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User Maintenance and Administration for Planning and Modelling

Guide for Providers

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Table of Contents

Section 1 – Overview	4
System Overview	6
User Roles	7
Accessing the System.....	9
Section 2 – User Maintenance	12
Creating brand new users.....	13
Giving an existing LSC applications user access to PaM	17
Updating an existing user	22
How to change your password.....	25

Section 1 – Overview

Overview This section provides an overview of User Maintenance and Administration (UMA), user roles and how to log into the system.

In this section This section will cover the following topics:

Topic	See Page
Introduction	
Who is this User Guide for?	5
What is in this Guide?	5
Getting More Help and Information	5
System Overview	6
User Roles	7
Accessing the System	9

Introduction, Continued

Who is this User Guide for?

This guide is aimed at User Approvers in provider organisations responsible for User Maintenance and Administration (UMA) on the Planning and Modelling (PaM) system.

What is in this Guide?

This guide provides:

- an overview of User Maintenance and Administration (UMA), including user roles and tasks
 - step-by-step instructions for creating new PaM users where the user does not already have an LSC login
 - step-by-step instructions for creating new PaM users where the user already has an LSC login
 - step-by-step instructions for modifying a user's details
 - step-by-step instructions for resetting a user's password
 - step-by-step instructions for deleting a user
 - step-by-step instructions for changing your password.
-

Getting more help and information

If you have a query about using UMA or PaM, ask your Regional PaM Administrator.

System Overview

User Maintenance and Administration

User Maintenance and Administration is a system that allows you to manage users of the systems provided by the Learning and Skills Council (LSC), including PaM. Specifically, it allows you to:

- create new users
- modify a user's details
- reset a user's password
- delete a user.

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User Roles

UMA

UMA allows users to set up and administer different types of users for PaM. The table below details the different roles that can be allocated to a user in UMA, and details of the level of access available to each role.

User Organisation	Business role	User Role in PaM	Authority within application
LSC National Office	National User Approver	User Approver	<ul style="list-style-type: none"> creates and maintains National LSC users, and Regional User Approvers
	National PaM Administrator	PaM Administrator	<ul style="list-style-type: none"> sets and imports national level information into PaM imports Local Planning Assumptions
	LSC PaM Help Desk	PaM Help Desk	<ul style="list-style-type: none"> supports users in the use of PaM
	National LSC PaM User	Read Only	<ul style="list-style-type: none"> view only
LSC Region	Regional User Approver	User Approver	<ul style="list-style-type: none"> creates and maintains LSC users in the region, and provider User Approvers
	Regional PaM Administrator	PaM Administrator	<ul style="list-style-type: none"> sets and imports regional level information into PaM
	Regional Planning Officer	Planning Officer	<ul style="list-style-type: none"> reviews and approves provider plans enters planning details for new providers
	Regional LSC PaM User	Read Only	<ul style="list-style-type: none"> view only
Provider	Provider User Approver	User Approver	<ul style="list-style-type: none"> creates and maintains users at the provider
	Provider Planning Officer	Read Write	<ul style="list-style-type: none"> creates maintains plans at the provider
	Provider PaM User	Read Only	<ul style="list-style-type: none"> view only
BSU		User Approver super user	<ul style="list-style-type: none"> create and maintains users at all levels in PaM

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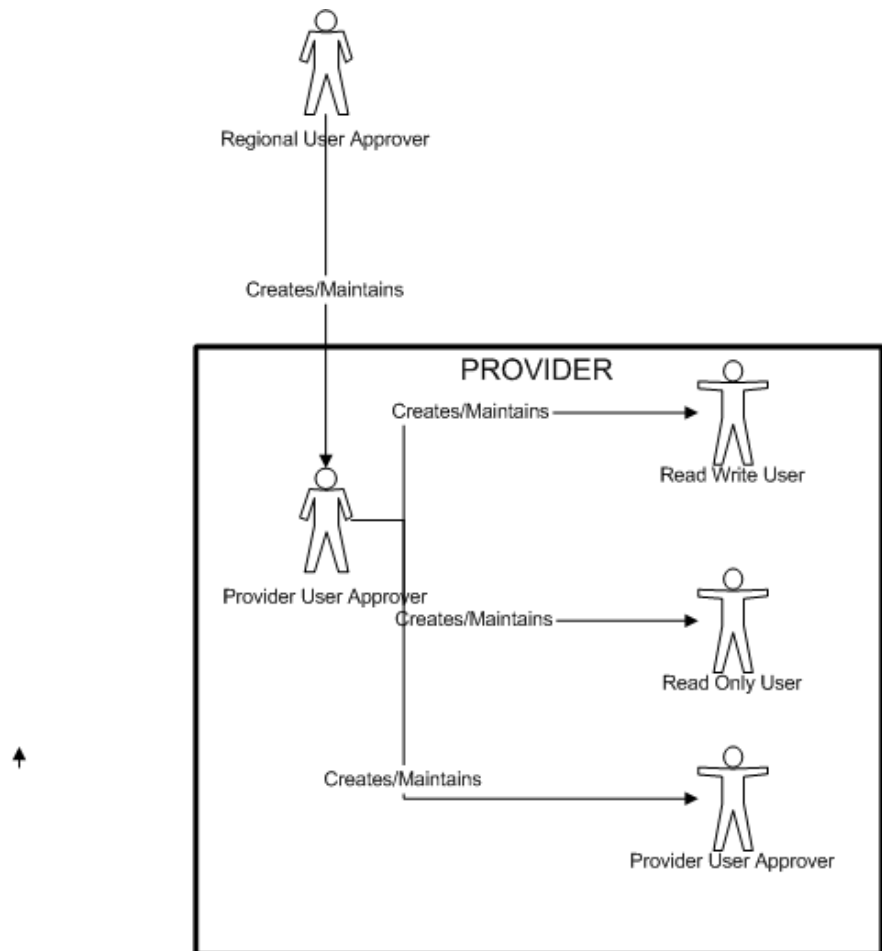
User roles, continued

User Approver

User administration functions are performed by User Approvers at different levels for their own organisation.

- A User Approver is assigned in each provider organisation.
- The provider User Approver is assigned by the User Approver in the Regional LSC.
- The provider User Approver has the ability to create and maintain the users in their organisation.

These relationships are depicted in the diagram below:



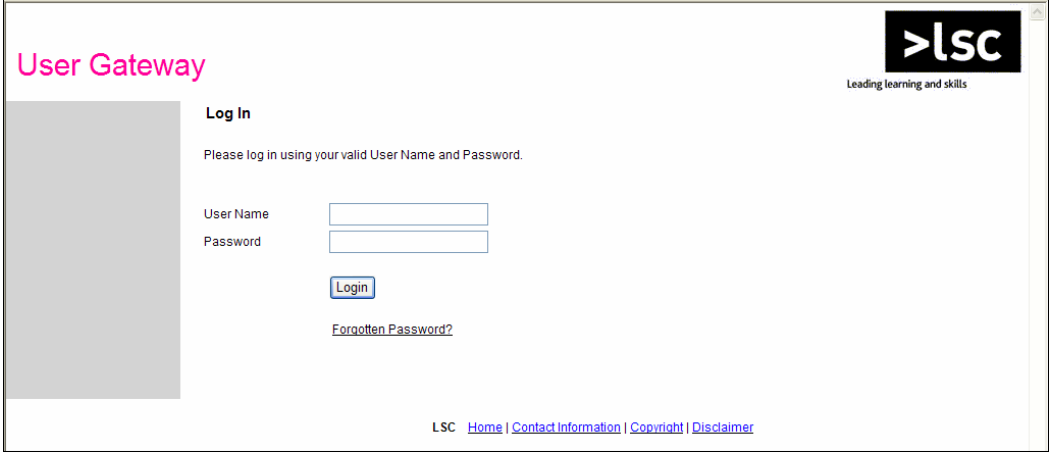
Accessing the System

Overview UMA is a module available within the Provider Gateway.

Step	Action
1	<p>To select the Provider Gateway:</p> <ul style="list-style-type: none"> • launch your Internet browser (for example, Internet Explorer). • enter the URL address of the Gateway in the Address field and press RETURN (alternatively, the Provider Gateway may be an option on your Favorites list, where you can select it). <p><i>Note: The Gateway address will be supplied to you by the LSC.</i></p>
2	<p>The first screen you will see is the Provider Gateway Welcome screen:</p> <div data-bbox="363 790 1417 1429" style="border: 1px solid black; padding: 10px;"> <p>Provider Gateway</p> <p>Welcome to the Provider Gateway.</p> <p>The Provider Gateway is a web-based internet portal which enables the Learning and Skills Council (LSC), the inspectorates and providers to access information which supports self-assessment and quality improvement. The Gateway hosts:</p> <p>A Document Exchange enabling you to download, view, and upload various types of electronic documents including:</p> <ul style="list-style-type: none"> • Self-assessment reports (SAR) and quality improvement plans uploaded by providers • College performance reports (CPR), provider performance reports (PPR) and other data supplied by the inspectorates • The FE stats workbook template and completed documents • The other learner type (OLT) workbook template and completed documents • Local LSC college briefing reports for Ofsted annual assessment visits <p>The Learner Achievement Tracker (LAT) containing Value Added and Distance Travelled data</p> <p>User Administration facilities to enable user-approvers to create new users for access to the Gateway and maintain existing user accounts</p> <p>The Training/Help section (available without logging in) to explain how the Gateway works. Access this when using the Gateway for the first time. Frequently Asked Questions and other guidance documents are also available.</p> <p>Upon Login, you will be taken to the Provider Gateway Home Page.</p> </div> <p>Click the Login link on the left side of the screen.</p>

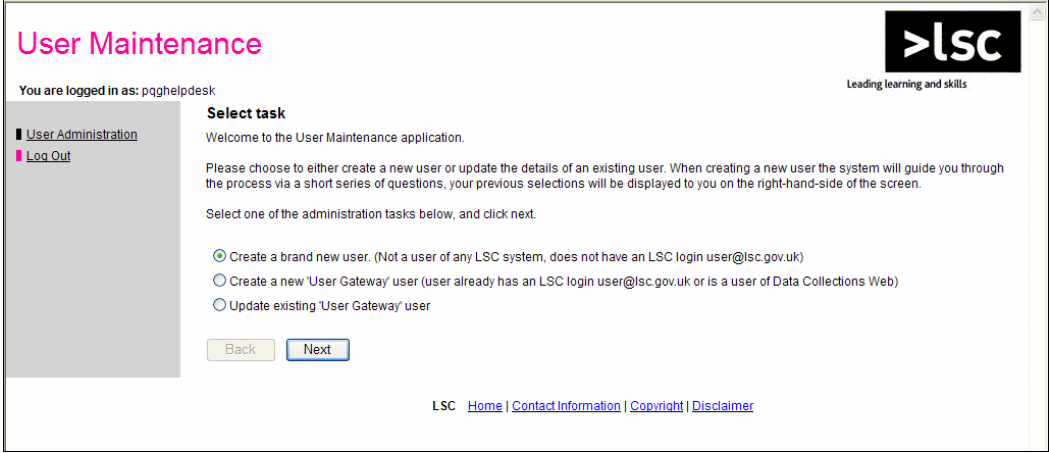
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Accessing the System, continued

Step	Action
3	<p>The login screen is displayed:</p>  <p>Enter your username and password and click Login.</p>
4	<p>The Provider Gateway opens at the <i>Home</i> screen. The menu on the left side of the screen enables you to navigate to the services on the Gateway.</p> <p>Click the User Admin/Change Password link.</p> 

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Accessing the System, continued

Step	Action
5	<p>The UMA Home screen is displayed:</p>  <p>From here you can select any of the User Maintenance tasks.</p>

Section 2 – User Maintenance

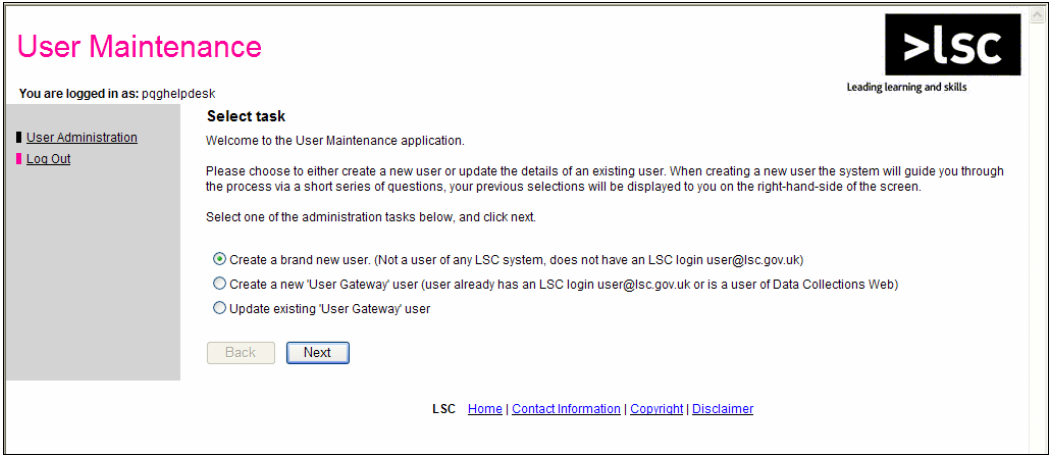

Overview This section provides step-by-step instructions for creating users and editing user details.

In this section This section will cover the following topics:

Topic	See Page
Creating brand new users	13
Giving PaM access to existing LSC applications users	17
Updating an existing user	22
– Deactivating a user's account	24
– Deleting a user	24
– Resetting a user's password	24
How to change your password	25

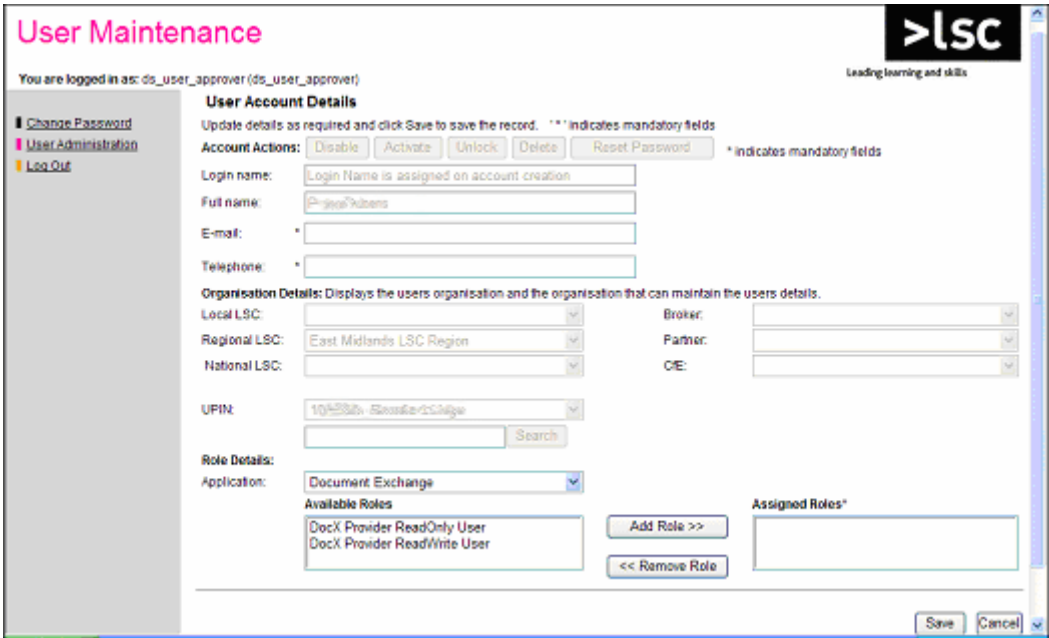
Creating brand new users

Overview This topic describes how to create a new PaM user who does not already have login access to any other LSC system.

Step	Action
1	Login to the Provider Gateway and navigate to the UMA Home screen, as described in Section 1 above.
2	<p>On the UMA Home screen, select the Create a brand new user radio button and click Next.</p> 
3	<p>The Enter Username field is displayed. Enter the user's name and click Next. The user's name is used to generate their login username.</p> 

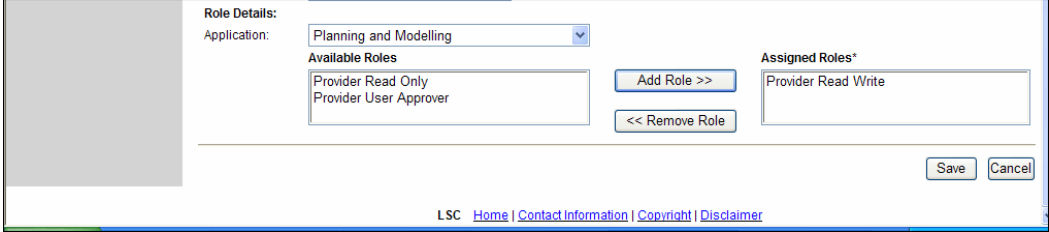
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Creating brand new users, continued

Step	Action
4	<p>The User Account Details screen is displayed.</p> <ul style="list-style-type: none"> The Login name field is populated with the user's new login name generated by the system. The Full name field is pre-populated with the user's name you entered at step 3. The E-mail and Telephone fields are mandatory and you must complete these. The UPIN field is pre-populated with your UPIN and organisation name. Use the Application drop-down list to select Planning and Modelling. 

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Creating brand new users, continued

Step	Action
5	<p>Scroll down to the bottom of the screen. You must assign a new user a role in the <i>Planning and Modelling</i> application, and also in the <i>Provider Gateway</i> application.</p> <ul style="list-style-type: none"> • Select <i>Planning and Modelling</i> in the Application drop-down list and assign at least one role to the user. A user can have more than one role. To assign a role, click on the role in the Available Roles window to highlight it, and then click Add Roll>>. The role is moved into the Assigned roles window. • Select <i>Provider Gateway</i> in the Application drop-down list and assign at least one a read-only role to the user. If a user is being set up with the User Approver role in PaM, then they must also be assigned the User Approver role in Provider Gateway. 
6	<p>Click Save when you have completed the screen.</p> <p>Note that Cancel takes you back to the UMA Home screen without saving the user details.</p>

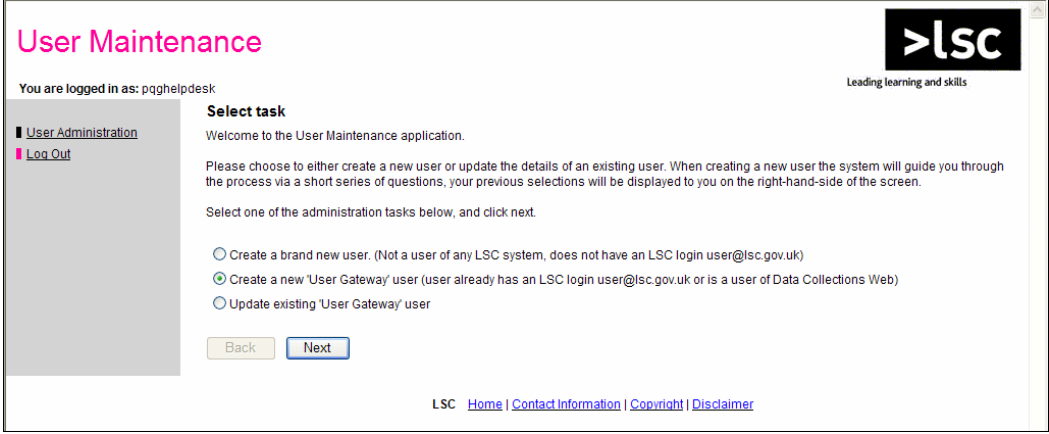
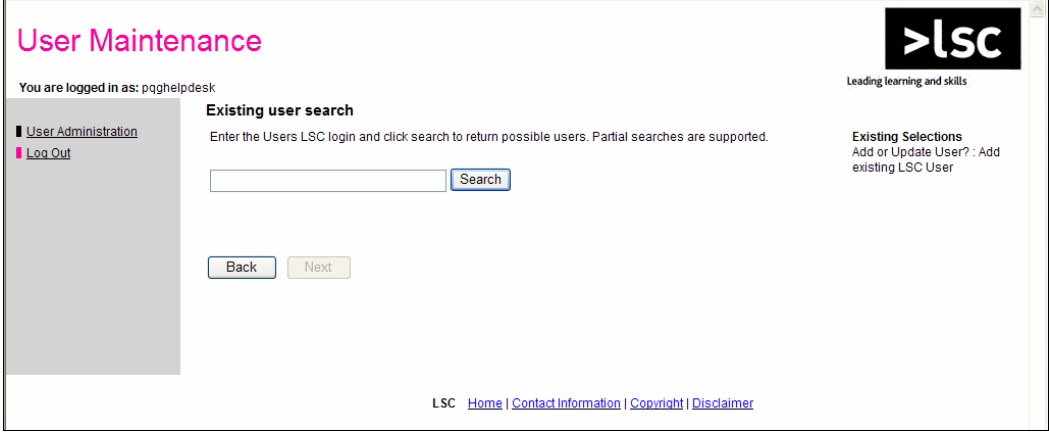
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Creating brand new users, continued

Step	Action
7	<p>The user's details are saved and a random password is generated for the user.</p> <p>An email is sent to the user which they should use to select a new password.</p> <div data-bbox="363 472 1417 1059" style="border: 1px solid black; padding: 5px;"> <p>User Account Details Update details as required and click Save to save the record. ** indicates mandatory fields</p> <p>Account Actions: Disable Activate Unlock Delete Reset Password * indicates mandatory fields</p> <p>Login name: LSCDEVJohn Smythe Full name: John Smythe E-mail: * john.smith@college.ac.uk Telephone: * 01219876543</p> <p>Organisation Details: Displays the users organisation and the organisation that can maintain the users details. Local LSC: [dropdown] Broker: [dropdown] Regional LSC: [dropdown] Partner: [dropdown] National LSC: [dropdown] OE: [dropdown]</p> <p>UPIN: [dropdown] Search [button]</p> <p>Role Details: Application: Planning and Modelling [dropdown]</p> <p>Available Roles: BSU Helpdesk [dropdown] LSC National Application Administrator [dropdown] LSC National ReadOnly [dropdown]</p> <p>Assigned Roles* Provider Read Write [dropdown]</p> <p>Buttons: Add Role >> << Remove Role</p> <p>Save [button] Cancel [button]</p> <p><small>User details have been saved. The new password is: 5Ds*Ni-9c An e-mail has been sent to the registered e-mail account of this user, which they can use to create a new password.</small></p> </div> <p>The Disable button is enabled, allowing you to deactivate the user. When a user is deactivated they can no longer use the system, but their details remain on the system and they can be reactivated using the Activate button.</p>

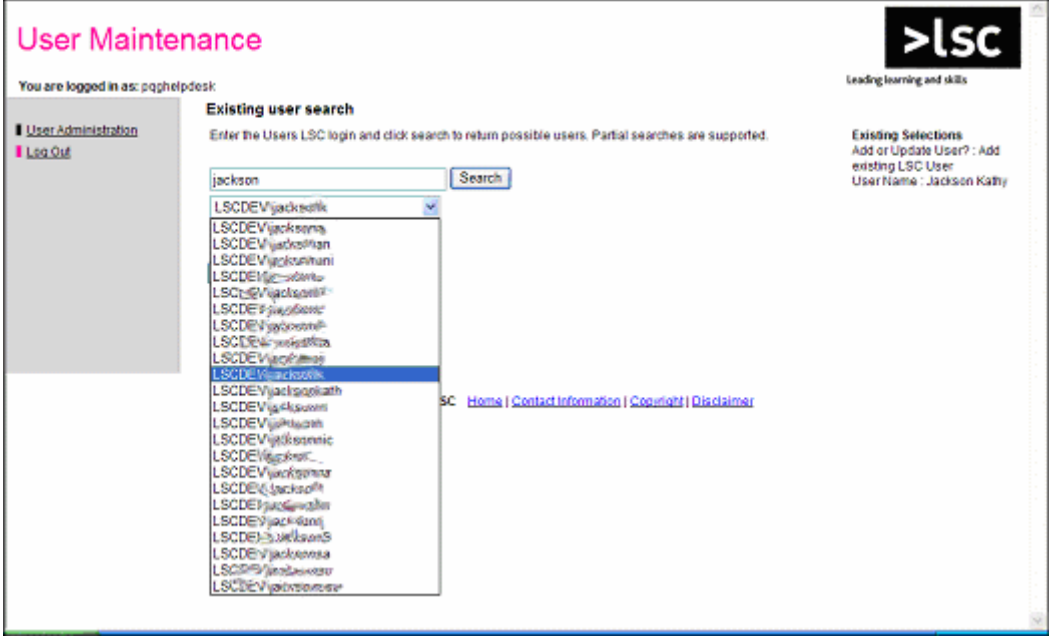
Giving an existing LSC applications user access to PaM

Overview This topic describes how to assign access to PaM to an existing user who already has login access to other LSC systems.

Step	Action
1	Login to the Provider Gateway and navigate to the UMA Home screen, as described in Section 1 above.
2	<p>On the UMA Home screen, select the Create a new 'User Gateway' user radio button (the second radio button) and click Next.</p> 
3	<p>You are prompted to select the user. Enter the user's login. Logins are based on the user's name, so if you don't know the login you can search for it using the user's name. Enter the user's surname or first name in the Search field, and click Search.</p> 

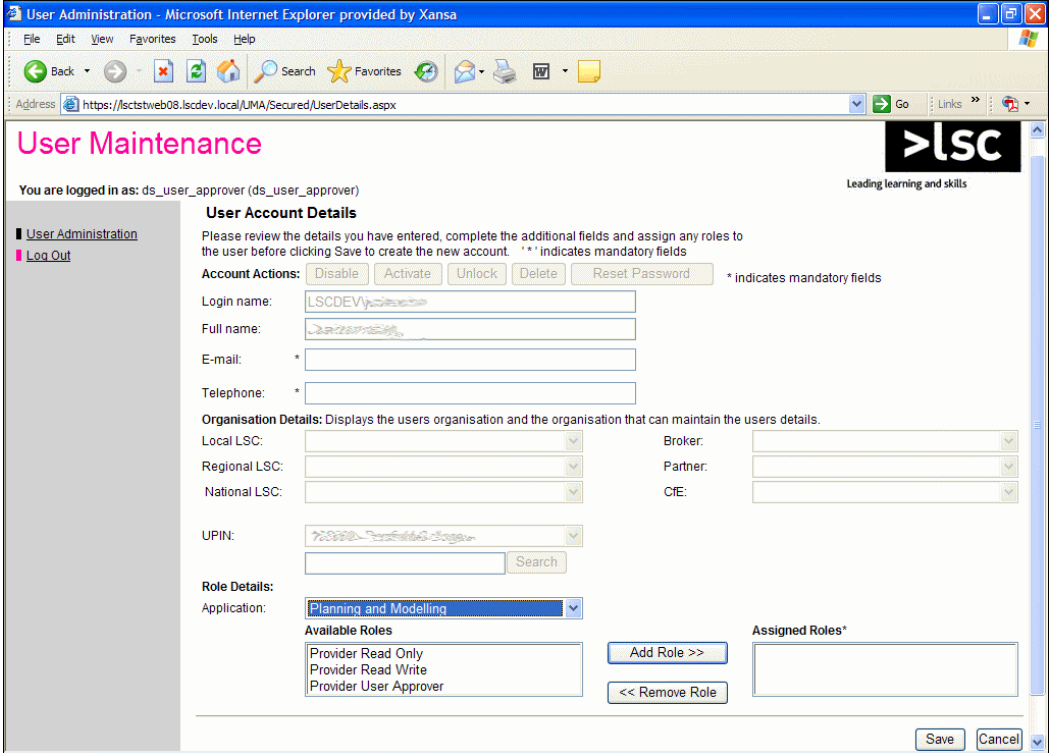
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Giving an existing LSC applications user access to PaM, continued

Step	Action
4	<p>More than one name may be returned. Use the drop-down list to select the user you want, and click Next.</p>  <p>The screenshot shows the 'User Maintenance' page. At the top left, it says 'You are logged in as: pqghelpdesk'. On the left is a navigation menu with 'User Administration' and 'Log Out'. The main area is titled 'Existing user search' and contains a search box with 'jackson' entered and a 'Search' button. A dropdown menu is open, showing a list of users starting with 'LSCDEV\jackson'. The user 'LSCDEV\jackson' is highlighted. On the right, there is a logo for '>LSC' and text 'Leading learning and skills'. Below that, it says 'Existing Selections: Add or Update User? : Add existing LSC User User Name : Jackson Kathy'. At the bottom right, there are links for 'Home Contact Information Cookies Disclaimer'.</p>

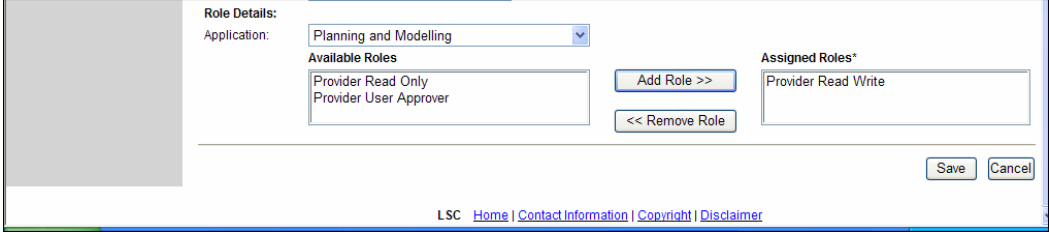
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Giving an existing LSC applications user access to PaM, continued

Step	Action
5	<p>The User Account Details screen is displayed.</p> <ul style="list-style-type: none"> • The Login name field is populated with the user's login name. • The Full name field is populated with the user's name. • The E-mail and Telephone fields are mandatory and you must complete these. • The UPIN field is populated with the UPIN and name of your organisation. • Use the Application drop-down list to select Planning and Modelling. 

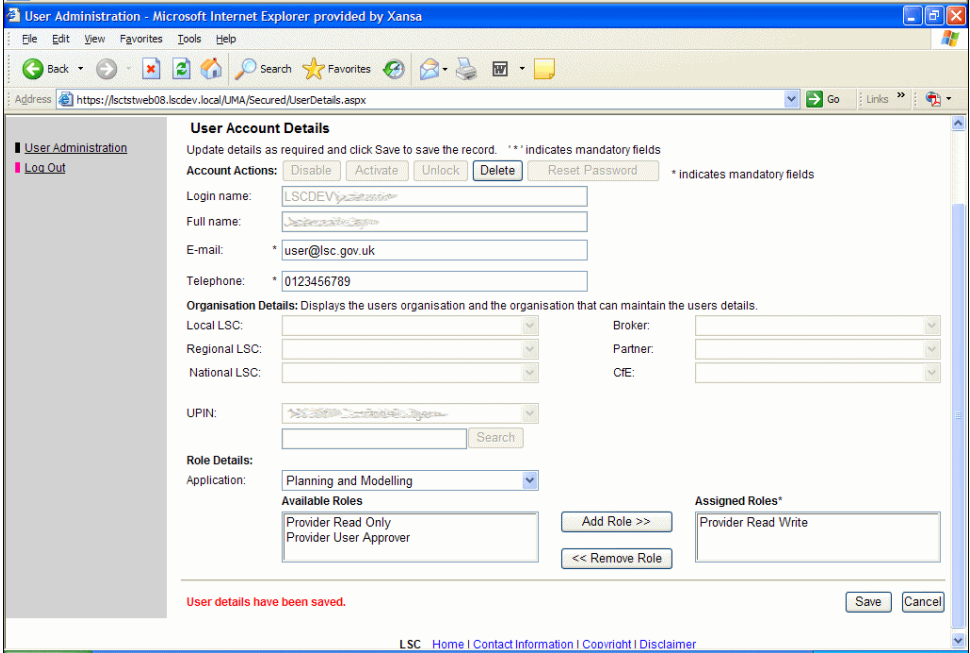
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Giving an existing LSC applications user access to PaM, continued

Step	Action
6	<p>Scroll down to the bottom of the screen. You must assign a new user a role in the <i>Planning and Modelling</i> application, and also in the <i>Provider Gateway</i> application.</p> <ul style="list-style-type: none"> • Select <i>Planning and Modelling</i> in the Application drop-down list and assign at least one role to the user. A user can have more than one role. To assign a role, click on the role in the Available Roles window to highlight it, and then click Add Role>>. The role is moved into the Assigned roles window. • Select <i>Provider Gateway</i> in the Application drop-down list and assign at least one read-only role to the user. If a user is being set up with the User Approver role in PaM, then they must also be assigned the User Approver role in Provider Gateway. 
7	<p>Click Save when you have completed the screen.</p> <p><i>Note that Cancel takes you back to the UMA Home screen without saving the user details.</i></p>

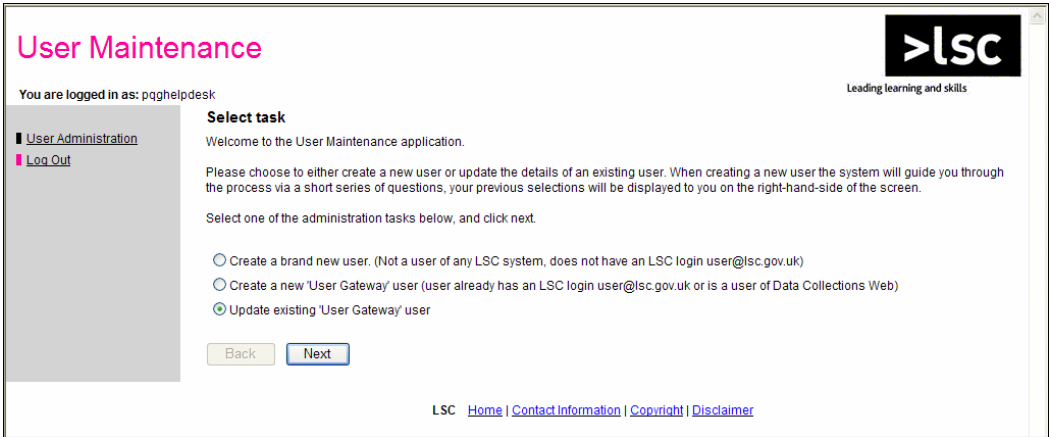
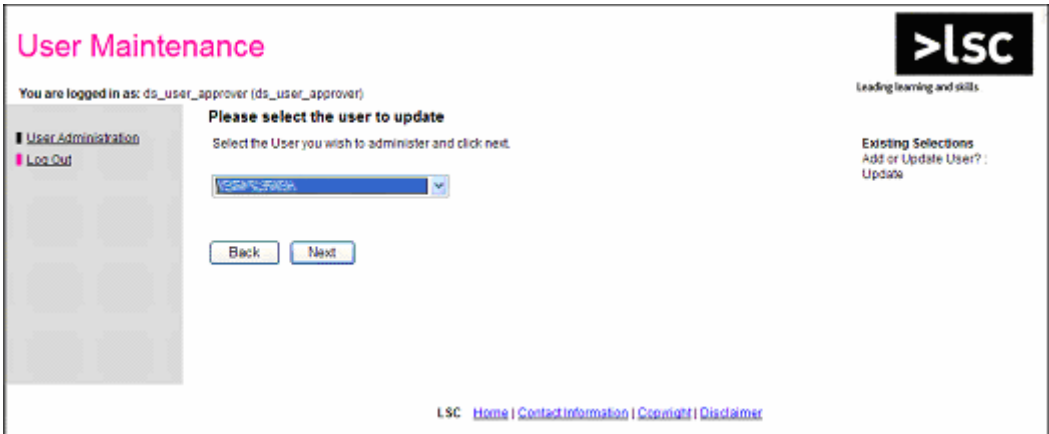
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Giving an existing LSC applications user access to PaM, continued

Step	Action
8	<p>The user's details are saved.</p>  <p>The Delete button is enabled, allowing you to delete the user from the system.</p> <p><i>Note that you can only delete the user as a PaM user. You cannot affect the user's access to any other system. Likewise, the user administrators on other systems cannot delete the user's access to PaM.</i></p> <p><u>Username</u></p> <p>If the user is set up against their OLDC logon they will log on to Provider Gateway without using the prefix ISP\ (e.g. WilkinsI, not ISP\WilkinsI).</p> <p><u>Passwords</u></p> <p>If the user is set up against their OLDC logon ISP\ (e.g. ISP\WilkinsI) the password will be their OLDC password.</p>

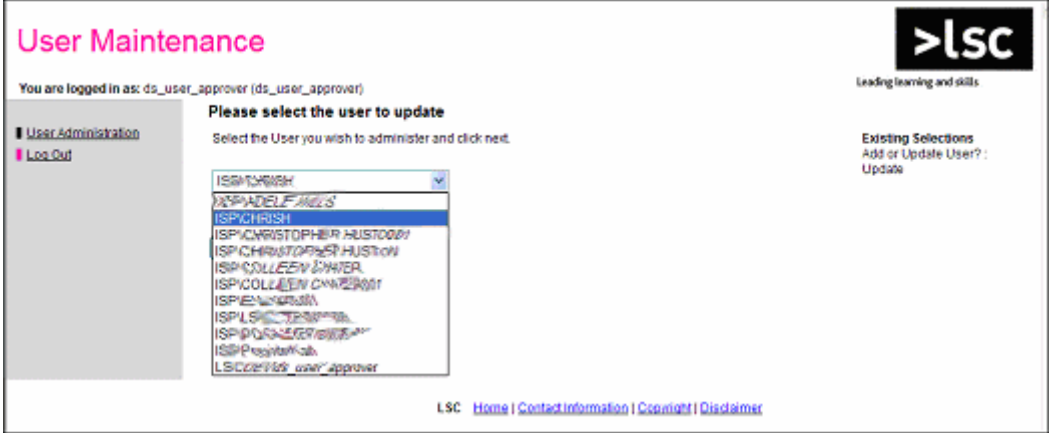
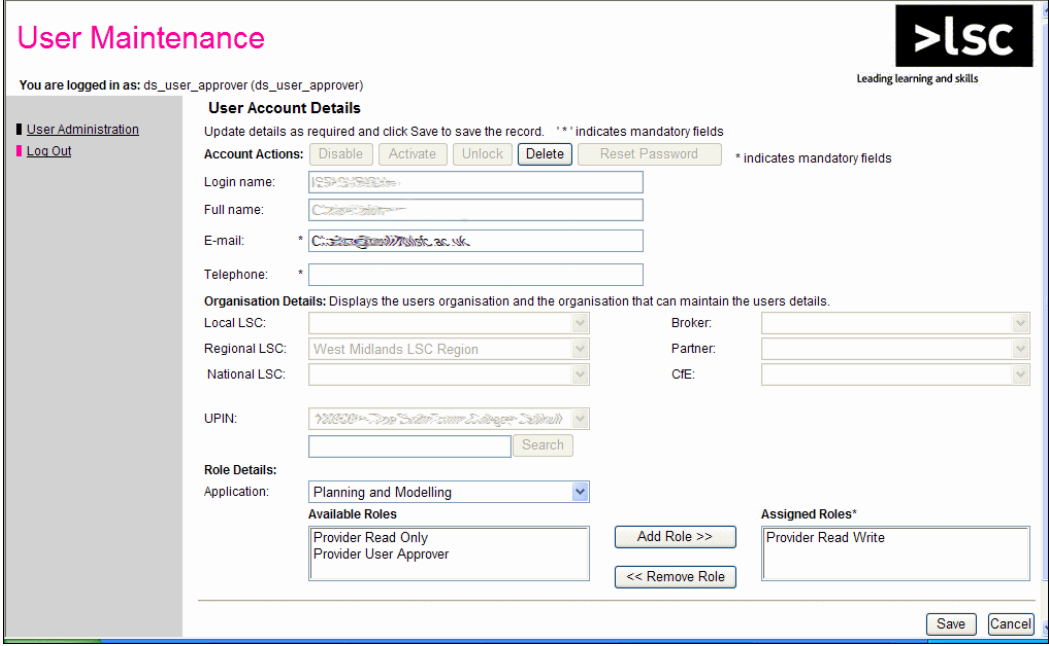
Updating an existing user

- Overview** This topic describes:
- how to update the details for an existing user
 - how to deactivate a user’s account
 - how to delete a user
 - how to reset a user’s password.

Step	Action
1	Login to the Provider Gateway and navigate to the UMA Home screen, as described in Section 1 above.
2	<p>On the UMA Home screen, select the Update existing ‘User Gateway’ user radio button (the third radio button) and click Next.</p> 
3	<p>You are prompted to select the user. The drop-down list lists all current users in alphabetical order.</p> <p>Search the list for the user you want to update</p> 

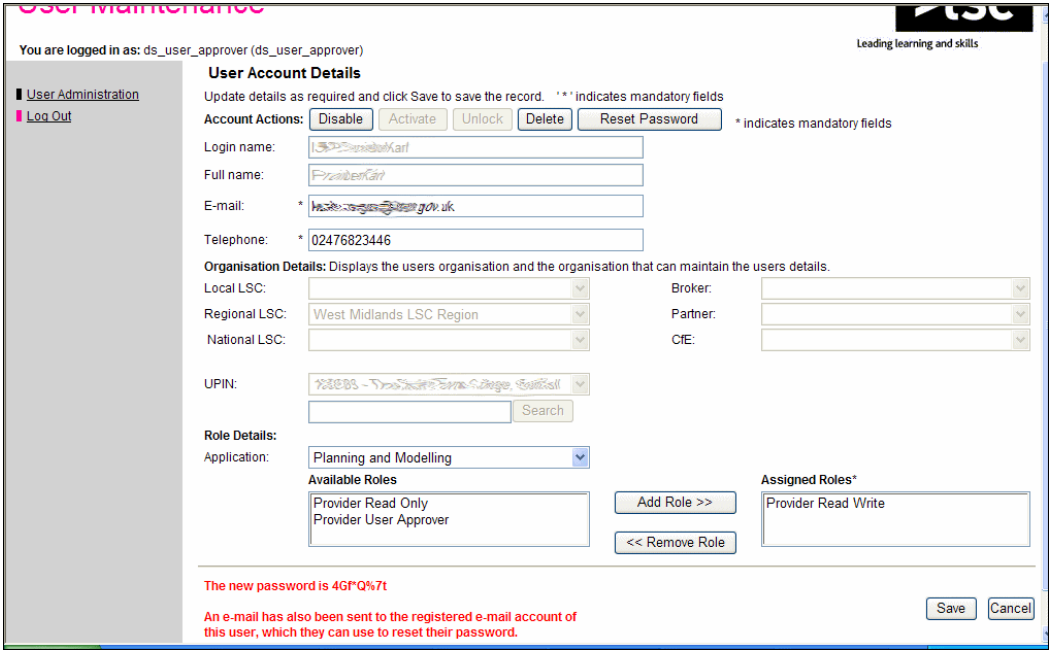
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Updating an existing user, continued

Step	Action
4	<p>When you find the user, click on the username to highlight it, and click Next.</p> 
5	<p>The User Account Details screen is displayed. You can update the user's email address and telephone number, organisation details and roles.</p> <p>Click Save to save the changes.</p> 

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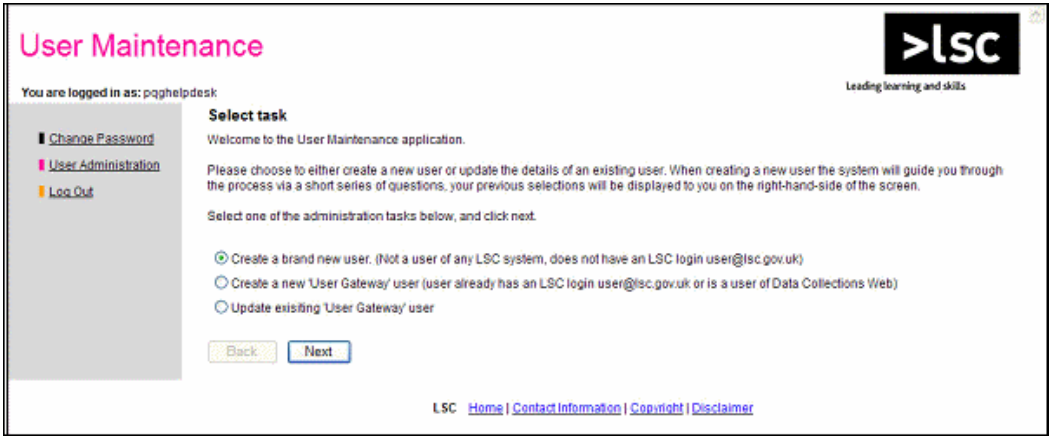
Updating an existing user, continued

Step	Action	
6	IF	THEN
	you want to deactivate the user's account	Click Disable . When a user account is deactivated the user can no longer use the PaM system, but their details remain on the system and can be re-activated using Activate .
	you want to delete the user's account	Click Delete . The user's account is completely removed from the system.
	you want to reset the user's password	Click Reset Password and go to step 7.
7	<p>The system generates a random password for the user and displays it at the bottom of the screen. An email with the new password is sent to the user, who can elect to change it.</p> 	

How to change your password

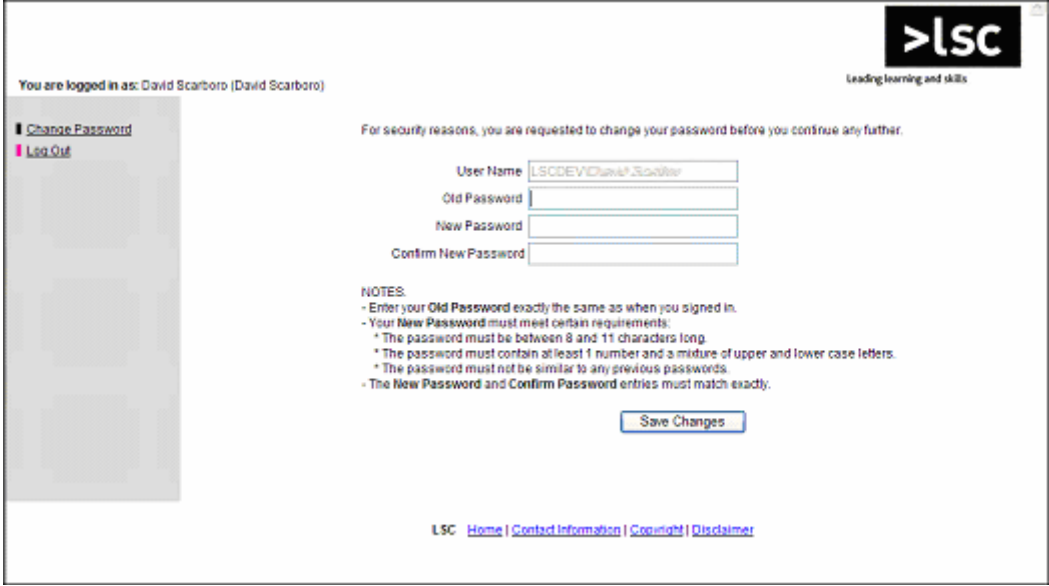
Overview This topic describes how to change your password.

Note that this feature changes your password, not that of a user. To reset a user's password you need to update the user's details and reset their password as described in the previous topic, especially steps 6 and 7.

Step	Action
1	Login to the Provider Gateway and navigate to the UMA Home screen, as described in Section 1 above.
2	Click the Change Password option on the menu. <div style="border: 1px solid black; padding: 10px; margin-top: 10px;">  </div>

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How to change your password, continued

Step	Action
3	<p>The Change Password screen is displayed.</p> <ul style="list-style-type: none"> • Enter your old password in the Old Password field. • Enter your new password in the New Password field. • Enter your new password again in the Confirm New Password field. • Click Save Changes.  <p>Your password is changed. <i>Be sure to remember your new password!</i></p>