Setting Up Completely NEW QIA 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.

QIA User-Approvers should not set-up any Read Only accounts for any other organisation. QIA User-Approvers should only create, amend, update, or delete the accounts of QIA users.

All QIA User accounts should be set-up using a valid @qia.gsi.gov.uk email suffix.

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 QIA e-mail address is entered.

<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>
<tbody>
<tr>
<td>Login name:</td>
<td>Jane Smith</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full name:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-mail:</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telephone:</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

**Please ignore the Organisation Details of this User Administration page.**

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.

**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>QIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider Gateway</td>
<td>PG QIA User Approver AND/OR PG QIA ReadOnly User</td>
</tr>
<tr>
<td>Document Exchange</td>
<td>DocX QIA User Approver AND/OR DocX QIA ReadOnly User</td>
</tr>
</tbody>
</table>

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

![Assigned 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.

![Assigned 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 Smith001</td>
</tr>
<tr>
<td>E-mail:</td>
<td><a href="mailto:jane.smith@qia.org.uk">jane.smith@qia.org.uk</a></td>
</tr>
<tr>
<td>Telephone:</td>
<td>02476 111 222</td>
</tr>
</tbody>
</table>

**Organisation Details:**
- Regional LSC: 
- National LSC: 
- UPIN: 
- Broker: 
- Partner: 
- CfE: 

**Role Details:**

<table>
<thead>
<tr>
<th>Application</th>
<th>Assigned Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Exchange</td>
<td>DocX QIA ReadOnly User</td>
</tr>
<tr>
<td>Provider Gateway</td>
<td>PG QIA 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.
QIA USER-APPROVERS SHOULD NOT USE THIS OPTION

- 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

Please use Reference Card One for setting up a new QIA User or use Reference Card Three to amend an existing user account.
Updating Existing Provider Gateway Accounts

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

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

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

QIA User-Approvers can reset passwords for QIA 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.

KEY ENTRY: It is extremely important that a valid QIA 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 QIA 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.
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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</table>

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

Then, assign roles in the Document Exchange and Learner Achievement Tracker applications, as necessary, but do not save the details yet.

Before completing the registration process, please review the ‘User Account Details’ page to ensure all of the information that has been entered 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.