Adviser manual

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

UCAS
Progress

ADVISER 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**.

Search
With Search young people can research learning opportunities irrespective of local boundaries. Search's localised start points offer 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 AND APPLY

1.0 What is Search and Apply?

UCAS Progress Search and Apply provide learners with the opportunity to search for (locate) courses and then submit and manage applications online.

UCAS Progress Search is an online directory enabling learners to find courses and opportunities available to them in their area.

UCAS Progress Apply enables young people to submit their application to their chosen providers and manage their applications through to enrolment in one place.

Your local network of IAG advisers, your council representatives or your local authority promote these resources to learners.

1.1 What is the Adviser role?

An Adviser has the ability to view the number and the details of learners' applications. This is a view only role and no changes can be made to a learners profile.

Depending on the permission access granted this will be for an individual provider or group of providers.

As an Adviser you can:
- view learners at the provider(s)
- search for learners at the provider(s)
- reset learner passwords
- view learner profiles
- review whether learners have submitted an application
- review whether learner have saved any favourites
- identify those learners who have made more than three applications
- identify those learners with no offers
- view the detail of the applications made, identifying where and for which subject(s)
- have access to the September guarantee/destination report.

1.2 What is the purpose of the administration area?

The administration area provides tools to view learner information and applications to enable an Adviser to support learners when appropriate. This manual will provide information on how to use the administration area and the individual functions that can be performed as part of this permission level.

1.3 How will I receive my account details?

All user accounts will be set up by your local authority representative.

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 access to your account.

To change your username or password see section 3.0.

2.0 LOGGING IN AND OUT

2.1 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 If you have forgotten your password there is a 'Forgotten your password?' link underneath the login boxes.

2.3 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.
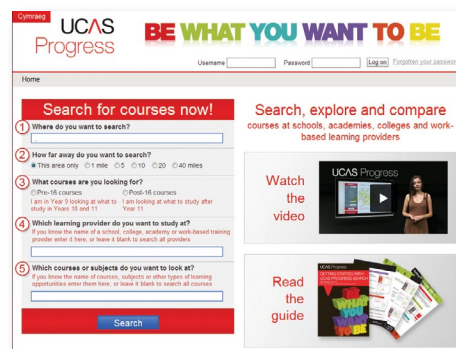
3.0 MANAGING YOUR ACCOUNT

3.1 Accessing your account details
Click 'Account' on the UCAS Progress administration homepage. From here you can edit your personal details, username and password.
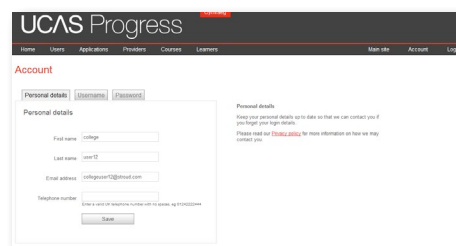
3.2 Editing personal details
In this section you can change your first name, last name, email address and telephone number. When you have finished making your updates click 'Save'.

3.3 Editing your username
In this section you can change your username to something more memorable. The username must be between six and 256 characters and may contain letters, numbers or a few select characters (@.-_). When you have finished the 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 your new password. Your password must be between six and 20 characters and contain at least one letter and one symbol or a number. When you have finished making your updates click 'Save'.

3.5   Getting started with the Adviser role

When you first login to UCAS Progress as an Adviser, you will be asked to agree to the terms and conditions of both using the role and in being granted the permissions of the role.

In order to proceed to the dashboard, you will need to agree to the terms and conditions stated by clicking 'Accept and continue'.

If you choose not to agree with the terms, and click 'Cancel' you will then be redirected back to the login screen.
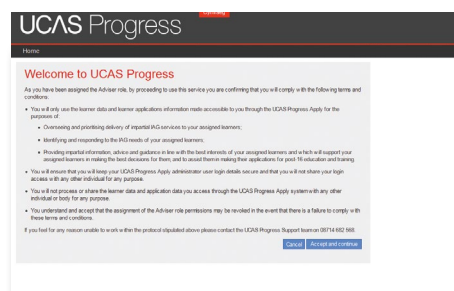
4.0   NAVIGATING THE ADVISER DASHBOARD

Your dashboard allows you to have an overview of your role and highlights areas you may want to have a look at, for example as an adviser manager you can see information about your learners such as those who have never logged in and details about their applications and offers by clicking on the red hyperlinks.

From here you are able to link through to more information about the learners allocated to you.

Adviser

Learners

Never logged in

With no favourites

Awaiting profile approval

Learners with no submitted applications

Learners with more than three applications

Learners with no offers

These sections will help you to identify those learners needing additional support either to make applications or identifying those who have made too many.

5.0 MANAGING LEARNER ACCOUNTS

5.1 Viewing applications made by a learner
There are two ways to access information about a learner's application(s), these are as follows:

a. Locating applications using the learner dashboard link

1. Click on the 'Learners' link on the dashboard or the 'Adviser's learners' tab across the top menu bar and a list of learners will be displayed.

2. Locate the learner you wish to view more information about, either by scrolling down the list of learners or through using the filters in the top left of the page. The filters enable you to filter by learner name, current provider and year group.

3. Once you have found the learner whose applications you would like to view, then click on the number in the 'Count of applications' column.

4. This will display a list of all applications the learner has made, including which provider, the date it was received and the status of each.

5. To see more details about the application, including what the learner has applied for, click on the applicant's name.

6. The applications form that a learner has submitted will then be displayed, including the status, where and what they have applied for, the profile information including any additional questions, and any messages sent or received.

b. Locating applications using the 'Adviser's applications' tab

1. Click on the 'Adviser's applications' tab across the top menu bar and a list of learner applications will be displayed.

2. Locate the learner application you wish to view more information about, either by scrolling down the list of learners or through using the filters in the top left of the page. The filters enable you to filter by applicant name, current provider and Applications for courses starting September.

3. Once you have found the learner's application that you would like to view, then click on the name of the applicant to view more information.

4. The application form that a learner has submitted will then be displayed, including the status, where and what they have applied for and the profile information including any additional questions and any messages sent or received.
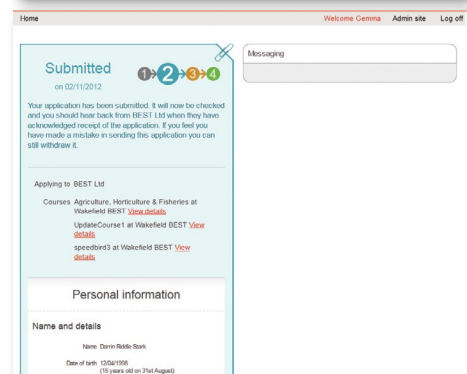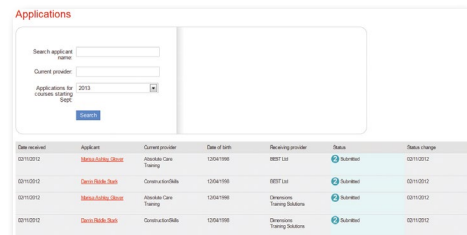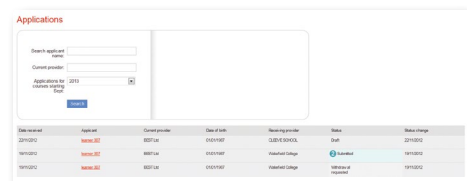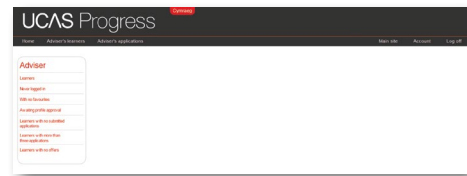
5.2 Reviewing learner favourites

To review learners favourites follow the steps below:-

a. Click on the 'Learners' link on the dashboard or the 'Adviser's learners' tab across the top menu bar and a list of learners will be displayed.

Username	Last name	First name	Email address	Current provider	Count of favourites	Count of applications	Locked out		
hparks	parks	hannah	janet@blabla.com	Cambridge Training School	6	1	☐	View profile	Reset password

b. Locate the learner you wish to view more information about, either by scrolling down the list of learners or through using the filters in the top left of the page. The filters enable you to filter by learner name, current provider and year group.

c. Once you have found the learner whose favourites you would like to view, then click on the number in the 'Count of favourites' column.

d. This will display a list of all courses and providers the learner has chosen to favourite.

e. To see more information about either the courses or the provider that the learner has favourited, click on the red link for either the name of the course or the provider. This will take you through to the populated course or provider information.

5.3 Resetting learner passwords

If you are required to reset a learner's password, then please follow the steps below.

a. Click on the 'Learners' link on the dashboard or the 'Adviser's learners' tab across the top menu bar and a list of learners will be displayed.

b. Locate the learner you wish to manage, either by scrolling down the list of learners or through using the filters in the top left of the page. The filters enable you to filter by learner name, current provider and year group.

c. Once you have found the learner whose password needs resetting, then click on the 'Reset password' button of this learner.

d. A page displaying the learner's username and a prompt to create a new password for the learner will appear. Create the new password and click 'Submit'.

e. A page informing you that the password has been saved will appear. You will then need to communicate this new password to the learner to enable then to access their account.
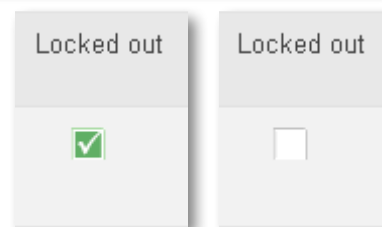
Please note: *upon entering the newly created password the learner will be prompted to change it to something memorable.*

5.4   Unlocking learner accounts

If a learner enters their password incorrectly, after seven attempts their account will lock. You will then need to unlock the learner account and potentially reset their password (see section 5.3).

a. Click on the 'Learners' link on the dashboard or the 'Adviser's learners' tab across the top menu bar and a list of learners will be displayed.

b. Locate the learner you wish to manage, either by scrolling down the list of learners or through using the filters in the top left of the page. The filters enable you to filter by learner name, current provider and year group.

c. A locked learner account will clearly display a green tick in the column 'Locked out'. Click on the tick box to unlock the account and the green tick will disappear.

d. If the learner has locked themselves out because they could not remember their password, follow section 5.3 c-e on page 6 to reset the password.

5.5   Viewing a learner profile

To view a learners profile please follow the steps below:-

a. Click on the 'Learners' link on the dashboard or the 'Adviser's learners' tab across the top menu bar and a list of learners will be displayed.

b. Locate the learner whose profile you wish to view, either by scrolling down the list of learners or through using the filters in the top left of the page. The filters enable you to filter by learner name, current provider and year group.

c. Once you have located the learner, then click on the 'View profile' link.

d. The profile information of this learner will then display on a scrolling page, divided into sections.

6.0   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.

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.

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