

# User manager manual

## Introduction to Search

Helping you support young people as they progress through their learning and enabling them to achieve positive outcomes.

UCAS  
Progress



## USER MANAGER MANUAL

UCAS Progress works with education providers and local authorities to support young people aged 13 to 19 as they make choices about their learning pathways. UCAS Progress spans academic courses through to vocational courses and training opportunities. It is for all learners irrespective of destination.

There are two components – Search and Apply – available at [www.ucasprogress.com](http://www.ucasprogress.com).

**Search.** With Search young people can research learning opportunities irrespective of local boundaries. With localised start points, it offers searching and map views based on location and distance the learner is willing to travel.

**Apply.** A single online application system, Apply enables young people to apply for learning opportunities, either within or outside their current provider. Teachers and advisers have a simple and efficient means of managing applications and admissions, plus reporting to support tracking, analysis and provision planning.

This manual is part of a series of role-based manuals and guides designed to help you get the most out of using UCAS Progress.

October 2013

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## 1.0 INTRODUCTION TO UCAS PROGRESS SEARCH

### 1.1 What is Search

UCAS Progress Search is an online directory enabling young people to find courses and opportunities available in their area. Your local network of IAG advisers, your council representatives or your local authority promote this resource to learners.

### 1.2 What is a User Manager?

In this context a User Manager has responsibility for managing people with administration access at their individual provider or across multiple providers depending on the permissions of your role.

A User Manager can:

- view users at the provider(s)
- search for users at the provider(s)
- create users at the provider(s)
- edit users at the provider(s)
- lock users at the provider(s)
- reset passwords of users at the provider(s)
- delete users at the provider(s)
- set-up user groups

### 1.3 What is the purpose of the administration area?

The administration area provides tools to manage and edit users within the system. If you have responsibility for multiple users, you will be provided with an overview of users at all your providers.

### 1.4 How will you receive your log in details?

All user accounts will be set up either by your local authority representative or by a dedicated user manager within your provider.

Your username will be set up as your email address in the first instance and to verify your account you will receive a system generated verification email from UCAS Progress.

Within the email you will be requested to click the verification hyperlink and will be prompted to choose a password. Ensure that you choose a memorable password to allow successful repeat access to your account.

To change your username or password see section 3.

## 2.0 LOGGING IN AND OUT

### 2.1 Logging in

From the UCAS Progress homepage go to the top right-hand corner and enter your username and password. This will take you to your own individual administration site homepage.

### 2.2 Resetting your password

If you have forgotten your password there is a 'Forgotten your password?' link to the right of the log in boxes.

### 2.3 Logging out

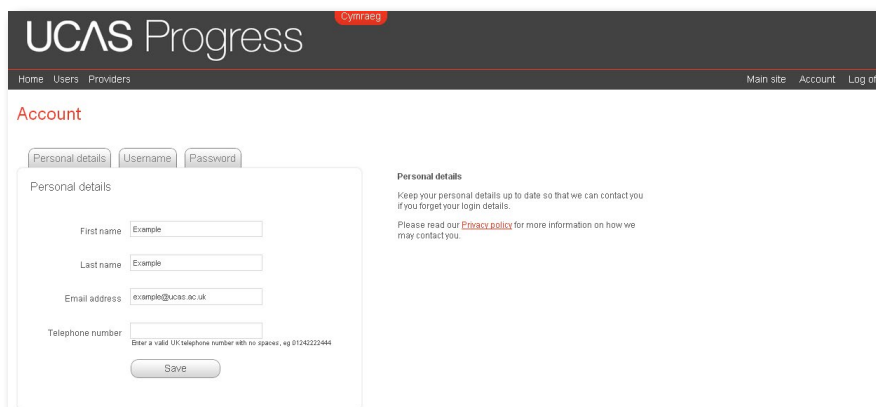
When you are ready to finish your session you can log off by clicking the 'Log off' button at the top right-hand corner of the screen.



## 3.0 MANAGING YOUR ACCOUNT

### 3.1 Accessing your account

To access your account click 'My Account' on the UCAS Progress administration homepage. On this page you can edit your personal details, username and password.



The screenshot shows the UCAS Progress 'Account' page. At the top, there's a navigation bar with 'Home', 'Users', 'Providers', 'Main site', 'Account', and 'Log off'. Below this, the 'Account' section has three tabs: 'Personal details' (selected), 'Username', and 'Password'. The 'Personal details' form includes fields for 'First name' (Example), 'Last name' (Example), 'Email address' (example@ucas.ac.uk), and 'Telephone number' (with a note: 'Enter a valid UK telephone number with no spaces, eg 01242222444'). A 'Save' button is at the bottom. To the right, a 'Personal details' section contains instructions: 'Keep your personal details up to date so that we can contact you if you forget your login details. Please read our [Privacy policy](#) for more information on how we may contact you.'

### 3.2 Editing personal details

In this section you can change your first name, last name, email address and telephone number. When you have finished your updates click 'Save'. Keep your personal details up to date so that we can contact you if you forget your log in details.

### 3.3 Editing your username

In this section you can change your username. The username must be between six and 256 characters and may contain letters, numbers or certain characters (i.e. @, -, \_). You can change your username to something that is more memorable so that you don't forget it. When you have finished your updates click 'Save'.

When you change your username you will be logged out of the site. You will need to log back in with your new username to continue using the site.

### 3.4 Editing your password

To change your password select the 'Password' tab and enter your current password, then your new password, and then confirm that new password. Your password must be between six and 20 characters and contain at least one letter and one symbol or number. When you have finished the updates click 'Save'.

## 4.0 MANAGING YOUR DASHBOARD

Your dashboard enables you to have an overview of your role and highlights areas you may want to have a look at. For example as a user manager you can see how many users have not yet activated their account or which users have been locked out. By clicking on the red hyperlink you will be directed to specific areas.

The screenshot shows the 'User manager' dashboard. It has a title 'User manager' in red, followed by a subtitle 'As a user manager you can administer your users.' Below this is a table with four rows, each representing a different user status. Each row has a red hyperlink for the status name and a count in red. Callout boxes with arrows point to each of these elements, providing further explanation.

User manager	
As a user manager you can administer your users.	
<a href="#">Users</a>	262
<a href="#">Locked users</a> <small>Users can be locked by a user manager or because they have entered an incorrect password 7 times.</small>	4
<a href="#">Users awaiting activation</a> <small>Users have been set up but have not yet activated their accounts.</small>	139
<a href="#">Users without an email address</a> <small>Users with email addresses will be able to retrieve lost passwords and receive notifications.</small>	7

User activity - 10/08/2012 11:06

This provides a count of the number of users linked with your provider.

From this part of the dashboard you are able to see the number of users who have locked themselves out or that you have locked out.

These are users who have not yet activated their account and set up their password.

This provides you with a count of those users who do not have email addresses attached to their account.

## 5.0 OVERVIEW OF USER ROLES

To enable you to set up the correct users with the correct permission levels, please find below an overview of the user roles within UCAS Progress Search and Apply.

### User Manager

If you set up a User Manager either within your local authority or at a provider, they will have the ability to add other users at this level. For example if you set up a User Manager within your provider they will only be able to set up other users within your provider. If the user is at local authority level, they will have the ability to set up users at both their level and at provider level.

### Provider Manager

By setting someone up with a Provider Manager role within one or multiple providers, they will have the ability to edit all provider details, add YouTube videos and enhance the provider information. By setting someone up with a Provider Manager role at local authority level, they will have the ability to create new providers and edit provider information.

### Course Manager

By setting someone up with a Course Manager role within one or multiple providers, they will have the ability to add, edit and enhance all course information using YouTube videos. By setting someone up with a Course Manager role at local authority level, they will have the ability to create courses at all levels.

### Learner Manager

By setting a user with the Learner Manager permissions within one or multiple providers, they will have the ability to add, edit and reset passwords of all learners associated with them. This role is suitable for Head of Year, Form tutors and IAG or support staff within your provider. By setting someone up with a Learner Manager role at local authority level, they will have the ability to create learners at all providers.

Where Apply is operating in your area, the Learner Manager will also have the ability to see how learners are progressing with their profile and make changes where necessary.

### Application Manager – For Apply clients only

An Application Manager will have the ability to acknowledge applications, make offers and enrol applicants onto courses within one or multiple providers. The Application Manager will be able to see which applicants have applied for what courses within their provider and where necessary offer alternative courses to individual applicants. By setting someone up with the application manager role at local authority level, they will have the ability to manage applications at all assigned providers.

### Adviser Manager

If you set up an Adviser Manager either at a provider or multiple providers, they will have the ability to view their learners profiles and assist learners with their applications. They will be able to see favourites, all applications at each stage and the details of those applications.



## 6.0 CREATING AND MANAGING USER ACCOUNTS

### 6.1 Creating a new user

To create a new user follow the steps below:-

- Click the 'Users' tab along the top menu bar.
- Click 'Create User'.
- Complete the key information for the new user.  
Enter their email address, first name, last name, local authority area, the provider they are attached to and the role that they need. Roles can be:
  - Learner Manager
  - User Manager
  - Provider Manager
  - Course Manager
  - Application Manager
  - Adviser.

User roles can be made up of a combination of these roles or one individual element of the list above if appropriate.

You can also add a telephone number for the user.

- An email will then be automatically generated from the system, requesting that they verify and activate their account, enabling them to create a password.

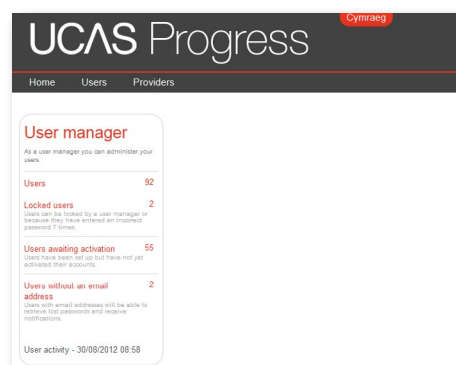
### 6.2 Managing your users

To manage your user follow the steps below:-

- Click the 'Users' tab along the top menu bar.
- On the main user page you will see a list of all the users that you are able to manage. You will see their first name, last name and email address. You will also be able to identify whether they have activated their account and if they are locked out.

You will also have the ability to filter your user list by role.

- If an account is locked, untick the green box and then 'reset password'.
- To edit their account details, click on the name of the user and their key information will be displayed for you to amend.
- Click 'Reset password' to change a user's password.
- If you want to remove a user from the system click 'Delete' on the right of the screen.



Last name	First name	Email address	Locked out	Approved	Role	Actions
12	Mr	john@ucas.ac.uk	<input checked="" type="checkbox"/>	True	Learner manager	<a href="#">Reset password</a> <a href="#">Delete</a>
13	Mr	john@ucas.ac.uk	<input checked="" type="checkbox"/>	True	Course manager	<a href="#">Reset password</a> <a href="#">Delete</a>
14	Mr	john@ucas.ac.uk	<input checked="" type="checkbox"/>	True	Learner manager	<a href="#">Reset password</a> <a href="#">Delete</a>

## 7.0 MANAGING USERS AT MULTIPLE PROVIDERS

(This information is for users who manage more than one provider.)

### 7.1 Creating a new user

To create a new user follow the steps below:-

- Click the 'User' tab along the top menu bar.
- Click 'Create User'.
- Complete the key information for the new user. Enter their email address, first name, last name, local authority area, which providers they are attached to and the role that they need.

Roles can be:

- Learner Manager
- User Manager
- Provider Manager
- Course Manager
- Application Manager
- Adviser Manager.

Users are able to have more than one role if appropriate.

You can also add a telephone number for the user.

- An email will be automatically generated from the system requesting that they verify and activate their account, enabling them to create a password.

### 7.2 Managing your users

To manage a user follow the steps below:-

- Click the 'Users' tab along the top menu bar. On the main user page you will see a list of all the users that you manage. You will see their first name, last name and email address. You will also see whether they have activated their account and if they are locked out.

You will also have the ability to filter your user list by role.

- If an account is locked, untick the green box and then 'reset password'.
- To edit their account details, click on the users name and their key information will be displayed for you to amend.
- Click 'Reset password' to change a user's password.
- If you want to remove a user from the system click 'Delete' on the right of the screen.



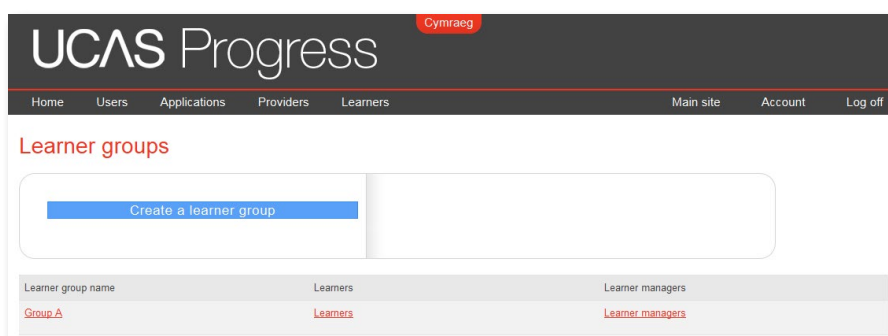
## 8.0 CREATING AND MANAGING LEARNER GROUPS AS A USER MANAGER

The ability to create learner groups and associate learner managers with these groups can be done by the Provider Manager and User Manager within a provider. Within each provider there needs to be at least one Provider Manager and User Manager with an overview of all students in the school. Before learner groups are created it is very important to make sure that all Provider Managers, User Managers and Learner Managers are set up in the system and all of the learners have been imported. The ability to associate learner managers with learner groups can be done by a Learner Manager with visibility of all learners within an individual provider

A learner group could be a tutor groups, learning support groups, teaching groups etc.

### 8.1 Creating Learner groups:

- a. To create a learner group, as a Provider Manager or User Manager, click on the 'Provider' tab and then click on the 'Learner groups' link.
- b. Click 'Create a learner group' and choose a learner group name.



- c. Ensure that your Provider name is listed underneath the Provider text box. If the Provider name is not listed here start to type in the name of the provider in the text box and after 3 letters have been typed a list of the possible providers it could be will appear. Select the provider(s) you wish to associate the learner groups with and that will then appear underneath the provider box.

**N.B:** Please note that you can associate one learner group with multiple providers

d. Click save and the learner group will be saved.

## 8.2 Allocating a Learner manager:

a. Once all learners have been associated with the correct groups, a Provider Manager or User manager can allocate appropriate Learner Managers to these groups.

**NB:** Ensure learner managers are created before allocating learner managers to the groups.

b. Click on the 'Provider' tab and then click on the 'Learner groups'.

Learner group name	Learners	Learner managers
Group A	Learners	Learner managers

c. Click on the associated 'Learner Manager' link for the learner group, a list of Learner Managers associated with your provider will be displayed.

d. Click on all learner managers to be associated with that group.

**NB:** multiple learner managers can be associated with groups and can be amended at any time.

Key information

Learner group name \*

This field is required

Please note, you must add all providers required for this group now, they cannot be added later

Provider

ACACIA TRAINING & DEVELOPMENT - ATC Remove

Start entering the name of the provider and select it from the suggestion list

Save

If more than one learner manager is to be assigned to a group hold down 'Ctrl' and click on each learner manager. They will then be highlighted in blue.

- e. Once a Learner manager is allocated to a group or groups they will only be able to see Learners within that group rather than the whole cohort. If a Learner manager is not associated to any learner group they can then see all learners in the cohort. This could for example be Head of Year 11.
- f. To allocate Learner managers to more than one group, go into each learner group and assign that learner manager to the group in the same way as above.

### 8.3 To un-assign a Learner Manager from a Learner group

- a. If a Learner Manager needs to be removed from a group, click on the 'Providers' link at the top of the screen and click on the 'Learner groups' link.
- b. Click the 'Learner Managers' tab against the Learner group they need to be removed from.
- c. This page will say at the top 'Associate learner managers to group'
- d. You will be presented with a scrolling list of all learner managers in the system at your Provider.
- e. Those assigned to the particular group you are in will be highlighted in blue.
- f. To un-assign a learner manager from a group hold down Ctrl and then click on the relevant learner manager.

## 9.0 LINKING TO THE MAIN SITE

Along the top bar there is a 'Main Site' link, this takes you back to the UCAS Progress homepage

### **UCAS Progress Support Team**

The Support Team is available to support clients with technical enquiries and system requests relating to existing UCAS Progress products and services.

The Support Team can be contacted on 08714 682 568 Option 1 or at [ucasprogresssupport@ucas.ac.uk](mailto:ucasprogresssupport@ucas.ac.uk).

### **UCAS Progress Training and Implementation Team**

The Training and Implementation Team is on-hand to support clients and users with product implementation and training, either by telephone or in face-to-face sessions. In addition to our core programmes, they can devise and deliver programmes to meet your specific requirements.

The Training and Implementation Team can be contacted on 08714 682 568 Option 2 or at [ucasprogresstraining@ucas.ac.uk](mailto:ucasprogresstraining@ucas.ac.uk).



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