Setting Up Completely NEW PROVIDER Users

A completely NEW user on the Provider Gateway would be an individual that has no existing user accounts in any LSC system (i.e. Online Data Collections), and is not a member of LSC Staff.

PROVIDER User-Approvers **should not** set-up any Read Only or Read/Write accounts for any other organisation. PROVIDER User-Approvers **should only** create, amend, update, or delete the accounts of their own organisation’s PROVIDER users.

All PROVIDER User accounts should be set-up using a valid **provider** email address for the provider organisation.

Please refer to the following steps to set-up a completely new user:

1. Enter the User Administration section of the Provider Gateway.

2. Select the first option on the ‘Select Task’ Menu:
   - Create a brand new user. (Not a user of any LSC system, does not have an LSC login user@lsc.gov.uk)
   - Create a new User Gateway user (user already has an LSC login user@lsc.gov.uk or is a user of Data Collections Web)
   - Update existing User Gateway user

3. The next screen will request you to enter a **username**. You will be notified if the username you have entered is currently registered to another user.

   **Enter Username**

   Enter the new user's name (this will be used to generate the login name), and click next.

   Jane Smith

A good username is: First Name (Space) Surname (i.e. Jane Smith)
4. You will now be presented with the main account maintenance screen which contains ‘User Account Details’. It is vital that this screen is administered correctly.

**KEY ENTRY:** It is extremely important that a valid PROVIDER e-mail address is entered.

**User Account Details**

Please review the details you have entered, complete the additional fields and assign any roles to the user before clicking Save to create the new account. * indicates mandatory fields.

<table>
<thead>
<tr>
<th>Account Actions:</th>
<th>Disable</th>
<th>Activate</th>
<th>Unlock</th>
<th>Delete</th>
<th>Read Password</th>
</tr>
</thead>
</table>

**Login name:** Login Name is assigned on account creation

**Full name:** Jane Smith

**E-mail:** * 

**Telephone:** *

Once you have entered a valid/working e-mail address for this user, please enter a contact number.

Please ensure that only the Regional LSC field is completed in the Organisation Details of this User Administration page. If any of the Local or National fields are completed, then please email: provider.gateway@lsc.gov.uk

![Local LSC:](image)

**Regional LSC:** South West LSC Region

**National LSC:**

You must now enter the ‘Role Details’ for this account.

This is the most security and access issue sensitive portion of the entire user administration process. Most queries are a result of input errors in this area.

Firstly, no user or User-Approver will be able to access the Provider Gateway without at least a Read Only Role in the Provider Gateway Application. Select the Provider Gateway Application first from the drop-down menu.

**Role Details:**

<table>
<thead>
<tr>
<th>Application:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Exchange</td>
</tr>
<tr>
<td>Planning and Modelling</td>
</tr>
<tr>
<td><strong>Provider Gateway</strong></td>
</tr>
<tr>
<td>Learner Achievement Tracker</td>
</tr>
<tr>
<td>Default Provider Read Only User</td>
</tr>
</tbody>
</table>

**KEY ENTRY:** All users and User-Approvers must be assigned a Read Only role in the Provider Gateway Application. Additionally, all User-Approvers must also have the User-Approver role assigned to them in the Provider Gateway Application.

No user should be given any role that is relevant to another organisation as this will be a serious security breach.
Before you assign any roles, please note the following table which displays the types of roles that should be assigned to the user account you are creating.

**Exclusive Roles For Organisations**

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider Gateway</td>
<td>PG Provider User Approver AND PG Provider ReadOnly User</td>
</tr>
<tr>
<td>Document Exchange</td>
<td>DocX Provider User Approver AND ONE OF DocX Provider ReadOnly User OR DocX Provider ReadWrite User</td>
</tr>
<tr>
<td>Learner Achievement Tracker/VADT</td>
<td>VADT Provider User Approver AND ONE OF VADT Provider ReadOnly User OR VADT Provider ReadWrite User</td>
</tr>
</tbody>
</table>

If you have access to the Planning and Modelling (PaM) or the College Financial Reporting (CFR) applications the same rules of exclusive roles dependent on the user’s organisation apply.

First assign a role in the Provider Gateway application, but do not click ‘Next’ yet.

![Assign Roles](image)

Then, assign a role in the Document Exchange, Learner Achievement Tracker applications (and other applications such as CFR and PaMs), as necessary, but do not click ‘Next’ yet.

![Assign Roles](image)

Before clicking ‘Next’, please review the ‘User Account Details’ page to ensure all of the information that has been entered is correct.
You will now be presented with a summary screen of the details you have just entered and the role you have assigned.

**Confirmation of User Account Details**

Please review the details you have entered before clicking Save to create the new account.

<table>
<thead>
<tr>
<th>Login name:</th>
<th>Login Name is assigned on account creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full name:</td>
<td>Jane Smith</td>
</tr>
<tr>
<td>E-mail:</td>
<td><a href="mailto:jane.smith@abc.com">jane.smith@abc.com</a></td>
</tr>
<tr>
<td>Telephone:</td>
<td>02476 111111</td>
</tr>
</tbody>
</table>

**Organisation Details:**

- **Regional LSC:** London LSC Region
- **National LSC:** London LSC Region
- **UPIN:** 115013

**Role Details:**

<table>
<thead>
<tr>
<th>Application</th>
<th>Assigned Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Exchange</td>
<td>DocX Provider ReadWrite User</td>
</tr>
<tr>
<td>Provider Gateway</td>
<td>PG Provider ReadOnly User</td>
</tr>
</tbody>
</table>

Once you have applied all of the necessary roles to the account, click on the ‘Save’ button to complete the registry of the account. To make any corrections, simply click ‘Return to User Details’.

An e-mail will be sent to the new user to set their new password. Please ensure that you provide the new user with their username immediately.
Setting Up Users with Existing OLDC Accounts

All Provider User and User-Approver Candidates with an existing Online Data Collections (OLDC) account should be set-up for access using this Reference Card.

A Provider User-Approver Candidate with no existing account on any LSC System or OLDC should be set-up for access using Reference Card One.

PROVIDER User-Approvers should not set-up any Read Only or Read/Write accounts for any other organisation. PROVIDER User-Approvers should only create, amend, update, or delete the accounts of their own organisation’s PROVIDER users.

All PROVIDER User accounts should be set-up using a valid provider email address for the provider organisation.

Please refer to the following steps to set-up a user with an existing account:

1. Enter the User Administration section of the Provider Gateway.

2. Select the second option on the ‘Select Task’ Menu:
   - Create a brand new user. (Not a user of any LSC system, does not have an LSC login user@lsc.gov.uk)
   - Create a new User Gateway user (user already has an LSC login user@lsc.gov.uk or is a user of Data Collections Web)
   - Update existing User Gateway user

3. The next screen will request you to search for the existing user account by entering the existing username. You will be notified if the username you have entered does or does not exist in the system.
4. You will now be presented with the main account maintenance screen which contains ‘User Account Details’. It is vital that this screen is administered correctly.

**KEY ENTRY:** It is extremely important that a valid PROVIDER e-mail address is entered.

**User Account Details**

*Please review the details you have entered, complete the additional fields and assign any roles to the user before clicking Save to create the new account. * indicates mandatory fields*

<table>
<thead>
<tr>
<th>Account Actions:</th>
<th>Disable</th>
<th>Activate</th>
<th>Unlock</th>
<th>Delete</th>
<th>Read Password</th>
</tr>
</thead>
</table>

| Login name:      | Login Name is assigned on account creation |
| Full name:       | Jane Smith |
| E-mail:          | * |
| Telephone:       | * |

Once you have entered a valid/working e-mail address for this user, please enter a contact number.

**Please ensure that only the Regional LSC field is completed in the Organisation Details of this User Administration page.** If any of the Local or National fields are completed, then please email: provider.gateway@lsc.gov.uk

![Organisation Details](image)

You must now enter the ‘Role Details’ for this account.

This is the most security and access issue sensitive portion of the entire user administration process. Most queries are a result of input errors in this area.

Firstly, no user or User-Approver will be able to access the Provider Gateway without at least a Read Only Role in the Provider Gateway Application. Select the Provider Gateway Application first from the drop-down menu.

**Role Details:**

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<th>Application:</th>
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<tr>
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</tr>
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<td>Document Exchange Planning and Modelling</td>
</tr>
<tr>
<td>Provider Gateway</td>
</tr>
<tr>
<td>Learner Achievement Tracker</td>
</tr>
<tr>
<td>Tool Provider Read Only User</td>
</tr>
</tbody>
</table>

**KEY ENTRY:** All users and User-Approvers must be assigned a Read Only role in the Provider Gateway Application. Additionally, all User-Approvers must also have the User-Approver role assigned to them in the Provider Gateway Application.

No user should be given any role that is relevant to another organisation as this will be a serious security breach.
Before you assign any roles, please note the following table which displays the types of roles that should be assigned to the user account you are creating.

**Exclusive Roles For Organisations**

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<th>Account Type Application</th>
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<td>VADT Provider User Approver AND ONE OF VADT Provider ReadOnly User OR VADT Provider ReadWrite User</td>
</tr>
</tbody>
</table>

If you have access to the Planning and Modelling (PaM) or the College Financial Reporting (CFR) applications the same rules of exclusive roles dependent on the user’s organisation apply.

Ensure there is a role in the Provider Gateway application, but do not click ‘Next’ yet.

Assigned Roles:

- PG Provider ReadOnly User

Then, assign a role in the Document Exchange, Learner Achievement Tracker applications (and other applications such as CFR and PAM), as necessary, but do not click ‘Next’ yet.

Assigned Roles:

- DocX Provider ReadWrite User

Before clicking ‘Next’, please review the ‘User Account Details’ page to ensure all of the information that has been entered is correct.
You will now be presented with a summary screen of the details you have just entered and the role you have assigned.

**Confirmation of User Account Details**

Please review the details you have entered before clicking Save to create the new account.

<table>
<thead>
<tr>
<th>Login name:</th>
<th>Login Name is assigned on account creation</th>
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</thead>
<tbody>
<tr>
<td>Full name:</td>
<td>Jane Smith</td>
</tr>
<tr>
<td>E-mail:</td>
<td><a href="mailto:jane.smith@abc.com">jane.smith@abc.com</a></td>
</tr>
<tr>
<td>Telephone:</td>
<td>02476 111111</td>
</tr>
</tbody>
</table>

**Organisation Details:**
- Regional LSC: London LSC Region
- National LSC: 115013
- UPIN: 115013

**Role Details:**
- **Application**
  - Assigned Roles: DocX Provider ReadWrite User
- **Document Exchange**
  - Assigned Roles: PG Provider ReadOnly User
- **Provider Gateway**
  - Assigned Roles: 

Once you have applied all of the necessary roles to the account, click on the ‘Save’ button to complete the registry of the account. To make any corrections, simply click ‘Return to User Details’.
Reference Card Three

Updating Existing Provider Gateway Accounts

PROVIDER User-Approvers are able to amend or update accounts of PROVIDER Users only.

Reference Card One should be used to create new accounts for non-registered Provider Gateway users.

PROVIDER User-Approvers should not amend accounts of any users from a non-PROVIDER organisation. PROVIDER User-Approvers should only amend, update, or delete the accounts of PROVIDER Users.

Please refer to the following steps to amend or update an existing account:

1. Enter the User Administration section of the Provider Gateway.

2. Select the third option on the ‘Select Task’ Menu:
   - Create a brand new user (Not a user of any LSC system, does not have an LSC login user@lsc.gov.uk)
   - Create a new User Gateway user (user already has an LSC login user@lsc.gov.uk or is a user of Data Collections Web)
   - Update existing User Gateway user

3. The next screen will present you with a drop-down list to search for the existing user account by entering the existing username.

4. You will now be presented with the main account maintenance screen which contains ‘User Account Details’. It is vital that this screen is amended or updated correctly.

RESET PASSWORD

PROVIDER User-Approvers can reset passwords for PROVIDER Read Only Users who had their account originally created through the Provider Gateway.

If a User’s account was originally created in the Online Data Collections application or is an LSC account, then the ‘Reset Password’ button will be disabled and hence, faded out and unclickable.

If the ‘Reset Password’ button is active, then clicking it will send an e-mail to the e-mail address that is registered to the account. However, the e-mail will only reach the user if the e-mail address is a valid and functioning one.
Please note, that you will be have to save any changes before resetting a user’s password, to ensure that the password reset email reach the intended recipient successfully.

**KEY ENTRY: It is extremely important that a valid PROVIDER e-mail address is entered.**

**DISABLING/ACTIVATING A USER**

If the ‘Disable’ button is clicked the user account will become inactive, however, it will still exist on the system. This is further highlighted, as you will notice that when the account is disabled, the ‘Activate’ button will be clickable, and vice versa.

The user will not be able to access their account once it is Disabled. When it is Activated, the user should be able to access their account with their existing password.

An account is permanently deleted only when the ‘Delete’ button is clicked.

**DELETING AN ACCOUNT**

Clicking the ‘Delete’ button will permanently delete the user’s account in its current format.

Accounts that require temporary removal of access should be disabled using the ‘Disable’ button.

**AMENDING ACCOUNT DETAILS**

If you are amending the e-mail address, please ensure you have entered a valid/working e-mail address for this user.

**KEY ENTRY: It is extremely important that a valid PROVIDER e-mail address is entered.**

Please be careful when updating any details in the ‘Role Details’ section, as this is the most security and access issue sensitive portion of the entire user administration process. Most queries are a result of input errors in this area.

Remember, no user or User-Approver will be able to access the Provider Gateway without at least a Read Only Role in the Provider Gateway Application. Ensure changes to the Provider Gateway application are undertaken correctly.

**Role Details:**

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<td>Learner Achievement Tracker</td>
</tr>
<tr>
<td>DeskPro Provider Read Only User</td>
</tr>
</tbody>
</table>

**KEY ENTRY: All users and User-Approvers must be assigned a Read Only role in the Provider Gateway Application. Additionally, all User-Approvers must**
also have the User-Approver role assigned to them in the Provider Gateway Application.

No user should be given any role that is relevant to another organisation as this will be a serious security breach.

Before you amend or assign any roles, please note the following table which displays the types of roles that should be assigned to the user account you are creating.

**Exclusive Roles For Organisations**

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<td>DocX Provider User Approver AND ONE OF DocX Provider ReadOnly User OR DocX Provider ReadWrite User</td>
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<tr>
<td>Learner Achievement Tracker/VADT</td>
<td>VADT Provider User Approver AND ONE OF VADT Provider ReadOnly User OR VADT Provider ReadWrite User</td>
</tr>
</tbody>
</table>

First assign a role in the Provider Gateway application, but do not click ‘Next’ yet.

Then, assign a role in the Document Exchange, Learner Achievement Tracker applications (and other applications such as CFR and PAM), as necessary, but do not click ‘Next’ yet.

Before completing the account update, please review the ‘User Account Details’ page to ensure all of the information that has been amended is correct.

Once you have ensured that all of the amendments are compliant and valid, click on the ‘Save’ button to complete the update of the account.