



Learning Provider Portal Quick Guide

Using Group Functionality for User Access Controls

Please refer to section 18 of the User Guide for full and detailed instructions on user access controls.

Overview

You can use the Learning Provider Portal Group functionality for user access controls to group learners and give members of staff specific access to particular groups only.

In this document a Learning Provider Portal user who has full access to all learners will be classed as a **Primary User**. Users who have a group assigned to them will be classed as Group Users.

You can create groups and assign learners to them. You can then link these groups 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 Primary User, meaning that each user can have bespoke portal access determined by their role or organisation.

Creating a User

You must create Group Users before they can be assigned to a group.

There are two points to remember when creating a user:

- Until they are assigned to at least one group, users will have access to all learners assigned to the learning provider. You should take this into account when creating users for groups and consider creating users without any access rights initially. You can then update the access rights after you assign the user to a group.
- 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.

Creating and Maintaining Groups

You can create and maintain groups in the Maintain Groups tab of the Learning Provider Portal.

Primary Users with an LP User Administrator user role can manage groups via the Learning Provider Portal. This includes:

- Creating groups
- Maintaining groups
- Making groups inactive

Assigning Groups to a User

Once you have created a group, you can add users to it. You can also add or remove users from existing groups.

Primary Users with the LP User Administrator user role can add and remove users from the selected Learning Provider's groups.

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

To add a user to a group, select the Edit button next to the group. This will open a pop-up on screen.

To add a user to the group, click the Add link next to the user. The user will then appear in the Users Assigned to Group section and disappear from the group users sub-section. Click the Save button on the pop-up to save any updates to the group.

To remove a user from a group, open the group pop-up and select the Remove option next to the user. This will unassign the user from the group. The user will not automatically appear in the list of all users in the Group Users sub-section but you can refresh this by saving changes, closing the pop-up and then reopening it.

Note – Users that are removed from all of their LP groups will automatically become Primary Users and will be able to view all learners. 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, each application must be assigned separately if a learner has more than one.

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

- Individually – from the Detailed Learner Information screen; or
- For more than one application – by using the Learner Information Search results screen.

A Primary User with an LP Administrator role will be able to assign learner applications to an active learning provider group.

Individually

You can use the Detailed Learner Information page to assign a learner to a group. Begin by selecting the learner's application and then select the Learner Information section of the Detailed Learner Information screen.

The Learner Information section of the Detailed Learner Information screen will include a new field titled Group Name. This will display the name of the group associated with the application. If no group is associated with the application, this field will be blank.

Where an application belongs to a group that has become inactive, a message will be displayed above the Group Name field.

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

Home Administer User Learning Provider Details Applicant Information Service Sign out

Detailed Learner Information

Learner Information

Full name KRIS ISSUE 142
 Date of Birth 01/01/1980
 Sex Male
 Customer Reference Number 7986 1258631
 ULN
 Additional Ref No.
 Address Line 1 STUDENT LOANS CO LTD
 Address Line 2 100 BOTHWELL STREET
 Address Line 3
 Town GLASGOW
 County
 PostCode G2 7JD
 NINO Verified Flag No
 Group Name New College Group One [Assign Group](#) [Remove Group](#)

Submit Cancel

Assessment Information
 Current Payment Schedule & Attendance

Create CoC Back

Selecting Assign Group will display the Assign Group pop-up which will show a list of all active Learning Provider Groups associated with the selected Learning Provider. You can use the radio button next to each Learning Provider Group to select a single group.

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

You can select a Learning Provider Group by clicking the appropriate radio button next to the group name and then clicking the Select Group button. As an application can only be assigned to one group at a time, you can only select one group.

When you click the Select Group button, the pop-up will close and the Learner Information section will appear with the new group populated in the Group Name field.

More than one application

A Primary 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. You can use this function 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.

If you would like to assign multiple applications to a Learning Provider Group, select at least one application from the results and click the Assign Group button.

This will open the Assign Group pop-up with a list of all active Learning Provider Groups associated with the selected provider. You can use the radio button next to each Learning Provider Group to select a single group.

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 Change of Circumstances (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 confirmations for any learners assigned to their group or groups; and
- 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. 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, as well as what each user role can access once assigned to a group, please refer to section 18 of the User Guide.