



# School Admissions Portal (Northern Ireland)

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Handbook

**CAPITA**

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# 01 | Document Change Control

Date	Release	Description
<b>Apr 2019</b>	<b>3.68</b>	This is a new handbook for the School Admissions Portal in Northern Ireland.



# 02 | Introduction

## Overview

The School Admissions portal enables you to perform the following tasks:

- View a list of applications made to your school for a selected transfer group.
- Respond to applications made to your school:
  - verify application
  - verify address
  - verify sibling.

## Using this Handbook

This handbook is intended for administrators at the Local Authority and schools. It describes the administration tasks performed by the Local Authority, as well as the processes performed by the school itself.

This document is split into four sections:

- **Introduction**
- **Managing Your User Account** – covers account activation and housekeeping.
- **Configuration** – covers the Provider Portal's text configuration, portal setup and user account review features.
- **Using the School Admissions Portal** – covers the specific School Admissions Portal features – viewing applications, applications and leavers, editing ranks, and verifying claimed siblings.

### More Information:

For information regarding using Portal Back Office, refer to *One Portal Back Office* handbook.

For information regarding configuring the Provider Portal, refer to the *Deploying and Configuring the One Provider Self Service Portal for Local Authorities* technical guide.

Both documents are available from the [One Publications](#) website.

## Setting the Language in Chrome

If the Provider portal is accessed using Google Chrome, the language must be set to English (United Kingdom).

English (United Kingdom) must be the first language in the list.

For more information regarding setting the language in Google Chrome, refer to:

<https://support.google.com/chrome/answer/95416?hl=en-GB>

## Common Functionality

The following functionality is common for all processes in the Provider portal.

Function	Description
Tooltips	Using the mouse, hover over an item on the screen to display a description of the information displayed or the action required.
Home button	Click the <b>Home</b> button to display the <b>Home</b> page
Change Password	Click the drop-down adjacent to the user name and select <b>Change Password</b> . Enter your <b>Current password</b> , <b>New password</b> and <b>Confirm new password</b> . Click the <b>Change password</b> button.
Change Secret Question	Click the drop-down adjacent to the user name and select <b>Change Secret Question</b> . Enter your <b>Current Password</b> . Select a <b>New Secret Question</b> and enter a <b>Secret Answer</b> . Click the <b>Save</b> button. <b>NOTE:</b> This functionality is only available if second factor authentication is enabled.
Enable Two Step Verification	Click the drop-down adjacent to the user name and select <b>Two Step Verification</b> . Select <b>Email</b> from the <b>Preferred method</b> drop-down. Click the <b>Save</b> button. You will be signed out and will need to sign in again.
Disable Two Step Verification	Click the drop-down adjacent to the user name and select <b>Two Step Verification</b> . Select <b>No Two Step Verification</b> from the <b>Preferred method</b> drop-down. Click the <b>Save</b> button. You will be signed out and will need to sign in again.
Sign out	Click the <b>Sign Out</b> button adjacent to the user name.

# 03 | Managing Your User Account

## Creating a Portal User Account

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

1. Set up the user in the One v4 Client and assign to them to the relevant user group via **Tools | Administration | User Management | User Accounts**.
2. Send the log in details (user name and initial password) to the new user via email.

## Activating a Portal User Account

A new Provider portal user needs to activate their 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.

### More Information:

For more information regarding user setup and permissions, refer to the *Technical Guide: Deploying and Configuring the One Provider Self Service Portal for Local Authorities*, which is available on [My Account](#).

## Logging into the Portal

A user with an active user account can log into the portal.

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

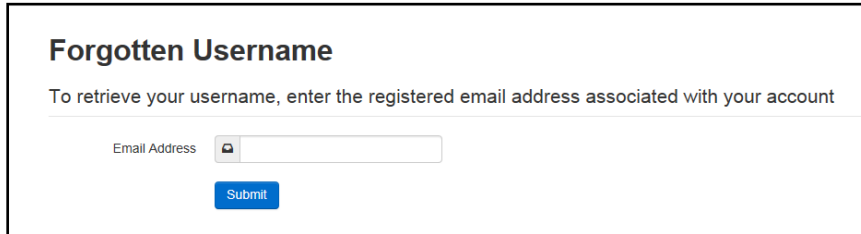
**NOTE:** The **Secret Question** page is only displayed if second factor authentication is enabled by the system administrator via **Administration | Site Setup | Configuration**.



## Retrieving Your User Name

If you forget your user name:

1. From the portal **Log In** screen, click the **Forgotten your username?** link to display the **Forgotten Username** page.

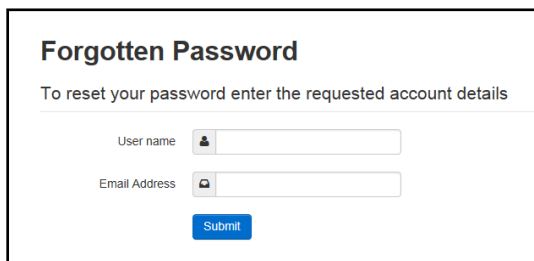


2. Enter your registered **Email Address** and click the **Submit** button.
3. Access your registered email account and open the email received to retrieve your user name.

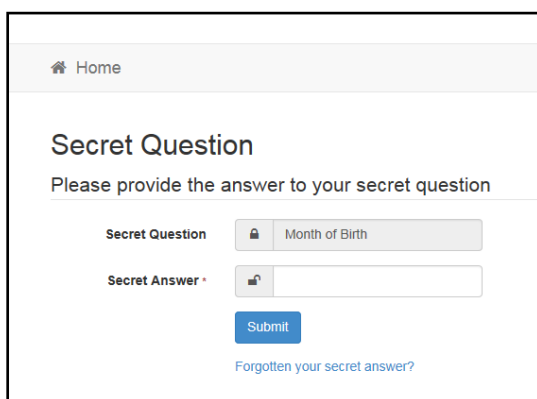
## Resetting Your Portal Password

To reset your password:

1. From the portal **Log In** screen, click the **Forgotten your password?** link to display the **Forgotten Password** page.



2. Enter your **User name** and registered **Email Address** and click the **Submit** button.
3. If second factor authentication is enabled, enter the **Secret Answer** and click the **Submit** button.



4. Access your registered email account and open the email received.
5. Follow the instructions in the email to reset your password.

## Resetting Your Secret Question

If you need to reset your secret question:

1. From the portal **Secret Question** screen, click the **Forgotten your secret answer?** link.

**Secret Question/Answer Reset**

To reset your secret question enter the requested account details

User name \*

Email Address \*

2. Enter your **User name** and registered **Email Address** and click the **Submit** button.
3. Follow the reset instructions in the email.



# 04 | Configuration

Only users who belong to groups that have the General Site Administrator business process set to Read-Write can access the portal administration functions. This business process gives access to provider portal admin features, but not to School Admissions Portal-specific functions. The General Site Administrator business process is part of the Provider Portal main business process, and can be assigned in the v4 Client via **Tools | Permissions | User Group Processes**.

For more information on assigning permissions, see the *System Managing Users, Groups & Permissions* handbook, available from the [One Publications](#) website.

All text, field labels and messages that are displayed on the website can be configured.

Type	Name	Description
Site Notices	Announcements and Welcome Text	Displayed when the user logs into the portal.
	Provider Home Guidance Text	Displayed on the <b>Home</b> page.
	About Contact Us Cookies Policy Privacy Notice Terms and Conditions Version and Licensing Submission Declaration	Text is displayed when the user clicks the corresponding button at the bottom of each page.
Text Resources		Field labels, user messages and tooltips (text displayed when a user hovers the mouse over a field).
Address	Address Registration	Guidance text displayed for address fields.
Module specific		Guidance text and other text displayed on module-specific pages.
Email		Text for standard emails and messages relating to managing user accounts.
Message	Message Report Sent Body	Text for the message to be sent to a portal user when a new report is available to view. NB. Not used in Training Manager.
Report		Guidance text for reports.
Site Titles	Site Title	Displayed at the top right-hand side of every page.
Tooltip	Tooltip for New Password	Displayed when user sets up a new password.

## Configuration

1. Select **Administration | Text Customisation** to display the **Text Customisation** page.

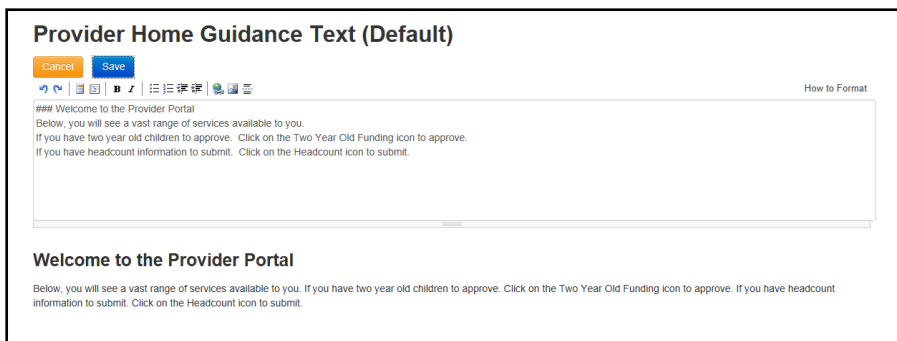
2. From the **Choose a text category** drop-down, select the category of text to be configured.
3. Alternatively, enter search criteria, click the **Search** button and select the text.
4. Select the **Default** or **Welsh** tab to determine the text language.
5. Click the **Add** button.

6. Enter required text in the formatting panel. Formatting buttons are provided above the panel.
7. The formatted text is displayed beneath.
8. Click the **Save** button.

**NOTE:** This topic provides an overview of text configuration in the Provider Portal. For specific information on configuring each screen of the School Admissions Portal, see the Customising the School Admissions Portal (NI) handbook, available from the [One Publications](#) website.

1. Select **Administration | Text Customisation** to display the **Text Customisation** page.

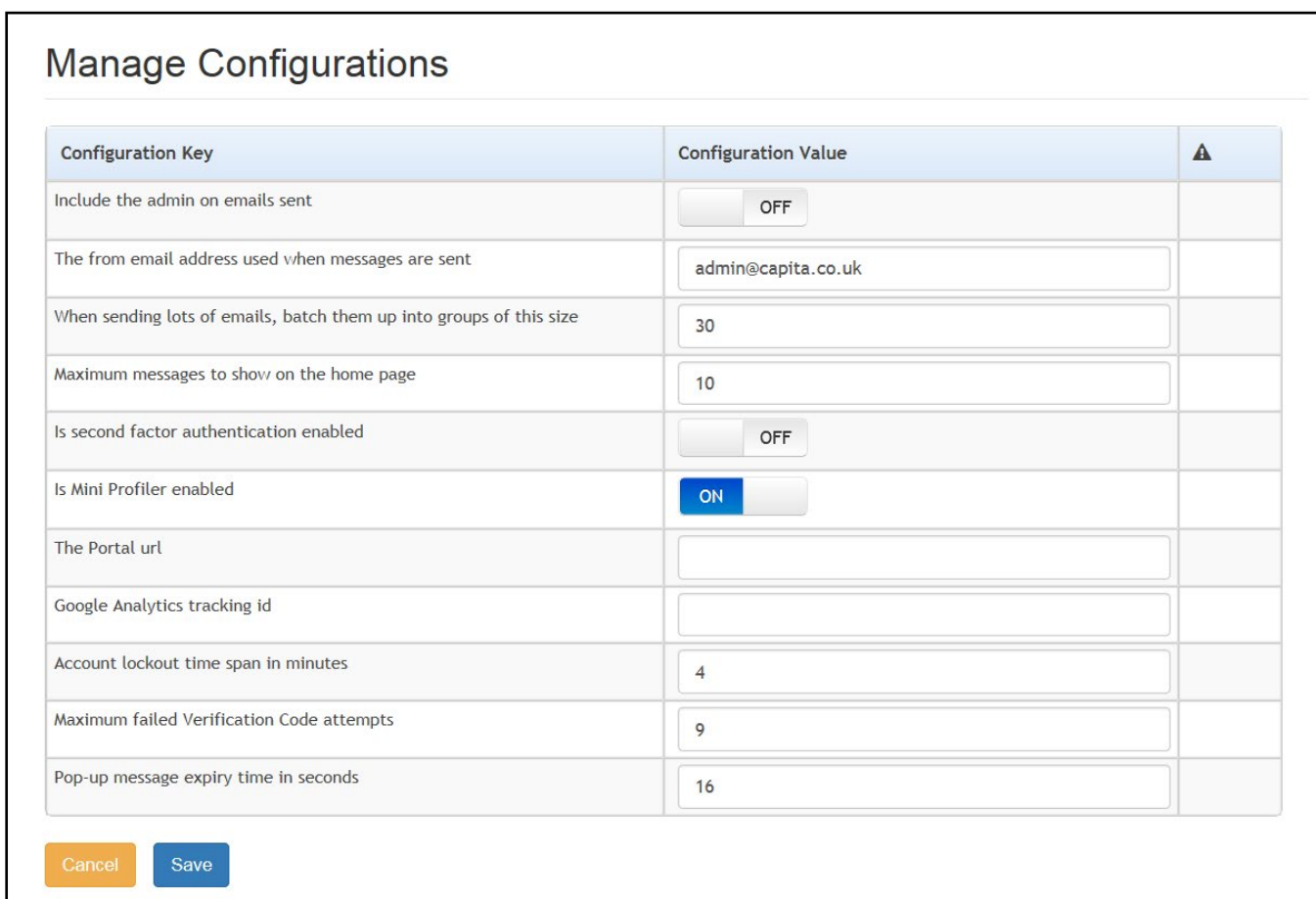
2. From the **Choose a text category** drop-down, select the category of text to be configured.
3. Select the **Default** tab to determine the text language.
4. Click the **Edit** button.



5. Make the required changes to the text displayed in the formatting panel. Formatting buttons are provided above the panel.
6. The amended text is displayed beneath.
7. Click the **Save** button.

## Configuring the Provider Portal

1. Select **Administration | Site Setup | Configuration** to display the **Manage Configurations** page.



2. For each **Configuration Key**, change the **Configuration Value**, if required:
3. If required, set **Include the admin on emails sent** to **On**.
4. Enter an email address for: **The from email address used when messages are sent**.
5. Enter a number for: **When sending lots of emails batch them up into groups of this size**.

## Configuration

6. Enter the number of **Maximum messages to show on the home page**.
7. If required, set **Is second factor authentication enabled** to **On**.
8. If required, set **Is Mini Profile enabled** to **On**.
9. If required, enter **The Portal url**.
10. If required, enter the **Google Analytics tracking id**.
11. If required, enter the **Account lockout time span in minutes**.
12. If required, enter the **Maximum failed Verification Code attempts**.
13. If required, enter the **Pop-up message expiry time in seconds**.
14. Click the **Save** button.

### More Information:

For more information regarding portal configuration, refer to the *Technical Guide: **Deploying and Configuring the One Provider Self Service Portal for Local Authorities***, which is available on [My Account](#).

## Reviewing Users

### Introduction

The **Review Users** page is used to view the users that are currently registered to use the Provider portal, to update their email address and enable them to update their password. It is also used to reset a user account that is inactive in the v4 Client.

**NOTE:** When a system administrator logs into the portal, their account is displayed as read-only.

### Viewing User Details

1. Select **Administration | Review User** to display the **Review Users** page.

The screenshot shows the 'Review Users' interface. At the top, there is a search bar with a 'Name' label and a 'Search' button. Below the search bar, it indicates '42 Records Found' and 'Page 5 of 5'. The table below lists two users:

Username	Description	Active	Registered	Email	Groups	Action
TestUser	Admin user for EPM	✓	✗	Testuser14@onetestr	EPADMIN	Reset Password, Reset Account
VPADM	vpadm	✓	✓	testuser10@onetestr	PP Headcount Adm	Reset Password

At the bottom of the table, there are 'Cancel' and 'Refresh' buttons.

2. If required, enter a partial **User Name**, **Description** or **Email** address and click the **Search** button.

### Updating a User Email Address

To update the user's **Email** address:

1. Select **Administration | Review User** to display the **Review Users** page.
2. Enter a new **Email** address and click the adjacent update button.

## Resetting a User Password

If a user has forgotten their password, to enable them to reset their password:

1. Select **Administration | Review User** to display the **Review Users** page.
2. Click the **Reset Password** link to send an email to the current **Email** address asking the user to update their password.

**NOTE:** Clicking the **Reset Password** link displays the **Reset Account** link in the **Action** column until the user resets their password. When the user resets their password, they receive an email to let them know that their password has been changed successfully. The **Reset Account** link is then removed from the screen.

## Resetting a User Account

If the user account is set to inactive in the v4 Client, the **Reset Account** link is displayed in the **Action** column and the **Active** status is displayed as a red cross as shown in the following graphic:

Username	Description	Active	Registered	Email	Groups	Action
EPMUSER	EPM user	✖	✔	Testuser17@onetestr	EPMUSERGROUP	Reset Password, Reset Account

To reset an inactive account and set the status to active in the v4 Client:

1. Select **Administration | Review User** to display the **Review Users** page.
2. Click the **Reset Account** link.

**NOTE:** The **Reset Account** link is also displayed if the user has requested a new password and this has not been reset. For more information, see [Resetting a User Password](#) on page 13





# 05 | Using the School Admissions Portal

## Accessing the School Admissions Portal

Only One users who meet all of the following criteria can access the School Admissions Portal:

- Has a recorded email address.
- Account is mapped to a school (base).
- Associated LA has a valid licence key for Portal School Admissions.
- Belongs to a user group that has at least read permissions to at least one of the following business processes (set up in the v4 Client via **Tools | Permissions | User Group Processes | Permissions Editor | Main Processes | Provider Portal**):
  - School Admissions – Verification Siblings = **Verify Applications**
  - School Admissions – View Applications & Allocations = **View Applications**

School Admissions - Ranking		✓	
School Admissions - Update In Year Offer Statuses		✓	
School Admissions - Verification Siblings		✓	
School Admissions - View Applications & Allocations	✓		
School Admissions - View Uploaded Files	✓		

The **Provider Portal Home** page displays the modules for which your LA has a licence for.

Users who do not have access to any other Provider Portal areas are taken directly to the School Admissions Portal landing page after logging in.

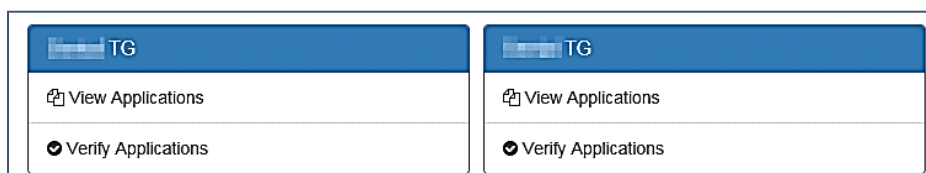
Select the **School Admissions** tile to display the **School Admissions** portal landing page.

## The School Admissions Portal Landing Page

The landing page is displayed when you first log in to the School Admissions Portal. It displays relevant transfer groups as a series of tiles.

Each **Transfer Group** displays **View Applications** and **Verify Applications** links according to the access rights you have been granted.

If the school you are mapped to has no applications against a **Transfer Group**, you will not see the tile for that **Transfer Group**.



Only transfer groups that match at least one of the following sets of criteria are displayed:

- The school you are mapped to is a receiver school for an active normal transfer group whose **Transfer Group Year** matches either the current year or the current year plus one (e.g. if the current year is 2015 then One would display active transfer groups with a **Transfer Group Year** of 2015 or 2016).
- There is at least one preference for your receiver in the transfer group for a non-withdrawn application.

### OR

- The system date month is between September to December inclusive.
- The school you are mapped to is a receiver school for an active normal transfer group whose **Transfer Group Year** matches the current year plus two.
- The Transfer Group NCY is 0.
- There is at least one preference for your receiver in the transfer group for a non-withdrawn application.

### OR

- The school you are mapped to is a feeder school for an active normal transfer group whose **Transfer Group Year** matches the current year or the current year plus one.

### OR

- The school you are mapped to is a receiver school for an active in year transfer group whose **Transfer Group Year** matches the current year or the current year minus one.
- There is at least one preference for your receiver for a non-withdrawn application.

Each transfer group tile has the following options that you can perform on that particular transfer group:

- **View Applications** – covered in the [Viewing Applications](#) topic.
- **Verify Applications** – covered in the [Verifying Applications](#) topic.

## Viewing Applications

From the School Admissions portal home page, click the **View Applications** hyperlink for the transfer group you wish to view.

The **Applications** page enables you to perform the following tasks:

- View a list of applications made to your school for a selected transfer group.
- Respond to applications made to your school.

The page displays a **Receiver Summary** panel.

Receiver Summary

PAN: 0

Applications: 3 ( 1st Pref: 1 2nd Pref: 2 )

Q  Next > Download Show/Hide columns Choose sort order

Filter: All offer statuses, All Preferences, Verified and unverified applications

All offer statuses All Preferences Verified and unverified applications Clear Filters

Highlight applications added between dd/mm/yyyy and 23/10/2018

Preference Number	Offer status	Student name	DoB	Gender	Student ID	Application reference	Application verified	Current school	Catchment	Address	Postcode
1	Not yet processed	C, Child									
2	Allocated	B, Child									
2	Provisional	A, Child									

Once you have opened the **Applications** page, you can perform the following optional actions:

- Enter a student name or ID into the search field on the left to highlight a particular student in the list.
- Select an offer status from the **All offer statuses** menu to filter the list by offer status.
- Use the **Show/Hide columns** menu to edit the information displayed about each applicant:
  - i. Click the **Show/Hide columns** button to display the **Show/Hide columns** dialog.

Show/Hide columns to display in applications list

Hidden Columns Visible Columns

Address verified > Offer status <

Application reference > Band <

Staff child >

Test score >

Cancel Done

- ii. Click the names of any of the columns in the **Hidden Columns** list that you wish to make visible. The column names are transferred to the **Visible Columns** list.

- iii. Click the names of any of the columns in the **Visible Columns** list that you wish to hide. The column names are transferred to the **Hidden Columns** list.
- iv. If required, edit the order of the columns in the **Visible Columns** list using the arrows at the side of each column name.
- v. Click the **Done** button to save your changes and close the dialog.
- Click the **Download** button to export the list of applicants and all displayed data as a .csv file.
- View further details of a particular student’s application by clicking on the student’s name.

**Application Details**

Basic details

Name: [Redacted] ID: [Redacted]

Date of Birth: 24 July 2010 Gender: Female

UPN: [Redacted]

Address verified: [Redacted]

Address: [Redacted]

---

Name: [Redacted] Relationship: [Redacted]

Responsibility: [Redacted] Address: [Redacted]

[Close](#)

## Verifying Applications

To verify an application, permission should be granted for the **School Admissions – Verify Siblings** process in the v4 Client via **Tools | Permissions | User Group Processes | Permissions Editor | Main Processes | Provider Portal**.

There are 3 aspects of an application which can be marked as verified:

- **Application** – see [Verify Application](#) on page 19.
- **Address** – see [Verify Address](#) on page 19.
- **Sibling** – see [Verify Sibling](#) on page 20.

The meaning of ‘verified’ for each of these items should be agreed between the Local Authority and their schools.

From the required Transfer Group, select the **Verify Applications** link to display the **Verify Applications** page containing a list of all students with an application to be processed.

Click the **Download** button to create a .csv file of all the students in the list.

Verify Applications - **Essex** TG

All verified and unverified records
 [Download](#)
2 Student(s)

Student name	DoB	Gender	Student ID	Application verified	Address	Address verified	Claims sibling	Sibling verified	Sibling name	Sibling address	Sibling DoB
[Redacted]	[Redacted]	[Redacted]	[Redacted]	Not verified	[Redacted]	Not verified	✓	Not verified			
[Redacted]	[Redacted]	[Redacted]	[Redacted]	Not verified	[Redacted]	Not verified	✓	Not verified			

Use the first filter to select a student by Name or ID.

The verification filter can be used to select the following options:

- All verified and unverified records
- All verified records

- All unverified records
- Verified siblings only
- Unverified siblings only
- Verified addresses only
- Unverified addresses only
- Verified applications only
- Unverified applications only.

## Verify Application

To verify an application:

1. On the transfer group, select the **Verify Applications** link to display the list of students.
2. Use the filter to select one of the following:
  - Unverified applications only
  - All verified and unverified records
  - All unverified records
3. In the **Application verified** column, use the dropdown on the **Not verified** button and select **Verify**. The status changes to **Verified**.

Student name	DoB	Gender	Student ID	Application verified	Address	Address verified	Claims sibling	Sibling verified	Sibling name	Sibling address	Sibling DoB
				Not verified - Verify		Not verified -	✓	Not verified -			
				Verified -		Not verified -	✓	Not verified -			

4. If required, click the **Download** button to create a .csv file of the updated records.

## Verify Address

To verify an address:

1. On the transfer group, select the **Verify Applications** link to display the list of students.
2. Use the filter to select one of the following:
  - Unverified addresses only
  - All verified and unverified records
  - All unverified records
3. In the **Address verified** column, use the dropdown on the **Not verified** button and select **Verify**. The status changes to **Verified**.

Verify Applications - [Redacted] TG

2 Student(s)

Student name	DoB	Gender	Student ID	Application verified	Address	Address verified	Claims sibling	Sibling verified	Sibling name	Sibling address	Sibling DoB
[Redacted]	[Redacted]	[Redacted]	[Redacted]	Not verified ▾	[Redacted]	Not verified ▾ Verify	✓	Not verified ▾			
[Redacted]	[Redacted]	[Redacted]	[Redacted]	Not verified ▾	[Redacted]	Verified ▾	✓	Not verified ▾			

- If required, click the **Download** button to create a .csv file of the updated records.

## Verify Sibling

To verify a sibling:

- On the transfer group, select the **Verify Applications** link to display the list of students.
- Use the filter to select one of the following:
  - Unverified siblings only
  - All verified and unverified records
  - All unverified records
- In the **Sibling verified** column, use the dropdown on the **Not verified** button and select **Verify**. The status changes to **Verified**.

Verify Applications - [Redacted] TG

2 Student(s)

Student name	DoB	Gender	Student ID	Application verified	Address	Address verified	Claims sibling	Sibling verified	Sibling name	Sibling address	Sibling DoB
[Redacted]	[Redacted]	[Redacted]	[Redacted]	Not verified ▾	[Redacted]	Not verified ▾	✓	Not verified ▾ Verify			
[Redacted]	[Redacted]	[Redacted]	[Redacted]	Not verified ▾	[Redacted]	Not verified ▾	✓	Verified ▾			

- If required, click the **Download** button to create a .csv file of the updated records.

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