



HE Gateway

User Guide for Universities and Colleges

Version 0.1

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Purpose of the *HE Gateway User Guide*

The purpose of the *HE Gateway User Guide* is to introduce staff of Higher Education Institutions (HEIs) to the HE Gateway.

It outlines basic processes and procedures to follow when using the HE Gateway, the functions available to you, help resources and general best practice rules.

It assumes that users are familiar with the browser application Microsoft Internet Explorer.

What is the HE Gateway?

The Student Loans Company (SLC) provides administration services to HEIs in support of student funding. The HE Gateway is a secure website that has been developed to facilitate HE online services.

The HE Gateway

Section

1

How to access the HE Gateway

Logging in


The HE Gateway is accessed through a web browser, such as Microsoft Internet Explorer. You access the Gateway through the HE Services website: <http://www.heinfo.slc.co.uk>.




Add this address to your Favorites in Internet Explorer so that you can find it again easily. Select Favorites / Add to Favorites.

Your login, initial password and secret answer will have been provided to you by your HEI User Administrator. To log in:

1. Enter the web address. Then select the HE Services Portal link. You will then be directed to the **Login** screen.

2. At **Enter Username**, enter your username and click .

3. Enter your password and the answer to your secret question. Your responses display as asterisks. Note that both your password and answer are case sensitive.
4. Click . You are now logged in to the HE Gateway.

Incorrect login

If you enter your username, password or the answer to the question incorrectly, you will be prompted to re-enter your login details.

Login

Enter Username (or ART ID)

The login details you have provided are incorrect, please try again


[Why am I being asked to sign in?](#)

[Having problems signing in?](#)

After three unsuccessful attempts you will be locked out of the system. Contact the member of staff at your HEI, responsible for User Administrator, for assistance.

First-time login

To ensure security, when you first log in to the system you will be required to enter a new password and choose a new secret question and answer.

1. After you have entered your username and clicked , the following screen will appear:

Login

You are required to change your password. Passwords must be a minimum of 8 characters long and a maximum of 16, and are subject to a number of [format restrictions](#), including being [case sensitive](#).

Enter your current password

Enter your new password (note restrictions above)

Confirm your new password

[Having problems signing in?](#)

2. Enter the password given to you by your User Administrator.

NOTE

Passwords are case-sensitive, must be between 8 and 16 characters in length and must contain at least one alphanumeric character. They are also blocked from containing easily guessed words and sequences such as your username or password1.

3. Enter your new proposed password and confirm it:

Login

You must now enter the initial secret answer provided to you and choose a new [Secret Question and Answer](#). Secret answers must be between 4 and 16 characters in length, and are [case sensitive](#).

Enter your initial secret answer

What was the surname of your childhood hero?

What was the name of the place you first met your partner?

What was the surname of your favourite teacher?

What is your most memorable place, but not where you were born or live?


What is the surname of a memorable person who isn't a relation or partner?

What is your favourite musical instrument?

Enter your new secret answer (note restrictions above)

Confirm your new secret answer

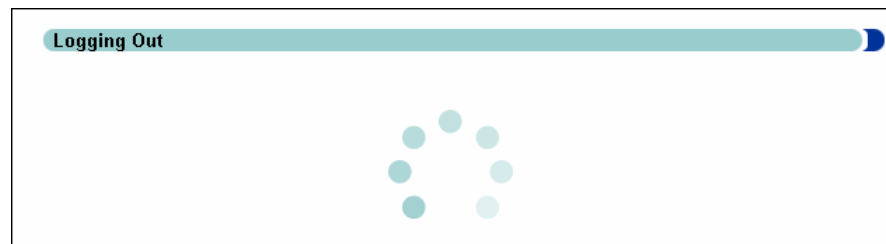
[Having problems signing in?](#)

4. Enter the secret answer given to you by your User Administrator. Then, choose a new secret question by checking the relevant radio button.
5. Enter and confirm your new secret answer.
6. Click on the  button to complete your initial login.

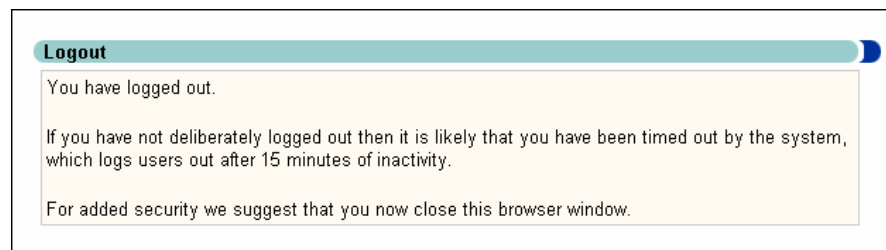
Logging out

You should always log out of the system when you are finished, to prevent unauthorised use of your login ID.

To close down, click **Logout** on the top-right of the screen. The **Logging Out** screen displays while the system completes the process. Do not close your browser at this point.



A confirmation message displays when the log out is complete.



For security purposes, you should now close your browser. Note that after 15 minutes of inactivity, the system will log you out automatically.

Security

HEIs are required to be vigilant about logins and passwords. If someone leaves an HEI, it is essential that the User Administrator expires their login on the system, to ensure the security of the HE Gateway. To find out more about expiring logins, please see Expiring user accounts on page 22.

Technical specifications

To use the HE Gateway and Bursary portal at an optimum level, the required technical specifications are:

- 100Mbps network connection
- Pentium 4 PC with a 60Gb hard drive and at least 256Mb memory
- Windows 2000/XP with Internet Explorer version 6
- 1025 x 768 screen resolution.

Section

2

System Roles

Bursary User Roles

Users of the Bursary Portal have 'roles' associated with their logins. These roles determine their level of access to the system: the options they see on screen and the actions they can perform. Staff can be assigned more than one role.

HEI User	This role must be assigned to all HEI users. It enables basic functionality, such as viewing pages correctly.
HES User Administrator	HEI users who will facilitate user maintenance functions within their own HEI User Base. This includes setting up new users, allocating roles and administration such as resetting passwords. It is important that you have more than one user with this roll, to cover holidays etc.
HEI HEBSS Administrator	HEI users who will be able to maintain/view the HEBSS/WBS Profile and Award information, including setting up new Payment Profiles and creating and activating Awards.
HEI HEBSS Approver	HEI users with full access to Student List functions, who can approve award sets and cancel, reinstate and override payments.
HEI HEBSS Assessor	HEI users with full access to Student List functions, who can cancel, reinstate and override payments. They cannot approve award sets.
HEI HEBSS Advisor	HEI users with full access to some Student List functions and read-only access to others.

Which system roles does my HEI need?

To operate HEBSS/ WBS, your HEI must contain at least one of each HEI role. Each person can be allocated more than one role, and each person **must** be assigned the role HEI User. You may require more than one Approver, as if an Approver is the last person to amend a student's entitlements, they cannot approve these entitlements. Alternatively, if you only have one Approver, then an Assessor must make these types of amendments.

System role keys

Throughout this user guide you will see keys indicating which system roles can access different parts of the HE Gateway and HEBSS/ WBS.

**Full access**

User Administrator
Administrator
Approver
Assessor

Read access

Advisor

If you see the above key at the beginning of a section, this means that the HES **User Administrator**, the HEI HEBSS **Administrator**, the HEI HEBSS **Approver** and the HEI HEBSS **Assessor** have full access to functionality within that section, while the HEI HEBSS **Advisor** has read access.

If the key is at the beginning of a section, it relates to all functions within that section. The *Using Student List Functions* section has a key beside each of the pages described, as different levels of access apply to different functions. Sections outlining functionality for all users, or general information, are identified with this key:



Course Database User Roles

Users of the HE Course Database service have 'roles' associated with their logins. These roles determine the options they see on screen and the actions they can perform. Staff can be assigned more than one role.

HEI User	This role must be assigned to all HEI users. It enables basic functionality, such as viewing pages correctly.
HEI Course Advisor	HEI users who can access the course information to deal with general enquires, on a read only basis.
HEI Course Administrator	This role is assigned to Users who will be able to view and maintain the Institute Profiles and course information.
HEI User Administrator	This role is assigned to HEI users who will facilitate user maintenance functions, such as resetting passwords.
Web Service User	This role is assigned to HEI users who will be able to view and maintain the Institute Profile and course information via the web service

Which system roles does my HEI need?

Each person using the Gateway **must** be assigned the role HEI User. Other roles should be assigned depending on the needs of the user.

Section

3

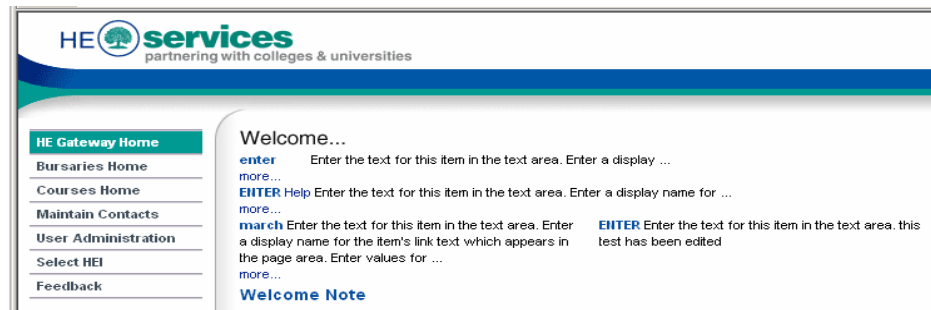
Using the HE Gateway

The HE Gateway Home page

The HE Gateway Home page provides you with links to current service options.



All roles




The options you can see will depend on your role in the system. See System Roles on pages 9 and 10 for more information.

The service options display in the panel on the left, and include:



Bursary Home	Accesses the Bursary & Scholarship Scheme Home page.
Courses Home	Accesses the HE Course Database service Home page.
Maintain Contacts	This option is used to view and update the list of contacts for HEIs. See Maintaining HEI Contacts on page 15.
User Administration	This section allows User Administrators to administer different users. See Administering System Users on page 17.
Select HEI	Use this option to select an HEI to administer, if you have access to more than one HEI. See Selecting an HEI on page 13.

News and other information items appear in the message area in the centre of the screen.

The [Back to Top](#)  link at the bottom right returns you quickly to the top of the screen without having to scroll.

A [Logout](#) link at the top right of the screen allows you to log out from anywhere in the system.



Since the HE Gateway is an application rather than simple web pages, do not use the browser's back and forward buttons  Back  to move through the screens. You are likely to get unexpected results. Use system navigation only – that is, on-screen buttons and menus.

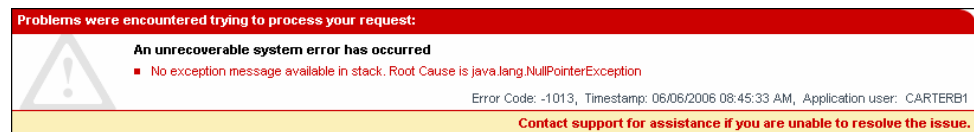
Error messages

The system will display error messages at the top of the screen. For example, the system may have detected a validation issue, such as a mandatory field that has not been entered, or incorrectly formatted data, as shown below:



In these cases, you can correct the error and continue.



If there is a problem with the system, the error message will be more technical, for example:



Contact the Business Services Helpdesk for assistance (see Telephone or email assistance below).

Getting help

Online help

The system includes an online help facility. Click on  to open help for the current screen in a separate browser window. Use the scroll bar to move through the help text. You can resize the window if you wish. Click on  to close help.

Telephone or email assistance

Business Services Helpdesk (for HEIs)

If you have problems operating the HE Gateway, please call the Business Services Helpdesk on 0845 702 3316 or email bursary@slc.co.uk for Bursary enquires or HEI_data@slc.co.uk for Course Database enquires. The Helpdesk is available from 9am – 5.30pm, Monday to Friday.

Section

4

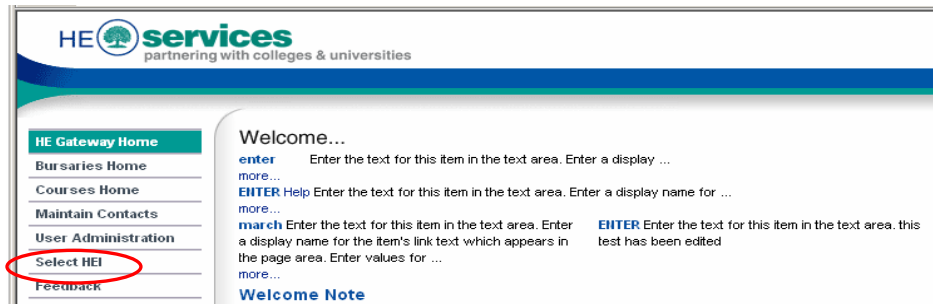
Selecting an HEI

If you only have access to one HEI, it will automatically be selected when you login to the HE Gateway. If you click on the Select HEI menu item, it will display the message *"Your HEI has been determined. You are not permitted to choose another HEI."*

If you have access to more than one HEI, you must select which HEI you want to administer before using the HE Gateway. You can only administer one HEI at a time. To do this:



All roles



1. On **Select HEI** from the HE Gateway or HEBSS Home pages. The **Selected HEI** screen displays.

If you have already been working on an HEI, the system displays the name of the HEI.

2. Select **Change**.

3. Enter your search using the **HEI Code** or **Institution Name**. You can use the wildcard '%' in **Institution Name**, though you must also use a minimum of three letters. You may use two wildcards - for example, %York% will pick up those institutions (that you have access to) that contain York, whereas York% will pick up those that start with York. If you are using the **HEI code**, you cannot use wildcards - the code must be an exact match.

NOTE

You cannot submit a blank search – you must enter either an HEI code or an institution name. Similarly, you cannot use the wildcard alone – you must also enter a character combination.

4. Click **Next**. The institutions matching your search display in **Search Results**. If there is only one institution matching your search it will automatically display.
5. Click on the entry in **HEI Name** to select the institution. If the institution is not listed, click on **Back** to return to the **Select HEI** screen and search again.

Section

5



All roles

Maintaining HEI Contacts

The system holds a list of contacts within HEIs that use the services. Each contact is assigned one or more contact roles. If the Student Loans Company needs to get in touch with an HEI to deal with an issue or resolve a query, they can use this list to identify the most appropriate person.

Please ensure your HEI keeps its contacts updated. The email addresses provided in the contact screen will be used when system generated emails are issued to users.

When you make changes, please send a copy of the changes through to support_services@slc.co.uk, so SLC can update their database.

Adding contacts

1. To add a new contact, click on Maintain Contacts from the HE Gateway Home page. The **Maintain Contacts** screen displays the Contact List.

HE services
partnering with colleges & universities

You are administering BRUI BRUIEL UNIVERSITY

Maintain Contacts

Bursaries Courses Other Contacts

Title	Surname	Forenames	Job Title / Department	Tel / HEI Office	Ext	Email	Roles	Edit
Miss	FAIRCLOUGH	CAROLE	ADMINISTRATIVE OFFICER	01895 266312			Course Contact	

[Add New Contact](#)

Add new contact

2. Click **Add New Contact**. The Contact List now displays a blank record underneath any existing records.

HE services
partnering with colleges & universities

You are administering BRUI BRUIEL UNIVERSITY

Maintain Contact Details

Contact Details

Title

Forenames

Surname

Job Title

Department

HEI Office

Tel

Ext

Email

Bursaries Courses Other Contacts

Contact Role	Assign
Award Approval Queries	<input type="checkbox"/>
Financial Queries	<input type="checkbox"/>
General Queries	<input type="checkbox"/>
Student Referrals	<input type="checkbox"/>
System User Account Queries	<input type="checkbox"/>
Technical Queries	<input type="checkbox"/>

[Back](#) [Delete Record](#) [Save Changes](#)

3. Complete the relevant fields.
4. Click **Save Changes**.

Editing contacts

To edit contact information, click Maintain Contacts from the HE Gateway Home page.

The screenshot shows the 'HE services' logo at the top left. Below it is a navigation menu with 'Maintain Contacts' highlighted. The main content area is titled 'Maintain Contacts' and shows a 'Contact List' table. The table has columns for Title, Surname, Forenames, Job Title / Department, Tel / HEI Office, Ext, Email, Roles, and Edit. A row is visible for Miss FAIRCLOUGH CAROLE, with Job Title 'ADMINISTRATIVE OFFICER' and Tel '01895 266312'. A yellow box labeled 'Edit' points to the 'Edit' icon in the 'Edit' column of this row.

When you have finished editing, click **Save Changes**.

Deleting contacts

1. To delete a contact, click Maintain Contacts from the HE Gateway Home page.

The screenshot shows the 'HE services' logo and navigation menu. The main content area is titled 'Maintain Contact Details' and shows a form for editing contact information. The form has fields for Title, Forenames, Surname, Job Title, Department, HEI Office, Tel, Ext, and Email. Below the form is a table with columns for 'Bursaries', 'Courses', and 'Other Contacts'. A yellow box labeled 'Delete' points to the 'Delete Record' button at the bottom of the page.

2. Click **Delete** below the contact you wish to delete.

Section

6

Administering System Users

The HE Gateway includes a facility to create and maintain user accounts. Accounts are created using a defined structure of a User Base, then User Groups and User Roles.



Full access
User Administrator

User Base

A user base is a collection of users. For HEIs, there is one user base within the Gateway: HEIs.

User Group

A user group is an organisational group with which a user is associated. The user group determines the customer records a user can process.

For HEI users, this will be the name of their HEI (and any associated HEIs where applicable).

User Role

A user role is the level of access a user has within a system. A user can be assigned a number of roles, depending on the level of access and responsibility they are to have. See System Roles on page 9 and 10 for more information.

Using the User Administration function

To begin administrating users, click on **User Administration** from the HE Gateway Home page.

HE services
partnering with colleges & universities

HE Gateway Home
Bursaries Home
Courses Home
Maintain Contacts
User Administration
SLC Administration
Select HEI
Edit

Welcome...
Welcome to the HE Gateway.
The HE Gateway is a secure site that provides you with access to the Bursary and Scholarship Scheme, giving your HEI an easy way to administer bursary and scholarship functions.
Please note the following communication formats available to you to contact SLC with bursary queries:
0845 702 3316
This is the telephone number for the Helpdesk Services Team within the Business Services Department. You should call this team with all general bursary queries and to report any problems you are experiencing with the Portal.

If you have access to more than one User Group, the **User Group** page will appear. From this page, you can click on a **User Group** to show the **Users List**.

If you have access to a single user group, or if you have chosen a User Group as per the paragraph above, the **Users List** will appear.

The screenshot shows the 'Users List' interface. On the left, three yellow boxes with arrows point to specific fields: 'User Base' points to the 'User Base' field, 'User Group' points to the 'User Group' field, and 'Usernames' points to the 'Username' column of the user list table. The table contains the following data:

Service Group	N/A		
User Base	HEIs		
User Group	ASKHAM BRYAN COLLEGE		
Username	Surname	Forename(s)	Expired
ADAMSJA	ADAMS	JACQUI	<input type="checkbox"/>
ADAMSJC	ADAMS	JACQUI	<input type="checkbox"/>
ADAMSP	ADAMS	PAUL	<input type="checkbox"/>
ADAMSPA	ADAMS	PAUL	<input type="checkbox"/>
ADAMST	ADAMS	THOMAS	<input type="checkbox"/>
ADAMSTH	ADAMS	THOMAS	<input type="checkbox"/>
ANDERSA	ANDERSON	ALAN	<input type="checkbox"/>

The **Users List** displays a list of users within the User Group. From this page you can create new users and administer existing users.

Creating new users

1. Click on **User Administration** from the HE Gateway Home page, and choose **Create New User**, located on the bottom-right of the screen, from the page that displays. The **Profile for New User** page will appear.

The screenshot shows the 'Profile for New User' form. A yellow box labeled 'Authorisation and Authentication' has an arrow pointing to the 'Authorisation and Authentication' button at the bottom right of the form. The form fields are:

- Forename(s):
- Surname:
- Contact No:
- Email address:
- Expired:

2. Enter the new user's details: **Forename(s)**, **Surname**, **Contact No** and **Email address**. These are all mandatory fields.
3. Click **Authorisation and Authentication**. The **Group Memberships** screen will display.

The screenshot shows the 'Group Memberships for New User' form. A yellow box labeled 'Add Group' has an arrow pointing to the 'Add Group' button. Another yellow box labeled 'Continue' has an arrow pointing to the 'Continue' button. The form fields are:

- Group:
- Start Date/Time: 15/Jun/2006
- End Date/Time:

4. Choose from the drop down box a **Group** that you wish to assign to the user.
5. Click **Add Group**.
6. If there is more than one group available, you may repeat steps 4 and 5 until you have added all the groups you wish to assign to the new user.
7. Choose **Continue**. The **Role Memberships** screen will display.

Role Memberships for New User			Help
Role	Start Date/Time	End Date/Time	
HEI User	15/Jun/2006	Add Role	
			Back/Continue

Add Role →

8. Choose from the drop down box a **Role** that you wish to assign to the user. See System Roles on page 9 for more information on Roles.
9. Click **Add Role**.



You must assign the role HEI User to all users.

10. Repeat steps 8 and 9 until you have added all the roles you wish to assign.
11. Choose **Continue**. The **Credentials for New User** screen will display.

Credentials for New User			Help
Method	Set/Re-set	Lock	
Single Sign On	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
			Back/Continue

12. Choose **Continue** (this screen is to set and re-set login details, which is not necessary when creating a new user).
13. The **Confirm Details** screen displays, showing user details including memberships and login details. **You must take a screenshot of this page, or print it, so that you can advise the user of their new login details. This information will not be provided to you in any other way.**

Confirm Details for TAYLORLN			Help
Service Group	N/A		
User Base	HEIs		
User	TAYLORLN		
Forename	LYNLEY		
Surname	TAYLOR		
Contact Number	0131 5555 5555		
Email	lynley@hei.co.uk		
Expired	<input type="checkbox"/>		
Group Memberships			Help
	Start Date	End Date	
ASKHAM BRYAN COLLEGE	15/Jun/2006		
Role Memberships			Help
	Start Date	End Date	
HEI User	15/Jun/2006		
Authentication Methods			Help
	Set/Re-set	Lock	
Single Sign On	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Authentication Details			Help
Password	FXCSEU67		
Secret Answer	TERSXM57		
			Back Submit

Submit →

- Click **Submit**. The new user has now been created. You are now back at the **User Administration** screen.

Administering existing users

You can amend a user's profile (name and contact details), cause a user's account to expire, amend a user's user roles and groups and reset, cancel or activate login details.

From the **Users List** screen, scroll through and choose the person that you wish to administer by clicking their Username.

NOTE

If you only have access to a single User Group, the Users List will appear when you click User Administration from the HE Gateway Home page. If you have access to more than one User Group, you must choose one for the Users List to appear.

Their **Profile** screen will display.

Profile for TAYLORLN		Help
Forename(s)	LYNLEY	
Surname	TAYLOR	
Contact No	0131 5555 5555	
Email address	lynley@hei.co.uk	
Expired	<input type="checkbox"/>	
		Back Expire Account Authorisation and Authentication

Amending user name and contact details

From this screen, you can now amend the user's forename, surname, contact phone number and email address by changing the fields in the form. Note that amending the names will not result in a regenerated username for that user.



If the Expired checkbox is ticked, you cannot amend any user details.

Amending roles and login details

Use this function to amend a user's user roles and groups and reset, cancel or activate login details.

- From the Profile screen, choose **Authorisation and Authentication**. The **Group Memberships** screen will display.

Group Memberships for: TAYLORLN			Help
Group	Start Date/Time	End Date/Time	
ASKHAM BRYAN COLLEGE	15/Jun/2006		Expire
ASKHAM BRYAN COLLEGE	15/Jun/2006		Add Group
			Back/Continue

- If you want to amend group membership, choose from the drop down box a **Group** that you wish to add or delete for the user.
- Click **Add Group** to add, or **Expire** to delete.

4. Repeat steps 2 and 3 until you have added or deleted all the groups you wish to amend for the user.
5. Choose **Continue**. The **Role Memberships** screen will display.

Role Memberships for TAYLORLN			Help
Role	Start Date/Time	End Date/Time	
HEI User	15/Jun/2006	Expire	
HEI HEBSS Advisor	15/Jun/2006	Add Role	
			Back Continue

6. If you want to amend roles for the user, choose from the drop down box a **Role** that you wish to add or delete. See System Roles on page 9 for more information on roles.
7. Click **Add Role** to add, or **Expire** to delete. Repeat steps 6 and 7 until you have added or deleted all the roles you wish to amend.
8. Choose **Continue**. The **Credentials for New User** screen displays.

Credentials for TAYLORLN			Help
Method	Set/Re-set	Lock	
Single Sign On	<input type="checkbox"/>	<input type="checkbox"/>	
			Back Continue

9. If you wish to reset login details, tick the Set/Re-set box. If the user has locked their account, the **Lock** box will be checked.
10. Choose **Continue**. The Confirm Details screen will display, showing user details such as memberships and login information. **You must take a screenshot of this page, or print it, so that you can advise the user of their new login details.**

Confirm Details for TAYLORLN			Help
Service Group	N/A		
User Base	HEIs		
User	TAYLORLN		
Forename	LYNLEY		
Surname	TAYLOR		
Contact Number	0131 5555 5555		
Email	lynley@hei.co.uk		
Expired	<input type="checkbox"/>		
Group Memberships			Help
	Start Date	End Date	
ASKHAM BRYAN COLLEGE	15/Jun/2006		
Role Memberships			Help
	Start Date	End Date	
HEI HEBSS Advisor	15/Jun/2006		
HEI User	15/Jun/2006		
Authentication Methods			Help
	Set/Re-set	Lock	
Single Sign On	<input type="checkbox"/>	<input type="checkbox"/>	
			Back Submit

Submit

- Click **Submit**. The user details have been amended. You are now back at the **User Administration** screen.

Expiring user accounts

Use this function to cause a user's account to expire, if it is no longer required – for example, if they leave the HEI or their role within the HEI changes. Note that once a user's account is expired, their records cannot be amended or reinstated.

From the Users List, click on a username to display the **Profile** screen. Choose **Expire Account**. The **Confirm Details** screen will display.

Confirm Details for TAYLORLN		Help
This user is being expired.		
Service Group	N/A	
User Base	HEIs	
User	TAYLORLN	
Forename	LYNLEY	
Surname	TAYLOR	
Contact Number	0131 5555 5555	
Email	lynley@hei.co.uk	
Expired	<input checked="" type="checkbox"/>	
Group Memberships		
	Start Date	End Date
Role Memberships		
	Start Date	End Date
Authentication Methods		
	Set/Re-set	Lock
		Back Submit

Choose **Submit**. The user's details have now been expired. You are now back at the User Administration screen.

Resetting user password

If a user enters their username, password or secret answer incorrectly three times their access will be locked. The HEI User Administrator can unlock the user access and generate a new password via this screen.

HE services
partnering with colleges & universities

Credentials for GALLAGH		Help
Method	Single Sign On	
	Set/Re-set	<input checked="" type="checkbox"/>
	Lock	<input type="checkbox"/>
		Back/Continue

bulk upload

Reset Password