

Setting Up Training Manager v4 for Local Authorities

last updated for the Autumn 2014 release

Technical Guide

CAPITA

Revision History

| Version | Published on |
|---|--------------|
| Autumn 2014 (3.55) - 1.0 | 27/11/2014 |
| Autumn 2014 (3.55) - 1.1 - Added information about scheduled tasks, see <i>Setting up scheduled tasks</i> on page 7. Updated template. | 11/01/2017 |

Doc Ref

Setting Up Training Manager v4 for Local Authorities Technical Guide/Autumn 2014/2017-01-11

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Please ensure that you include the document name, version and aspect of documentation on which you are commenting.

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01 / Introduction and Prerequisites

Overview

This document describes how to configure your One environment to support Training Manager v4 module, including configuring the One Provider Self Service and One Citizen Self Service portals. The portals are hosted in the One web-tier and therefore the server components are installed by the One Technical Services team. However, there are configuration steps that must be carried out on the mid-tier components as well. For Local Authorities that manage their own mid-tier infrastructure, these mid-tier configuration steps must be carried out by the local IT department. Finally, there are configuration steps that must be completed by a One Administrator via the One v3 Client, One v4 Client and within the Provider and Citizen portals.

IMPORTANT NOTE: This handbook assumes that you have an existing Citizen Self Service portal and Provider Self Service portal installed. If you do not, please refer to the Technical Guide - Deploying and Configuring the One Citizen Self Service Portal for Local Authorities and Technical Guide - Deploying and Configuring the One Provider Self Service Portal for Local Authorities documents available on the One Publications website (<http://www.onepublications.com>).

Using this Handbook

This handbook is intended to be used by One Administrators configure the One environment to use the Training Manager v4 module. It is assumed that the One Citizen Self Service and One Provider Self Service portals have already been installed by the One Technical Services team. Configuration is required in the One v3 Client, One v4 Client and within the One Citizen Self Service and the One Provider Self Service portals.

Prerequisites

- Existing Citizen Self Service and Provider Self Service portal installations.
- A Training Manager v4 licence.

Configuring Training Manager v4 checklist

For the Training Manager v4 module, a One Administrator should complete the following tasks:

| Step | Where to do it | What to do | Completed |
|------|---|--|--------------------------|
| 1 | v3 Client | Install appropriate Training Manager v4 licence in the v3 client. For more information, see Licensing Training Manager v4 on page 3. | <input type="checkbox"/> |
| 2 | v3 Client, Citizen and Provider portals | If not already done, create a Citizen Portal administrator and Training Manager v4 administrator. For more information, see Setting User Permissions on page 4. | <input type="checkbox"/> |
| 3 | Citizen and Provider portals | Activate the Citizen Administrator account and Training Manager v4 administrator account. For more information, see Activating a Provider Portal User Account on page 4. | <input type="checkbox"/> |
| 4 | v4 Online | Create a base group containing the schools and LA departments that might be paying for training courses. For more information, see Creating a base group on page 6. | <input type="checkbox"/> |

| Step | Where to do it | What to do | Completed |
|------|----------------|---|--------------------------|
| 5 | v4 Online | Create a dummy base to be used for communication log entries. For more information, see Creating a dummy base for communication log entries on page 6. | <input type="checkbox"/> |
| 6 | CCSConfigTool | Enter communication log dummy base number in CSSConfigTool via Application Server Training Mgr Scheduled Communicatoin Log From Base ID . For more information, see Creating a dummy base for communication log entries on page 6. | <input type="checkbox"/> |
| 7 | CCSConfigTool | Enter preferred From address for emails sent from Training Manager in CSSConfigTool via Application Server TM From Address for Email . For more information, see Configuring From address for external communications on page 7 . | <input type="checkbox"/> |
| 8 | Citizen Portal | Enter base group details in Citizen Portal via Administration Configuration Application Settings Training Manager Schools bas group . For more information, see Creating a base group on page 6. | <input type="checkbox"/> |
| 9 | Citizen Portal | Enable Training Manager v4 in the Citizen Portal via Administration Configuration Application Type Settings . For more information, see Editing Application Type Settings on page 15. | <input type="checkbox"/> |

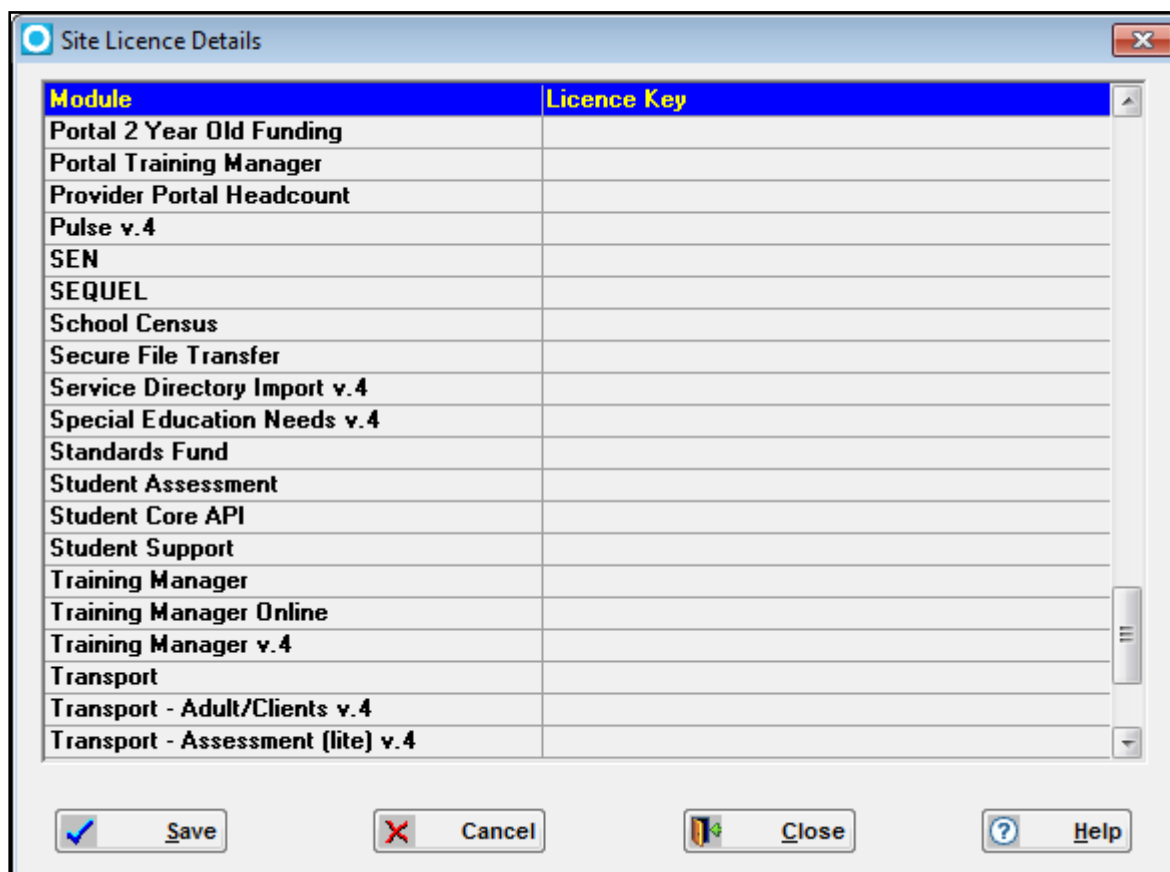
02 / Installing the license

Licensing Training Manager v4

To enable the Training Manager v4 module, you must install a Training Manager v.4 licence key. A One Administrator should enter the required licence keys before the installation of the server components.

To apply the required licence keys:

1. In the v3 Client, select **Tools | Licensing** to display the **Site Licence Details** dialog.



| Module | Licence Key |
|-----------------------------------|-------------|
| Portal 2 Year Old Funding | |
| Portal Training Manager | |
| Provider Portal Headcount | |
| Pulse v.4 | |
| SEN | |
| SEQUEL | |
| School Census | |
| Secure File Transfer | |
| Service Directory Import v.4 | |
| Special Education Needs v.4 | |
| Standards Fund | |
| Student Assessment | |
| Student Core API | |
| Student Support | |
| Training Manager | |
| Training Manager Online | |
| Training Manager v.4 | |
| Transport | |
| Transport - Adult/Clients v.4 | |
| Transport - Assessment (lite) v.4 | |

2. Enter the required **Licence Key** for the **Training Manager v.4** module.
3. Click the **Save** button.

03 / Setting User Permissions

Setting User Permissions

The Training Manager v4 module has components in both the Citizen Self Service area and the Provider Portal area. To configure the Citizen Self Service components, you will need administrator access to the Citizen Portal Admin module of v4 Online. To grant users access to the Citizen Portal Admin module, the user must be in a group that has *Read-Write-Delete* permissions to the **Citizen Portal** and **Administration** business processes under the **Citizen Portal** main business process.

There are two types of user that can access the Training Manager v4 module within the Provider Self Service portal; standard users, who work for the LA or a provider and wish to book training, and administrators, who manage incoming applications and perform Provider portal site administration. All Provider Portal users and administrators must be One users created in the v3 Client and have a valid email address recorded against them. After being created, users should be added to user groups with the required permissions in v3. To complete the configuration tasks outlined in this document, they must be a member of any group that has *Read-Write* permissions to the **TM Site Administrator** business process under the **Provider Portal** main business process.

MORE INFORMATION:

RG_Equipment available from the One Publications website (www.onepublications.com).

Creating a Portal User Account

To create a new portal user account, the One System Administrator must:

1. Set up the user in One v3 and assign to them to the relevant group for the modules to which they require access, either as a user or administrator.
2. Send the log in details (user name and initial password) to the new user via either email or an alternative method.

Activating a Provider Portal User Account


When the user first logs in with their user name and initial password, they are informed that an activation email has been sent to them and that they must click on the activation link in the email to verify their email address. The user must:

1. Click on the unique link contained in the email.
2. Enter their user name and original password.

They are prompted to change their password and, if second factor authentication is enabled, to select a secret question and supply an answer.

Logging into the Provider Portal

After activating their account, the user can log into the portal.

The screenshot shows the 'Provider Portal' login interface. At the top right is the title 'Provider Portal'. Below it is a navigation bar with a 'Home' link. The main content area is divided into two sections. On the left is a 'Log In' box containing a 'Username' field with a person icon, a 'Password' field with a key icon, a blue 'Log In' button, and two links: 'Forgotten your username?' and 'Forgotten your password?'. On the right is a grey box with the text 'Welcome to the provider portal'.

Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

NOTE: The **Secret Question** page is only displayed if second factor authentication is enabled via **Site Administration / Site Setup / Configuration**.

04 / Setting up Training Manager

Creating a base group

For users making an application to Training Manager v4 via the Citizen Self Service portal, a list of bases (most likely schools but could also be LA departments) can be made available to the applicant from which they can select the organisation that will be paying for their training course. To enable this functionality, a base group must be created with the required bases added and then the base group name must be added to the Citizen Portal Application Settings area.

To configure the functionality:

1. In v4 Online, create a new base group and add any bases to the group that might potentially pay for training. For more information on creating base groups, refer to the *Base Groups / All Base Groups* topic of the *Bases v4* chapter in the *Bases v4 Online* handbook (available from <http://www.onepublications.com>).
2. Note the **Name** of the base group.
3. Log in to the Citizen Self Service portal as an administrator.
4. Select **Administration | Configure Portal Settings** to display the **Site Settings** page.
5. If necessary, scroll to the **Application Settings** panel.
6. Enter the name of the newly created base group in the **Training Manager Schools base group field**.
7. Click the **Save** button.

NOTE: The base group should be reviewed periodically as new bases are added and old ones are removed.

Creating a dummy base for communication log entries

Training Manager v4 utilises the communication log functionality built into One. To identify communications that originate from within Training Manager v4, a new dummy base must be created and the name of the new base must be entered into the CCSServerConfigTool.

1. In v4 Online, create a new base. For more information on creating a base, refer to the *Adding a New Base* topic of the *Bases v4* chapter in the *Bases v4 Online* handbook (available from <http://www.onepublications.com>).
2. Note the **Name** of the base.
3. On your application server, open the CCSServerConfig.exe tool.
4. Select the **Application Servers** tab.
5. In the **Application Server Settings** panel, enter the name of the base you created in step 1.
6. Click the **Save** button.

Configuring From address for external communications

The email address that appears in the From field in emails sent out by Training Manager v4 can be configured.

To configure the Training Manager v4 email address:

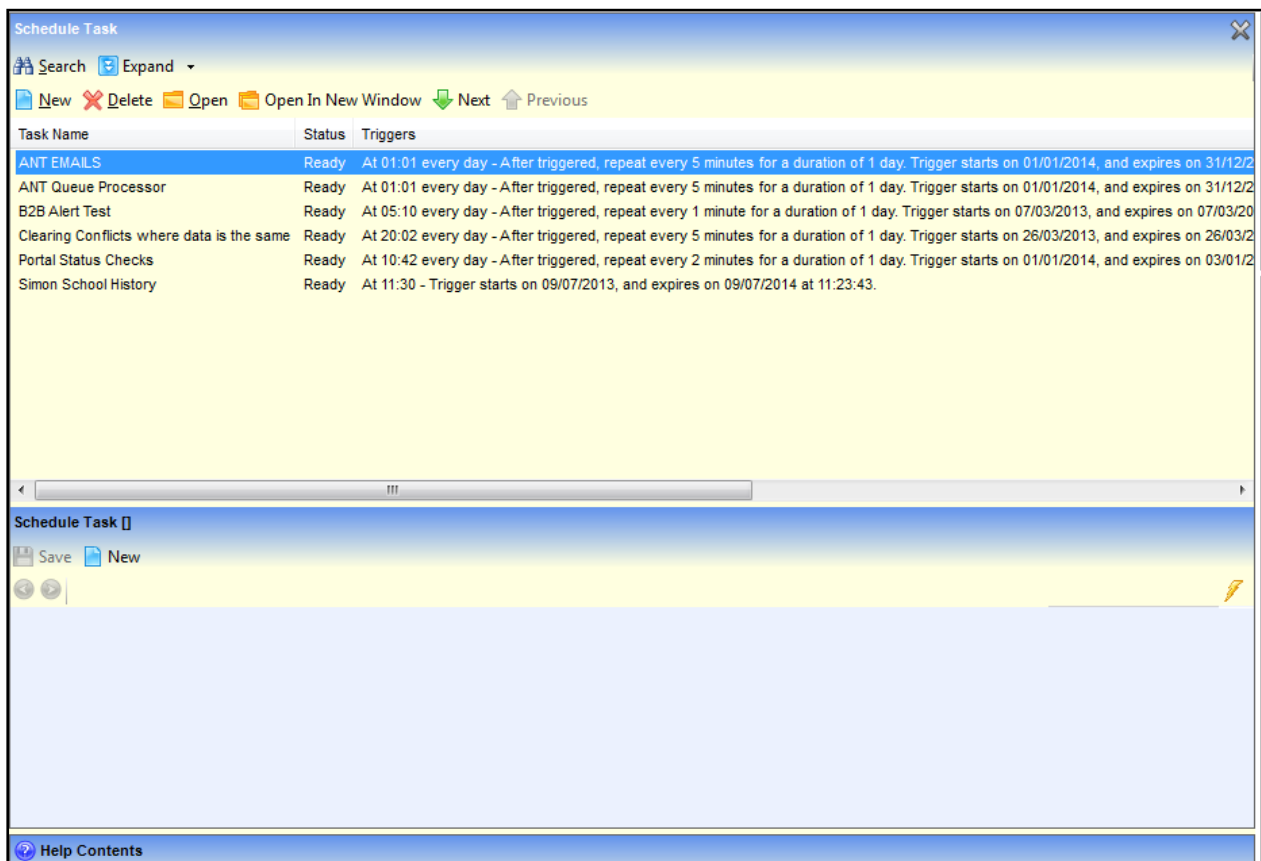
1. On your application server, open the CCSServerConfig.exe tool.
2. Select the **Application Servers** tab.
3. In the **Application Server Settings** panel, enter the name of the base you created in step 1.
4. Click the **Save** button.

Setting up scheduled tasks

Before configuring scheduled communications in Training Manager v4 and Music Tuition v4 applications, the System Administrator needs to configure two scheduled task in the One v4 Client. One scheduled task must have the 'Training Manager Schedule Queues' action associated with it the other scheduled task must have the 'Email Queue Processor' action associated with it. These scheduled tasks will check for any unprocessed communications from the TMMT modules and then process them as appropriate.

Configuring the Training manager schedule queues scheduled task

1. In the One v4 Client, select **Tools | Administration | Schedule Task** to display the **Schedule Task** panel.



- Click the **New** button to display the **Schedule Task[]** panel.

The screenshot shows the 'ScheduleTask []' window with the '01. General' tab selected. The window has a menu bar with 'Save' and 'New' buttons. Below the menu bar are tabs for '01. General', '02. Trigger', '03. Actions', '04. Next 10 sched...', and '05. History'. The '01. General' tab contains the following fields:

- Name:** A text input field.
- Description:** A large text area.
- If the task is already running, then the following rule applies:** A dropdown menu set to 'Do not start a new instance'.
- Logging level:** A dropdown menu set to 'Unspecified'.
- Enabled:** A checkbox that is checked.
- Application Server:** A dropdown menu set to 'Application Server 1'.
- Author Name:** A text input field.
- Created on:** A date/time picker.
- Updated By:** A text input field.
- Last Updated:** A date/time picker.

At the bottom of the window, there is a '02. Trigger' tab with a table showing 'Type', 'Start', 'End', and 'Details'. There are 'Add' and 'Edit' buttons next to the table.

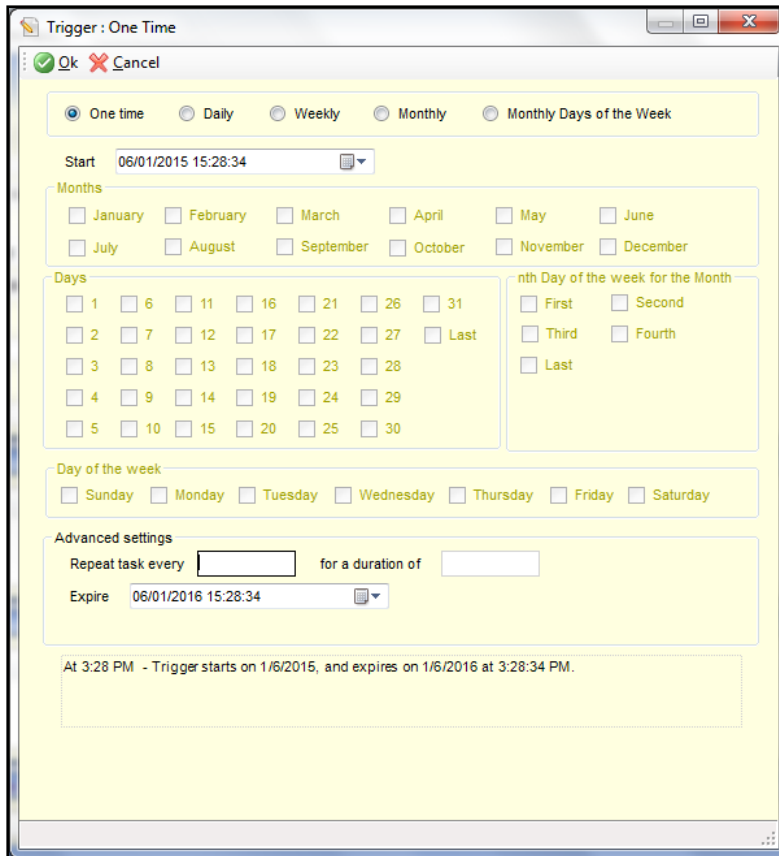
- Enter a **Name** and **Description**, then select **Detailed** from the **Logging level** drop-down list.

The screenshot shows the 'ScheduleTask []' window with the '01. General' tab selected. The fields are now populated with the following values:

- Name:** 'Tmmt Schedule'
- Description:** 'Tmmt Scheduler'
- If the task is already running, then the following rule applies:** 'Do not start a new instance' (unchanged)
- Logging level:** 'Detailed' (changed from 'Unspecified')
- Enabled:** Checked (unchanged)
- Application Server:** 'Application Server 1' (unchanged)
- Author Name:** (empty)
- Created on:** (empty)
- Updated By:** (empty)
- Last Updated:** (empty)

The '02. Trigger' tab is still visible at the bottom, showing the same table structure with 'Add' and 'Edit' buttons.

- In the **Trigger** panel, click the **Add** button to display the **Trigger:** dialog.



Trigger: One Time

Ok Cancel

☒ One time ☐ Daily ☐ Weekly ☐ Monthly ☐ Monthly Days of the Week

Start 06/01/2015 15:28:34

Months

☐ January ☐ February ☐ March ☐ April ☐ May ☐ June
☐ July ☐ August ☐ September ☐ October ☐ November ☐ December

Days

☐ 1 ☐ 6 ☐ 11 ☐ 16 ☐ 21 ☐ 26 ☐ 31
☐ 2 ☐ 7 ☐ 12 ☐ 17 ☐ 22 ☐ 27 ☐ Last
☐ 3 ☐ 8 ☐ 13 ☐ 18 ☐ 23 ☐ 28
☐ 4 ☐ 9 ☐ 14 ☐ 19 ☐ 24 ☐ 29
☐ 5 ☐ 10 ☐ 15 ☐ 20 ☐ 25 ☐ 30

nth Day of the week for the Month

☐ First ☐ Second
☐ Third ☐ Fourth
☐ Last

Day of the week

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

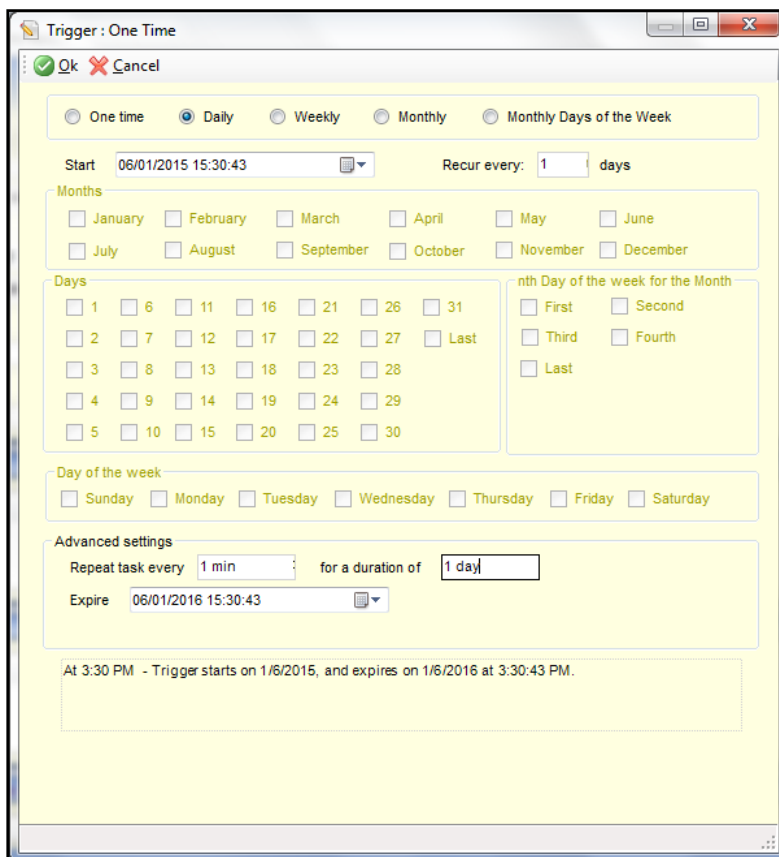
Advanced settings

Repeat task every for a duration of

Expire 06/01/2016 15:28:34

At 3:28 PM - Trigger starts on 1/6/2015, and expires on 1/6/2016 at 3:28:34 PM.

5. Select the required frequency and duration for the trigger. In the following graphic, the scheduler is configured to trigger daily from 06 Jan 2015 and will repeat every minute until 06 Jan 2016.



Trigger: One Time

Ok Cancel

☐ One time ☒ Daily ☐ Weekly ☐ Monthly ☐ Monthly Days of the Week

Start 06/01/2015 15:30:43 Recur every: 1 days

Months

☐ January ☐ February ☐ March ☐ April ☐ May ☐ June
☐ July ☐ August ☐ September ☐ October ☐ November ☐ December

Days

☐ 1 ☐ 6 ☐ 11 ☐ 16 ☐ 21 ☐ 26 ☐ 31
☐ 2 ☐ 7 ☐ 12 ☐ 17 ☐ 22 ☐ 27 ☐ Last
☐ 3 ☐ 8 ☐ 13 ☐ 18 ☐ 23 ☐ 28
☐ 4 ☐ 9 ☐ 14 ☐ 19 ☐ 24 ☐ 29
☐ 5 ☐ 10 ☐ 15 ☐ 20 ☐ 25 ☐ 30

nth Day of the week for the Month

☐ First ☐ Second
☐ Third ☐ Fourth
☐ Last

Day of the week

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Advanced settings

Repeat task every 1 min for a duration of 1 day

Expire 06/01/2016 15:30:43

At 3:30 PM - Trigger starts on 1/6/2015, and expires on 1/6/2016 at 3:30:43 PM.

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- Click the **Ok** button to save the trigger and close the dialog. The newly created trigger is displayed in the **Trigger** panel.

ScheduleTask []

Save New

01. General | 02. Trigger | 03. Actions | 04. Next 10 sched... | 05. History

01. General

If the task is already running, then the following rule applies: Do not start a new instance

Logging level: Detailed Enabled ☒

Application Server: Application Server 1

Author Name:

Created on:

Updated By:

Last Updated:

02. Trigger

| Type | Start | End | Details |
|-------|---------------------|---------------------|---|
| Daily | 1/6/2015 3:30:43 PM | 1/6/2016 3:30:43 PM | At 3:30 PM every day - After triggered, repeat every 1 min for a duration of 1 day. Trigger starts on 1/6/2015, and |

+ Add - Edit - Remove

03. Actions

Action:

+ Add - Edit - Remove

- In the **Actions** panel, click the **Add** button to display the **Action** dialog.

Action

Ok

01. General | 02. Details

01. General

Action: Not Specified

- Not Set
- Attendance aggregation
- A&T Emails
- Early Years Feedback Messages
- ECAF Auto Messages
- Email Queue Processor
- ICSF Hazard Flags
- Absentees Inv messages
- School History
- FSM History
- Alerts
- Alert Outcomes
- Delete expired alert messages
- B2B:Student Process for Clearing Conflicts
- B2B:Student Process for Deleting Files
- Transfer Timelines Reporting Data
- DR - Delete Routine
- DR - Clear Delete Log
- Provider Portal Headcount Import
- Provider Portal Status Checks
- Citizen Portal Delete Messages
- Training Manager Schedule Queues**
- Do nothing

- From the **Action** drop-down list, select **Training manager schedule queues**.
- Click the **Ok** button to add the action to the scheduler. The newly created action is displayed in the **Action** panel.

The screenshot shows the 'ScheduleTask' dialog box with the '01. General' tab selected. The 'Save' button is highlighted in blue. The 'If the task is already running, then the following rule applies' dropdown is set to 'Do not start a new instance'. The 'Logging level' is set to 'Detailed', and the 'Enabled' checkbox is checked. The 'Application Server' is set to 'Application Server 1'. The 'Author Name', 'Created on', 'Updated By', and 'Last Updated' fields are empty.

02. Trigger

| Type | Start | End | Details |
|-------|---------------------|---------------------|---|
| Daily | 1/6/2015 3:30:43 PM | 1/6/2016 3:30:43 PM | At 3:30 PM every day - After triggered, repeat every 1 min for a duration of 1 day. Trigger starts on 1/6/2015, and |

03. Actions

| Action |
|----------------------------------|
| Training Manager Schedule Queues |

- Click the **Save** button.

Configuring the email processor queue scheduled task

- In the One v4 Client, select **Tools | Administration | Schedule Task** to display the **Schedule Task** panel.

This screenshot is identical to the one above, showing the 'ScheduleTask' dialog box with the '01. General' tab selected. The 'Save' button is highlighted in blue. The 'If the task is already running, then the following rule applies' dropdown is set to 'Do not start a new instance'. The 'Logging level' is set to 'Detailed', and the 'Enabled' checkbox is checked. The 'Application Server' is set to 'Application Server 1'. The 'Author Name', 'Created on', 'Updated By', and 'Last Updated' fields are empty.

02. Trigger

| Type | Start | End | Details |
|-------|---------------------|---------------------|---|
| Daily | 1/6/2015 3:30:43 PM | 1/6/2016 3:30:43 PM | At 3:30 PM every day - After triggered, repeat every 1 min for a duration of 1 day. Trigger starts on 1/6/2015, and |

03. Actions

| Action |
|----------------------------------|
| Training Manager Schedule Queues |

- Click the **New** button to display the **Schedule Task[]** panel.

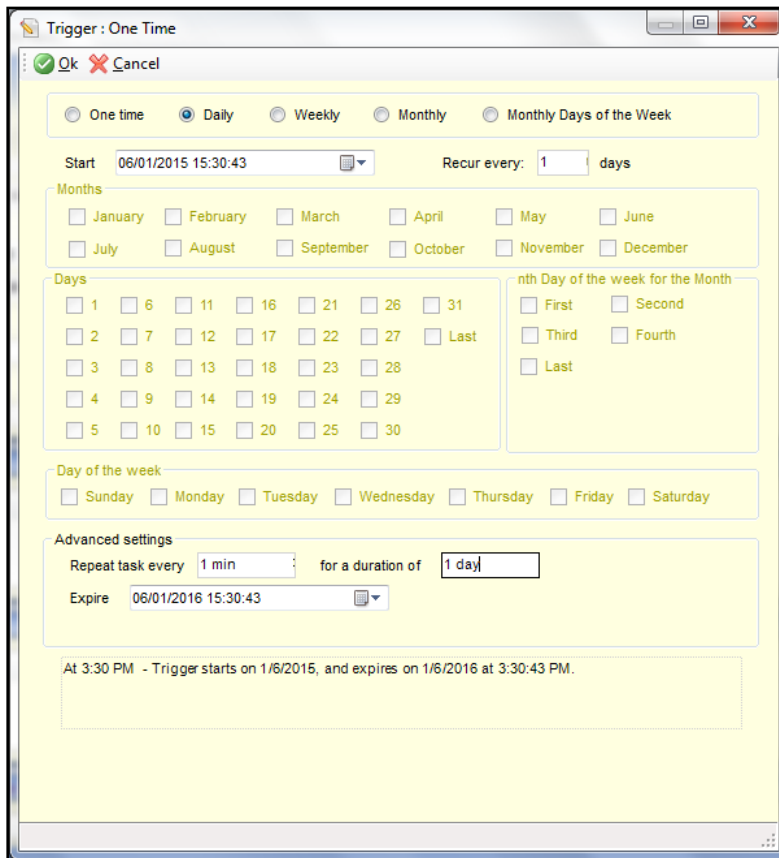
3B Setting up Training Manager

The screenshot shows the 'ScheduleTask' dialog box with the '01. General' tab selected. The 'Name' and 'Description' fields are empty. The 'Logging level' is set to 'Unspecified', and the 'Enabled' checkbox is checked. The 'Application Server' is set to 'Application Server 1'. The 'Author Name', 'Created on', 'Updated By', and 'Last Updated' fields are also empty. The '02. Trigger' tab is partially visible at the bottom.

3. Enter a **Name** and **Description**, then select **Detailed** from the **Logging level** drop-down list.
4. In the **Trigger** panel, click the **Add** button to display the **Trigger**: dialog.

The screenshot shows the 'Trigger: One Time' dialog box. The 'One time' radio button is selected. The 'Start' date is '06/01/2015 15:28:34'. The 'Months' section shows checkboxes for all months. The 'Days' section shows checkboxes for all days of the month. The 'Day of the week' section shows checkboxes for all days of the week. The 'Advanced settings' section shows 'Repeat task every' and 'for a duration of' fields. The 'Expire' date is '06/01/2016 15:28:34'. A summary line at the bottom states: 'At 3:28 PM - Trigger starts on 1/6/2015, and expires on 1/6/2016 at 3:28:34 PM.'

5. Select the required frequency and duration for the trigger. In the following graphic, the scheduler is configured to trigger any pending email communication daily from 06 Jan 2015 and will repeat every minute until 06 Jan 2016.



Trigger: One Time

Ok Cancel

☐ One time
 ☒ Daily
 ☐ Weekly
 ☐ Monthly
 ☐ Monthly Days of the Week

Start 06/01/2015 15:30:43 Recur every: 1 days

Months

☐ January
 ☐ February
 ☐ March
 ☐ April
 ☐ May
 ☐ June
 ☐ July
 ☐ August
 ☐ September
 ☐ October
 ☐ November
 ☐ December

Days

☐ 1 ☐ 6 ☐ 11 ☐ 16 ☐ 21 ☐ 26 ☐ 31
☐ 2 ☐ 7 ☐ 12 ☐ 17 ☐ 22 ☐ 27 ☐ Last
☐ 3 ☐ 8 ☐ 13 ☐ 18 ☐ 23 ☐ 28
☐ 4 ☐ 9 ☐ 14 ☐ 19 ☐ 24 ☐ 29
☐ 5 ☐ 10 ☐ 15 ☐ 20 ☐ 25 ☐ 30

nth Day of the week for the Month

☐ First ☐ Second
☐ Third ☐ Fourth
☐ Last

Day of the week

☐ Sunday
 ☐ Monday
 ☐ Tuesday
 ☐ Wednesday
 ☐ Thursday
 ☐ Friday
 ☐ Saturday

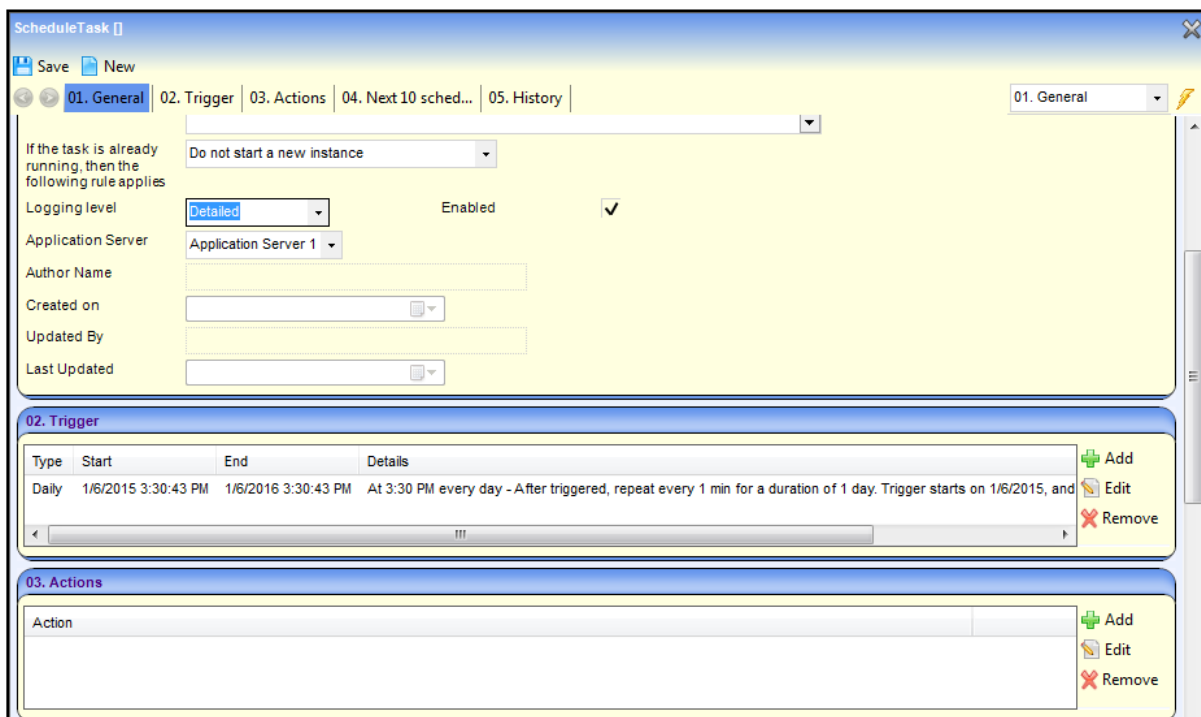
Advanced settings

Repeat task every 1 min for a duration of 1 day

Expire 06/01/2016 15:30:43

At 3:30 PM - Trigger starts on 1/6/2015, and expires on 1/6/2016 at 3:30:43 PM.

9. Click the **Ok** button to save the trigger and close the dialog. The newly created trigger is displayed in the **Trigger** panel.



ScheduleTask []

Save New

01. General 02. Trigger 03. Actions 04. Next 10 sched... 05. History

01. General

If the task is already running, then the following rule applies: Do not start a new instance

Logging level: Detailed Enabled ☒

Application Server: Application Server 1

Author Name:

Created on:

Updated By:

Last Updated:

02. Trigger

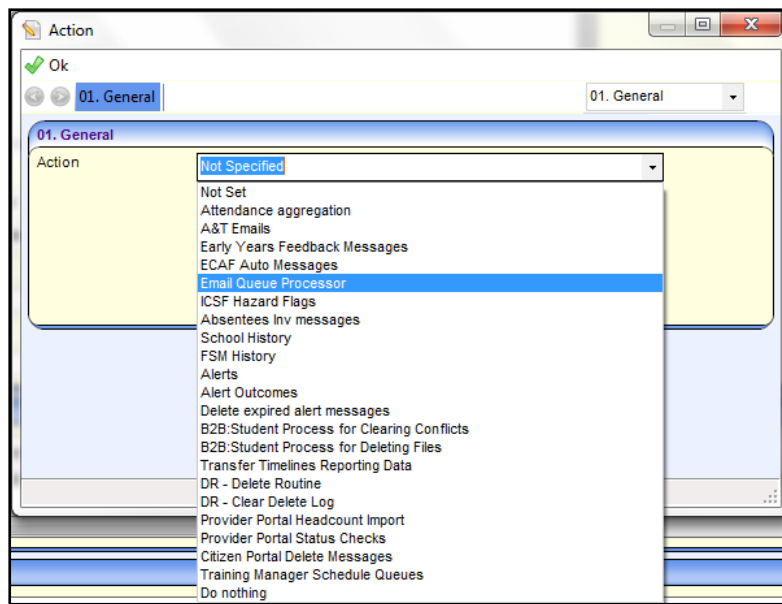
| Type | Start | End | Details |
|-------|---------------------|---------------------|--|
| Daily | 1/6/2015 3:30:43 PM | 1/6/2016 3:30:43 PM | At 3:30 PM every day - After triggered, repeat every 1 min for a duration of 1 day. Trigger starts on 1/6/2015, and expires on 1/6/2016 at 3:30:43 PM. |

03. Actions

| Action |
|--------|
| |

10. In the **Actions** panel, click the **Add** button to display the **Action** dialog.

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11. From the **Action** drop-down list, select **Email queue Processor**.
12. Click the **Ok** button to add the action to the scheduler. The newly created action is displayed in the **Action** panel.
13. Click the **Save** button. This scheduler will regularly look for any pending emails in the queue that need to be triggered.

05 / Citizen Portal configuration

Overview

To enable the Citizen Portal and Provider Portal to communicate with each other and process Training Manager v4 applications, several options in the Citizen Portal must be configured. To configure the settings within the Citizen Self Service Portal, you must be a Citizen Portal Administrator.

Editing Application Settings

The **Application Settings** section is used to store settings used when submitting applications via the Citizen Portal. The following table describes each setting related to Training Manager and provides a brief description.

| Field Name | Description |
|-------------------------------------|--|
| Training Manager Schools base group | A list of bases (either schools and LA departments) that might potentially pay for training courses. If required, someone making a training application can select a base from this group if that base that will be paying for the course. |

To edit the settings, complete the following procedure:

1. Log in to One v4 Online as a Portal Administrator and click the **Citizen Portal Admin** button to display the **Citizen Portal Home** page.
2. From the **Administration** menu, select the **Configure Portal Settings** option to display the **Site Settings** page.
3. Navigate to the **Application Settings** area.
4. Enter the name of the base group that you created earlier into the **Training Manager Schools base group** field. For more information, see [Creating a base group](#) on page 6.
5. Click the **Save** button.

Editing Application Type Settings

The **Application Type Settings** section controls the availability of the application panels within the Citizen Portal.

To enable training applications to be submitted via the Citizen Portal, complete the following procedure:

1. Log in to One v4 Online as a Portal Administrator and click the **Citizen Portal Admin** button to display the **Citizen Portal Home** page.
2. From the Administration menu, select the **Configure Portal Settings** option to display the **Site Settings** page.
3. Navigate to the **Application Type Settings** section.

Application Type Settings

Configure Application Type Settings

Show Admission and Transfer Application Panel ☐ OFF

Show Free School Meals Application Panel ☐ OFF

Show Transport Application Panel ☐ OFF

Show TYOF Application Panel ☒ ON

Show Training Manager Application Panel ☐ OFF

4. Click the **Show Training Manager Application Panel** button to enable Training Manager v4 applications to be made from the Citizen Portal.

06 / What Next?

The One environment is now configured to run Training Manager v4. However, before using the system, a Training Manager v4 administrator should customise the other settings within the Citizen portal, Provider portal and Training Manager v4.

More Information:

One Training Manager Courses Citizen Portal handbook
One Training Manager Courses Provider Portal handbook
One Training Manager v4 handbook

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