Learning Provider Portal Quick Guide

Learning Provider User Access Controls

Please refer to section 18 of the User Guide for full and detailed instructions on User Access Controls.

Overview

SLC have enhanced Learning Provider Portal user access controls to allow Sub Contractors to gain access to the portal, and either view or administer the learners at their organisation. This can also be used by primary providers to give access to members of staff throughout the organisation at varying levels.

For the purposes of this document a Learning Provider Portal user from a Primary Learning Provider will be classed as a "**Primary** Learning Provider user". Users who have a group assigned to them will be classed as a "Learning Provider **Group** user".

Groups can be created and have learners assigned to them. These groups can then be linked to a user. This means that a group user can log into the portal and only access the learners within that group. The user rights for that group user can be dictated and managed by the prime provider, meaning each user can have bespoke portal access determined by their role or organisation.

Creating a User

For the purposes of Learning Provider Group users, a user must be created before they can be assigned to a group.

There are two points to remember when creating a user;

- As any user with user administration access can create and maintain users for their learning provider, if a Group user is given the user administration role they too will be able to administer all users for the primary learning provider. This is not restricted.
- A user created will have access to all learners assigned to the learning provider until it is assigned to at least 1 group. This should be taken into account when creating users for groups and providers should consider creating users without any access rights initially. This can then be updated after the user is assigned to a group.

Creating and Maintaining Groups

There will be a new tab within the Learning Provider Portal called "Maintain Groups". This section will be the part of the portal where groups can be created and maintained.

Primary Learning Provider users, with a LP User Administrator user role, will be able to manage Learning Provider Groups via the Learning Provider Portal, this includes;

- Creating groups
- Maintaining groups
- Making groups inactive

Assigning Groups to a User

Once a group is created users can be added to the group. Users can also be added or removed from existing groups.

Primary Learning Provider users, with the LP User Administrator user role, will be able to add and remove users from the selected Learning Provider's Learning Provider Groups.

The same process is followed for adding users to a group, whether than group has been newly created or is an existing group.

To add a user to a group the 'Edit' button next to the desired group must be selected; this will result in a pop up being displayed on screen.

To add a user to the group the 'Add' link next to the desired user must be selected, the user will then appear in the "users assigned to group" section and disappear from the group users sub section. The save button on the pop up should then be selected to ensure any updates to the group are saved.

To remove a user from a group, when in the desired group pop up the user will have the option "remove" next to each assigned user. Once the remove button is selected the user will be unassigned from the group. The user will not automatically appear in the list of all users in the group users sub section but this can be refreshed by saving changes, closing the pop up and then reopening the pop up.

Note – When a user is removed from all of their LP Groups then they will automatically become a primary LP user. In these circumstances the system will display a warning message.

Adding learner applications to a Group

Any application can be assigned to any active group. A learner's application can only be assigned to one group at a time. As applications are assigned to groups rather than the learner, if a learner has more than one application each much be assigned separately.

Assigning learners to a group can be done in two ways;

- Individually – From the Detailed Learner Information screen
- For more than one application – By using the learner information search results screen

A Primary Learning Provider user with a LP Administrator role will be able to assign learner applications to an active learning provider group.

Individually

Assigning a learner to a group can be done within the detailed learner information page. Once the desired learner's application is selected the 'learner information' section of the detailed learner information screen must be selected.

The Learner Information section of the Detailed Learner Information screen will include a new field, 'Group Name', which will display the name of the group associated to the application or be blank if no group is associated with the application.

Where an application does belong to a group but that group has become inactive, then a message will be displayed above the Group Name.

The Group Name field will have two actions available Assign Group and Remove Group. If the Learning Provider does not have any associated Groups then the Assign Group button will not be enabled.

Selecting Assign Group will display the Assign Group pop up which will display a list of all active Learning Provider Groups associated to the selected Learning Provider and a radio button next to each Learning Provider Group so a single group can be selected.

If the application is assigned to a group, that group will be the first on the list with the radio button selected.

A Learning Provider Group can be set by selecting the appropriate radio button next to the Learning Provider Group Name and then selecting the 'Select Group' button. As an application can only be assigned to one group at a time, only one group can be selected.

Selecting the Select Group button will result in the pop up closing and the Learner Information section being displayed with the new group populated in the Group Name field.

More than one application

A Primary Learning Provider user with a LP Administrator role will be able to assign multiple learner applications to an active learning provider group via the Learner Information screen. This function will allow providers to assign multiple applications to one group.

This can be done on the learner information screen, using the search results from any relevant search.

When the Learner Information Search Results are returned a valid user will see the action Assign Group.

From the results returned the user can assign multiple applications to a Learning Provider Group by selecting at least one application from the results displayed and selecting the Assign Group button.

Selecting Assign Group will display the Assign Group pop up which will display a list of all active Learning Provider Groups associated to the selected Learning Provider and a radio button next to each Learning Provider Group so a single group can be selected.

Assign Group	
Active Learning Provider Groups	**Select**
Made up college black sheep group	●
Made up college yellow sheep group	○
Made up college blue sheep group	○
Made up college pink sheep group	○
Made up college orange sheep group	○
Made up college pink sheep group	○
Made up college purple sheep group	○
Made up college green sheep group	○
Made up college aqua sheep group	○
Made up college red sheep group	○

|◄ ◄◄ 1 2 3 ►► ►|

Select Group   Cancel ✕

Summary of Group User Access Roles

Group users with the appropriate role can:

- Import ULNs, but only for learners assigned to the same group as the user;

- Administer CoCs just as a Primary User can; Group Users will only have access to perform and submit CoCs for any learners assigned to their group or groups;

- View CoC reports just as a Primary User can; Group Users will only have access to view CoCs for any learners assigned to their group or groups;

- Import CoCs via an XML file upload just as a Primary User can; that validation will only allow the system to process CoCs for learners assigned to the same group as the Group User;

- View and administer attendance confirmations just as a Primary User can; Group Users will only have access to view, amend and submit attendance confirmation for any learners assigned to their group or groups;

- Import attendance confirmations via an XML file upload just as a Primary User can; validation will only allow the system to process attendance confirmations for learners assigned to the same group as the user;

Please note, a Group User with the appropriate role will have access to the Finance Home section of the portal. Unlike other areas of the portal, the financial area is not restricted to Group Users. This means that Group user Finance Administrators will be able to see the same data as Primary User Finance Administrators and data will not be limited to learners in the groups, but for all learners under that Learning Provider

Further details for User Access Control functionality

For further information on removing learners applications from groups and what each user role can access once assigned to a group, please refer to section 18 of User Guide.