One Training Manager Courses Citizen Portal

last updated for the Spring 2021 (3.74) release

Handbook

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01 | **Document Change Control**

Date	Release	Description
Spring 2021	**3.74**	If a child's address is amended in **My Family** the **Update address for other people** dialog will be displayed prompting you to change the address of anyone listed in **My Family**, including the account holder.
Autumn 2020	**3.73**	When searching for addresses, only those marked as **Active** will be dislayed in the list. If the postcode of an Inactive address is entered, a message stating 'No Results' is displayed. If an address used in the portal is made **Inactive**, the address will still be displayed in the area that it has been used, eg **My Account	Contact Details**, applications, etc. **V4 online	Administration	System Administration	Address Management	Manage Addresses** New functionality has been added to manage address. This includes making them active/inactive.
Spring 2020	**3.71**	**Site Logo and Header text** Portal administrators can now configure the site logo and header text so that they do not get overwritten during upgrades.
		**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 [Post Office Postcode Finder](#) 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.
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 "Ian" and "Ian ". 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.

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*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:
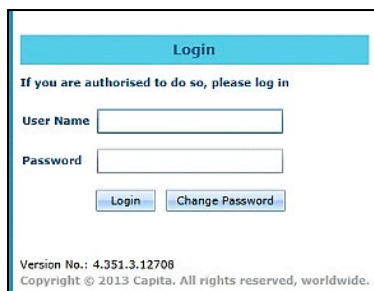 - your LA must have a Citizen Portal licence key.

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

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 Changing a Password on page *6*.

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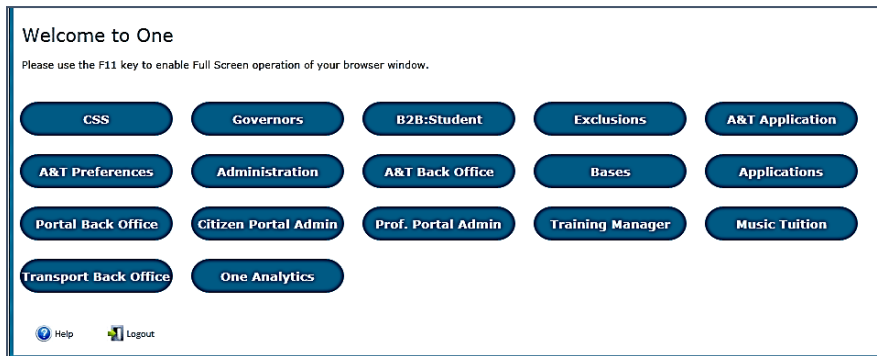
The **Welcome to One** page displays the options that are available to you, subject to a licence being held by your Local Authority and your personal or group permissions.

More Information:
RG_Online_Administration_Login_Logout available from the **One Publications** website.

Changing a Password

To change your password in v4 Online:

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

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.
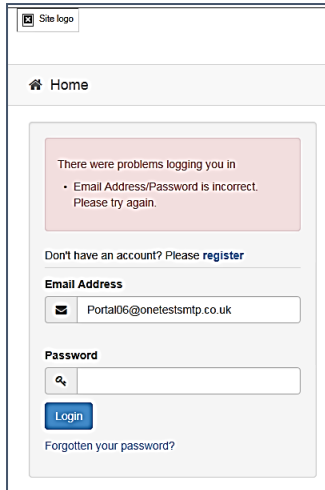
More Information:
RG_Online_Administration_Login_Logout available from the **One Publications** website.

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.
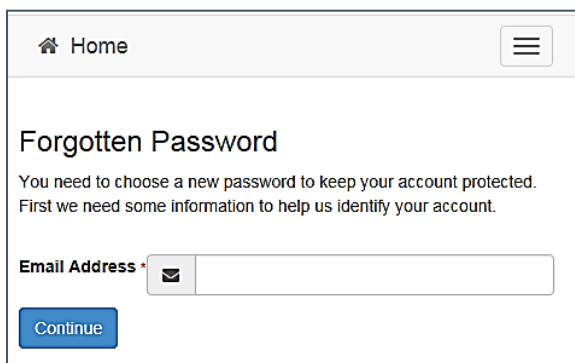
To reset a password:

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

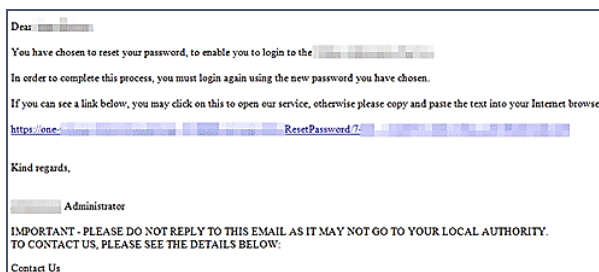2. Enter your email address, then click the **Continue** button.

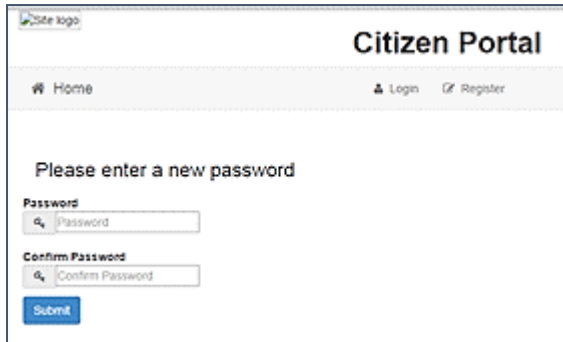   A message is displayed to confirm that a password change was requested.

   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.

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 email address, be set up as a user and belong to a user group in One v4. Your System Administrator will have set up the Citizen One Portal licence key and your permissions via **v4 Client | Tools | Permissions | User Group Permission**s.

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

1. Log in to v4 Online. For more information see
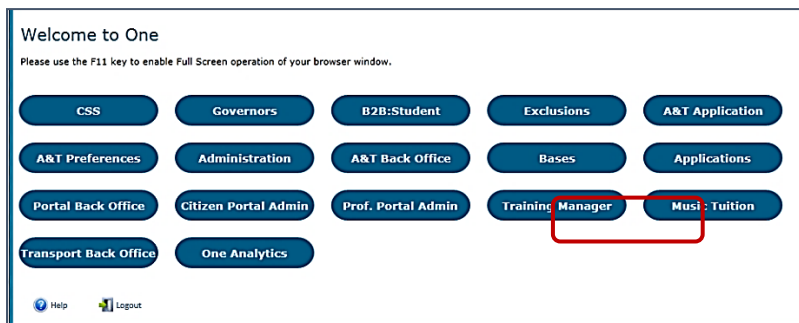
2. Click the **Citizen Portal Admin** button to display the **Announcements** page.
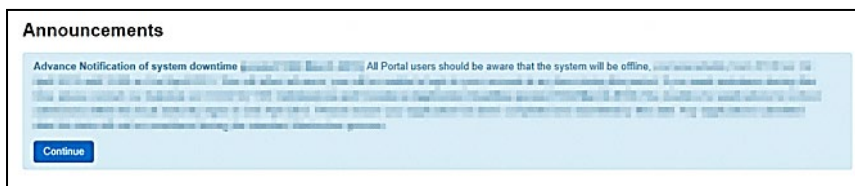
The **Announcements** page displays only if there are announcements regarding the portal.

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

<table>
<tr><td colspan="2" style="background:#1a9bbf;color:white;font-weight:bold">The Announcements page is edited via Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks.</td></tr>
<tr><td>Announcements</td><td>Placeholder_Title</td></tr>
<tr><td>Announcement Start Date</td><td>Placeholder_Forename</td></tr>
<tr><td>Announcements End Date</td><td>Placeholder_Surname</td></tr>
</table>

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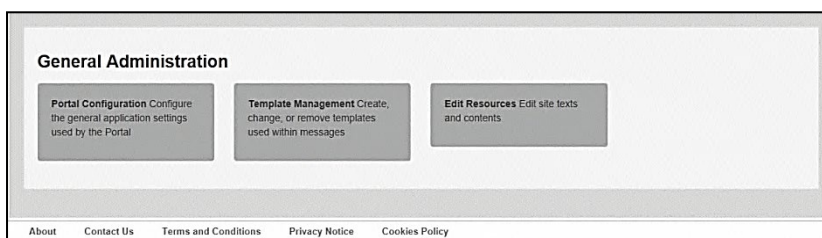
The **General Administration** panel enables you to perform the following tasks:

- **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.

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:
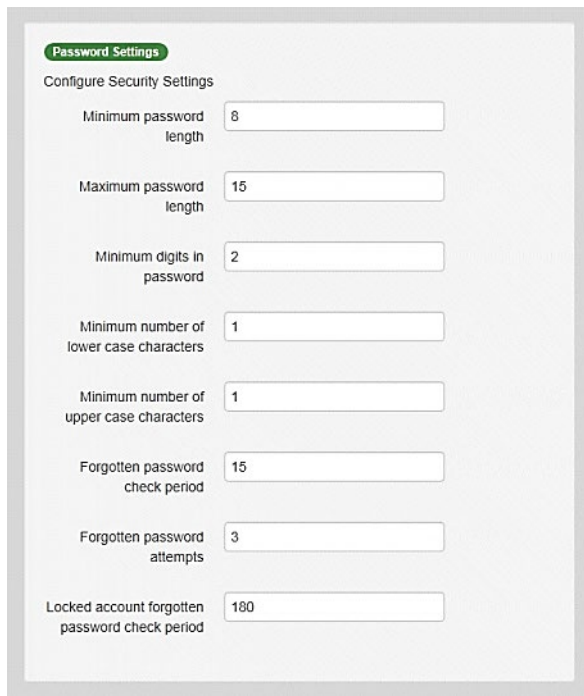
- Password Settings

- 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.

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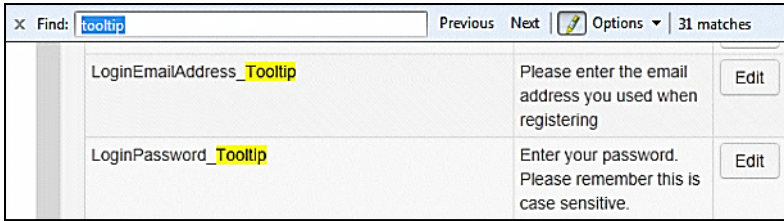
> **NOTE:** *You may need to search through more than one folder. For example, tooltips can be found in most of the resource configuration descriptions.*

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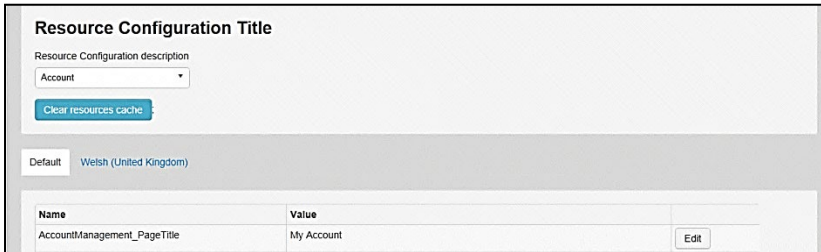
   The default option is English (en). Click the **Welsh (United Kingdom)** button to display the Welsh (cy) descriptions.

2. Select an area from the **Resource Configuration Description** drop-down to display the Descriptions and Values associated with the resource types.
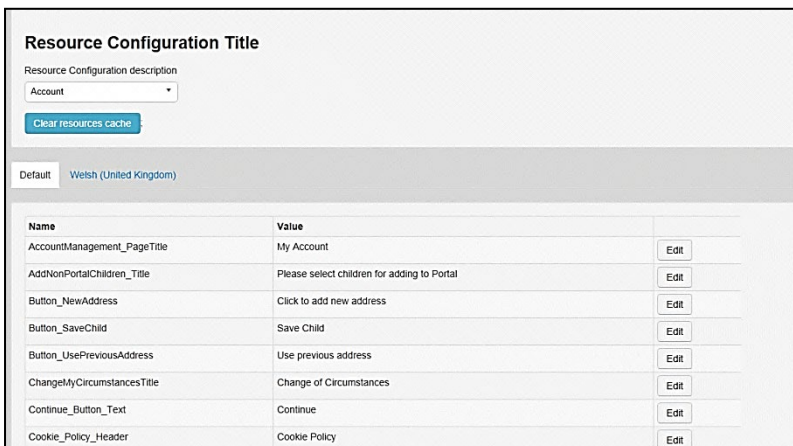
3. Click one of the **Edit** buttons next to a **Value** to display the **Edit Resource Title** dialog.

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.

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.

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.

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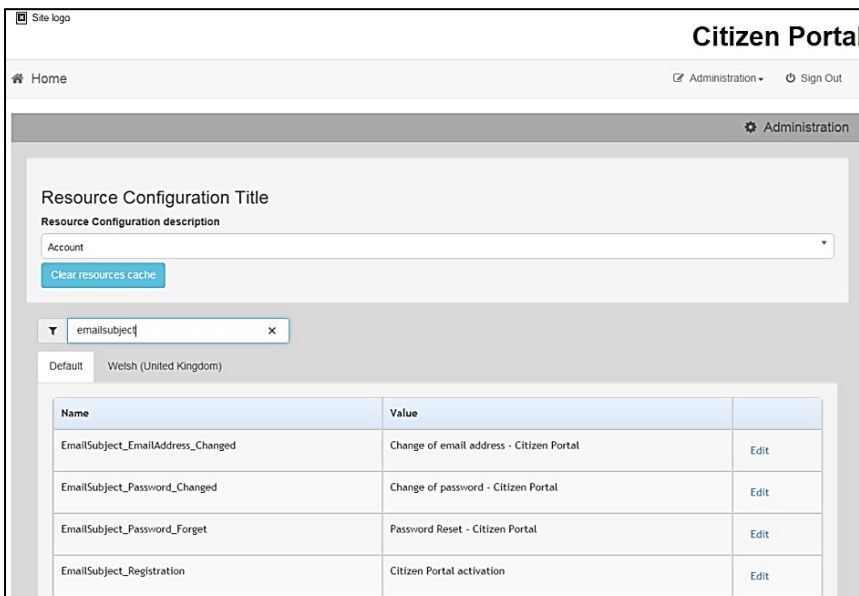
To configure the contents for the different email types, select **Citizen Portal Administration | Administration | Edit Site Texts | Resource Configuration Title | Markdown | Text Blocks**. Default text has been automatically configured for each.

Type *email_* into the **Search** box to filter the list to display the new configurable content items for the different email types.
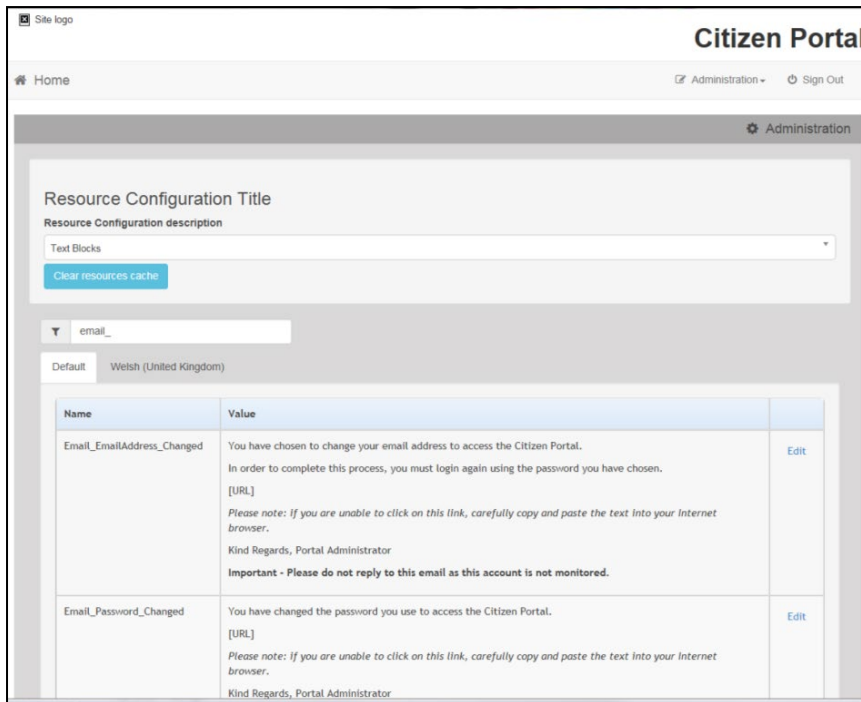
The configurable text block resource names are:

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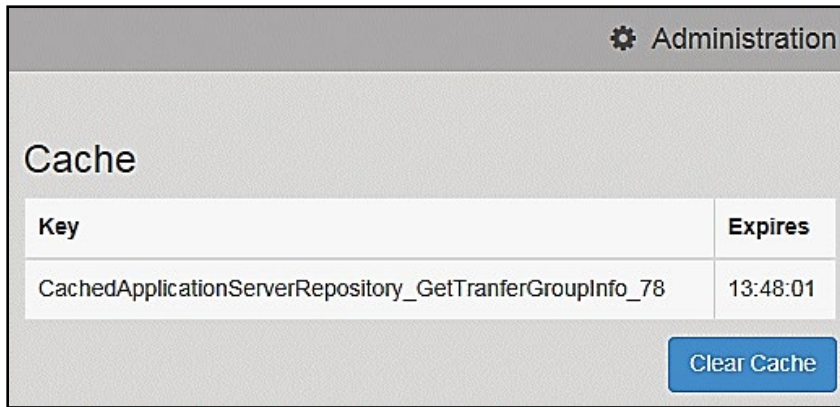
2. Click the **Clear Cache** button to remove the list of cached items. Cached items cannot be deleted individually.

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**.
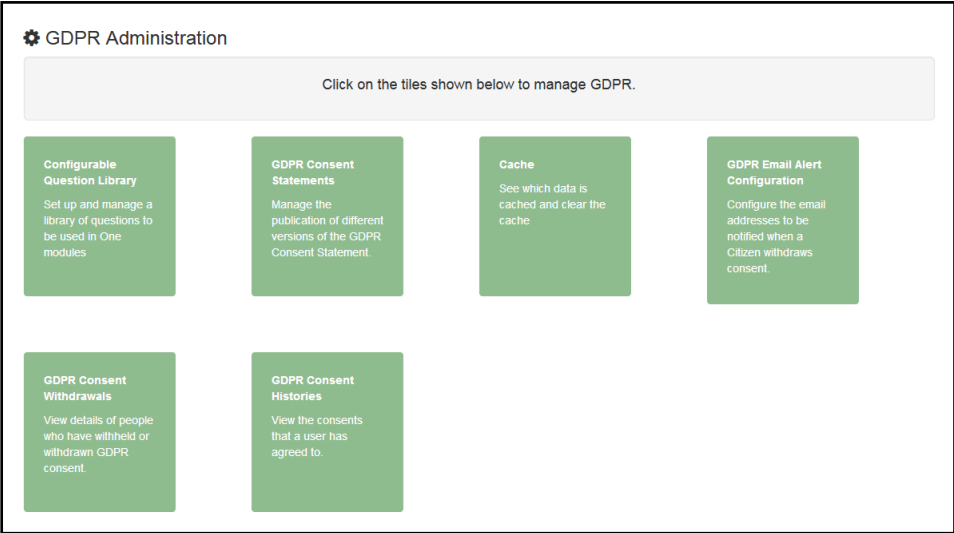
You can only access the **GDPR Administration** area if you have **Read-Write** permission for the **GDPR Administration** business process as shown in the following graphic:
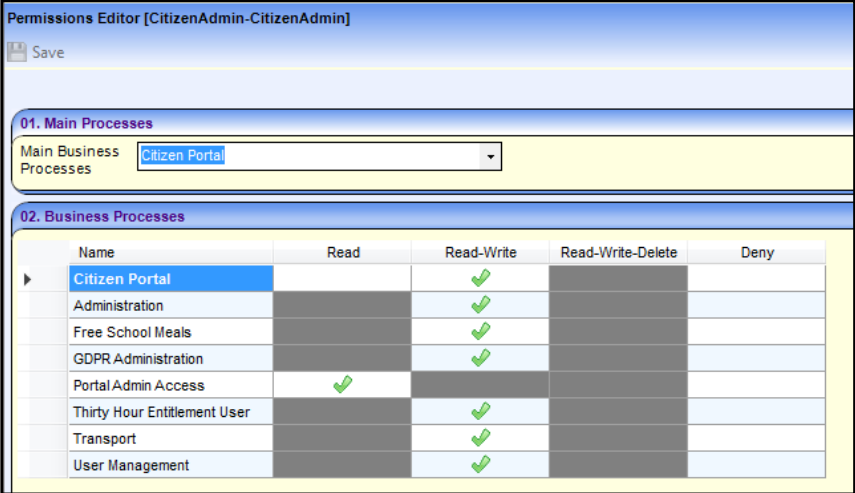
Permissions are set up in the v4 Client via **Tools | Permissions**.

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**.
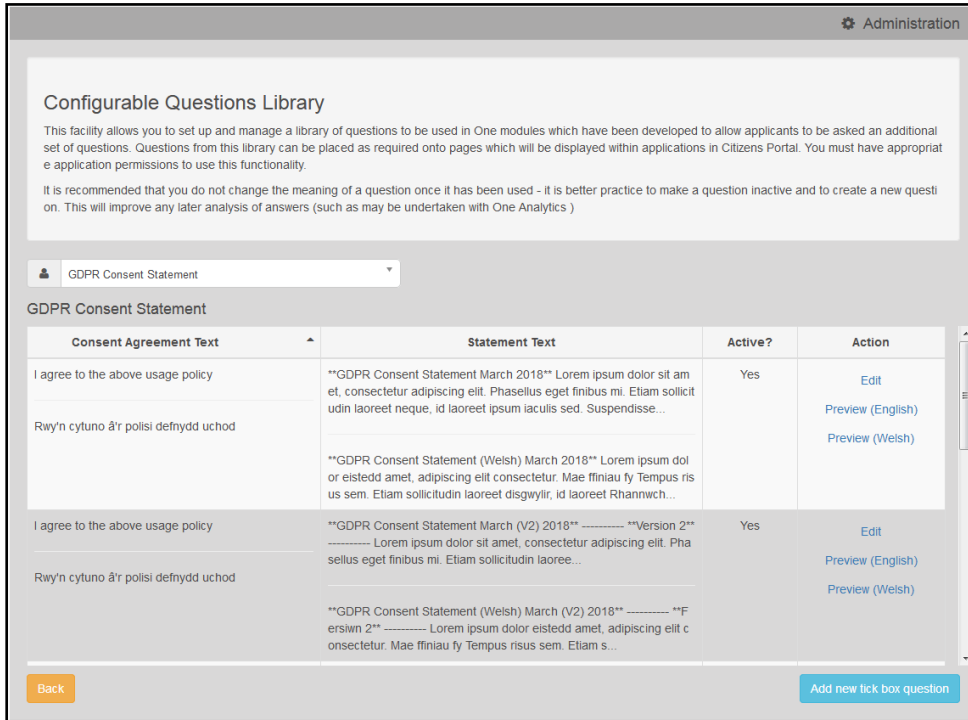
Adding a New Question

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.

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

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.

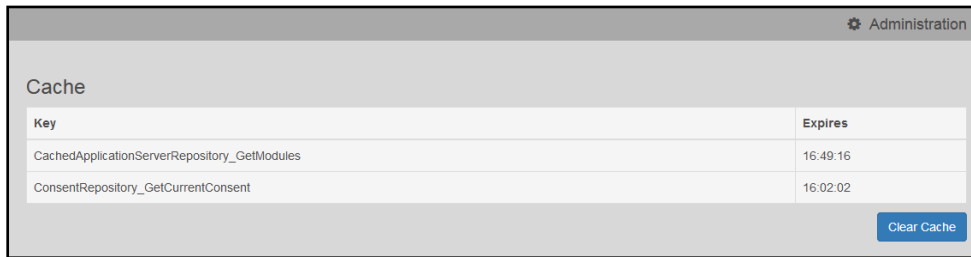2. Click the **Add New** button to display a list of consent statements that have been stored in the question library.

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.

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.

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.

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

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.

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

GDPR Consent History

Please search for a Citizen Portal Account Holder. Once an account is selected a list of their GDPR consents will be shown.

neil	Search

Name	Email Address	User Id	Action	Action On
Neil	portal19@onetestsmtp.co.uk	8249	Consent Withdrawn	09/03/2018 13:20:18
Neil	portal19@onetestsmtp.co.uk	10068	Consent Withdrawn	09/03/2018 13:47:28
Neil	portal19@onetestsmtp.co.uk	10070	Consented	09/03/2018 14:25:38

Consent History for User

Forename	Surname	User Id	Email Address	Address
Neil		10070	portal19@onetestsmtp.co.uk	12, Greyfriars, BEDFORD, Simshire, MK40 1HJ

GDPR Consent Statement	Action	Action On	Consent Version	Consent Published Date
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 … View full statement	Consented	09/03/2018 14:25:38	10	09/03/2018 14:20:00
GDPR Consent Statement March 2018 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 … View full statement	Consented	09/03/2018 13:48:53	9	09/03/2018 13:35:00

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.

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*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** <u>and</u> 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 (http://onepublications.com).

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.

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.

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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.

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☐ 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 ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓
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* Required field

Email Address *	✉	
Confirm Email *	✉	▓▓▓▓▓▓
Password *	🔑	●●●●● [Show]
Title *	👤	Please select ⌄
Forename *	👤	
Surname *	👤	
Gender *	👤	Please select a gender ⌄

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

Find Address	🏠	Postcode

[Search]

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. Only addresses marked as **Active** will be displayed.

   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	🏠	▓▓▓▓▓▓ ▓▓
District / Village	🏠	
Town	🏠	▓▓▓▓▓f
County	🏠	
Postcode *	🏠	▓▓▓ ▓▓▓
Country	🌐	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
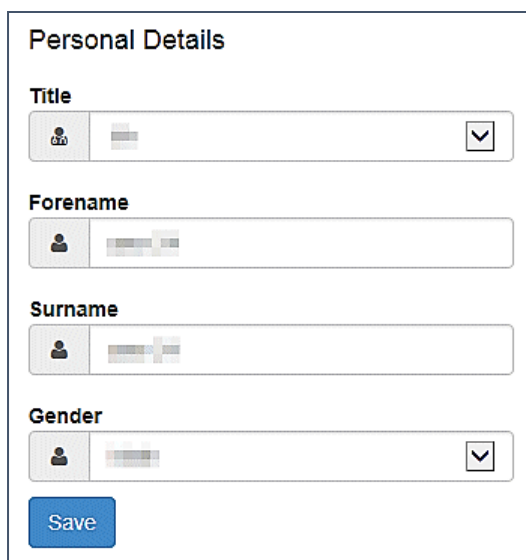- Contact Details
- Change Email Address

- 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.

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**.

4. To edit your address, click **Use Another Address** to display the **Find Address** dialog.

5. Enter a full or partial postcode and click the **Search** button to display a list of addresses for that postcode. Only addresses marked as **Active** will be displayed.

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.

1. Click the **Save** button to display the **Update address for children** dialog.

Select children as required to change their address to the new address.

2. Click the **Update** button to update selected records.

> NOTE: *If a child's address is amended in **My Family** the **Update address for other people** dialog will be displayed prompting you to change the address of anyone listed in **My Family**, including the account holder.*

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.

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 <u>Contact us</u> 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**.

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:

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.

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.
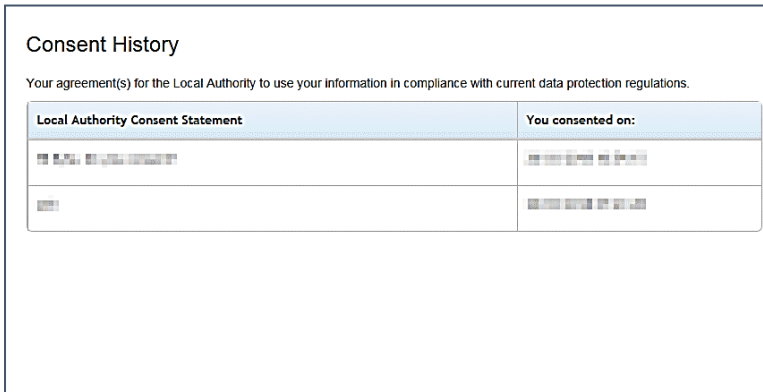
This is a read-only page.

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.
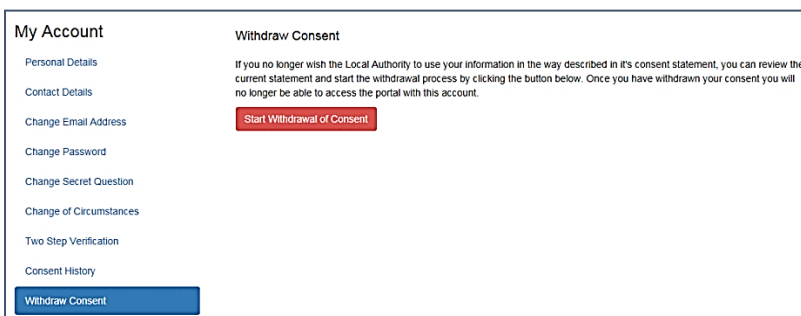
4. Click the **Start Withdrawal of Consent** button to display the **Data Protection** dialog.

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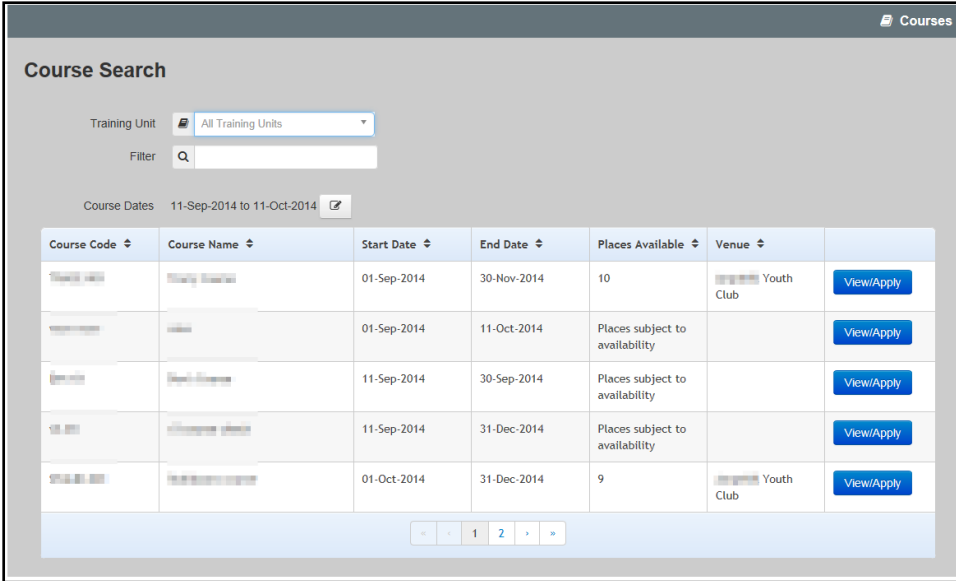
The Citizen portal user can search the list of Training Manager courses.

1. Select **Citizen Portal | Home | Courses** to display the Training Courses and Applications welcome page.
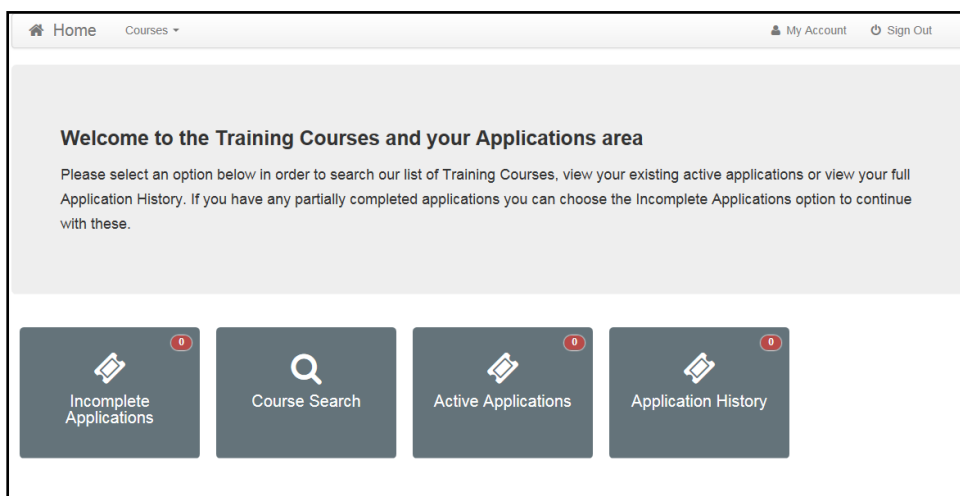
2. Click the **Course Search** button to display a list of all available courses for the selected **Course Dates**.

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 Searching for a Course *on page 37*.

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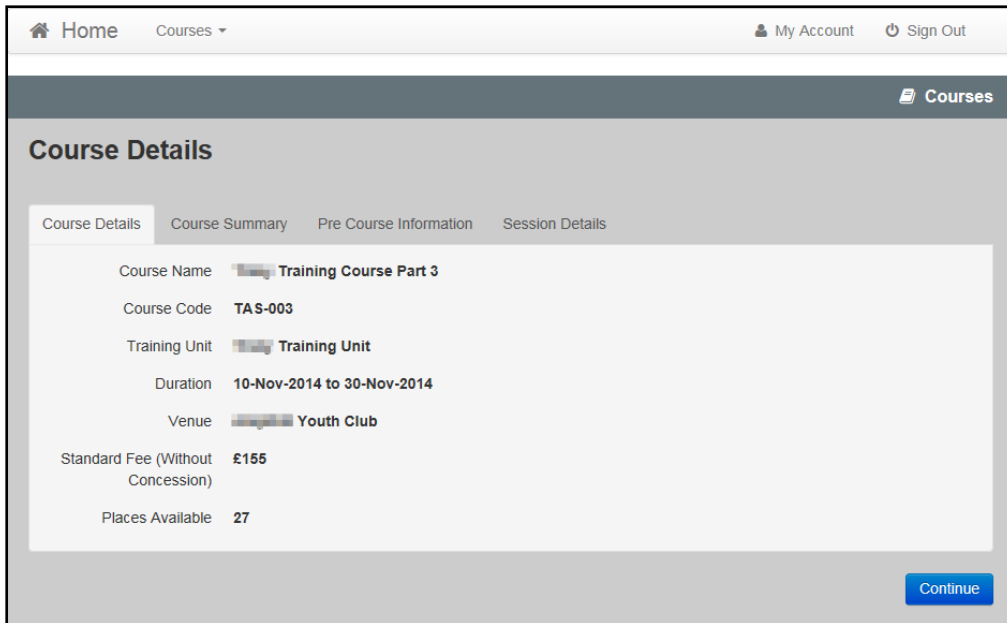
> **NOTE:** *If the course is associated with a nominal ledger with a default fee greater than zero, the **Standard Fee (Without Concession)** is displayed. This does not include any discounts.*

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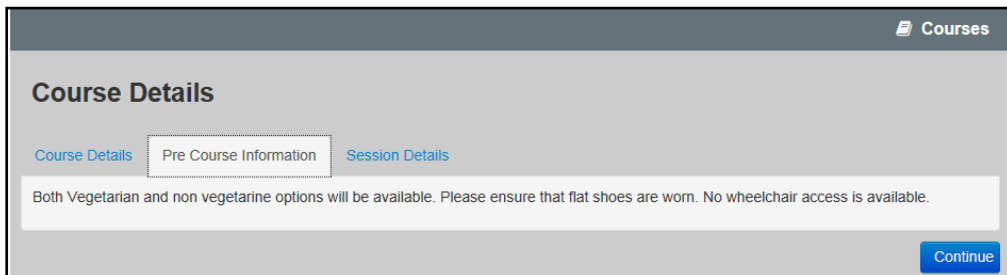
5. If session details have been defined you can view these via the **Session Details** tab.
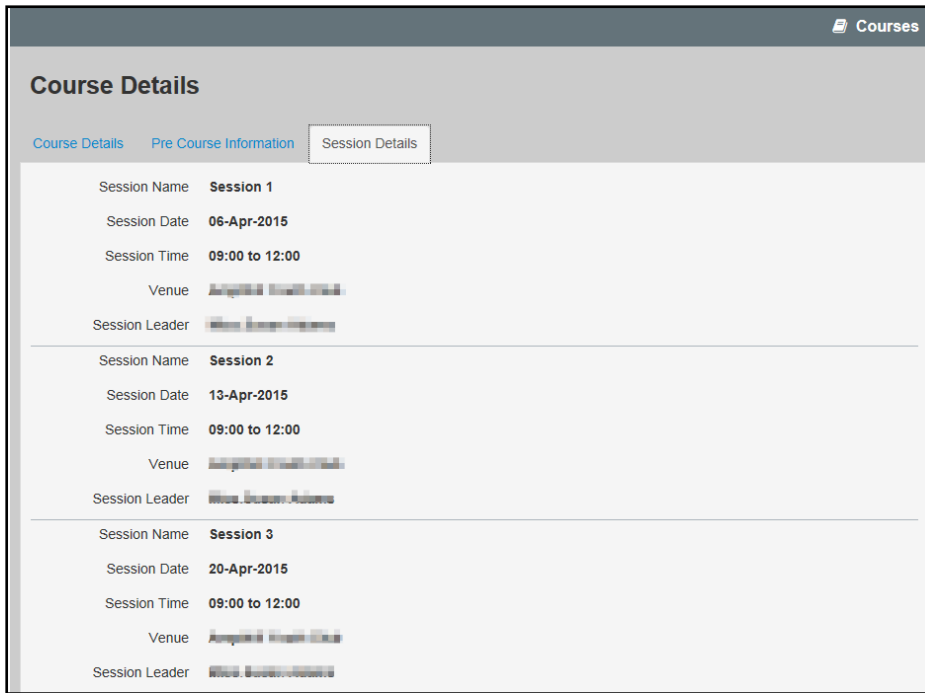
Applying for a Course

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 .

2. Click the **View/Apply** button to display the **Course Details** page.

3. Click the **Continue** button to display the **Application Details** page.
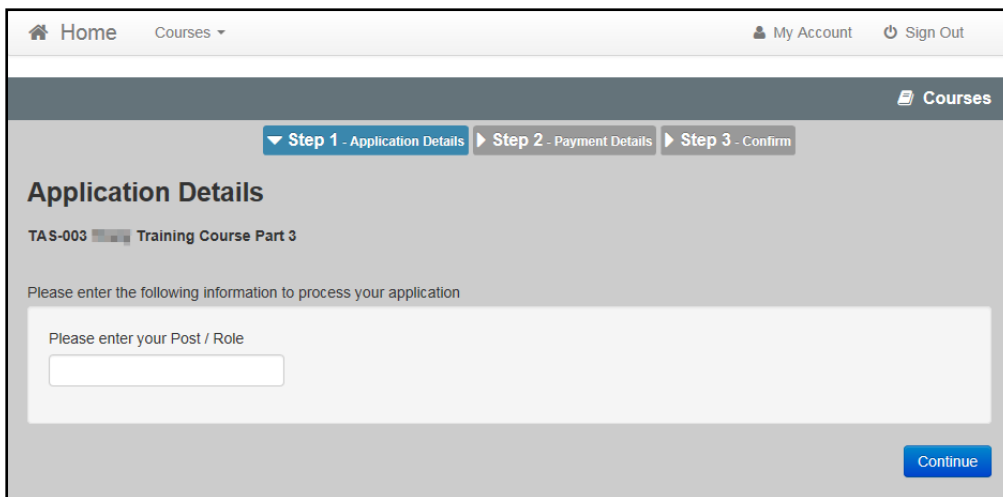
4. If required, enter a **Post** or **Role**.

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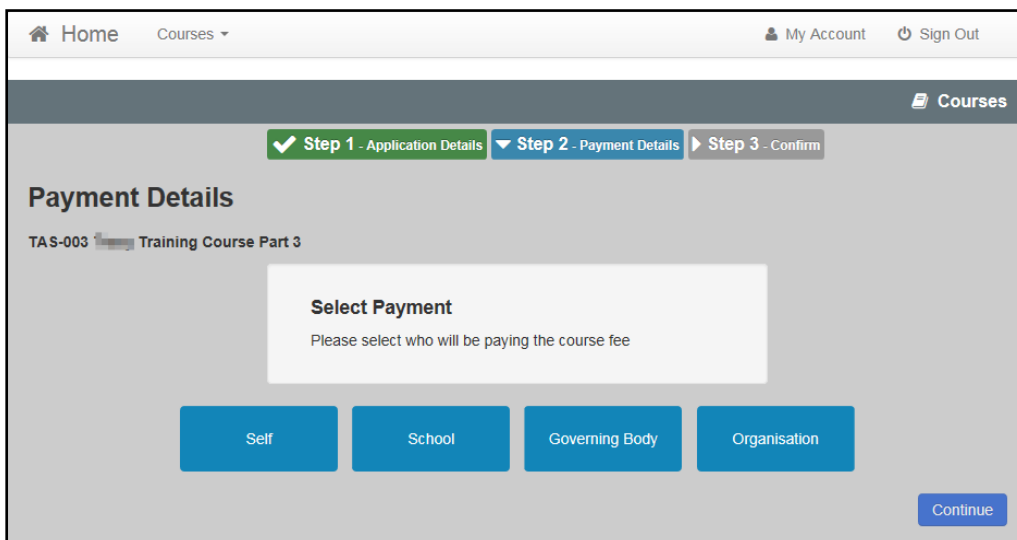
6. Click the required button to select whether the course fee will be paid by **Self**, **School**, **Governing Body** or another **Organisation**.

> *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**.*

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.
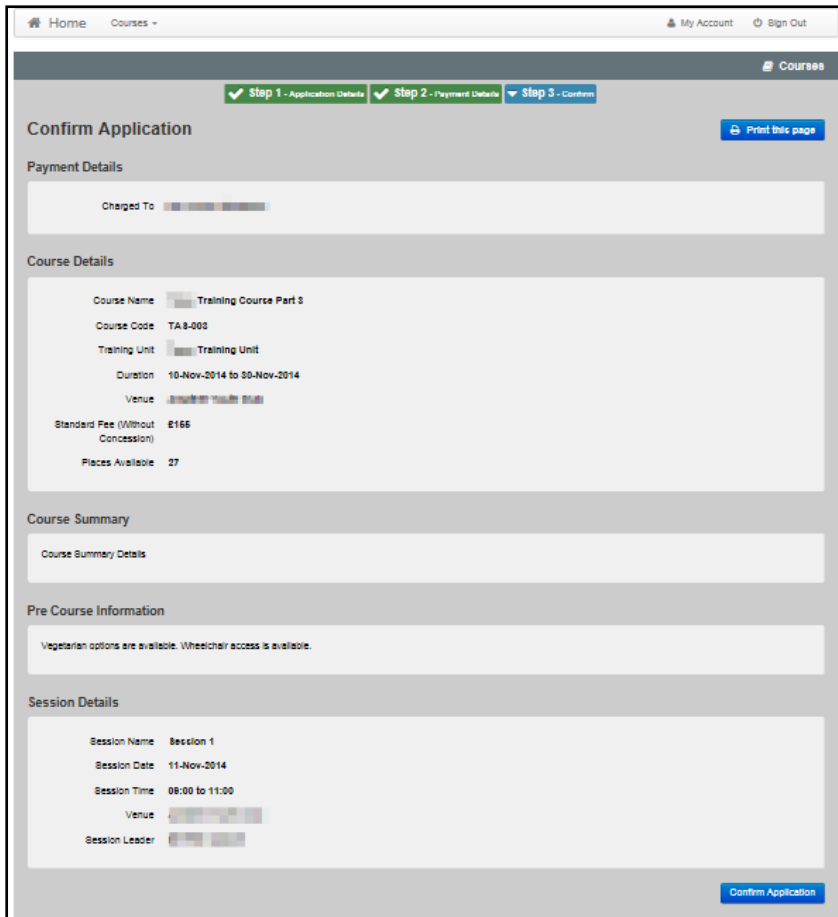
9. If required, click the **Print this Page** button to print the application details.

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.
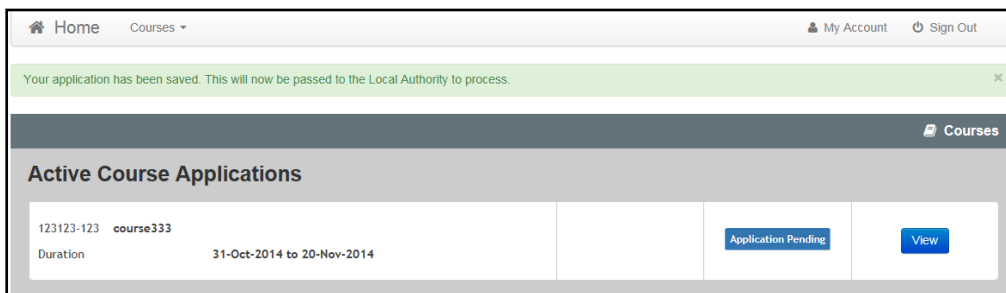
Viewing Active Course Applications

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.
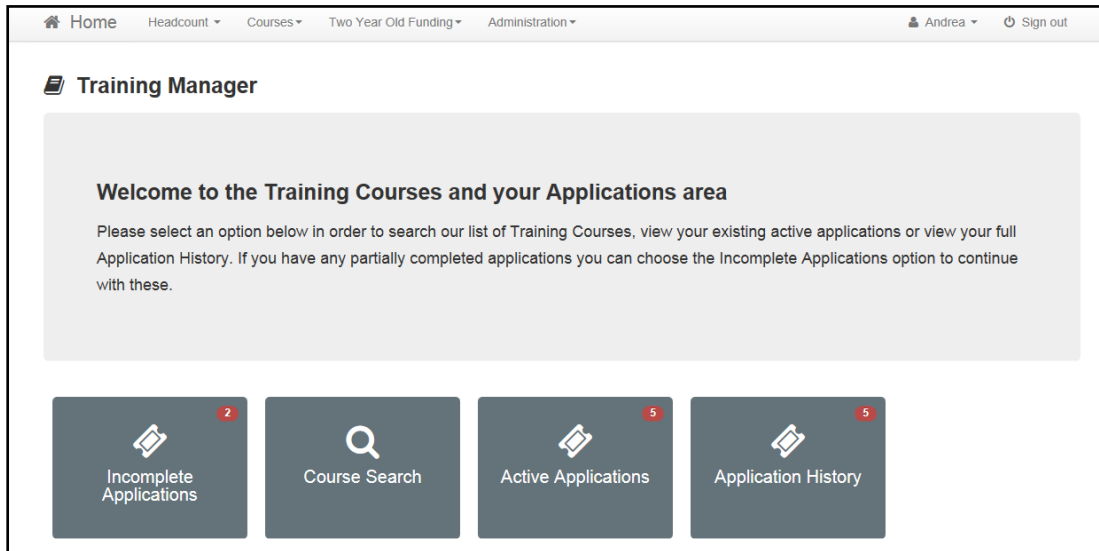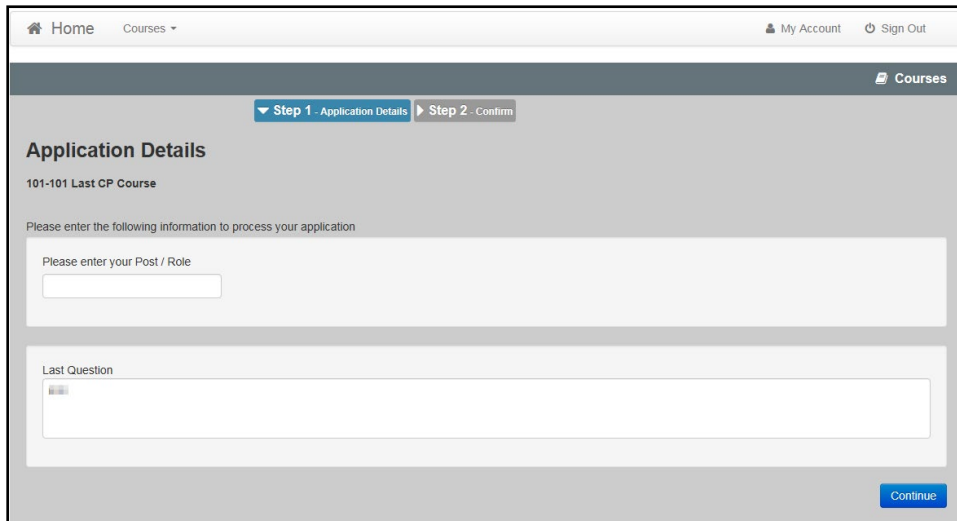

1. Click the **Active Applications** button to display the **Active Course Applications** page. Initially the status displays **Application Pending** and will be updated as the application is processed by the Local Authority.
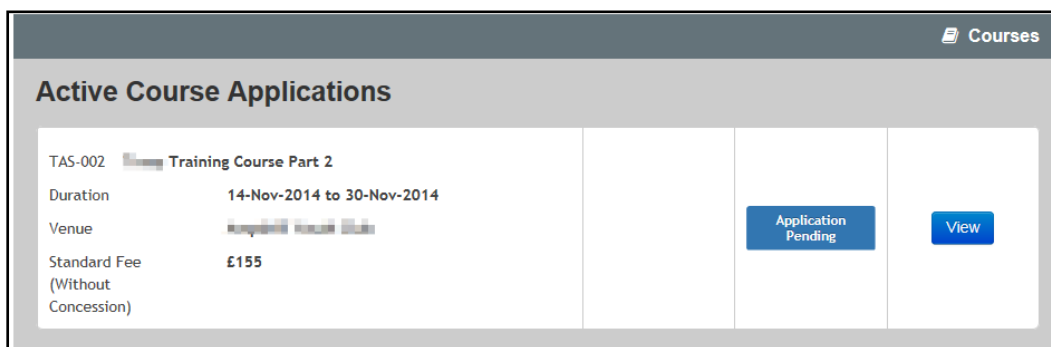
2. Click the **View** button to display the **Application Details** page.
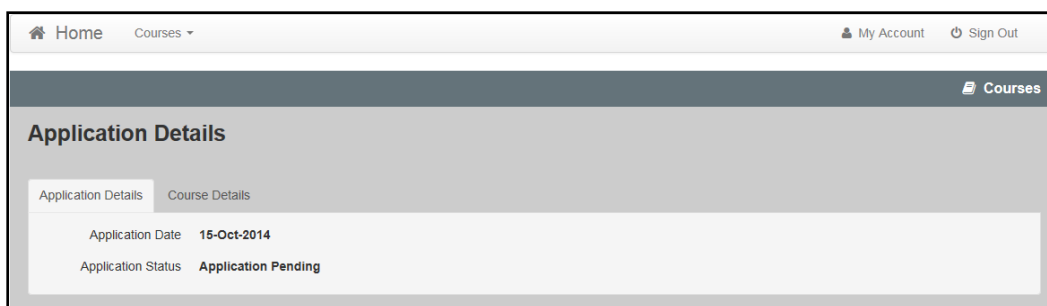
Continuing with an Incomplete Application

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.
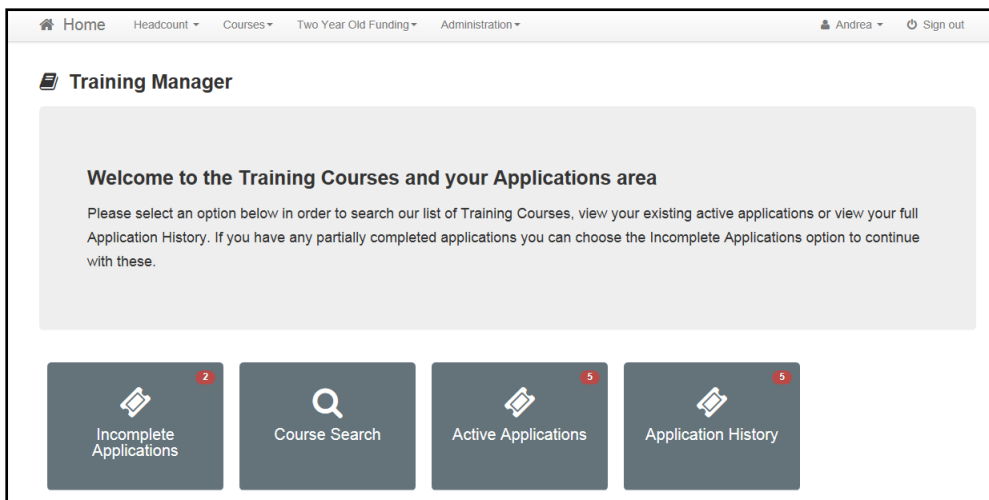
1. Click the **Incomplete Applications** button to display the **Incomplete Applications** page.
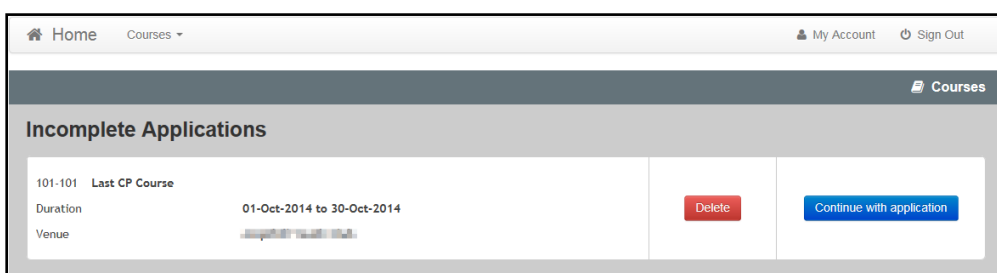
2. Click the **Continue with application** button to display the **Course Details** page, which is pre-populated with the course details that were previously entered.
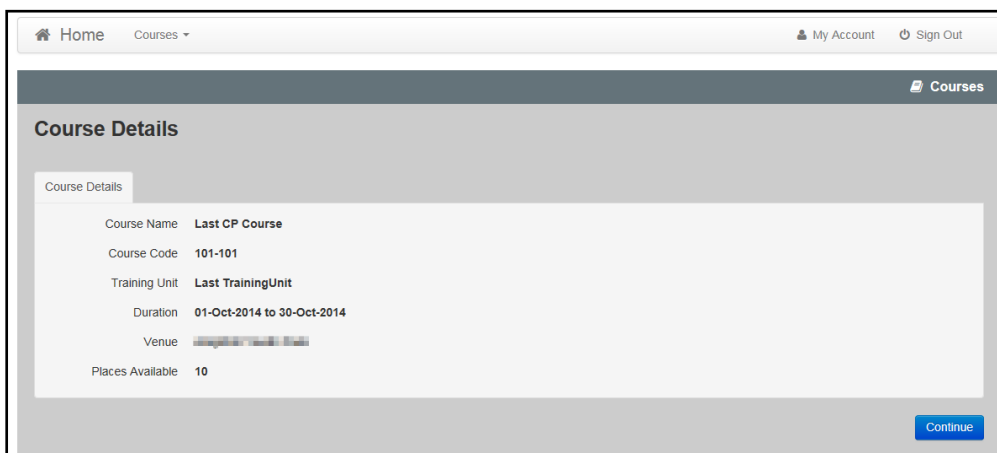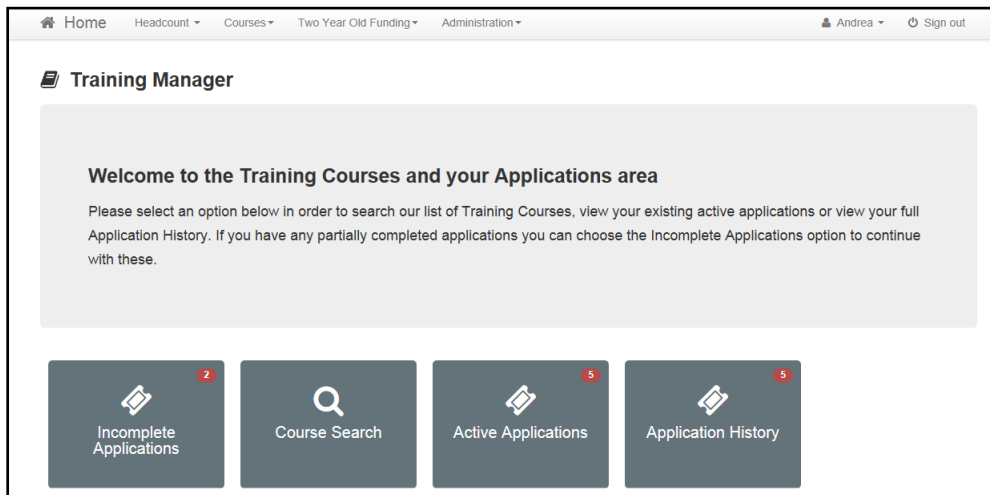

3. Click the **Continue** button to display the **Application Details** page and continue with the application.
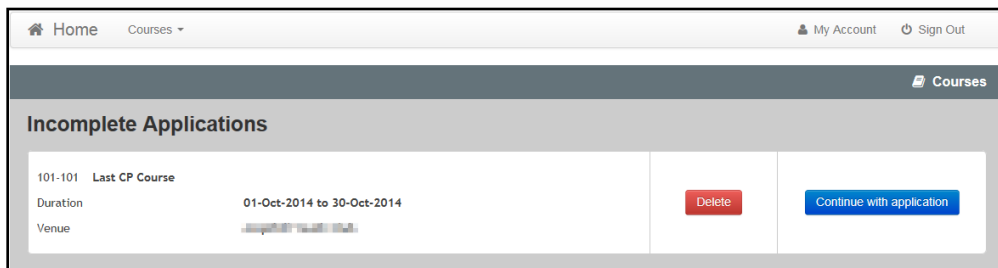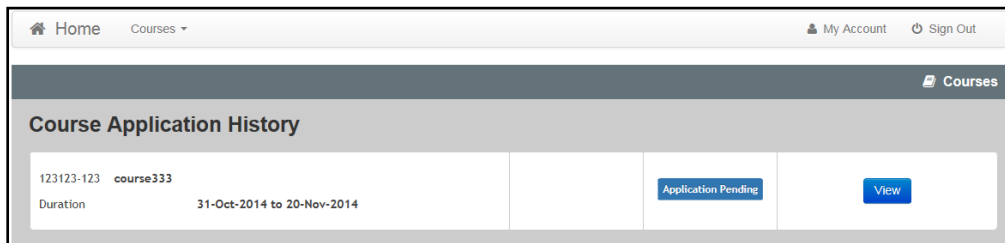
Deleting an Incomplete Application

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

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

2. Click the **Delete** button.

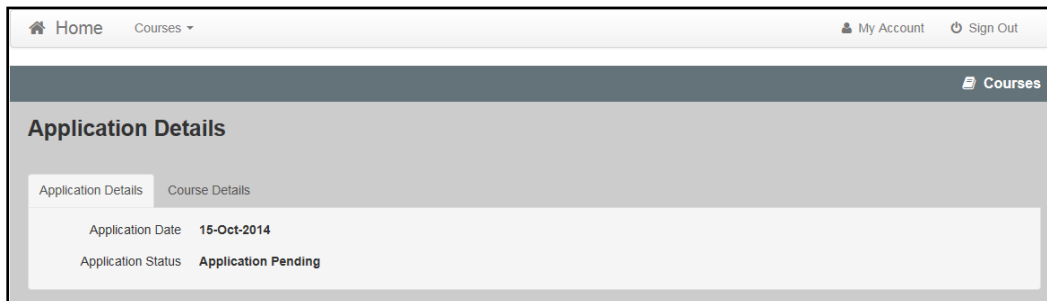# Viewing Course Application History

The Citizen portal user can view their course application history.
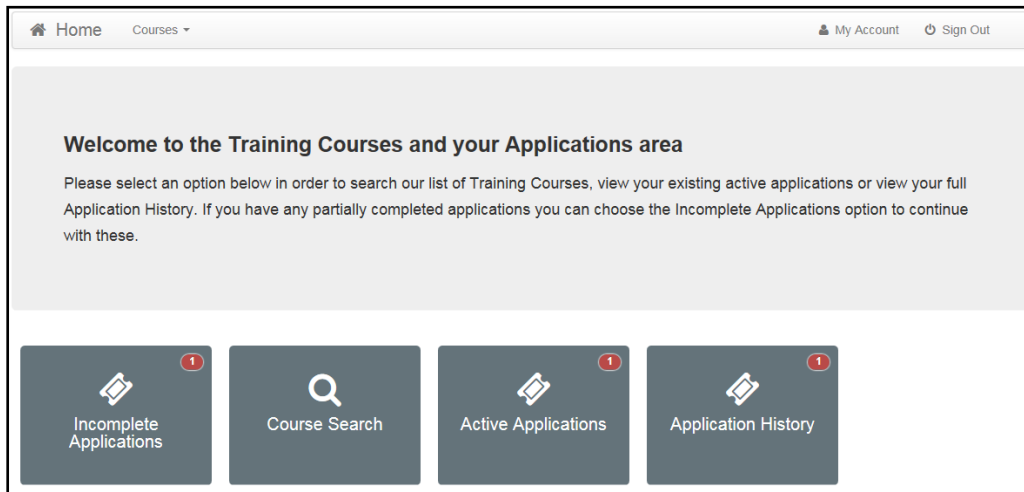
1. Click the **Application History** button to display the **Course Application History** page.

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

Index