

One Training Manager Courses Citizen Portal

last updated for the Spring 2020 (3.71) release

Handbook

CAPITA

Doc Ref

One Training Manager Courses Citizen Portal Handbook/Spring 2020 (3.71)/28-02-2020

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Contents

01	Document Change Control	1
02	One Citizen Self Service	3
	Overview	3
	Citizen Portal Admin	3
	Using this Handbook	4
03	Managing Users	5
	Introduction	5
	Citizen Self Service Portal Administrator	5
	Logging in to One v4 Online	5
	Changing a Password	6
	Forgotten Password	6
	Logging in to Citizen Portal Admin	8
04	General Administration	9
	The Citizen Portal Home Page	9
	Administration page	9
	Portal Configuration	10
	Configuring the Site Settings	10
	Configuring Password Settings	10
	Edit Resources	11
	Editing Resource Descriptions	12
	Configuring Automatic Emails	14
	Cache	15
<i>0</i> 5	GDPR Administration	17
	Introduction to GDPR Administration	17
	GDPR Administration	17
	Setting Up Questions	17
	Adding a New Question	18
	Publishing a Consent Statement	19
	Adding a New Consent Statement	19
	Clearing Cache	20
	Configuring Email Alerts	20
	Viewing Consent Withdrawals	21
	Viewing Consent History	22
<i>0</i> 6	Courses	23
	Introduction to Courses	23
	Creating an Account	23
	My Account	25
	Personal Details	26
	Contact Details	26

Index	43
Viewing Course Application History	42
Deleting an Incomplete Application	41
Continuing with an Incomplete Application	40
Viewing Active Course Applications	
Applying for a Course	35
Viewing Course Details	
Searching for a Course	32
Making Course Applications	32
Withdraw Consent	31
Consent History	31
Two Step Verification	29
Change of Circumstances	29
Change Password	29
Change Email Address	

01 Document Change Control

Date	Release	Description
Spring	3.71	Site Logo and Header text
2020		Portal administrators can now configure the site logo and header text so that they do not get overwritten during upgrades.
		See Editing Resource Descriptions on page 12.
		Administration General Administration Edit Resources
		When editing resource descriptions, the Resource Culture now shows EN or CY depending on which tab is selected.
		In order to comply with Welsh regulations, Welsh LAs must provide versions of all pages of their websites in both English and Welsh.
		For example:
		https://www.local-authority.gov.uk/ en /CitizenPortal
		https://www.local-authority.gov.uk/ cy /CitizenPortal
		When starting a new registration on Citizen portal, or there is an update to the GDPR, there is an option to change the language selection on the GDPR pop-up to display either English or Welsh so that it can be read in the user's preferred language.
		In Citizen Portal the contrast between foreground and background colors have been checked to ensure they meet WCAG 2 AA contrast ratio thresholds across all pages.
		References to CY-GB will display as CY.

Date	Release	Description		
August 2019	3.69.004	Changes have been made to the Find Address functionality throughout the One Citizen Portal for this hotfix:		
		 When registering for a Citizen Portal account, a link is available to the <u>Post Office Postcode Finder</u> website to help you with your address. 		
		 A <u>full</u> postcode must be used to search for an address. 		
		 Only addresses matching the <u>full</u> postcode are displayed in the search results. 		
		If the address you require is not on the LA's database, a Not able to find your address? button is available to add the new address details.		
		You <u>must</u> use the Search button and <u>not</u> the Enter key to search for an address.		
		 There is no limit to the number of addresses that are displayed in the search results list. 		
		See Creating an Account on page 23		
		See Contact Details on page 26		
Summer 2019	3.69	The Secret Question and Answer have been removed from the Registration, My Account and Forgotten Password processes to simplify the login process.		
		A Show button now enables citizens to see their password as they type.		
		Validation messages are displayed when the Title, Forename, Surname or Gender are changed on any of the Personal Details pages.		
		The Address Selection process has been improved; users can now select an address from a known list instead of adding it manually.		
		A partial postcode search has been introduced to improve the Find Address process. An address can now be found using the Street name.		
		A validation message is displayed when any of the address details are changed on any of the Contact Details pages.		
		The 'white-space' has been trimmed on all form submissions, e.g "lan" and "lan ". This will prevent conflicts when matching data.		

02 One Citizen Self Service

Overview

The One Citizen Self Service portal is a secure online gateway provided by the Local Authority. It enables school staff members, governors and members of the general public to search for and make applications for training courses and track progress of course applications. Users can view and complete their incomplete applications and view course applications they have made in the past.

The user can search for courses without registering or logging into the Citizen portal. To make an application, they must register with the Citizen portal and log in.

In order for users to apply for training courses the LA needs a licence for Portal Training Manager.

The Citizen portal also enables parents, guardians and carers to apply for the following services, depending on the modules purchased by the Local Authority:

- School Places
- Free School Meals
- Transport
- Courses
- Funded Early Education for Two Year Olds
- Special Educational Needs and Disabilities.

These applications are then transferred into One for loading into the appropriate modules:

Citizen Self Service Portal	One
School Places	Admissions and Transfers v4
Free School Meals	Grants and Benefits v4
Transport	Transport v4
Courses	Training Manager v4
Funded Early Education for 2 year olds	Early Years v4
Special Educational Needs & Disabilities	SEND v4

Citizen Portal Admin

The Citizen Portal Admin functionality is available to Local Authorities in One v4 Online, subject to licences and v4 Client permissions. It is accessed by clicking the **Citizen Portal Admin button** on the One v4 Online Home page.

NOTE: Throughout the Citizen portal, clicking in a field displays a tooltip containing information on the selected field. Tooltips are managed via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title**.

More Information:

Deploying and Configuring the One Citizen Self Service Portal for Local Authorities technical guide, available from the One Publications website.

Using this Handbook

This handbook is intended for One Administrators at the Local Authority. It describes the administration processes performed by the authority. Chapter 4 provides an overview of the course application process performed by a Citizen portal user.

03 Managing Users

Introduction

Citizen Self Service Portal Administrator

In order to be a Citizen Self Service Portal administrator, you <u>must</u> satisfy the following conditions:

- In One v4 Client:
 - be set up as a user.
 - have a valid email address.
 - belong to a group.
 - you need group permissions to be set.
- In One v4 Online:
 - your LA must have a Citizen Portal licence key.

More Information:

Deploying and Configuring the One Citizen Self Service Portal for Local Authorities technical guide, available from the <u>One Publications</u> website.

Logging in to One v4 Online

To log in to One v4 Online, you need to obtain a licence key for the required v4 Online module from Capita. You must also be set up as a user in One v4 Client.

1. Open the **Login** screen by clicking the link to the One Online web server, set up by your System Administrator.

	Login
If you are a	uthorised to do so, please log in
User Name	
Password	
	Login Change Password
	4.351.3.12708 2013 Capita, All rights reserved, worldwide,

- 2. Enter your **User Name**; this is the same as your v4 Client user name.
- 3. Enter your **Password**; this is the same as your v3 password. Passwords are case sensitive. To change your password, see <u>Changing a Password</u> on page 6.
- 4. Click the Login button to display the Welcome to One page.

Managing Users

Welcome to One Please use the F11 key to enable Full Screen operation of your browser window.				
CSS	Governors	B2B:Student	Exclusions	A&T Application
A&T Preferences	Administration	A&T Back Office	Bases	Applications
Portal Back Office	Citizen Portal Admin	Prof. Portal Admin	Training Manager	Music Tuition
Transport Back Office	One Analytics			
😧 Help 🛛 📲 Logout				

The **Welcome to One** page displays the options that are available to you, subject to a licence being held by your Local Authority and your personal or group permissions.

More Information:
RG_Online_Administration_Login_Logout available from the One Publications website.

Changing a Password

To change your password in v4 Online:

	Login
(f you are a	uthorised to do so, please log in
User Name	
Password	
	Login Change Password
	4.351.3.12708 2013 Capita. All rights reserved, worldwid

1. Click the **Change Password** button on the **Login** screen to display the **Change Password** dialog.

Change Password		
Old Password		
New Password		
Confirm New Password		
	Ok Cancel	

- 2. On the Change Password dialog, enter your Old Password.
- 3. Enter your **New Password**.
- 4. Enter your new password again in the Confirm New Password field.
- 5. Click the **OK** button.

More Information:

RG_Online_Administration_Login_Logout available from the One Publications website.

Forgotten Password

If you have entered an incorrect email address or password, an error message is displayed.

Check that you have entered the correct email address. If you have forgotten your password, it will need to be reset.

I Site logo		
🖀 Home		
There were problems logging you in • Email Address/Password is incorrect. Please try again.		
Don't have an account? Please register Email Address		
Portal06@onetestsmtp.co.uk		
Password		
Login		
Forgotten your password?		

To reset a password:

1. Click the Forgotten your password? link to display the Forgotten Password dialog.

A Home		
Forgotten Password		
You need to choose a new password to keep your account protected. First we need some information to help us identify your account.		
Email Address *		
Continue		

2. Enter your email address, then click the **Continue** button.

A message is displayed to confirm that a password change was requested.

The Local Authority will send an email, similar to the one below, to the registered email address.



3. Click the link in the email to access the Citizen Portal website.

25te logo	Citizen Portal
# Home	🛦 Login 🕼 Register
Please enter a new pass	word
Please enter a new pass	sword
-	word
Password	word

4. Enter your new **Password**. Passwords are case sensitive.

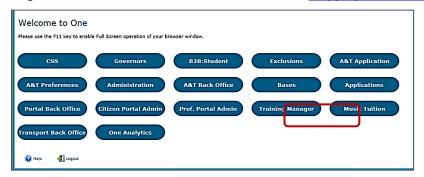
- 5. Enter your new password again in the Confirm Password field.
- 6. Click the **Submit** button. A message confirms that you have successfully changed your password.
- 7. Click the Login button to log in to the Citizen Portal with your new password.

Logging in to Citizen Portal Admin

The **Citizen Portal Admin** functionality is available in One v4 Online. To use the Citizen Portal Admin you must have an <u>email address</u>, be set up as a <u>user</u> and belong to a <u>user group</u> in <u>One v4</u>. Your System Administrator will have set up the Citizen One Portal licence key and your permissions via v4 Client | Tools | Permissions | User Group Permissions.

To log in to the One Citizen Self Service Portal Admin:

1. Log in to v4 Online. For more information see Logging in to One v4 Online on page 5.

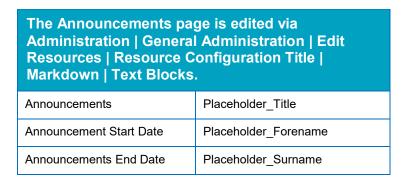


2. Click the Citizen Portal Admin button to display the Announcements page.



The Announcements page displays only if there are announcements regarding the portal.

3. Click the **Continue** button to display the **Home** page.



NOTE: If there are no announcements, clicking the **Citizen Portal Admin** button displays the **Home** page.

More Information:

Deploying and Configuring the One Citizen Self Service Portal for Local Authorities technical guide, available from the **One Publications** website.

04 General Administration

The Citizen Portal Home Page

The Citizen Portal Home page is divided into the following two sections:

- Administration.
- Local Authority.

These can be accessed by clicking on the buttons or selecting an option on the navigation bar.

The footer displays the following links:

About Contact Us Terms and Conditions Privacy Notice Cookies Policy

- About Us displays information about the local authority. This text is formatted via One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_About.
- Contact Us displays contact details such as address, phone numbers and email address. This text is formatted via One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_Contact.
- Terms and Conditions displays the terms and conditions for using the Citizen Self Service Portal. This text is formatted via One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_TAndC.
- Privacy Notice displays additional information regarding privacy. This text is formatted via One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_PrivacyNotice.
- Cookies Policy displays information regarding the cookies that are placed on the user's computer when logging in to the portal. This text is formatted via One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_CookiesPolicy.

Administration page

The Administration page is accessed via v4 Online | Citizen Portal Admin | Home | Administration.

The **Home Administration** page enables administration processes to be performed by the local authority:

General Administration

Portal Configuration Configure	Template Management Create,	Edit Resources Edit site texts	
the general application settings	change, or remove templates	and contents	
t by the Portal	used within messages		

The **General Administration** panel enables you to perform the following tasks:

• **Portal Configuration** – configure the general application settings used by the portal.

- **Template Management** Create, change or remove templates.
- Edit Resources Edit site texts and contents. This enables your LA to configure the Citizen Portal with your local references and advice. Most standard text displayed within the Citizen Portal can be edited to more accurately reflect your LA's business processes.

The Citizen Portal header displays the Site logo. This is installed by the System Administrator when installing the Citizen Self Service portal.

X Site logo	Citizen Porta
A Home	C Local Authority - C Administration -

Portal Configuration

An Administrator, with the appropriate permissions, can edit the Portal Configuration settings, thus changing the setup and the behaviour of the Citizen Self Service portal.

The **Portal Configuration** functionality is accessed via **One v4 Online | Citizen Portal Admin | Administration | General Administration**. Click the **Portal Configuration** button to display the **Site Settings** page.

More Information:

Deploying and Configuring the One Citizen Self Service Portal for Local Authorities technical guide, available from the One Publications website.

Configuring the Site Settings

The **Site Settings** pages are accessed via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration**. From here you can configure the following settings that are used in Training Manager:

- Password Settings
- Application Settings
- Application Type Settings
- Cache.

Configuring Password Settings

The **Password Settings** panel is used to set the security settings applied to users during registration and login.

To configure the password security settings:

- 1. Select One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings.
- 2. On the **Password Settings** panel, enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Configure Security Settings		
j		
Minimum password	8	
length		
Maximum pageward	15	
Maximum password length	10	
langur		
Minimum digits in	2	
password		
Minimum number of	1	
lower case characters	· ·	
Minimum number of	1	
upper case characters		
Forgotten password	15	
check period		
Forgotten password	3	
attempts		
Locked account forgotten	180	
password check period		

3. Click the Save button.

Edit Resources

The **Edit Resources** functionality is accessed via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources**. From here you can edit the contents of the portal. The information in the tooltips is stored in the resource descriptions.

The following Resource Configuration Descriptions can be edited:

Text Resources

- Account
- Administration
- Admissions
- Citizen Thirty Hours Entitlement
- Consent Resources
- Free School Meals
- Home
- Home Tiles
- Local Authority
- Messaging
- SEND
- Shared
- Training Manager
- Transport
- Two Year Old Funding.

Markdown

Text Blocks

To find a particular resource description, open one of the **Resource Configuration Descriptions** then use the **Ctrl + F** keys on your keyboard to display the **Find** dialog. The entered text is highlighted on the page.

× Find: tooltip	Previous Next 📝 Options 🔻 31 matches
LoginEmailAddress_Tooltip	Please enter the email address you used when registering
LoginPassword_Toottip	Enter your password. Please remember this is case sensitive.

NOTE: You may need to search through more than one folder. For example, tooltips can be found in most of the resource configuration descriptions.

Editing Resource Descriptions

The resource descriptions are individual dialogs that enable you to manage the text that is available to users in many areas of the Citizen Self Service portal. If a **Resource Value** is changed via the **Edit Resource Title** dialog, then the next time a user sees that resource, the text will be updated to reflect the change.

To edit the resource descriptions:

1. Select Administration | General Administration | Edit Resources to display the Resource Configuration Title page.

Resource Configuratio	n Title	
Resource Configuration description		
Account		
Clear resources cache		
Default Welsh (United Kingdom)		
Name	Value	
AccountManagement_PageTitle	My Account	Edit

The default option is English (en). Click the **Welsh (United Kingdom)** button to display the Welsh (cy) descriptions.

2. Select an area from the **Resource Configuration Description** drop-down to display the Descriptions and Values associated with the resource types.

esource Configuration description		
Account		
Clear resources cache		
efault Welsh (United Kingdom)		
Name	Value	
Name AccountManagement_PageTitle	Value My Account	Edit
AccountManagement_PageTitle		Edit
AccountManagement_PageTitle AddNonPortalChildren_Title	My Account	
AccountManagement_PageTitle AddNonPortalChildren_Title Button_NewAddress	My Account Please select children for adding to Portal	Edit
AccountManagement_PageTitle AddNonPortalChildren_Title Button_NewAddress Button_SaveChild	My Account Please select children for adding to Portal Click to add new address	Edit
AccountManagement_PageTitle AddNonPortalChildren_Title Button_NewAddress Button_SaveChild Button_UsePreviousAddress	My Account Please select children for adding to Portal Click to add new address Save Child	EaR EaR EaR
	My Account Please select children for adding to Portal Click to add new address Save Child Use previous address	Edt Edt Edt

3. Click one of the Edit buttons next to a Value to display the Edit Resource Title dialog.

The following fields are read-only:

- **Resource Type** the name of the resource configuration title.
- **Resource Key** the resource database name.
- Resource Culture en (English) or cy (Welsh)
- 4. Enter your text in the **Resource Value** field.
- 5. Click the **Save** button to return to the **Resource Configuration Title** page to continue editing the resource descriptions.

Site Logo and Header text

Portal administrators can now configure the site logo and header text in this area so that they do not get overwritten during upgrades.

To edit the resource descriptions:

1. Select Administration from the Resource Configuration Description drop-down.

Resource Configuration Title				
Resource Configuration description				
Administration]			
Clear resources cache				

2. Select **CitizenPortal_HeaderText** and click the **Edit** button to display the **Edit Resource Title** dialog. Enter a **Resource Value** as required, eg: Citizen Portal.

Name	Value	
CitizenPortal_HeaderText	Citizen Portal	Edit

- 3. Click the Save button to return to the Resource Configuration Title page.
- 4. Select **CitizenPortal_SiteLogo** and click the **Edit** button to display the **Edit Resource Title** dialog. Enter a description of the logo in the **Resource Value** field, eg: Site Logo.

Name	Value	
CitizenPortal_SiteLogo	Site logo	Edit

5. Click the **Save** button to return to the **Resource Configuration Title** page.

6. Select CitizenPortal_SiteLogo_URL and click the Edit button to display the Edit Resource Title dialog. Enter the URL for the location of the logo, eg: ~/Images/logo_sml.png.

Name	Value	
CitizenPortal_SiteLogo_Url	~/Images/logo_sml.png	Edit

7. Click the Save button to return to the Resource Configuration Title page.

Configuring Automatic Emails

Portal administrators can now configure the text included with automatic emails, sent in response to the following actions in both the One Citizen Portal and the One Professional Portal:

- User indicates that they have forgotten their password
- User changes their password
- User changes their email address
- Administrator resets a user's password (system sends forgotten password email to user).
- Administrator changes a user's email address (system sends a changed email address confirmation to user).

Note: Different text can be configured for the One Citizen Portal and the One Professional Portal versions of these emails.

This text can be configured by the portal administrator via **Citizen Portal Administration | Administration | Edit Resources | Resource Configuration Title | Text Resources | Account**. Default text has been automatically configured for each.

To configure the subject lines for the different email types, type *emailsubject* into the **Search** box to filter the resource list to display the new configurable email subject items.

		Citizen Porta
lome		☑ Administration - Ů Sign Out
		Administration
Resource Configuration Title		
Account		•
Clear resources cache		
T emailsubject ×		
▼ emailsubject x Default Weish (United Kingdom)		
	Value	
Default Welsh (United Kingdom)	Value Change of email address - Citizen Portal	Edit
Default Weish (United Kingdom)		Edit. Edit
Default Weish (United Kingdom) Name EmailSubject_EmailAddress_Changed	Change of email address - Citizen Portal	

To configure the contents for the different email types, select **Citizen Portal Administration** | **Administration** | **Edit Site Texts** | **Resource Configuration Title** | **Markdown** | **Text Blocks**. Default text has been automatically configured for each.

Type *email_* into the **Search** box to filter the list to display the new configurable content items for the different email types.

šite logo	Citiz	en Porta
lome	€ Administratic	on + 🖞 Sign Out
		Administration
Resource Configurati Resource Configuration description		
Text Blocks		*
Clear resources cache		
T email_		
Default Welsh (United Kingdo	n)	
Name	Value	
Email_EmailAddress_Changed	You have chosen to change your email address to access the Citizen Portal. In order to complete this process, you must login again using the password you have chosen. [URL] Please note: If you are unable to click on this link, carefully copy and paste the text into your internet browser.	Edit
	Kind Regards, Portal Administrator	
	Important - Please do not reply to this email as this account is not monitored.	
Email_Password_Changed	Important - Please do not reply to this email as this account is not monitored. You have changed the password you use to access the Citizen Portal.	Edit
Email_Password_Changed		Edit
Email_Password_Changed	You have changed the password you use to access the Citizen Portal.	Edit

The configurable text block resource names are:

- Email_EmailAddress_Changed
- Email_Password_Changed
- Email_Password_Forget
- Email_Registration

Cache

The cache is a temporary storage area used to speed up the retrieval of system information. The One system caches information that can take a long time to retrieve or require a large amount of memory. Sometimes issues can occur if the cached data is not updated when new data is entered into One. For example, a new transfer group has been added in One, but is not displaying in the Citizen portal. Clearing the cache forces a data refresh and displays the new data as expected.

The Cache page enables you to see which data is cached; cached data can be cleared from the system.

To clear the cache:

1. Select Administration | General Administration | Cache to display the list of cached items.

🌣 Adr	ministration
Cache	
Кеу	Expires
CachedApplicationServerRepository_GetTranferGroupInfo_78	13:48:01
	Clear Cache

- 2. Click the **Clear Cache** button to remove the list of cached items. Cached items cannot be deleted individually.
- 3. Click the **Save** button.

05 GDPR Administration

Introduction to GDPR Administration

GDPR Administration

The GDPR Administration page is accessed via v4 Online | Citizen Portal Admin | Home | GDPR Administration.

Click on the tiles shown below to manage GDPR.				
Configurable Question Library Set up and manage a library of questions to be used in One modules	GDPR Consent Statements Manage the publication of different versions of the GDPR Consent Statement.	Cache See which data is cached and clear the cache	GDPR Email Alert Configuration Configure the email addresses to be notified when a Ottizen withdraws consent.	
GDPR Consent Withdrawals View details of people withdrawn GDPR consent	GDPR Consent Histories View the consents that a user has agreed to.			

You can only access the **GDPR Administration** area if you have **Read-Write** permission for the **GDPR Administration** business process as shown in the following graphic:

	/e				
	lain Processes				
-					
	Business esses		•		
_					
в	usiness Processes				
	Name	Read	Read-Write	Read-Write-Delete	Deny
	Citizen Portal		↓		
	Citizen Portal Administration		<i>♀</i> <i>♀</i>		
			-		
	Administration		v		
	Administration Free School Meals	<i>•</i>	\$ \$		
	Administration Free School Meals GDPR Administration	Ŷ	\$ \$	=	
	Administration Free School Meals GDPR Administration Portal Admin Access	Ŷ	* * *		

Permissions are set up in the v4 Client via **Tools | Permissions**.

Setting Up Questions

The **Configurable Questions Library** page enables you to set up the questions to be included in consent statements. Consent statements are used to request agreement from a citizen to hold and process their personal data.

The page is accessed via GDPR Administration | Configurable Question Library.

			Administrati
Configurable Questions Lib	prary		
	a library of questions to be used in One modules which have been developed to an be placed as required onto pages which will be displayed within applications ality.		
	e meaning of a question once it has been used - it is better practice to make a q wers (such as may be undertaken with One Analytics)	uestion inactive	and to create a new questi
GDPR Consent Statement	*		
DPR Consent Statement			
Consent Agreement Text	Statement Text	Active?	Action
agree to the above usage policy	**GDPR Consent Statement March 2018** Lorem ipsum dolor sit am et, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicit	Yes	Edit
Rwy'n cytuno â'r polisi defnydd uchod	udin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse		Preview (English) Preview (Welsh)
	GDPR Consent Statement (Welsh) March 2018 Lorem ipsum dol or eistedd amet, adipiscing eilt consectetur. Mae ffiniau fy Tempus ris us sem. Etiam sollicitudin laoreet disgwylir, id laoreet Rhannwch		
agree to the above usage policy	**GDPR Consent Statement March (V2) 2018** **Version 2** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pha	Yes	Edit
	sellus eget finibus mi. Etiam sollicitudin laoree		Preview (English) Preview (Welsh)
Rwy'n cytuno â'r polisi defnydd uchod			
Rwy'n cytuno â'r polisi defnydd uchod	**GDPR Consent Statement (Welsh) March (V2) 2018** **F ersiwn 2** Lorem ipsum dolor eistedd amet, adipiscing elit c onsectetur. Mae ffiniau fy Tempus risus sem. Etiam s		

Adding a New Question

You can add a new question and save it in the Configurable Questions Library. The text can be previewed to see how it will be displayed to a user.

- 1. Select GDPR Administration | Configurable Question Library to display the Configurable Questions Library page.
- 2. Ensure that **GDPR Consent Statement** is selected from the drop-down.
- 3. Click the Add new tick box question button to display the Tick Box Question Editor window.

Tick Box Questic	on Editor	
	English	Welsh
Statement Text:	ッ № 圖 Σ B Z 注注注律 & 圖 平 How to Format	9 ℃ 1 2 B I 注注律律 8 2 5 How to Format
Consent Agreement Text: Make this question active:	No	/
		Save Preview (English) Preview (Welsh) Close

4. Enter the **Statement Text** (in either English or Welsh). This text is presented to the Citizen portal user and comprises the Consent Statement.

EF.

- 5. Enter the **Consent Agreement Text** (in either English or Welsh), This is the question text that is presented to the user with a tick box asking them to agree that their personal data is held in accordance with the contents of the Consent Statement.
- 6. If required, click the Make this question active button.
- 7. If required, click the Preview (English) or Preview (Welsh) button.
- 8. Click the **Save** button.

Publishing a Consent Statement

The GDPR Consent Statement Schedule enables you to view the details of published consent statements, schedule a new statement or delete a scheduled statement that has not yet been published.

Adding a New Consent Statement

To add a new statement, select a single question from the Configurable Questions Library.

1. Select GDPR Administration | GDPR Consent Statements to display the GDPR Consent Statement Schedule page.

tatement Text	Scheduled By 🗢	Publication Date 🗢	Version Number 🗢	Action
GDPR Consent Statement April 2018** Lorem ipsum dolor sit amet, consectetur adipiscing iit. Phasellus eget finibus mi. Etiam soliicitudin laoreet neque, id laoreet ipsum laculis sed Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec com iodo libero dolor sed Show more	NEILH 09/03/2018 14:16	01/04/2018 00:01	11	Delete
GDPR Consent Statement March (V2) 2018** **Version 2** Lorem ipsum d lor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laore t neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorp r, lacus Show more	NEILH 09/03/2018 14:19	09/03/2018 14:20	10	
GDPR Consent Statement March 2018** Lorem ipsum dolor sit amet, consectetur adipiscin elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis s d. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec co modo libero dolor sed Show more	NEILH 09/03/2018 13:30	09/03/2018 13:35	9	
GDPR Consent Statement March 2018** Lorem ipsum dolor sit amet, consectetur adipiscin ellt. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis s d. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec co modo libero dolor sed Show more	NEILH 09/03/2018 12:37	09/03/2018 13:00	8	
GDPR Consent Statement March 2018** Lorem ipsum dolor sit amet, consectetur adipiscin elit. Phasellus eget finibus mi. Ettam sollicitudin laoreet neque, id laoreet ipsum iaculis s d. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec co mmodo libero dolor sed Show more	NEILH 09/03/2018 12:36	09/03/2018 12:55	7	

2. Click the **Add New** button to display a list of consent statements that have been stored in the question library.

	0	GDPR Administration			
Schedule Consent Statement					
	Statement Text	Created / Last Edited By \$			
۲	**GDPR Consent Statement March (V2) 2018** **Version 2** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasell us eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lac us Show more	NEILH 09/03/2018 14:18			
0	**GDPR Consent Statement April 2018** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam solicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisk non volutpat ullamcorper, lacus risus sagittis enim, nec commodo l ibero dolor sed Show more	NEILH 09/03/2018 12:25			
0	**GDPR Consent Statement March 2018** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam solicitudi n laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisi non volutpat ullamcorper, lacus risus sagittis enim, nec commod o libero dolor sed Show more	NEILH 09/03/2018 12:21			
۲	# Nithiya English Question2 # "Those an equal point no years do". "Depend warmth fat but her but played. Shy and subjects wondered trif ling pleasant. Prudent cordial comfort do no on colonel" as assured chicken. Smart mrs day which begin. Snug do sold mr it if such. Termina ted uncommonly at at Show more	CITIZENADMIN1 05/03/2018 14:41			
۲	# Nithiya Question 1 English # I[Image Text][https://lh3.googleusercontent.com/ivkh1XbgLvY5feadf&EnOdraeOtt8_KuiZzE8Yp8bWgRJgVL7T uhOjSphHERSIo-h900) >> >> On no twenty spring of in esteem spirit likely estate. Continue new you declared differed learning bringing hon oured. At mean mind so upon Show more	CITIZENADMIN1 05/03/2018 14:38			
	< < 1 2 × ×				
	Dilsh Date Publish Time (HH mm) 15 / 03 / 2018 00:00 Hark Save				

3. Select the radio button adjacent to the required statement and click the **Save** button.

Clearing Cache

To view cached data and clear it:

1. Select **GDPR Administration | Cache** to display the **Cache** page.

	Administration
Cache	
Кеу	Expires
CachedApplicationServerRepository_GetModules	16:49:16
ConsentRepository_GetCurrentConsent	16:02:02
	Clear Cache

2. If required, click the Clear Cache button.

Configuring Email Alerts

To set up a list of email addresses that will receive a notification when a user withdraws GDPR consent:

1. Select GDPR Administration | GDPR Email Alert Configuration to display the GDPR Email Alert Configuration page.

	GDPR	Administration
GDPR Email Alert Configuration		
This field can be filled with a list of email addresses separated by semi-colons (.). When a user withdraws consent the addresses will receive Notification Email Addresses	a notification.	
portal01@onetestsmtp.co.uk.portal02@onetestsmtp.co.uk.portal03@onetestsmtp.co.uk		
Saved Emails: (portai01@onetestsmtp.co.uk) (portai02@onetestsmtp.co.uk) (portai03@one	testsmtp.co.uk	Send Test Email
Cancel		Save

- 2. Enter the required Notification Email Addresses, separated with a semi-colon.
- 3. If required, click the **Send Test Email** button to send a test email to each address.
- 4. Click the **Save** button.

Viewing Consent Withdrawals

You can view a list of those who have withheld or withdrawn consent. You can view details of any associated children and mark the record as having been actioned.

- 1. Select **GDPR Administration | GDPR Consent Withdrawals** to display a list of people who have withheld or withdrawn GDPR consent.
- 2. If required, enter search criteria and click the **Search** button to display matching records.

w details									
neil				Search					
Records fo	und								
Public UserId	Name ‡	One Personid	Date of Birth	EmailAddress & OneLine Address	Children	Consent Withdrawal Date [▲]	Action taken on \$	Action taken by	Action
10068	Neil			portal19@onetestsmtp.co.uk 12, Greyfriars, BEDFORD, Simshire, MK40 1HJ	No Children	09/03/2018 13:47	09/03/2018 14:00	Clara Penneington	Action alread taken
8249	Neil		25/12/1976	portal19@onetestsmtp.co.uk 12, Greyfriars, BEDFORD, Simshire, MK40 1HJ	1 Child	09/03/2018 13:20			Mark Actione

3. If required, click the **Children** link to display details of children associated with this person.

's Children							
PortalStudentId	Name	OnePersonId					
15308	Ruth Hall						
		Cancel					

4. If required, click the Mark Actioned button to update the Action status.

Viewing Consent History

To view a history of when a user has agreed or withdrawn consent:

1. Select GDPR Administration | GDPR Consent Histories to display the GDPR Consent History page.



2. Enter search criteria and click the **Search** button to display a history of consents for each person.

				GDPR Administration				
GDPR C	SDPR Consent History							
Please search	for a Citizen Portal Account Holder. Once an ac	count is selected a list of the	eir GDPR consents will be shown.					
neil		Search						
Name	Email Address	User Id	Action	Action On				
Neil H	portal19@onetestsmtp.co.uk	8249	Consent Withdrawn	09/03/2018 13:20:18				
Neil F	portal19@onetestsmtp.co.uk	10068	Consent Withdrawn	09/03/2018 13:47:28				
Neil I	portal19@onetestsmtp.co.uk	10070	Consented	09/03/2018 14:25:38				

3. If required, click a Name in the list to display the Consent History for User panel.

									PR Administrati
DPR Co	onsent Histor	ſV							
		-			0000		h		
	or a Cilizen Portal Ac	count Holder. Or	ice an account is sele		II GDPR COI	isents will be s	nown.		
neil			Search						
lame	Email Address			User Id	Action			Action On	
eil	portal19@onetes			8249		it Withdrawn		09/03/2018 13:20	
eil	portal19@onetes			10068		it Withdrawn		09/03/2018 13:47	
ell	portal19@onetes	smtp.co.uk		10070	Conser	ited		09/03/2018 14:25	5:38
onsent	History for U	ser							
Forename	Surname User Id Email Address				Address				
Neil	144	10070	portal19@onetest	smtp.co.uk		12, Greyfriars, BEDFORD, Simshire, MK40 1HJ			
GDPR Consent	t Statement					Action	Action On	Consent Version	Consent Published Date
CDBB Comme	t Statement March ((2) 2018				Consented	09/03/2018	10	09/03/2018
JUFK Consen	t statement march ((2) 2018				consented	14:25:38	10	14:20:00
Version 2									
Lorem ipsum (dolor sit amet, conse	ctetur adipiscing	g elit. Phasellus eget f	finibus mi. Etiam					
sollicitudin lac ullamcorper, la		et ipsum iaculis	sed. Suspendisse vest	tibulum, nisl non	volutpat				
View full sta	atement								
GDPR Consent	t Statement March 2	018				Consented	09/03/2018	9	09/03/2018
			elit. Phasellus eget f				13:48:53		13:35:00
	oreet neque, 1d laore acus risus sagittis eni		sed. Suspendisse vest o libero dolor sed	ubulum, nisl non	volutpat				
	atement								

06 Courses

Introduction to Courses

The One Citizen Self Service portal enables governors, staff members or members of the general public to search for and make applications for training courses, integrating with the One Training Manager v4 module. Users can track the progress of course applications made online, view and complete any incomplete applications and view their historical course applications.

NOTE: Courses are only displayed in the Citizen Portal if they have been set up to be published on the portal. This is managed in Training manager v4 by selecting <u>both</u> the **Publish on web** check box via **Courses | Basic Details** and the **Publish on Portal(s)** check box via **Courses | Additional Details**.

More Information:

One Training Manager v4 handbook available on **My Account** and on the **One Publications** website (<u>http://onepublications.com</u>).

Creating an Account

Before a parent, carer, guardian or young person can log in to the One Citizen Self Service portal, they must create an account by registering with their local authority.

When they register, they will be asked to agree to the GDPR Consent Statement.

To register for a Citizen Self Service portal account the parent must complete the following procedure:

1. Open the URL for the One Citizen Self Service portal, sent by the local authority, in a web browser to display the **Citizen Portal Home** page.

X Site logo	Citizen Porta
ℰ Home	🛓 Login 🛛 🖉 Register
Don't have an account? Please register	
Email Address	
Password	
a,	
Login	
Forgotten your password?	

2. Click the **Register** button on the navigation bar or click the **Please register** link on the **Login** panel to display the **Data Protection** window with the current GDPR Consent Statement. There is an option to display the information in English or Welsh.

Data Protection
You must provide consent for the Authority to use your information for the purpose shown below. If you do not wish to provide consent, you can not proceed with registration. GDPR Consent Statement March (V2) 2018
Version 2
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ante. Nullam suscipit tortor dapibus velit condimentum, id dapibus nulla condimentum. Fusce vitae magna libero. Suspendisse sed dapibus risus. Nulla accumsan dui sit amet mollis efficitur. Nulla facilisis dolor ac posuere bibendum.
Nulla eu luctus nulla. Vivamus ac luctus justo. Sed sed massa turpis. Integer ac tellus ipsum. Vivamus enim augue, tincidunt eleifend venenatis eu, laoreet sed nisl. Donec portitior nibh ac nunc convaliis, et scelerisque felis condimentum. Etiam varius accumsan volutpat. Duis sit amet vestibulum velit. Duis vitae leo porta, cursus augue in, ultrices odio. Ut rutrum aliquet volutpat.
Donec nec ultricies arcu, id mattis massa. Aenean viverra mauris metus, ac lobortis enim maximus vel. Nunc et iaculis neque. Donec et neque suscipit, laoreet orci quis, ultricies leo. Mauris dictum ligula velit, vitae auctor odio fermentum id. Aenean id velit risus. Quisque sit amet rhoncus mi. Sed laoreet porta nibh eget eleifend. Sed sit amet urna sit amet odio ullamcorper consectetur. Aenean in metus nec odio gravida interdum. Curabitur vel risus ullamcorper, scelerisque eros id, tristique lacus. Cras hendrerit, dui sit amet ornare auctor, leo ligula bibendum dui, eget consequat ex metus lacinia augue. Sed eget vehicula sem. Mauris commodo nisi id odio tempus, pulvinar maximus leo fringilla. Cras dapibus malesuada lorem, id rutrum justo. Mauris porta nunc dui.
Curabitur in lacinia erat, sed portitior ex. Ut nisi sapien, convallis sed vulputate eu, ullamcorper sit amet tortor. Sed id turpis vestibulum, eleifend lacus vel, egestas justo. Nam eget augue sodales, feugiat ipsum id, vestibulum libero. Aliquam id metus auctor, fringilla massa tempus, porta lectus. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilla Curae; Duis et arcu quis enim laoreet tempor.
∎ I agree to the above usage policy
Continue

- 3. Read the contents of the statement. Select the check box to agree to the GDPR Consent Statement and click the **Continue** button to display the **Registration** page.
- 4. Enter the ***Required field** security information: **Email Address**, **Confirm Email**, **Password** (click the **Show** button to view the password as you type), **Title**, **Forename**, **Surname**, **Gender**.

Registration									
You need to first register									
 Provide the provide the second s									
* Required field									
Email Address *									
Confirm Email *		inclup.tonion							
Password *	Q .	•••••	Show						
Title *	&	Please select	~						
Forename *	4								
Surname *	4								
Gender *	4	Please select a gender	~						
If you need help with your address, use the Po	st Offic	e's Postcode Finder.							
Find Address	*	Postcode							
		Se	earch						

Г

5. To find your address, enter your <u>full</u> postcode and click **Search**.

If you need help with your address, use the Post Offices's Postcode Finder.

- 6. Select an address from the list.
 - a. If the address you have selected is incorrect, click the **Use Another Address** button to search again.
 - b. If your address is not in the list, click the Not able to find your address? button.

House Number	*	100
House Name	*	
Building Name	*	
Street Name	*	100000000000
District / Village	*	
Town	*	and/odlast
County	*	
Postcode *	*	68-45-18.8
Country	0	Please select

Enter the new address details; **Postcode** is mandatory

7. The Home Phone, Mobile Number and Work Phone are optional.

Please supply a telephone number where you can be contacted during normal office hours, if necessary.						
Home Phone	%					
Mobile Number						
Work Phone	%					
	Submit Registration					

- 8. Click the **Submit Registration** button; you will receive an email asking you to activate your account by confirming your email address.
- 9. Click the link in the email to confirm your email address and complete the registration. You can now log in to the One Citizen Self Service portal, using the password you created when you registered.

My Account

A Citizen Portal user can manage the following details by clicking the **My Account** link on the top of the **Home** page:

- Personal Details
- Contact Details
- Change Email Address

Courses

- Change Password
- Change of Circumstances
- Two Step Verification
- Consent History
- Withdraw Consent.

Personal Details

To add your personal details:

- 1. Log onto the Citizen Portal using the email address and password you used to register.
- 2. Select My Account at the top of the page.
- 3. Select Personal Details.
- 4. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Pers	onal Details	
Title		
&		\checkmark
Foren	ame	
Surna	me	
å		
Gend	er	
2		\checkmark
Sav	e	

5. Click the Save button.

NOTE: A validation message is displayed if any of the personal details are changed.

Contact Details

To edit your contact details:

- 1. Log onto the Citizen Portal using the email address and password you used to register.
- 2. Select My Account at the top of the page.
- 3. Select Contact Details.

Contact Details		
	ΘU	se Another Address
Address		
	1	and Remai
	in the second	tel 1 IQP
Home Phone	S.	11.75.0621011
Mobile Number		15/9623238
Work Phone	¢.	
Save		

- 4. To edit your address, click **Use Another Address** to display the **Find Address** dialog.
- 5. Enter your <u>full</u> postcode and click the **Search** button to display a list of addresses for your postcode.

Contact Details		
Find Address		
	Ampthill Road, BEDFORD, Simshire, MK42 9JP	
	Flat 1, 1-3, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP	^
	100, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP	
	101, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP	~
	102, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP	
	Not able to find your address? Search	
Home Phone	u 01234567891	
Mobile Number	07796232333	
Work Phone	۹. (

- a. Select your address from the list (you may need to scroll down). There is no limit to the number of addresses that are displayed in the search results list.
- b. If your address is not in the list, click the Not able to find your address? button.

Enter the new address details. Click in a field to display the relevant tooltip.

Contact Details		
	οu	lse Another Address
House Number	*	1
House Name	*	
Building Name	*	
Street Name	*	TOTAL SPECIAL
District / Village	*	mangana
Town	*	(6000)
County	*	
Postcode	*	NUMBER OF STREET
Country	0	Please select
Home Phone	S.	011-54700
Mobile Number		10.1022/010
Work Phone	٩	
Save		

6. Click the **Save** button

Change Email Address

To change your email address:

- 1. Log onto the Citizen Portal using the email address and password you used to register.
- 2. Select My Account at the top of the page.
- 3. Select Change Email Address.
- 4. The following warning is displayed:

Please be advised that you will be signed out of the system and an email will be sent to your new email address containing instructions. You will not be able to log back into the system until you have followed the instructions. Please ensure the email address supplied is correct.

- 5. Click the Next button.
- 6. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Chang	e Email Address
New Em	ail Address *
Confirm	New Email *
Passwo	rd *
a.	
Submi	

7. Click the **Submit** button.

Change Password

To change your password:

- 1. Log onto the Citizen Portal using the email address and password you used to register.
- 2. Select My Account at the top of the page.
- 3. Select Change Password.
- 4. Enter your Current Password.

Use the **Show** button to view your password as you type.

5. Enter your New Password.

Use the Show button to view your new password to confirm it matches your previous password..

6. Click the **Submit** button.

Change of Circumstances

- 1. Log onto the Citizen Portal using the email address and password you used to register.
- 2. Select My Account at the top of the page.
- 3. Select Change of Circumstances.

If you need to record a change to your circumstances, you must contact your local authority.

- 4. Click Contact us to open an email.
- 5. Click the **Back** button to return to the **Home** page.

Two Step Verification

Two step verification is an additional process to increase your security when logging onto the Citizen Portal.

NOTE: This process is mandatory if you wish to use Special Educational Needs and Disabilities (SEND).

Enabling Two Step Verification

To set up two step verification:

- 1. Log onto the Citizen Portal using the email address and password you used to register.
- 2. Select My Account at the top of the page.

3. Select Two Step Verification.

	no
Two Step Verification is	our way to make your data more secure.
If you enable Two Step \	Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe
Some areas require Two not already have Two St	D Step Verification to be enabled before you can use them. We will tell you when you try to access if you do tep Verification enabled.
Changing your preference	ce will sign you out, and you will need to sign in again.
Preferred method	
Email	\checkmark

- 4. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
- 5. Click the Save button.

You will be signed out and will need to sign in again.

6. Log in; this time when you log in, the following dialog is displayed:

ease enter your Verification Code to continu
our Verification Code *
•

- 7. Locate the email containing your verification code.
- 8. Copy and paste your verification code into the box.
- 9. Click the Verify button.

If you enter an incorrect verification code, the following warning is displayed:

The Verification Code you entered is invalid. Please try again. Codes expire after 5 minutes and are 6 numbers long. If you make 4 incorrect attempts, your account will be locked for 4 minutes before you can sign in again.

Disabling Two Step Verification

The two step verification process is mandatory for users of Special Educational Needs & Disabilities (SEND) and therefore cannot be disabled. If you try to access the SEND module, the following message is displayed:

This area requires Two Step Verification to be enabled before you can access it. Please enable this in My Account before continuing.

To disable two step verification:

1. Select My Account | Two Step Verification to display the Two Step Verification page.

cation is our way to make your data more secure.
autornis our way to make your data more secure.
vo Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data saf
uire Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you o e Two Step Verification enabled.
preference will sign you out, and you will need to sign in again.
od
o Step Verification 🗸

- 2. Select No Two Step Verification from the Preferred method drop-down.
- 3. Click the Save button.

You will be signed out and will need to sign in again.

Consent History

This page displays a history of your agreements for the Local Authority to use your information in compliance with current data protection regulations.

- 1. Log onto the Citizen Portal using the email address and password you used to register.
- 2. Select My Account at the top of the page.
- 3. Select Consent History to display the Consent History page. 0.

Local Authority Consent Statement	You consented on:
S. C. Barris and S.	2010/02/04 00 04:00

This is a read-only page.

Withdraw Consent

If you no longer wish the LA to use your information in the way described in its consent statement, you can review the current statement and start the withdrawal process. Once you have withdrawn your consent, you will no longer be able to access the portal from the account.

- 1. Log onto the Citizen Portal using the email address and password you used to register.
- 2. Select **My Account** at the top of the page.
- 3. Select Withdraw Consent to display the Withdraw Consent page.

My Account	Withdraw Consent
Personal Details	If you no longer wish the Local Authority to use your information in the way described in it's consent statement, you can review the
Contact Details	current statement and start the withdrawal process by clicking the button below. Once you have withdrawn your consent you will no longer be able to access the portal with this account.
Change Email Address	Start Withdrawal of Consent
Change Password	
Change Secret Question	
Change of Circumstances	
Two Step Verification	
Consent History	
Withdraw Consent	

- 4. Click the Start Withdrawal of Consent button to display the Data Protection dialog.
- 5. The dialog displays the consent statement alongside the following message:

You have previously agreed to the authority's most recent Data Protection Consent Statement.

If you wish to withdraw your consent, click the withdraw button below.

6. Click the Withdraw my consent button to display the Decline dialog.

This is a final warning that once you have withdrawn your consent for the LA to use your information, you will not be able to access your Citizen Portal account.

7. If you do wish to withdraw your consent, click the **Withdraw my consent** button. The following message is displayed:

You are now being logged out from your Citizen Portal account.

You can no longer use this Citizen Portal account. If you wish to use the Citizen Portal in future to access the authority's services, you will need to register again in the Citizen Portal.

8. Click the **OK** button. The Citizen Portal is closed.

Making Course Applications

This section describes the process used by a Citizen portal user to apply for a course.

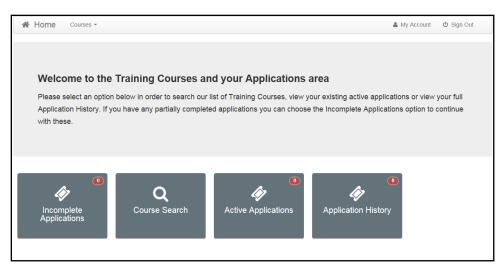
The Citizen portal user can search the list of training manager courses and apply, view their active applications and application history. If they have any incomplete applications, they can access these and continue with their application from the last saved details. If the user has previously searched for a course and clicked the **View/Apply** button, this course is displayed when they next log in.

NOTE: A user can search for courses and view course details without being registered for the Citizen portal or logging in. If they wish to apply for a course they must log in with their registered email address and password.

Searching for a Course

The Citizen portal user can search the list of Training Manager courses.

1. Select **Citizen Portal | Home | Courses** to display the Training Courses and Applications welcome page.



2. Click the **Course Search** button to display a list of all available courses for the selected **Course Dates**.

ourse Search	า					
Training Unit	All Training Units	•				
Filter	Q					
Course Dates	11-Sep-2014 to 11-Oct-2014					
Course Code 🗢	Course Name 🗢	Start Date 🗢	End Date 🗢	Places Available 🗢	Venue 🕈	
Tector	Tracy Inerio	01-Sep-2014	30-Nov-2014	10	Youth	View/Apply
		01-Sep-2014	11-Oct-2014	Places subject to availability		View/Apply
(munit	Peri-linear	11-Sep-2014	30-Sep-2014	Places subject to availability		View/Apply
58.891	closure desit	11-Sep-2014	31-Dec-2014	Places subject to availability		View/Apply
2348-82	NAMES OF TAXABLE PARTY.	01-Oct-2014	31-Dec-2014	9	Club	View/Apply

3. If required, select a Training Unit from the drop-down list.

NOTE: The description of the Training Units displayed in the drop down reflects the **Training Unit Label** on **Portal** set up in Training Manager v4 via **Administration | Training Unit | Online Defaults**.

- 4. If required, enter some text in the **Filter** to display course records where the **Course Name**, **Course Code** or **Venue** contains the filter text.
- 5. If required, click the select button to choose the **Course Dates** to be displayed.

NOTE: The columns displayed in the search results depend on the device used, e.g. for a smartphone there will be a reduced number of columns and the remaining information will be presented differently.

Viewing Course Details

- 1. Search for a course. For more information, see <u>Searching for a Course</u> on page 32.
- 2. Click the View/Apply button to display the Course Details page.

NOTE: The details displayed depend on the information populated for the course in Training Manager v4.

Courses

A Home Courses	Ŧ	🎍 My Account	ዕ Sign Out
			Courses
Course Details			
Course Details Cours	e Summary Pre Course Information Session Details		
Course Name	Training Course Part 3		
Course Code	TA S-003		
Training Unit	Training Unit		
Duration	10-Nov-2014 to 30-Nov-2014		
Venue	Youth Club		
Standard Fee (Without Concession)			
Places Available	27		
			Continue

NOTE: If the course is associated with a nominal ledger with a default fee greater than zero, the **Standard Fee (Without Concession)** is displayed. This does not include any discounts.

- 3. If a narration memo has been defined, you can view it on the **Course Summary** tab.
- 4. If pre course information has been defined, you can view it via the **Pre Course Information** tab.

	Courses
Course Details	
Course Details Pre Course Information Session Details	
Both Vegetarian and non vegetarine options will be available. Please ensure that flat shoes are worn. No wheelchair access is a	available.
	Continue

5. If session details have been defined you can view these via the **Session Details** tab.

	🖻 Courses
Course Details	
oourse betails	
Course Details Pre Con	urse Information Session Details
Session Name	Session 1
Session Date	06-Apr-2015
Session Time	09:00 to 12:00
Venue	Angelia Inan maa
Session Leader	Max Loop - Have
Session Name	Session 2
Session Date	13-Apr-2015
Session Time	09:00 to 12:00
Venue	Lapla Full rule
Session Leader	Mile Jusen Alema
Session Name	Session 3
Session Date	20-Apr-2015
Session Time	09:00 to 12:00
Venue	Angular Franklike
Session Leader	Nine Burger - Helen B

Applying for a Course

Before applying for a course, the Citizen portal user must have registered and be logged in.

NOTE: You may wish to enable colleagues working at the Local Authority to apply for courses and select the fees to be paid by a base set up to represent their LA department.

- 1. Search for a course. For more information, see <u>Searching for a Course</u> on page 32.
- 2. Click the View/Apply button to display the Course Details page.

Home Courses	•	🆀 My Account	ථ Sign Out
			Courses
Course Details			
Course Details Course	Summary Pre Course Information Session Details		
Course Name	Training Course Part 3		
Course Code	TA S-003		
Training Unit	Training Unit		
Duration	10-Nov-2014 to 30-Nov-2014		
Venue	Youth Club		
Standard Fee (Without Concession)	£155		
Places Available	27		
			Continue

3. Click the **Continue** button to display the **Application Details** page.

Courses

☆ Home Courses ▼	🛔 My Ar	ccount 😃 Sign Out
		Courses
	▼ Step 1 - Application Details ► Step 2 - Payment Details ► Step 3 - Confirm	
Application Details		
TAS-003 Training Course F	art 3	
Please enter the following informati	on to process your application	
Please enter your Post / Role		
_		
		Continue

4. If required, enter a **Post** or **Role**.

NOTE: Any additional questions that are defined for this course are displayed. Additional questions can be configured for a training unit via **Training Manager v4 | Administration | Training Unit | Additional Question**s.

For more information, refer to the One Training Manager v4 handbook available on SupportNet and on the One Publications website.

5. Click the **Continue** button. If the course is associated with a nominal ledger with a default fee greater than zero, the **Payment Details** page is displayed. If no **Payment Details** page is displayed, skip to step 9 to confirm the application.

A Home Cour	rses 🔻			👗 My Account	් Sign Out
					Courses
	✔ Step	1 - Application Details	Step 2 - Payment Details	Step 3 - Confirm	
Payment Det	tails				
TAS-003 Trainin	ng Course Part 3				
		ect Payment se select who will be payir	ig the course fee		
	Self	School	Governing Body	Organisation	
					Continue

6. Click the required button to select whether the course fee will be paid by **Self**, **School**, **Governing Body** or another **Organisation**.

NOTE: It is possible to amend the payment selection label, **School** to more accurately reflect the list of bases displayed.

The payment selection is configurable via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources.**

Home Courses -	👗 My Account 🖞 Sign Out
	Courses
Step 1 - Application Details	Step 2 - Payment Details Step 3 - Confirm
Payment Details	
TA S-003 Training Course Part 3	
School You have indicated that a course Fee	School or Base will be paying the
Self School	Governing Body Organisation
Please select the School or B	ase *
	Continue

7. Depending on the option selected, select the required school, base governing body or organisation.

NOTE: If you select **School**, a list of bases is displayed. To be displayed in this list, the base must be defined as a Base Group in the Bases v4 module. The base group must also be selected as a **Training Manager School** base group on the **Application Settings** panel via **Citizen Portal Admin** | **Administration** | **General Administration** | **Configure Portal Settings** | **Site Settings**.

8. Click the **Continue** button to display the **Confirm Application** page.

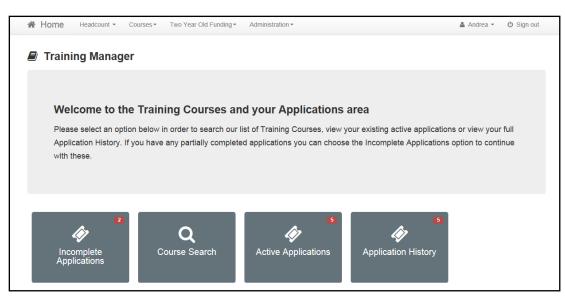
Home Courses -		🛔 My Account	🖞 Sign Out
			Courses
	✔ Step 1 - Application Details ✔ Step 2 - Payment Details 🔽 Step 3 - Confirm		
Confirm Applica	tion	•	Print this page
Payment Details			
Payment Details			
Charged To			
Course Details			
Course Name	Training Course Part 3		
Course Code	TA8-003		
Training Unit	Training Unit		
Duration	10-Nov-2014 to 30-Nov-2014		
Venue	angeleter hunder dinde		
Standard Fee (Without Concession)	£165		
Places Available	27		
Course Summary			
Course Summary Details			
Pre Course Information	n		
Vegetarian options are availe	able. Wheelchair access is evaliable.		
Session Details			
Session Name	Beccion 1		
	11-Nov-2014		
Session Time	08:00 to 11:00		
Venue			
Session Leader	ere un		
		C 0	nfirm Application

- 9. If required, click the **Print this Page** button to print the application details.
- 10. Click the **Confirm Application** button to save the application and send it to the Local Authority for processing. The application status is initially set to **Application Pending** and will be updated as the application is processed.

Home Courses -	👗 My Account 🛛 🖞 Sign Out
Your application has been saved. This will now be passed to the Local Authority to process.	×
	Courses
Active Course Applications	
123123-123 course333 Duration 31-Oct-2014 to 20-Nov-2014	Application Pending View

Viewing Active Course Applications

If the Citizen portal user has any current applications that have been saved and sent to the Local Authority, the **Active Applications** button is enabled on the **Training Manager Welcome** page and the number of active applications is displayed. They can view the details of these applications.



1. Click the **Active Applications** button to display the **Active Course Applications** page. Initially the status displays **Application Pending** and will be updated as the application is processed by the Local Authority.

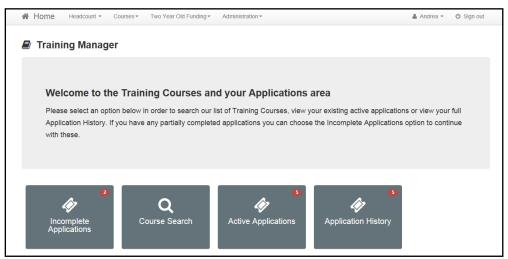
			┛ Courses
Active Cour	se Applications		
TAS-002 Tra Duration Venue Standard Fee (Without Concession)	aining Course Part 2 14-Nov-2014 to 30-Nov-2014 Least Labor £155	Application Pending	View

2. Click the View button to display the Application Details page.

A Home Courses -	🏝 My Account	് Sign Out
		Courses
Application Details		
Application Details Course Details		
Application Date 15-Oct-2014 Application Status Application Pending		

Continuing with an Incomplete Application

If there are any applications that have been started but not confirmed, the **Incomplete Applications** button is enabled on the **Training Manager Welcome** page and the number of incomplete applications is displayed.



1. Click the **Incomplete Applications** button to display the **Incomplete Applications** page.

Home Courses -			Account 🙂 Sign Out
			🔊 Courses
Incomplete Applicat	tions		
101-101 Last CP Course			
Duration	01-Oct-2014 to 30-Oct-2014	Delete	Continue with application
Venue	angel Pradicial		

2. Click the **Continue with application** button to display the **Course Details** page, which is prepopulated with the course details that were previously entered.

Home Courses	- 👗 My Accou	nt ம் Sign Out
		┛ Courses
Course Details		
Course Details		
Course Name	Last CP Course	
Course Code	101-101	
Training Unit	Last TrainingUnit	
Duration	01-Oct-2014 to 30-Oct-2014	
Venue	angen and and	
Places Available	10	
		Continue

3. Click the **Continue** button to display the **Application Details** page and continue with the application.

A Home Courses -	🏝 My Account	ර් Sign Out
		Courses
Step 1 - Application Details Step 2 - Confirm		
Application Details		
101-101 Last CP Course		
Please enter the following information to process your application		
Please enter your Post / Role		
Last Question		
**		
		Continue

Deleting an Incomplete Application

The **Incomplete Applications** button displays the number of applications that have been started but not confirmed. These applications can be deleted.

*	Home	Headcount -	Courses -	Two Year Old Funding -	Administration -		🛔 Andrea 👻	එ Sign out
	Trainir	ng Manage	r					
	Weld	come to the	e Train	ing Courses an	d your Applications	area		
						our existing active applications		
	with th		you nave	any partially complete	applications you can choos	e the incomplete Applications (nue
		(2)			5	5		
	4	<i>></i>		Q	Ŵ	le l		
		mplete cations	C	ourse Search	Active Applications	Application History		

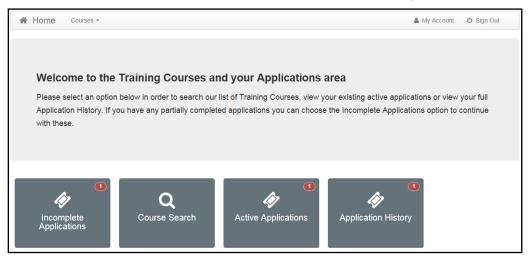
1. Click the **Incomplete Applications** button to display the **Incomplete Applications** page.

Home Cours	ies *		🌢 My Account 🖞 Sign Out
			🗐 Courses
Incomplete A	pplications		
101-101 Last CP Cou	rse		
Duration	01-Oct-2014 to 30-Oct-2014	Delete	Continue with application
Venue	angelight model that		

2. Click the Delete button.

Viewing Course Application History

The Citizen portal user can view their course application history.



1. Click the Application History button to display the Course Application History page.

Home Courses -	La My Account ♂ Sign Out
	🖉 Courses
Course Application History	
123123-123 course333 Duration 31-Oct-2014 to 20-Nov-2014	Application Pending View

2. Click the View button to display the Application Details page.

Home Courses -	👗 My Account	ර් Sign Out
		Courses
Application Details		
Application Details Course Details		
Application Date 15-Oct-2014		
Application Status Application Pendin	g	

Index

Active Course Applications	38
Cache	
Citizen Portal Admin	
Logging In	8
Citizen Self Service Portal	
Administrator	5
Consent History	31
Course Application History	42
Course Applications	32
Edit Resources	11
Configuring Automatic Emails	14
GDPR Administration	17
General Administration	
Cache	
Configuring Password Settings	
Edit Resources	11
Editing Resource Descriptions	12
Portal Configuration	
Incomplete Course Applications	
My Account	
Change Email Address	
Change of Circumstances	
Change Password	
Consent History	
Personal Details	
Two Step Verification	
Withdraw Consent	31
Parents Making Applications	
Registering for a Citizen Portal Account	
Password Settings	10
Passwords	
Forgotten Password	7
Portal Configuration	
Password Settings	
Resource Descriptions	
Two Step Verification	29
v4 Online	
Logging In	
Passwords	
Withdraw Consent	31