UNIT-e

Handbook - Technical
Document version: 6.6
Issue date: May 2025

All Markets

Managing UNIT-e Online Services



For documentation issues email: documentation@unit-e.uk

Education Software Solutions Ltd.

Registered office:
11 Kingsley Lodge, 13 New Cavendish Street, London. W1G 9UG.
Registered in England no. 12595779.

www.educationsoftwaresolutions.co.uk

© 2021 Education Software Solutions Ltd. All rights reserved.
No part of this document may be reproduced, photocopied, stored on a retrieval system, translated or transmitted without the express written consent of ESS Ltd.

Trademark Notice
All company and product names may be trademarks of their respective companies.

4.61 enhancements

The following enhancements are provided in this release:

- *Online Services web config user group (os_online)* (see page 16)

  Select, Insert and Update permissions for the Employer class have been added for the os_online user group.



Enhancements introduced in previous releases are listed in *Appendix A: Previous enhancements* (see page 282).

Contents



If you are unable to find the information you require, the search facility in Adobe Acrobat enables you to search individual PDFs or the entire UNIT-e documentation catalogue. Refer to the *About UNIT-e documentation* section in the *Working with UNIT-e* handbook (WWU.pdf) for further details.

4.61 enhancements 3

Chapter 1: About UNIT-e Online Services 11

Chapter 2: Setting up your UNIT-e Online Services software 13

Licence requirements 14
Defining user access rights 15
The Online Services web config user 15
Classes 16
Menus and menu items 20
Lookups 22
Defining settings 23
Settings for Online Services 23
Settings for Student Merging 41
Settings for online card payments 46
Settings for document uploads 46
Settings for QR codes functionality 48
Defining personal data properties for strangers 50
Reports 52
Amending the locked account reports 57
IICL methods for Task Scheduler 59
Network credentials for Pay360 web services 60
Access to UNIT-e Messaging 61
Setting up AFD Postcode Internet functionality in Online Services 62
AFD Postcode Internet licence requirements 63
AFD Postcode Internet lookups 63
AFD Postcode Internet settings 63
AFD Postcode Internet installation 65
Modifying the registration web page for AFD Postcode Internet 66
Retrieving Adult Education Budget (AEB) data 66
Creating questions 68
Enabling document uploads to support answers 69
Defining the 'Upload' Module Question Type lookup ... 70
Enabling the upload functionality for individual modules 70

Using File Uploader with a Blob to upload documents 71
Using the SharePoint Online upload service 74

Chapter 3: Configuring web pages 77

A note about browsers 79
Web page file types 80
Changing the appearance of the web pages 81
Images 81
Style 82
Textual content 82
Changing the structure of web pages 83
Making web page fields mandatory 84
Example from register.master.cs 84
Adding and removing fields 86
Example from contact.master.cs 86
Maintaining case style 88
Dealing with the New Visitor Register check boxes 89
Deciding how to record student qualifications 90
Editing email text 91
Amending the signature 91
Amending body text 92
Customising enrolment fees 93
Creating student events 94
The ImportXML function 95
ImportXML prerequisites 95
Using the ImportXML function 96

Chapter 4: Data requirements for Online Services 97

Setting up module data 99
Showing departments on the Course directory page .. 99
Flagging modules to appear on the web site 100
Associating modules with departments 102
Specifying places available on a module 103
Displaying module fees on the web site 104
Flagging module options to appear on the web site . 110
Dealing with student data 111
Understanding the Stranger check-box 111
Storing student addresses 112
Storing student email addresses 112
Links between enquiries, applications & enrolments 113
Using the Qualification Online Entry check-box 113
Flagging brochures to appear online 114

Chapter 5: Creating students from strangers 115

The Online Stranger Mapping process 117
Online Stranger Mapping prerequisites 118
Amending Online Stranger Mapping reports 119
Amending the Stranger pick-list report 119
Amending the Student pick list report 121
Preserving mandatory properties in reports 121

Navigating the Online Stranger Mapping form 123
Viewing stranger and student data 124
Temporarily changing the search criteria 125
Manually converting strangers to students 127
Converting strangers to new students using Online Stranger Mapping 128
Merging stranger and Student records 130
Merging records with student authorisation 130
Merging records without student authorisation 133
Rules governing the merging process 133
Dealing with multiple stranger matches to a student ... 135
None of the strangers match the student 135
One or more of the strangers matches the student .. 135
One of the strangers matches a free search result ... 136
The Online Stranger Transfer process 137
Prerequisites 137
How the Online Stranger Transfer Service works 141
Dealing with failed transfers 142

Chapter 6: Dealing with student online accounts 145

Bulk creating online accounts for existing students 146
Creating online accounts for existing students with enrolments 146
Varying the selection of students 148
Creating online accounts for individual students 149
Creating online membership accounts using Microsoft Task Scheduler 152
Reports used by the process 152
Using the main student email address 153
Using alternative student email addresses 155
Dealing with locked online accounts 156
Notification reports 156
Unlocking online accounts 157
Deleting online accounts 158
Deleting online accounts via Online Services Account Manager 158
Deleting online accounts via Online Stranger Mapping 159
Associating an online account with a UNIT-e user 161

Chapter 7: Using Referee Manager 163

Retrieving referee details 164

Chapter 8: Dealing with online Extended Applications 165

Curriculum structure - Extended Applications modules . 167
Using routes in Online Services 168
Reports and settings used by Extended Applications in Online Services 169
Reports for Extended Applications 169
Settings for Extended Applications 169

The Extended Application process 170
The Extended Applications data structure 172

Chapter 9: QR code generation 175
QR code generation prerequisites 176
User group access..... 176
QR code settings 176
QR code lookups..... 177
QR code reports 177
IICL method - GenerateQuickEnrolmentEmails 178
UNIT-e Windows Messaging Services 178
QR code reader 178
Generating emails with QR codes..... 179
Enrolling students with QR codes 181

Chapter 10: About card payments & End of Day files 185

Chapter 11: Using Online Services 187
The tabs available in Online Services..... 189
Searching for information 191
Using the search field..... 191
Using Advanced Search 192
Registering as a user 193
Recording personal details..... 193
Using the Postcode Lookup functionality 195
About Student periodic records (applies to English FE sites only) 195
Logging into and out of Online Services..... 196
Logging into Online Services..... 196
Logging out of Online Services..... 197
Dealing with email addresses and passwords 198
Forgotten passwords..... 198
Changing passwords 199
Changing contact or login email addresses..... 200
Making general enquiries..... 203
Requesting brochures 204
Enquiring about courses..... 205
Applying for courses 207
Enrolling on courses..... 208
Completing requests 209
Selecting course options..... 213
Changing student details 215
Paying for enrolments online 216

Chapter 12: Screen and field information 217
Other applications..... 219
Welcome to Online Services..... 220
Login 221
New visitor registration 222
Advanced course search..... 223

Forgotten password? 224
Courses home 225
Course directory 226
Course Search Results 227
Brochure search 238
Brochure search results 239
General enquiry 240
Course fee policy 241
Pay balance online 242
Online Payments (E-Commerce payment options) 244
Online Payments (Card details) 244
Online Payments (Address confirmation) 245
Payment Confirmation Page 246
Online Payments (Verified by Visa) 246
Choose an account 247
Your Wallet 247
Pay by CC Instalments 248
Catalogue 249
Funds 250
Summary 251
Personal details 253
Change login email 254
Change password 255
Contact details 256
Qualification details 257
Referees details 258
Course options 259
Request change 261
AFD Postcode Internet Settings 262
Online Services Account Manager 264
Learner Online Account tab 264
Associate Online Account 265
Online Stranger Mapping 266
Settings tab 269
Free Search tab 270
Pre-EOD tab 271
End of Day tab 271
Refunds tab 272
Touch Tone tab 272
Student Details 273
Pending Merged Students 275
Stranger Personal Details 276
Student Personal Details 276
Stranger Enrolments 277
Student Enrolments 277
Referee Manager 278
Student tab 278
Referee tab 279

Appendices 281
Appendix A: Previous enhancements 282
4.60 enhancements 282
4.59 enhancements 282
4.58 enhancements 283
Appendix B: Colours used in the style sheet 284
Appendix C: Web page files 286

Index 295

List of figures 299

Chapter 1:

About UNIT-e Online Services

UNIT-e Online Services provides you with a web site that your students and potential students can use to investigate the courses on offer at your institution. Using this software they can search for course details, make enquiries, apply for places on courses and enrol. They also have the option of paying their course fees online by credit card, a facility that's provided through the Pay360 payment service.



The provision of a card payment facility is covered in detail in the *Managing UNIT-e Card Payments & Refunds* handbook (MCP.pdf).

The benefits of using UNIT-e Online Services

- UNIT-e Online Services offers the ability to manage courses of all types, from those with a simple structure, such as evening classes, to those with more complex offering programmes.
- Online payments reduce administration costs.
- The software can be configured to your requirements, providing a web site that reflects the identify of your institution.
- Real-time access to your UNIT-e database provides you with the most up-to-date information.
- The online data transfer facility ensures that potentially duplicate records can be avoided; existing students enquiring online are easily identified.
- The software is compliant with the Equality Act 2010 and WCAG 2.0.

This handbook is designed for MIS Managers, providing setup and technical information. Procedures for web site installation are covered in the *Managing UNIT-e Online Services - Web Site Installation* handbook (MOSWSI.pdf). The following areas are covered:

- *Chapter 2: Setting up your UNIT-e Online Services software* (see page 13)
- *Chapter 3: Configuring web pages* (see page 77)
- *Chapter 4: Data requirements for Online Services* (see page 97)
- *Chapter 5: Creating students from strangers* (see page 115)
- *Chapter 6: Dealing with student online accounts* (see page 145)
- *Chapter 7: Using Referee Manager* (see page 163)
- *Chapter 8: Dealing with online Extended Applications* (see page 165)
- *Chapter 9: QR code generation* (see page 175)
- *Chapter 10: About card payments & End of Day files* (see page 185)
- *Chapter 11: Using Online Services* (see page 187)
- *Chapter 12: Screen and field information* (see page 217)

Chapter 2:

Setting up your UNIT-e Online Services software

The following elements must be set up before you can begin to use UNIT-e Online Services:

- *Licence requirements* (see page 14)
- *Defining user access rights* (see page 15)
- *Lookups* (see page 22)
- *Defining settings* (see page 23)
- *Defining personal data properties for strangers* (see page 50)
- *Reports* (see page 52)
- *IICL methods for Task Scheduler* (see page 59)
- *Network credentials for Pay360 web services* (see page 60)
- *Access to UNIT-e Messaging* (see page 61)
- *Setting up AFD Postcode Internet functionality in Online Services* (see page 62)
- *Creating questions* (see page 68)
- *Enabling document uploads to support answers* (see page 69)

Licence requirements

UNIT-e Online Services offers different levels of functionality, depending on the requirements of your institution. You therefore need at least one of the following licences in order to use it.

- **OSEQ** (Online Services Enquiries) - required for processing online enquiries.
- **OSAP** (Online Services Applications) - required for processing online applications.
- **OSEN** (Online Services Enrolments) - required for processing online enrolments.



If you want to offer online enquiries, applications and enrolments you must have all three of the above licences.

In addition you must have the following licences in order to operate background processes:

- **OSMA** (Online Services Manager Applications) - required to access manager applications.
- **RWSI** (Report Web Services Integration) - required to run the reports needed by the software.
- **OSEA** (Online Services Extended Applications) - required to run Extended Applications.

The following licences are required for optional Online Services functionality:

- **AFDW** - Web AFD Postcode (see page 63)
- **FMCI** - Finance Manager Credit Card Instalments (refer to the *Managing UNIT-e Card Payments & Refunds* handbook (MCP.pdf)
- **FMOR** - Online Services Refunds (refer to the *Managing UNIT-e Card Payments & Refunds* handbook (MCP.pdf)
- **FMSP** - Online Subsequent Payments (refer to the *Managing UNIT-e Card Payments & Refunds* handbook (MCP.pdf)
- **FMTT** - Finance Manager Touch Tone (refer to the *Managing UNIT-e Card Payments & Refunds* handbook (MCP.pdf)
- **OLSH** - Online Shop (refer to the *UNIT-e Online Shop* handbook (UOLS.pdf)
- **RWSW** - Report Web Services Writeback
- **SFOS** - Support Funds Online Services (refer to the *UNIT-e Support Funds* handbook (USF.pdf)



Contact the Support Team if you require further information regarding licensing problems or requirements.

Defining user access rights

- *The Online Services web config user* (see below)
- *Classes* (see page 16)
- *Menus and menu items* (see page 20)

The Online Services web config user

As students don't have direct access to your UNIT-e database, student access to Online Services is granted through the use of a web config user. This should be a user created specifically for Online Services (e.g. 'osuser') in UNIT-e Database Manager (Users) [UDMUS.exe], and that user should have access to the 'os_online' user group and also the 'hr_online' user group if you wish to provide staff access to the QR code functionality.



The **Username** should not be 'uniteadmin' or 'ess' for security reasons, and the **Password** must be a strong one.

As part of the Online Services web site installation process you must specify the web config user name as the **Username** in the **Application Settings**. When a student logs into Online Services using an email address and password, the web config user gives them access to the web pages.



Refer to the *Managing UNIT-e Online Services - Web Site Installation* handbook (MOSWSI.pdf) for further information about the web site installation process.

Classes

Access to classes is provided by two user groups:

- *Online Services web config user group (os_online)* (see below)
- *HR Online Services Web Config user (hr_online)* (see page 19)

- Additional class access is required by the user running the Online Stranger Transfer process. Refer to *The Online Stranger Transfer process - Class permissions* (see page 139) for further information.
- The user associated with the 'Windows Services user group' (winservices) is referenced by the **File Upload** service when documents are uploaded from the **Additional questions** page (see page 233).

Online Services web config user group (os_online)

The 'Online Services web config user' user group (os_online) enables you to grant class access to the web.config user. This user group has default access to the classes shown in Table 1.

The 'Module document' (moduledocument) class is provided for a specific customer requirement but is available to all customers. There is no default user group access.

Table 1: os_online user group class access rights

Class	Access type
Account code	Select, Insert, Update
Address	Select, Insert, Update
Agent	Select, Insert, Update
Agent application	Select, Insert, Update
Assessment	Select, Insert, Update
Attached document	Select, Insert, Update
Audit	Select, Insert, Update
Brochure	Select, Insert, Update
Catalogue	Select, Insert, Update
Concession mapping	Select, Insert, Update
Credit card	Select, Insert, Update
Credit card instalment invoice line	Select
Credit card instalment line	Select

Class	Access type
Credit card instalment plan	Select
Department	Select, Insert, Update
Direct debit invoice line	Select, Insert, Update
Direct debit line	Select, Insert, Update
Direct debit plan	Select, Insert, Update
Document	Select, Insert, Update
Employer	Select, Insert, Update
Enrolment	Select, Insert, Update
Enrolment event	Select, Insert, Update
Enrolment fee	Select, Insert, Update
Enrolment FES/SQA	Select, Insert, Update
Enrolment HEA	Select, Insert, Update
Enrolment HESA	Select, Insert, Update
Enrolment invoice line	Select, Insert, Update
Enrolment ISR/ILR	Select, Insert, Update
Enrolment periodic ILR	Select, Insert, Update
Enrolment WSR/LLWR	Select, Insert, Update
Experience HESA	Select, Insert, Update
Extended student application	Select, Insert, Update
Extended student application history	Select, Insert, Update
Fee	Select, Insert, Update
Fee concession	Select, Insert, Update
Gradeset grades	Select
Gradesets	Select
Hotlink	Select, Insert, Update
Hotlink upload	Select, Insert, Update
Institution	Select, Insert, Update
Invoice	Select, Insert, Update
Invoice line	Select, Insert, Update
Lookup valid values	Select, Insert, Update
Module	Select, Insert, Update
Module application	Select, Insert, Update
Module application event	Select, Insert, Update
Module custom	Select, Insert, Update

Class	Access type
Module event	Select, Insert, Update
Module fee	Select, Insert, Update
Module FES/SQA	Select, Insert, Update
Module HEA	Select, Insert, Update
Module HESA	Select, Insert, Update
Module ISR/ILR	Select, Insert, Update
Module question	Select, Insert, Update
Module question answer	Select, Insert, Update
Module question answer values	Select, Insert, Update
Module template	Select
Module WSR/LLWR	Select, Insert, Update
Offering	Select, Insert, Update
Online membership	Select, Insert, Update
Online membership audit	Select, Insert, Update
Online user data	Select, Insert, Update, Delete
Option	Select, Insert, Update
Person	Select, Insert, Update
Person address	Select, Insert, Update
Person invoice	Select, Insert, Update
Person message	Select, Insert, Update
Person message data	Select, Insert, Update
Person receipt	Select, Insert, Update
Person telephone	Select, Insert, Update
Personal details	Select, Insert, Update
Promotional voucher	Select, Insert, Update
Promotional voucher custom	Select, Insert, Update
Qualification	Select, Insert, Update
Receipt	Select, Insert, Update
Receipt line	Select, Insert, Update
Referee	Select, Insert, Update
Referee address	Select, Insert, Update
Referee telephone	Select, Insert, Update
Route	Select, Insert, Update
School	Select

Class	Access type
Section	Select
Setting	Select, Insert, Update
Setting key	Select, Insert, Update
Site	Select, Insert, Update
Student	Select, Insert, Update
Student application	Select, Insert, Update
Student application custom	Select, Insert, Update
Student application event	Select, Insert, Update
Student custom	Select, Insert, Update
Student enquiry	Select, Insert, Update
Student enquiry details	Select, Insert, Update
Student event	Select, Insert, Update
Student FES/SQA	Select, Insert, Update
Student HEA	Select, Insert, Update
Student HESA	Select, Insert, Update
Student ISR/ILR	Select, Insert, Update
Student periodic ILR	Select, Insert, Update
Student question	Select, Insert, Update
Student question answer	Select, Insert, Update
Student question answer values	Select, Insert, Update
Student visa application	Select, Insert, Update
Student WSR/LLWR	Select, Insert, Update
Sundry item	Select, Insert, Update
Telephone	Select, Insert, Update
Unit	Select, Insert, Update

HR Online Services Web Config user (hr_online)

The 'HR Online Services Web Config user' user group (hr_online) provides additional access for HR Online Services and QR codes functionality. This user group has default access to the classes shown in Table 2.



Refer to *QR code generation* (see page 175) for further information about the QR codes functionality.

Table 2: hr_online user group class access rights

Class	Access type
Address	Select, Insert, Update
Candidate	Select, Insert, Update
External appointment	Select, Insert, Update
Person	Select, Insert, Update
Person address	Select, Insert, Update
Person telephone	Select, Insert, Update
Personal details	Select, Insert, Update
Post question	Select
Post question answer	Select
Staff	Select, Insert, Update
Staff application	Select, Insert, Update
Staff application custom	Select, Insert, Update
Staff application event	Select, Insert, Update
Staff application event custom	Select, Insert, Update
Staff custom	Select, Insert, Update
Staff enquiry	Select, Insert, Update
Staff enquiry custom	Select, Insert, Update
Staff event	Select, Insert, Update
Staff event custom	Select, Insert, Update
Telephone	Select, Insert, Update
Vacancy	Select, Insert, Update

Menus and menu items

Members of staff need access to the following applications in order to process data from Online Services. Grant users access rights, as required, via UNIT-e Database Manager (Users) [UDMUS.exe]:

- Online Services
  - Answers Manager
  - Online Stranger Mapping
  - Questions Manager

- Referee Manager
- Online Services Account Manager
- Personal Learning Support Plan (PLSP)
    - ELS Assessor

Lookups

The following lookups are used in the Online Services web pages. These aren't specific to Online Services and it's likely that they already exist within your database.

- Country
- Disability
- Ethnicity
- First language
- Gender
- Nationality
- Source of student enquiry
- Title

The following lookups are used by the postcode lookup functionality (see page 195).

- Adult education budget (user-defined values)
- Adult education budget area (values provided)

Defining settings

Setting values are required to control the following areas of Online Services:

- *Settings for Online Services* (see below)
- *Settings for Student Merging* (see page 41)
- *Settings for online card payments* (see page 46)
- *Settings for document uploads* (see page 46)
- *Settings for QR codes functionality* (see page 48)

Settings for Online Services

- *Application|OSAP|Confirmation* (see below)
- *Application|OSEA* (see page 24)
- *Application|OSEN* (see page 25)
- *Application|OSEQ|Confirmation* (see page 28)
- *Application|OS* (see page 29)
- *Application|Finance|controlaccounts* (see page 40)

Application\OSAP\Confirmation

These keys control the format of the confirmation email sent to an online student who has made an application.

Figure 1: Settings - OSAP path



Path: Application\OSAP\Confirmation

Table 3: Settings - OSAP\Confor-mation

Setting\key	Notes
Application\OSAP\Confirmation\CC	Specify the email address to CC to (e.g. 'regis-tration@inst.ac.uk').

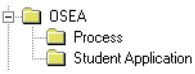
Setting\key	Notes
Application\OSAP\Confirmation\End Text	Specify the footer text to be included in the email (e.g. 'Yours faithfully, Student Services').
Application\OSAP\Confirmation\From	Specify the sender's email address (e.g. 'head.registration@inst.ac.uk').
Application\OSAP\Confirmation\Mail Format	Specify the format of the email as either 'html' or 'text'.
Application\OSAP\Confirmation\Send Mail	Indicate whether confirmation emails should be sent out or not. -1 = True (send) 0 = False (don't send)
Application\OSAP\Confirmation\Start Text	Specify the text for the email (e.g. 'Thank you for your application').
Application\OSAP\Confirmation\Subject	Specify the Subject of the email (e.g. 'Re. Your application').

Application\OSEA

These keys enable you to process Extended Applications via Online Services.

Refer to *Chapter 8: Dealing with online Extended Applications* (see page 165) for further information.

Figure 2: Settings - OSEA path



Paths: *Application*|*OSEA*|*Process* (see below)

Application|*OSEA*|*Student Application* (see page 25)

Application\OSEA\Process

Use this key to enable the use of Online Services Extended Applications.

Table 4: Settings - OESA\Process

Setting\key	Notes
Application\OSEA\Process\Enabled	Use this key to enable the use of Online Services Extended Applications. -1 = Enabled 0 (or null) = Not enabled

Application\OSEA\Student Application

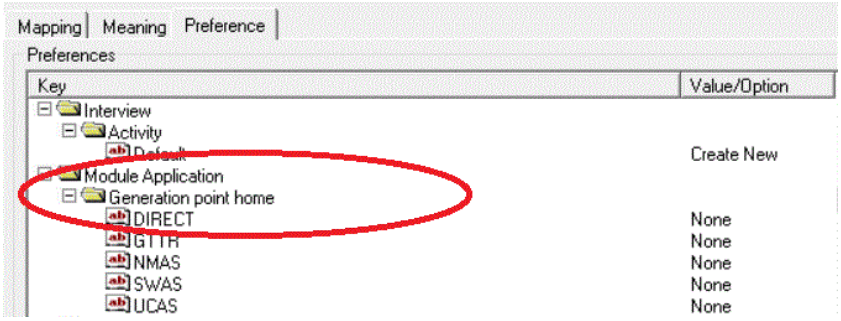
These keys define the agent and event type to be applied to the application.

Table 5: Settings - OSEA\Student Application

Setting\key	Notes
Application\OSEA\Student Application\Agent Institution	Specify the 'Agent institution' lookup value to be applied to Extended Applications (e.g. 'B16').
Application\OSEA\Student Application\Event Type	Specify the 'Student Event Type' lookup value to be applied to Extended Applications (e.g. 'ENTRY').

In addition to the setting keys within this section you should be aware of the 'Module Application\Generation point home\DIRECT' Preference setting key (Figure 3), which controls whether your online Extended Applications are generated using the 'on offer' or 'on entry' functionality (see page 161).

Figure 3: Module Application\Generation point home\DIRECT setting key



The options for this setting, which is accessed via the **Tools | Extended Applications** menu option in UNIT-e Data Manager (Settings) [UDMSE.exe], are:

(none) - this applies the 'on offer' setting by default.

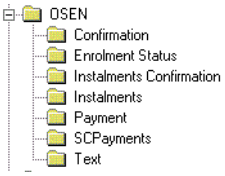
offer - this applies the 'on offer' option.

entry - this applies the 'on entry' option.

Application\OSEN

These keys enable the processing of Online Services enrolments.

Figure 4: Settings - OSEN path



Paths: *Application|OSEN|Confirmation* (see page 26)

Application|OSEN|Enrolment Status (see page 26)

Application|OSEN|Instalments Confirmation (see page 27)

Application|OSEN|Instalments (see page 27)

Application|OSEN|Payment (see page 27)

Application|OSEN|SCPayments (see page 28)

Application|OSEN|Text (see page 28)

Application\OSEN\Confirmation

These keys control the format of the confirmation email sent to an online student who has made an enrolment.

Table 6: Settings - OSEN\Confor-mation

Setting\key	Notes
Application\OSEN\Confirmation\CC	Specify the email address to CC to (e.g. 'regis-tration@inst.ac.uk').
Application\OSEN\Confirmation\End Text	Specify the footer text to be included in the email (e.g. 'Yours faithfully, Student Services').
Application\OSEN\Confirmation\From	Specify the sender's email address (e.g. 'head.registration@inst.ac.uk').
Application\OSEN\Confirmation\Mail Format	Specify the format of the email as either 'html' or 'text'.
Application\OSEN\Confirmation\Send Mail	Indicate whether confirmation emails should be sent out or not. -1 = True (send) 0 = False (don't send)
Application\OSEN\Confirmation\Start Text	Specify the text for the email (e.g. 'Thank you for choosing to enrol with us').
Application\OSEN\Confirmation\Subject	Specify the Subject of the email (e.g. 'Re. Your enrolment').

Application\OSEN\Enrolment Status

These keys generate an enrolment status when an enrolment is created. Different enrolment statuses can be created to accommodate differing situations (e.g. there may be no course fees, or the student may elect to pay now or later).

Table 7: Settings - OSEN\Enrol-ment Status

Setting\key	Notes
Application\OSEN\Enrolment Status\Free	Specify the 'Enrolment status' lookup value to be applied when an online student enrols on a free course (e.g. '1' (Current)).
Application\OSEN\Enrolment Status\Pay Later	Specify the 'Enrolment status' lookup value to be applied when an online student enrols on a course and elects to pay later (e.g. 'P' (Pre-enrolled)).

Setting\key	Notes
Application\OSEN\Enrolment Status\Pay Now	Specify the 'Enrolment status' lookup value to be applied when an online student enrols on a course and elects to pay now (e.g. '1' (Current)).

Application\OSEN\Instalments Confirmation

These keys specify the settings for the credit card instalments confirmation email. Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for further information.

Application\OSEN\Instalments

These keys control the handling of the CSV payment instalments file as part of the credit card instalments functionality. Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for further information.

Application\OSEN\Payment

These keys deal with the elements of online course fee payment and the connection to your payment provider. g of the CSV payment instalments file as part of the credit card instalments functionality. Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for further information.

Application\OSEN\SCPayments

These keys deal with the elements of online course fee payment via SCP and the connection to Pay360. Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for further information.

Application\OSEN\Text

This key controls the text that's displayed if a course is unavailable.

Table 8: Settings - OSEN\Text

Setting\key	Notes
Application\OSEN\Text\Course Unavailable	Specify the text shown on web pages when a course is unavailable (e.g. 'This course is currently unavailable.').

Application\OSEQ\Confirmation

These keys control the format of the confirmation email sent to an online student who has made an enquiry.

Figure 5: Settings - OSEQ



Path: Application\OSEQ\Confirmation

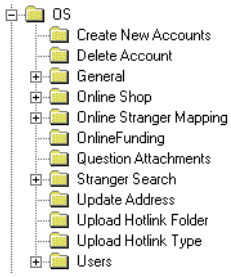
Table 9: Settings - OSEQ\Confirmation

Setting\key	Notes
Application\OSEQ\Confirmation\CC	Specify the email address to CC to (e.g. 'registration@inst.ac.uk').
Application\OSEQ\Confirmation\End Text	Specify the footer text to be included in the email (e.g. 'Yours faithfully, Student Services').
Application\OSEQ\Confirmation\From	Specify the sender's email address (e.g. 'head.registration@inst.ac.uk').
Application\OSEQ\Confirmation\Mail Format	Specify the format of the email as either 'html' or 'text'.
Application\OSEQ\Confirmation\Send Mail	Indicate whether confirmation emails should be sent out or not. -1 = True (send) 0 = False (don't send)
Application\OSEQ\Confirmation\Start Text	Specify the text for the email (e.g. 'Thank you for your enquiry').
Application\OSEQ\Confirmation\Subject	Specify the Subject of the email (e.g. 'Re. Your enquiry').

Application\OS

These keys control the operation of Online Services.

Figure 6: Settings - OS path



Paths: *Application|OS|Create New Accounts* (see page 30)

Application|OS|Delete Account (see page 30)

Application|OS|General (see page 30)

Application|OS|Online Shop - Refer to the *UNIT-e Online Shop* handbook (UOLS.pdf).

Application|OS|Online Stranger Mapping (see page 41)

Application|OS|Online Funding - Refer to the *UNIT-e Support Funds* handbook (USF.pdf).

Application|OS|Question Attachments (see page 31)

Application|OS|Quick Enrolment|Email (see page 48)

Application|OS|Stranger Search (see page 44)

Application|OS|Update Address (see page 32)

Application|OS|Upload Hotlink Folder (see page 32)

Application|OS|Upload Hotlink Type (see page 33)

Application|OS|Upload Photo Folder (not currently used)

Application|OS|Users (see page 33)

Application\OS\Create New Accounts

These keys control the process of creating new accounts.

Table 10: Settings - OS\Create New Accounts

Setting\key	Notes
Application\OS\Create New Accounts\Report	Specify the report used to control the creation of new accounts. The 'Report for online account creation' (createonlineaccount) is the default value but this may be amended to suite the requirements of your institution. Refer to *Varying the selection of students* (see page 148) for further information.
Application\OS\Create New Accounts\Search Form	Specify the Search form used in the process of creating new accounts. The Module Enrolment search form (gn.moduleenrolment) the default value but this may be amended to suite the requirements of your institution. Refer to *Varying the selection of students* (see page 148) for further information.

Application\OS\Delete Account

These keys control the process of deleting accounts.

Table 11: Settings - OS\Delete Account

Setting\key	Notes
Application\OS\Delete Account\Report	Specify the report used to control the deletion of accounts. The 'Report for deletion of online account' (deleteaccount) is supplied.
Application\OS\Delete Account\Search Form	Specify the Search form used in the process of deleting accounts. The Student search form (gn.student) is supplied.

Application\OS\General

Table 12: Settings - OS\General

Setting\key	Notes
About 'Request Change' keys The following 'Request Change' keys control the format of emails sent to online students as a result of a general request for change.	
Application\OS\General\Request Change\BCC	Specify the email address to blind copy to (e.g. 'admin@inst.ac.uk').
Application\OS\General\Request Change\CC	Specify the email address to CC to (e.g. 'registration@inst.ac.uk').
Application\OS\General\Request Change\From	Specify the sender's email address (e.g. 'uos@inst.ac.uk').
Application\OS\General\Request Change\Mail Format	Specify the format of the email as either 'html' or 'text'.

Setting\key	Notes
Application\OS\General\Request Change\Subject	Specify the Subject of the email (e.g. 'Thank you for your change request').
Application\OS\General\Request Change\To	Specify the email of the person or department dealing with the request for change within your institution (e.g. registration@inst.ac.uk).
About the 'Student Periodic' key The following 'Student Periodic' key specifies the Session type to be applied when Student periodic records are created as part of the student registration process.	
Application\OS\General\Student Periodic\Session Type	Specify the 'Session type' lookup value to be applied when Student periodic records are created (e.g. 'AY').

Application\OS\Online Stranger Mapping



Refer to *Application|OS|Online Stranger Mapping* (see page 41) for details.

Application\OS\OnlineFunding



These keys apply to Support Funds. Refer to the *UNIT-e Support Funds* handbook (USF.pdf) for further information.

Application\OS\Question Attachments

These keys apply to the document upload process (see page 69).



The keys within the setting Application\FileUploader are also used to control the document upload process. Refer to *Settings for document uploads* (see page 46) for further information.

Table 13: Settings - OS\Online-Funding

Setting\key	Notes
Application\OS\Question Attachments\Files format	Defines the file types that may be uploaded. A default of 'pdf,doc,docx,jpg,jpeg,PNG' is provided.
Application\OS\Question Attachments\Final File Location Category	This identifies the key within the 'Application\FileUploader\FinalFileLocationCategories' setting that defines the final location for uploaded files. For example, if this setting key value is 'General', the process references the 'Application\FileUploader\FinalFileLocationCategories\General' setting key to find the location (see page 47).

Setting\key	Notes
Application\OS\Question Attachments\Max File Size	Defines the maximum file size (in KBs) that may be uploaded. A default of '5000' is provided. **Note:** The maximum file size is also controlled by the 'Application\FileUploader\FileSize\Max File Size' setting key (see page 47). If the two values differ, the lower of the two is used as the maximum file size. The 'OS\Question Attachments\Max File Size' value should always be the lower value if there's a difference but ideally they should contain the same values.
Application\OS\Question Attachments\SharePoint Hotlink Mapping	If you're using SharePoint, specify the hotlink mapping to use when uploading question attachments into SharePoint.
Application\OS\Question Attachments\Use SharePoint	Set to '-1' to use SharePoint when attaching documents to questions or leave as blank or '0'.

Application\OS\Stranger Search



Refer to *Application|OS|Stranger Search* (see page 44) for details.

Application\OS\Update Address

Table 14: Settings - OS\Update Address

Setting\key	Notes
Application\OS\Update Address\Type	This key controls how information is stored if a student amends their address online. -1 = Create a new address record 0 = Overwrite the current address

Application\OS\Upload Hotlink Folder



These keys have been replaced by 'Application\OS\Question Attachments' setting keys and File Uploader setting keys. Refer to *Settings for document uploads* (see page 46) for further information.

Application\OS\Upload Hotlink Type

Table 15: Settings - OS\Upload Hotlink Type

Setting\key	Notes
Application\OS\Upload Hotlink Type\Type	This key indicates the 'Hotlink' lookup value to be applied to hotlinks added via Online Services (e.g. 'EVIDENCE' for Microsoft Word documents).

Application\OS\Users

Table 16: Settings - OS\Users

Setting\key	Notes
Application\OS\Users\Authentication Link\CC	This is used in the authorisation process for students coming into the database via Online Services. Specify the email address to CC to (e.g. 'registration@inst.ac.uk').
Application\OS\Users\Authentication Link\End Text	This is used in the authorisation process for students coming into the database via Online Services. Specify the footer text to be included in the email (e.g. 'Yours faithfully, Student Services').
Application\OS\Users\Authentication Link\From	This is used in the authorisation process for students coming into the database via Online Services. Specify the sender's email address (e.g. 'head.registration@inst.ac.uk').
Application\OS\Users\Authentication Link\Mail Format	Specify the format of the authentication link email as either 'html' or 'text'.
Application\OS\Users\Authentication Link\Send Email	This is used in the authorisation process for students coming into the database via Online Services. Indicate whether authentication emails should be sent out or not. -1 = True (send) 0 = False (don't send)
Application\OS\Users\Authentication Link\Start Text	This is used in the authorisation process for students coming into the database via Online Services. Specify the text for the email (e.g. 'Please click on this link to complete your registration').
Application\OS\Users\Authentication Link\Subject	This is used in the authorisation process for students coming into the database via Online Services. Specify the Subject of the email (e.g. 'Completing your Registration').

Setting\key	Notes
Application\OS\Users\Authentication Link\URL	This is used in the authorisation process for students coming into the database via Online Services. To give the student access to Online Services to authenticate their account, enter the Online Services URL here (e.g. http://(IP address)/ WebSite/OnlineServices).
About the 'Existing Student Link' keys The following 'Existing Students Link' keys are used to control the details of the authentication email sent to a new online student when an online record has been generated from the existing student database. **Note:** It's possible to specify more than one URL in the authentication email by making entries against both 'Application\OS\Users\Existing Students Link\Student Advantage URL' and 'Application\OS\Users\Existing Students Link\URL' (see below). This enables the student to chose whether they authenticate their account in Online Services or Student Advantage.	
Application\OS\Users\Existing Students Link\CC	Specify the email address to CC to (e.g. 'registration@inst.ac.uk').
Application\OS\Users\Existing Students Link\End Text	Specify the footer text to be included in the email (e.g. 'Yours faithfully, Student Services').
Application\OS\Users\Existing Students Link\From	Specify the sender's email address (e.g. 'head.registration@inst.ac.uk').
Application\OS\Users\Existing Students Link\Mail Format	Specify the format of the existing students link email as either 'html' or 'text'.
Application\OS\Users\Existing Students Link\Send Email	Indicate whether authentication emails should be sent out or not. -1 = True (send) 0 = False (don't send)
Application\OS\Users\Existing Students Link\Start Text	Specify the text for the email (e.g. 'Please click on this link to complete your registration'). This is the default text used when only one URL is specified in the email, irrespective of whether the URL is for Online Services or Student Advantage.
Application\OS\Users\Existing Students Link\Student Advantage URL	Enter the Student Advantage URL here to give the student access to Student Advantage to authenticate their account. Refer to the note above and the *Student Advantage* handbook (ADVSF.pdf) for further details.
Application\OS\Users\Existing Students Link\Subject	Specify the Subject of the email (e.g. 'Completing your Registration').
Application\OS\Users\Existing Students Link\Text Before Online Services Link	Specify the body text to be used in the authentication email before the 'URL' value if the Online Services URL and another URL are given.
Application\OS\Users\Existing Students Link\Text Before Student Advantage Link	Specify the body text to be used in the authentication email before the 'Student Advantage URL' value if another URL (i.e. for Online Services) is also given.

Setting\key	Notes
Application\OS\Users\Authentication Link\URL	This is used in the authorisation process for students coming into the database via Online Services. To give the student access to Online Services to authenticate their account, enter the Online Services URL here (e.g. http://(IP address)/ WebSite/OnlineServices).
About the 'Existing Student Link' keys The following 'Existing Students Link' keys are used to control the details of the authentication email sent to a new online student when an online record has been generated from the existing student database. **Note:** It's possible to specify more than one URL in the authentication email by making entries against both 'Application\OS\Users\Existing Students Link\Student Advantage URL' and 'Application\OS\Users\Existing Students Link\URL' (see below). This enables the student to chose whether they authenticate their account in Online Services or Student Advantage.	
Application\OS\Users\Existing Students Link\CC	Specify the email address to CC to (e.g. 'registration@inst.ac.uk').
Application\OS\Users\Existing Students Link\End Text	Specify the footer text to be included in the email (e.g. 'Yours faithfully, Student Services').
Application\OS\Users\Existing Students Link\From	Specify the sender's email address (e.g. 'head.registration@inst.ac.uk').
Application\OS\Users\Existing Students Link\Mail Format	Specify the format of the existing students link email as either 'html' or 'text'.
Application\OS\Users\Existing Students Link\Send Email	Indicate whether authentication emails should be sent out or not. -1 = True (send) 0 = False (don't send)
Application\OS\Users\Existing Students Link\Start Text	Specify the text for the email (e.g. 'Please click on this link to complete your registration'). This is the default text used when only one URL is specified in the email, irrespective of whether the URL is for Online Services or Student Advantage.
Application\OS\Users\Existing Students Link\Student Advantage URL	Enter the Student Advantage URL here to give the student access to Student Advantage to authenticate their account. Refer to the note above and the *Student Advantage* handbook (ADVSF.pdf) for further details.
Application\OS\Users\Existing Students Link\Subject	Specify the Subject of the email (e.g. 'Completing your Registration').
Application\OS\Users\Existing Students Link\Text Before Online Services Link	Specify the body text to be used in the authentication email before the 'URL' value if the Online Services URL and another URL are given.
Application\OS\Users\Existing Students Link\Text Before Student Advantage Link	Specify the body text to be used in the authentication email before the 'Student Advantage URL' value if another URL (i.e. for Online Services) is also given.

Setting\key	Notes
Application\OS\Users\Existing Students Link\Text Before mPad Student Link	Not in use.
Application\OS\Users\Existing Students Link\URL	Enter the Online Services URL here to give the student access to Online Services to authenticate their account (e.g. http://(IP address)/WebSite/OnlineServices).
Application\OS\Users\Existing Students Link\mPad Student URL	Not in use.
Application\OS\Users\Forgotten Password\CC	Specify the email address to CC to (e.g. 'registration@inst.ac.uk') in the email sent to a student when they request a reminder of their password.
Application\OS\Users\Forgotten Password\End Text	Specify the footer text to be included in the email (e.g. 'Yours faithfully, Student Services') in the email sent to a student when they request a reminder of their password.
Application\OS\Users\Forgotten Password\From	Specify the sender's email address (e.g. 'head.registration@inst.ac.uk') in the email sent to a student when they request a reminder of their password.
Application\OS\Users\Forgotten Password\Mail Format	Specify the format of the email as either 'html' or 'text' in the email sent to a student when they request a reminder of their password.
Application\OS\Users\Forgotten Password\Start Text	Specify the text for the email (e.g. 'Your password is as follows') in the email sent to a student when they request a reminder of their password.
Application\OS\Users\Forgotten Password\Subject	Specify the Subject of the email (e.g. 'Your Password Reminder') in the email sent to a student when they request a reminder of their password.
Application\OS\Users\Organisation Role\CC	Specify the email address to CC to (e.g. 'admin@inst.ac.uk') in the email sent to a member of an organisation when a new organisation role registers in Online Services for Organisations.
Application\OS\Users\Organisation Role\End Text	Specify the footer text to be included in the email sent to a member of an organisation when a new organisation role registers in Online Services for Organisations (e.g. 'Yours faithfully, Student Services').
Application\OS\Users\Organisation Role\From	Specify the sender's email address (e.g. 'admin@inst.ac.uk') to be used in the email sent to a member of an organisation when a new organisation role registers in Online Services for Organisations.
Application\OS\Users\Organisation Role\Send Email	Indicate whether emails should be sent to a member of an organisation when a new organisation role registers in Online Services for Organisations. -1 = True (send) 0 = False (don't send)

Setting\key	Notes
Application\OS\Users\Authentication Link\URL	This is used in the authorisation process for students coming into the database via Online Services. To give the student access to Online Services to authenticate their account, enter the Online Services URL here (e.g. http://(IP address)/ WebSite/OnlineServices).
About the 'Existing Student Link' keys The following 'Existing Students Link' keys are used to control the details of the authentication email sent to a new online student when an online record has been generated from the existing student database. **Note:** It's possible to specify more than one URL in the authentication email by making entries against both 'Application\OS\Users\Existing Students Link\Student Advantage URL' and 'Application\OS\Users\Existing Students Link\URL' (see below). This enables the student to chose whether they authenticate their account in Online Services or Student Advantage.	
Application\OS\Users\Existing Students Link\CC	Specify the email address to CC to (e.g. 'registration@inst.ac.uk').
Application\OS\Users\Existing Students Link\End Text	Specify the footer text to be included in the email (e.g. 'Yours faithfully, Student Services').
Application\OS\Users\Existing Students Link\From	Specify the sender's email address (e.g. 'head.registration@inst.ac.uk').
Application\OS\Users\Existing Students Link\Mail Format	Specify the format of the existing students link email as either 'html' or 'text'.
Application\OS\Users\Existing Students Link\Send Email	Indicate whether authentication emails should be sent out or not. -1 = True (send) 0 = False (don't send)
Application\OS\Users\Existing Students Link\Start Text	Specify the text for the email (e.g. 'Please click on this link to complete your registration'). This is the default text used when only one URL is specified in the email, irrespective of whether the URL is for Online Services or Student Advantage.
Application\OS\Users\Existing Students Link\Student Advantage URL	Enter the Student Advantage URL here to give the student access to Student Advantage to authenticate their account. Refer to the note above and the *Student Advantage* handbook (ADVSF.pdf) for further details.
Application\OS\Users\Existing Students Link\Subject	Specify the Subject of the email (e.g. 'Completing your Registration').
Application\OS\Users\Existing Students Link\Text Before Online Services Link	Specify the body text to be used in the authentication email before the 'URL' value if the Online Services URL and another URL are given.
Application\OS\Users\Existing Students Link\Text Before Student Advantage Link	Specify the body text to be used in the authentication email before the 'Student Advantage URL' value if another URL (i.e. for Online Services) is also given.

Setting\key	Notes
Application\OS\Users\Authentication Link\URL	This is used in the authorisation process for students coming into the database via Online Services. To give the student access to Online Services to authenticate their account, enter the Online Services URL here (e.g. http://(IP address)/ WebSite/OnlineServices).
About the 'Existing Student Link' keys The following 'Existing Students Link' keys are used to control the details of the authentication email sent to a new online student when an online record has been generated from the existing student database. **Note:** It's possible to specify more than one URL in the authentication email by making entries against both 'Application\OS\Users\Existing Students Link\Student Advantage URL' and 'Application\OS\Users\Existing Students Link\URL' (see below). This enables the student to chose whether they authenticate their account in Online Services or Student Advantage.	
Application\OS\Users\Existing Students Link\CC	Specify the email address to CC to (e.g. 'registration@inst.ac.uk').
Application\OS\Users\Existing Students Link\End Text	Specify the footer text to be included in the email (e.g. 'Yours faithfully, Student Services').
Application\OS\Users\Existing Students Link\From	Specify the sender's email address (e.g. 'head.registration@inst.ac.uk').
Application\OS\Users\Existing Students Link\Mail Format	Specify the format of the existing students link email as either 'html' or 'text'.
Application\OS\Users\Existing Students Link\Send Email	Indicate whether authentication emails should be sent out or not. -1 = True (send) 0 = False (don't send)
Application\OS\Users\Existing Students Link\Start Text	Specify the text for the email (e.g. 'Please click on this link to complete your registration'). This is the default text used when only one URL is specified in the email, irrespective of whether the URL is for Online Services or Student Advantage.
Application\OS\Users\Existing Students Link\Student Advantage URL	Enter the Student Advantage URL here to give the student access to Student Advantage to authenticate their account. Refer to the note above and the *Student Advantage* handbook (ADVSF.pdf) for further details.
Application\OS\Users\Existing Students Link\Subject	Specify the Subject of the email (e.g. 'Completing your Registration').
Application\OS\Users\Existing Students Link\Text Before Online Services Link	Specify the body text to be used in the authentication email before the 'URL' value if the Online Services URL and another URL are given.
Application\OS\Users\Existing Students Link\Text Before Student Advantage Link	Specify the body text to be used in the authentication email before the 'Student Advantage URL' value if another URL (i.e. for Online Services) is also given.

Setting\key	Notes
Application\OS\Users\Existing Students Link\Text Before mPad Student Link	Not in use.
Application\OS\Users\Existing Students Link\URL	Enter the Online Services URL here to give the student access to Online Services to authenticate their account (e.g. http://(IP address)/WebSite/OnlineServices).
Application\OS\Users\Existing Students Link\mPad Student URL	Not in use.
Application\OS\Users\Forgotten Password\CC	Specify the email address to CC to (e.g. 'registration@inst.ac.uk') in the email sent to a student when they request a reminder of their password.
Application\OS\Users\Forgotten Password\End Text	Specify the footer text to be included in the email (e.g. 'Yours faithfully, Student Services') in the email sent to a student when they request a reminder of their password.
Application\OS\Users\Forgotten Password\From	Specify the sender's email address (e.g. 'head.registration@inst.ac.uk') in the email sent to a student when they request a reminder of their password.
Application\OS\Users\Forgotten Password\Mail Format	Specify the format of the email as either 'html' or 'text' in the email sent to a student when they request a reminder of their password.
Application\OS\Users\Forgotten Password\Start Text	Specify the text for the email (e.g. 'Your password is as follows') in the email sent to a student when they request a reminder of their password.
Application\OS\Users\Forgotten Password\Subject	Specify the Subject of the email (e.g. 'Your Password Reminder') in the email sent to a student when they request a reminder of their password.
Application\OS\Users\Organisation Role\CC	Specify the email address to CC to (e.g. 'admin@inst.ac.uk') in the email sent to a member of an organisation when a new organisation role registers in Online Services for Organisations.
Application\OS\Users\Organisation Role\End Text	Specify the footer text to be included in the email sent to a member of an organisation when a new organisation role registers in Online Services for Organisations (e.g. 'Yours faithfully, Student Services').
Application\OS\Users\Organisation Role\From	Specify the sender's email address (e.g. 'admin@inst.ac.uk') to be used in the email sent to a member of an organisation when a new organisation role registers in Online Services for Organisations.
Application\OS\Users\Organisation Role\Send Email	Indicate whether emails should be sent to a member of an organisation when a new organisation role registers in Online Services for Organisations. -1 = True (send) 0 = False (don't send)

Setting\key	Notes
Application\OS\Users\Organisation Role\Start Text	Specify the text for the email sent to a member of an organisation when a new organisation role registers in Online Services for Organisations (e.g. 'A new organisation role has been created').
Application\OS\Users\Organisation Role\Subject	Specify the Subject of the email sent to a member of an organisation when a new organisation role registers in Online Services for Organisations (e.g. "New Organisation Role').
Application\OS\Users\Unlock Account\CC	Specify the email address to CC to in the email sent to a student when their account is unlocked (e.g. 'admin@inst.ac.uk').
Application\OS\Users\Unlock Account\End Text	Specify the footer text to be included in the email sent to a student when their account is unlocked (e.g. 'Yours faithfully, Student Services').
Application\OS\Users\Unlock Account\From	Specify the sender's email address in the email sent to a student when their account is unlocked (e.g. 'admin@inst.ac.uk').
Application\OS\Users\Unlock Account\Mail Format	Specify the format of the email sent to a student when their account is unlocked as either 'html' or 'text'.
Application\OS\Users\Unlock Account\Start Text	Specify the text for the email sent to a student when their account is unlocked (e.g. 'Your account has been unlocked').
Application\OS\Users\Unlock Account\Subject	Specify the Subject of the email sent to a student when their account is unlocked (e.g. 'Locked Account').

Application\Finance\controlaccounts

These keys control the default account codes applied to transactions. Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for further information.

Settings for Student Merging

The following settings are specific to the Student Merging process:

- *Application|Admissions* (see below)
- *Application|OS|Online Stranger Mapping* (see below)
- *Application|OS|Stranger Search* (see page 44)
- *Application|Student Merging* (see page 45)

If a record in your database and its matching stranger record have the same candidate references (as used in UNIT-e Exam Manager), merging is allowed. If both records have candidate references but they are different, the merge is not allowed, as it may cause data problems in UNIT-e Exam Manager.

Application\Admissions

This setting is only applicable to users of the UNIT-e Admissions Management Service.

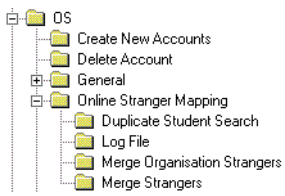
Table 17: Settings - Admissions

Key/Setting	Notes
Application\Admissions\DataServiceBaseURL	The request for applicant information is sent to the Admissions Data Service URL specified against this' setting key, with the token attached to the request so that the service recognises your request as valid. The value entered **must** be **https://adli01dsaps01.azurewebsites.net/** for all institutions using the UNIT-e Admissions Management Service, as this is required to ensure that Student Merging works correctly when dealing with applicants from Admissions.

Application\OS\Online Stranger Mapping

These keys control aspects of Online Stranger Mapping.

Figure 7: Settings - OS\Online Stranger Mapping path



Paths: *Application|OS|Online Stranger Mapping|Duplicate Student Search* (see below)

Application|OS|Online Stranger Mapping|Log File (see page 42)

Application\OS\Online Stranger Mapping\Merge Organisation Stranger - refer to the *UNIT-e Online Services for Organisations* handbook (UOSO.pdf)

Application|OS|Online Stranger Mapping|Merge Strangers (see page 43)

Application\OS\Online Stranger Mapping\Duplicate Student Search

Table 18: Settings - OS\Online Stranger Mapping\Duplicate Student Search

Key/Setting	Notes
Application\OS\Online Stranger Mapping\Duplicate Student Search\Students Only	If set to -1, only students with the **Student** flag set to true will be displayed in UNIT-e Online Stranger Mapping and when using the Free Search tool. The alternative setting is '0' (zero).

Application\OS\Online Stranger Mapping\Log File

This key has several uses:

- It specifies the path to the log file created when creating online accounts for existing students.



You should be aware that this **isn't** the log file path used by the Online Stranger Transfer Service student merging process. That path is located in the **UNITe Online Stranger Transfer Service.exe.config** file. Refer to *The Online Stranger Transfer process - Location of the Online Stranger Transfer service log file* (see page 138) for further information.

- The log file produced by the Create Online Account process in Online Services Account Manager is stored in this location. Refer to *Creating online accounts for individual students* (see page 149).



If you don't specify a location for the CreateUserLog file you're prevented from creating online accounts for existing students.

- The log file produced by the 'CreateOnlineMembershipForStudent' IICL process is stored in this location. Refer to *Creating online membership accounts using Microsoft Task Scheduler* (see page 152) for further information.
- The End of Day transaction build and refund import routines write to a log file stored in this location. Refer to the *Managing UNIT-e Card Payments & Refunds* handbook (MCP.pdf) for further details.

- It's used in UNIT-e Finance Manager to identify the location of the log file generated by the credit card instalments process.



Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for further details.

Table 19: Settings - OS\Online Stranger Mapping\Log File

Key/Setting	Notes
Application\OS\Online Stranger Mapping\Log File\Folder	Specify the folder location. This must be in UNC format and must point to a network drive (e.g. '\\<servername>\<OnlineServices-files>').

The path that you enter against this setting must be entered in UNC format and must point to a network drive, otherwise you won't have access to the functionality.

After entering the setting values you must refresh the cache in II Web Client to update general settings and user permissions. This task is carried out by clicking **Apply Settings** in the **Configure UNIT-e Information Interface (Web Client)** tool.



Refer to the *Managing UNIT-e Launch Pad and II Web Client* handbook (MLP.pdf) for further information about configuring II Web Client.

Application\OS\Online Stranger Mapping\Merge Strangers

Table 20: Settings - OS\Online Stranger Mapping\Merge Strangers

Key/Setting	Notes
Application\OS\Online Stranger Mapping\Merge Strangers\Applicant Request Batch Size	This restricts the number of student/stranger merges to 16 in one request, to prevent errors. If the batch size is higher than 16, the Online Stranger Transfer service runs in batches of 16. You are advised to leave this setting value at 16.

These keys are used by the Stranger Merging process to determine which of the current values should be overwritten. The values are '-1' to overwrite or '0' or null to prevent them being overwritten.

Table 21: Settings - OS\Online Stranger Mapping\Merge Strangers

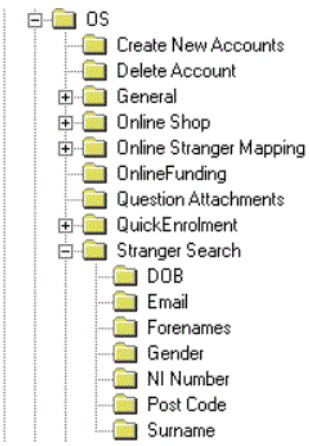
Key/Setting	Notes
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Current Address	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Current Telephone	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Data Return Address	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Data Return Email Address	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Data Return Telephone	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Email	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Emergency Address	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Emergency Email Address	

Key/Setting	Notes
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Emergency Mobile Telephone	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Emergency Telephone	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Home Address	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Home Email Address	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Home Telephone	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Invoice Address	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Invoice Telephone	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Local Address	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Local Telephone	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Mobile Telephone	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Next of kin Address	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Next of kin Telephone	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Other Email Address	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite Other Mobile	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite blank fields	
Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite blank flags	

Application\OS\Stranger Search

These keys are used by the Online Student Merge tool to determine which parameters are used (by default) when matching students.

Figure 8: Settings - OS\Stranger Search path



Path: Application\OS\Stranger Search

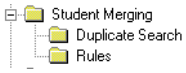
Table 22: Settings - OS\Stranger Search

Key/Setting	Notes
Application\OS\Stranger Search\DOB\Include	Specify whether the property should be included as part of the Stranger Search process. Yes = Include Any other value (e.g. 'No') = don't include **Note:** The default for DOB, Forenames, Gender and Surname is 'Yes' and the default for Email, NI Number and Post Code is 'No'.
Application\OS\Stranger Search\Email\Include	
Application\OS\Stranger Search\Forenames\Include	
Application\OS\Stranger Search\Gender\Include	
Application\OS\Stranger Search\NI Number\Include	
Application\OS\Stranger Search\Post Code\Include	
Application\OS\Stranger Search\Surname\Include	

Application\Student Merging

These keys are used by the Online Student Merge tool to determine which parameters are used (by default) when matching students.

Figure 9: Settings - Student Merging path



Paths: *Application|Student Merging|Duplicate Search* (see page 45)

Application|Student Merging|Rules (see page 45)

Application\Student Merging\Duplicate Search

These keys specify the report and search form to be used for duplicate searches.

Table 23: Settings - Student Merging\Duplicate Search

Key/Setting	Notes
Application\Student Merging\Duplicate Search\Report	Specify the report to be used for duplicate searches. The 'Student pick-list report' (student) is specified by default.
Application\Student Merging\Duplicate Search\Search Form	Specify the Search form to be used for duplicate searches. The 'Student Search' form (gn.student) is specified by default.

Application\Student Merging\Rules

These keys define the rules to be used when merging strangers and students.

Table 24: Settings - Student Merging Rules

Key/Setting	Notes
Application\Student Merging\Rules\Direct Debit Record	A merge is prevented if both the student and stranger has an active Direct Debit record. The default is '-1' (switched on); **Warning:** We recommend that you don't change this setting.
Application\Student Merging\Rules\Exam	A merge is prevented if both the student and stranger has an active Exam record. The default is '-1' (switched on). **Warning:** We recommend that you don't change this setting.
Application\Student Merging\Rules\Register	A merge is prevented if both the student and stranger are on a register. The default is '-1' (switched on). **Warning:** We recommend that you don't change this setting.
Application\Student Merging\Rules\SCN Number	A merge is prevented if the student and stranger have different SCN numbers. The default is '-1' (switched on). **Warning:** We recommend that you don't change this setting.
Application\Student Merging\Rules\Timetable	A merge is prevented if both the student and stranger has a timetable. The default is '-1' (switched on). **Warning:** We recommend that you don't change this setting.

Settings for online card payments

These keys control the way in which online payments, subsequent payments and Touch Tone payments are processed. Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for further information.

Settings for document uploads

The following settings define how uploaded documents are managed and stored in your UNIT-e database.

- *Application|OS|Question Attachments* (see page 31)
- *Application|FileUploader* (see below)

Application\FileUploader

Figure 10: Settings - File-Uploader\File-Size path

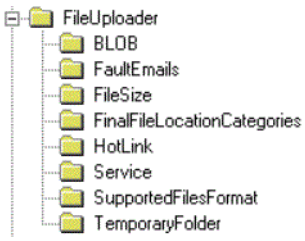


Table 25: Settings - File-Uploader

Key/Setting	Notes
Application\FileUploader\BLOB\ StoreFilesInBlob	Set this to -1 to enable Blob storage of uploaded files. Refer to *Using File Uploader with a Blob to upload documents* (see page 71) for further information.
Application\FileUploader\FileSize\File Size Error Msg	Define the message displayed when a student attempts to upload a file in support of a fund application and that file exceeds the size specified against the 'Application\FileUploader\FileSize\Max File Size' setting key (see below). A default value of 'This File is too large, the limit is {0} KB.' is provided but should be amended to suit the requirements of your institution. If the value is blank, a default error message is displayed which shows the maximum file size specified against the 'Application\FileUploader\FileSize\Max File Size' or 'Application\OS\OnlineFunding\Max File Size' setting key, whichever is smaller. **Note:** The maximum upload file size is controlled by two setting keys: • Application\FileUploader\FileSize\Max File Size • Application\OS\OnlineFunding\Max File Size If the two values differ, the lower of the two is used as the maximum file size. The 'OS\OnlineFunding\Max File Size' value should always be the lower value, if there's a difference, but ideally they should contain the same values.

Key/Setting	Notes
Application\FileUploader\FileSize\Max File Size	Specify the maximum file size that may be uploaded, in KBs. A default of '1000' is provided. **Note:** The maximum upload file size is controlled by two setting keys: • Application\FileUploader\FileSize\Max File Size • Application\OS\OnlineFunding\Max File Size If the two values differ, the lower of the two is used as the maximum file size. The 'OS\OnlineFunding\Max File Size' value should always be the lower value, if there's a difference, but ideally they should contain the same values.
Application\FileUploader\ FinalFileLocationCategories\AwardAppDoc	**Provided for UNIT-e Support Funds documents** Specify the final location for uploaded files supporting award applications.
Application\FileUploader\ FinalFileLocationCategories\General	Specify the final location for uploaded files.
Application\FileUploader\Service\ MinimumFileDuration	This setting key is no longer in use.
Application\FileUploader\ SupportedFilesFormat\FilesFormat	Defines the file types that may be uploaded. A default of 'pdf,doc,docx,jpg,jpeg,PNG' is provided.
Application\FileUploader\TemporaryFolder\ Path	This setting key is no longer in use.

Settings for QR codes functionality

These setting keys define the format of the email sent out to students.



Refer to *QR code generation* (see page 175) for further information about the QR codes functionality.

Table 26: Settings - OS\QuickEnrolment\Email

Key/Setting	Notes
Application\OS\QuickEnrolment\Email\ BaseSite	Specify the base URL for QR code. By default this is 'http://localhost/WCFWebSite/OnlineServices'.
Application\OS\QuickEnrolment\Email\ FindStudentReport	Specify the reference of the report used to retrieve students targeted to receive the email. A default of 'gn.qr.findstudent' is provided.
Application\OS\QuickEnrolment\Email\From	Specify the sender's email address (e.g. 'admin@inst.ac.uk').

Key/Setting	Notes
Application\OS\QuickEnrolment\Email\LogFile Location	Specify the location for the log file produced by the enrolment process.
Application\OS\QuickEnrolment\Email\ QRECCLevel	Specify the error correction code level to use for QR Codes. The following are valid: • L - Lowest (up to 7% damage can be corrected) • M - Medium (up to 15% damage can be corrected) • Q - Quality (up to 25% damage can be corrected) • H - Highest (up to 30% damage can be corrected. This refers to the ability of a QR code to still work even if a part of it is damaged or obscured. If a QR code has a low level of correction it can have a smaller print size but if it has a higher correction level it's more resistant to damage. A default of 'Q' is provided and advised.
Application\OS\QuickEnrolment\Email\ QREnrolmentPage	Specifies the Enrolment page accessed by the QR code when scanned. A default of 'qrEnrolment.aspx' is provided.
Application\OS\QuickEnrolment\Email\ QRFileLocation	This setting key is not currently in use.
Application\OS\QuickEnrolment\Email\ QRPixelsPerModule	Specifies the pixels per module to be used in the QR code. The size of the QR code is defined by this value. A default of '20' is provided, as this displays the QR code in the best format for mobiles/tablets but if your students print the emails the QR code will be very large. In this situation you can reduce the number of pixels to something smaller.
Application\OS\QuickEnrolment\Email\Subject	Specify the text to appear in the email **Subject** field.
Application\OS\QuickEnrolment\Email\ TemplateReport	Specify the report that defines the text within the email. By default this is 'gn.qr.template'.

Defining personal data properties for strangers

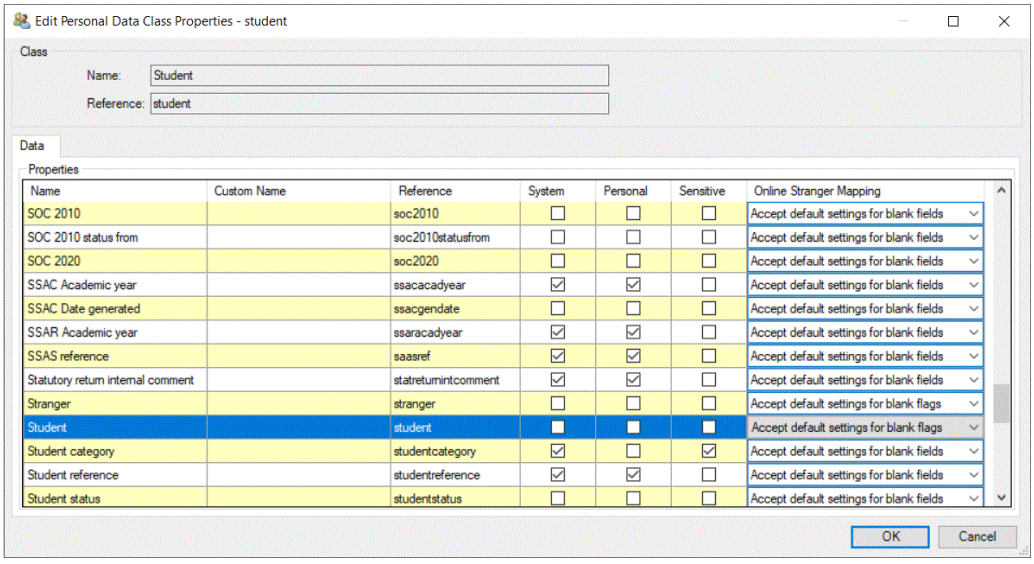
The **Manage Personal and Sensitive Data** tool available from the **Tools** menu in UNIT-e Information Interface allows you to view and edit **Personal** and **Sensitive** flags for the properties in your UNIT-e database, for the purposes of General Data Protection Regulation (GDPR).

Refer to the *Managing UNIT-e* handbook (MU.pdf) for further information about the **Manage Personal and Sensitive Data** tool.

The **Edit Personal Data Class Properties** screen (Figure 11), which is accessed from the **Properties** button on the **Manage Personal and Sensitive Data** screen, includes an **Online Stranger Mapping** column when you are viewing any of the following classes:

- Person
- Person details
- Student
- Student FES/SQA
- Student HEA
- Student HESA
- Student ISR
- Student WSR

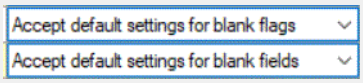
Figure 11: Edit Personal Data Class Properties



This column enables you to specify how personal data properties entered by a stranger student in Online Services should take precedence over data already held for a matching student in your UNIT-e database (if at all). The options are as follows:

- **Accept default settings for blank fields/flags** - The default option. This references the 'Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite blank fields' and 'Application\OS\Online Stranger Mapping\Merge Strangers\Overwrite blank flags' setting keys and applies those rules (see page 41).

This option refers to either 'blank fields' or 'blank flags', depending on the property **Type**.



- **Only update if blank** - Only updates the master (existing UNIT-e) property with the value provided by the stranger if the master property is blank.
- **Don't update** - The master (existing UNIT-e) property is not updated with the value provided by the stranger, even if the master property is blank.
- **Overwrite master** - Updates the master (existing UNIT-e) property with the value provided by the stranger.

The values that you specify in the **Online Stranger Mapping** column are retained when you carry out an upgrade.

For institutions using Admissions, the **Personal and Sensitive Data** tool is overridden to protect the UCAS Personal ID when strangers and students are merged. Refer to the Managing the UNIT-e Admissions Management Service handbook for further information.

Reports

Information shown on the UNIT-e Online Services web pages is taken from your UNIT-e database using the reports listed in Table 27. It's likely that you will need to amend these to meet the needs of your institution.

Edit and test the reports to ensure that they work, then publish them as XML from UNIT-e Report Generator. When you save a report the XML definition is automatically published at that point but you also have the option to publish in bulk using the **Block Publish Definition** tool.



The **Block Publish Definition** tool is only shown in UNIT-e Report Generator if you have user rights to the Publish Report process. This appears under Report Generator processes in UNIT-e Database Manager (Users) [UDMUS.exe].

Any UNIT-e class can be used to retrieve data from your database, but you can only save back to the database when using certain classes. Refer to the webservice for guidance regarding the classes that can be used for creating and amending.

Table 27: Online Services reports

Reference	Name
cgn.dm.0025	Locked Staff users list
cgn.dm.0025a	Locked Online membership accounts list
cgn.dm.0025b	Locked Staff users email alert
cgn.dm.0025c	Locked Online membership accounts email alert
cgn.dm.0025d	Locked users email alert import
Note: The above reports provide the functionality that alerts a nominated email account when a member of staff or online user accidentally locks their account by entering their password incorrectly three times. Refer to *Amending the locked account reports* (see page 57) and *Dealing with locked online accounts* (see page 156) for further information.	
gn.os.allowablefunditems	Report to fetch list of allowable fund items
gn.os.brochures	Online Services Brochure Search Results
gn.os.catalogue	Returns the catalogues to be displayed on the online shop
gn.os.ccarddetails	Get student credit card details
gn.os.departments	Online Services Departments
gn.os.directoresults	Online Services Directory Search Results
gn.os.directory	Online Services Directory Search Results
gn.os.directoryfees	Online Services Directory Search Results Fees
gn.os.duplicate	Duplicate Student pick-list report
gn.os.enquiryquestions	Online Services Enquiry Questions
gn.os.enrlfeetype	Enrolment Module Fee Type
gn.os.enrolmentdetails	Online Services Stranger Mapping - Enrolment Details

Reference	Name
gn.os.enrolref	Get Parent Module Reference by Invoice
gn.os.feeband	Online Services Student Fee Band **Note:** Refer to *About the Online Services fees reports* (see page 107) for further information.
gn.os.feelist	Fee pick-list report
gn.os.iicl.stu	IICL OS eligible students report
gn.os.iicl.stu.sub	IICL OS eligible students sub report (excluded if existing online membership)
gn.os.mandatorymodules	Online Services Mandatory Modules
gn.os.modulefees	Online Services Module Fees
gn.os.optionsenrolments	Online Services - Options - Enrolments
gn.os.preeoden	Online Services Student pre-EOD enrolment report
gn.os.qualifications	Online Services Qualifications
gn.os.qualmodules	Online Services Qualification Modules
gn.os.referees	Online Services Referees
gn.os.reverselinks	Address Reverse Links
gn.os.searchenrol	Online Services Search Results Enrolments
gn.os.searchfees	Online Services Search Results Fees **Note:** Refer to *About the Online Services fees reports* (see page 107) for further information.
gn.os.searchresults	Online Services Search Results
gn.os.strangers	Stranger pick-list report
gn.os.stuapplications	Online Services Student Applications
gn.os.studentdetails	Online Services Stranger Mapping - Student Details
gn.os.students	Student pick-list report
gn.os.stuenquiries	Online Services Student Enquiries
gn.os.stuenrolments	Online Services Student Enrolments
gn.os.stuexapplications	Online Services Student Extended Applications
gn.os.subpaycred	Subsequent Payments - Credit Notes
gn.os.subpaydd	Subsequent Payments - Direct Debits
gn.os.subpayinv	Subsequent Payments - Invoices
gn.os.subpayneginv	Subsequent Payments - Negative Invoices
gn.os.subpaynegrec	Subsequent Payments - Negative Receipts
gn.os.subpayrec	Subsequent Payments - Receipts
gn.os.subpayref	Subsequent Payments - Refunds
gn.os.subpayunrec	Subsequent Payments - Unallocated Receipt

Reference	Name
gn.os.enrolref	Get Parent Module Reference by Invoice
gn.os.feeband	Online Services Student Fee Band **Note:** Refer to *About the Online Services fees reports* (see page 107) for further information.
gn.os.feelist	Fee pick-list report
gn.os.iicl.stu	IICL OS eligible students report
gn.os.iicl.stu.sub	IICL OS eligible students sub report (excluded if existing online membership)
gn.os.mandatorymodules	Online Services Mandatory Modules
gn.os.modulefees	Online Services Module Fees
gn.os.optionsenrolments	Online Services - Options - Enrolments
gn.os.preeoden	Online Services Student pre-EOD enrolment report
gn.os.qualifications	Online Services Qualifications
gn.os.qualmodules	Online Services Qualification Modules
gn.os.referees	Online Services Referees
gn.os.reverselinks	Address Reverse Links
gn.os.searchenrol	Online Services Search Results Enrolments
gn.os.searchfees	Online Services Search Results Fees **Note:** Refer to *About the Online Services fees reports* (see page 107) for further information.
gn.os.searchresults	Online Services Search Results
gn.os.strangers	Stranger pick-list report
gn.os.stuapplications	Online Services Student Applications
gn.os.studentdetails	Online Services Stranger Mapping - Student Details
gn.os.students	Student pick-list report
gn.os.stuenquiries	Online Services Student Enquiries
gn.os.stuenrolments	Online Services Student Enrolments
gn.os.stuexapplications	Online Services Student Extended Applications
gn.os.subpaycred	Subsequent Payments - Credit Notes
gn.os.subpaydd	Subsequent Payments - Direct Debits
gn.os.subpayinv	Subsequent Payments - Invoices
gn.os.subpayneginv	Subsequent Payments - Negative Invoices
gn.os.subpaynegrec	Subsequent Payments - Negative Receipts
gn.os.subpayrec	Subsequent Payments - Receipts
gn.os.subpayref	Subsequent Payments - Refunds
gn.os.subpayunrec	Subsequent Payments - Unallocated Receipt

Reference	Name
gn.os.enrolref	Get Parent Module Reference by Invoice
gn.os.feeband	Online Services Student Fee Band **Note:** Refer to *About the Online Services fees reports* (see page 107) for further information.
gn.os.feelist	Fee pick-list report
gn.os.iicl.stu	IICL OS eligible students report
gn.os.iicl.stu.sub	IICL OS eligible students sub report (excluded if existing online membership)
gn.os.mandatorymodules	Online Services Mandatory Modules
gn.os.modulefees	Online Services Module Fees
gn.os.optionsenrolments	Online Services - Options - Enrolments
gn.os.preeoden	Online Services Student pre-EOD enrolment report
gn.os.qualifications	Online Services Qualifications
gn.os.qualmodules	Online Services Qualification Modules
gn.os.referees	Online Services Referees
gn.os.reverselinks	Address Reverse Links
gn.os.searchenrol	Online Services Search Results Enrolments
gn.os.searchfees	Online Services Search Results Fees **Note:** Refer to *About the Online Services fees reports* (see page 107) for further information.
gn.os.searchresults	Online Services Search Results
gn.os.strangers	Stranger pick-list report
gn.os.stuapplications	Online Services Student Applications
gn.os.studentdetails	Online Services Stranger Mapping - Student Details
gn.os.students	Student pick-list report
gn.os.stuenquiries	Online Services Student Enquiries
gn.os.stuenrolments	Online Services Student Enrolments
gn.os.stuexapplications	Online Services Student Extended Applications
gn.os.subpaycred	Subsequent Payments - Credit Notes
gn.os.subpaydd	Subsequent Payments - Direct Debits
gn.os.subpayinv	Subsequent Payments - Invoices
gn.os.subpayneginv	Subsequent Payments - Negative Invoices
gn.os.subpaynegrec	Subsequent Payments - Negative Receipts
gn.os.subpayrec	Subsequent Payments - Receipts
gn.os.subpayref	Subsequent Payments - Refunds
gn.os.subpayunrec	Subsequent Payments - Unallocated Receipt

Reference	Name
gn.os.enrolref	Get Parent Module Reference by Invoice
gn.os.feeband	Online Services Student Fee Band **Note:** Refer to *About the Online Services fees reports* (see page 107) for further information.
gn.os.feelist	Fee pick-list report
gn.os.iicl.stu	IICL OS eligible students report
gn.os.iicl.stu.sub	IICL OS eligible students sub report (excluded if existing online membership)
gn.os.mandatorymodules	Online Services Mandatory Modules
gn.os.modulefees	Online Services Module Fees
gn.os.optionsenrolments	Online Services - Options - Enrolments
gn.os.preeoden	Online Services Student pre-EOD enrolment report
gn.os.qualifications	Online Services Qualifications
gn.os.qualmodules	Online Services Qualification Modules
gn.os.referees	Online Services Referees
gn.os.reverselinks	Address Reverse Links
gn.os.searchenrol	Online Services Search Results Enrolments
gn.os.searchfees	Online Services Search Results Fees **Note:** Refer to *About the Online Services fees reports* (see page 107) for further information.
gn.os.searchresults	Online Services Search Results
gn.os.strangers	Stranger pick-list report
gn.os.stuapplications	Online Services Student Applications
gn.os.studentdetails	Online Services Stranger Mapping - Student Details
gn.os.students	Student pick-list report
gn.os.stuenquiries	Online Services Student Enquiries
gn.os.stuenrolments	Online Services Student Enrolments
gn.os.stuexapplications	Online Services Student Extended Applications
gn.os.subpaycred	Subsequent Payments - Credit Notes
gn.os.subpaydd	Subsequent Payments - Direct Debits
gn.os.subpayinv	Subsequent Payments - Invoices
gn.os.subpayneginv	Subsequent Payments - Negative Invoices
gn.os.subpaynegrec	Subsequent Payments - Negative Receipts
gn.os.subpayrec	Subsequent Payments - Receipts
gn.os.subpayref	Subsequent Payments - Refunds
gn.os.subpayunrec	Subsequent Payments - Unallocated Receipt

Reference	Name
gn.os.sundryitem	Returns the Sundry items to be displayed on the online shop
gn.os.usersummary	Online Services User Summary
gn.os.usersummary.c	Online Services User Summary - Contact Details
gn.os.usersummary.contact	Online Services User Summary - Contact Details
gn.os.usersummary.personal	Online Services User Summary - Personal Details
gn.qr.findstudent	Find students to send QR emails
gn.qr.module	QR Code Enrolment - Module
gn.qr.template	Email template for QR Emails
gn.salessummary	Report to override sales summary
os.areaofinterest	Online Services Area of Interest
os.catalogue	Returns the catalogues to be displayed on the online shop
os.coursedetails	Online Course Details
os.coursesearch	Online Services Course Search
os.dupsearch	Online Services Duplicate Search
os.moduleitemdet	Online Services Module Item Details
os.sundryitem	Returns the Sundry items to be displayed on the online shop
osap.route	Online Applications Route Report
osen.route	Online Enrolments Route Report
oseq.brochuredet	Online Enquiries Brochure Details
oseq.sources	Online Enquiry Sources

Amending the locked account reports

The following reports and the 'Locked users email alert' warehouse (cgn.dm.0025) provide the functionality that sends an email to a nominated account holder whenever a member of staff or online user accidentally locks their account by entering their password incorrectly three times. This enables the nominated account holder to unlock the account immediately, minimising the impact.

- Locked Staff users list (cgn.dm.0025)
- Locked Online membership accounts list (cgn.dm.0025a)
- Locked Staff users email alert (cgn.dm.0025b)
- Locked Online membership accounts email alert (cgn.dm.0025c)

- Locked users email alert import (cgn.dm.0025d)

In order to use this functionality you must update the Select statements of the 'Locked Staff users email alert' report (cgn.dm.0025b) and 'Locked Online membership accounts email alert' report (cgn.dm.0025c) to reference the correct email addresses. You can also amend the email text and subject, if required.

Figure 12: Locked Staff users email alert Select statement

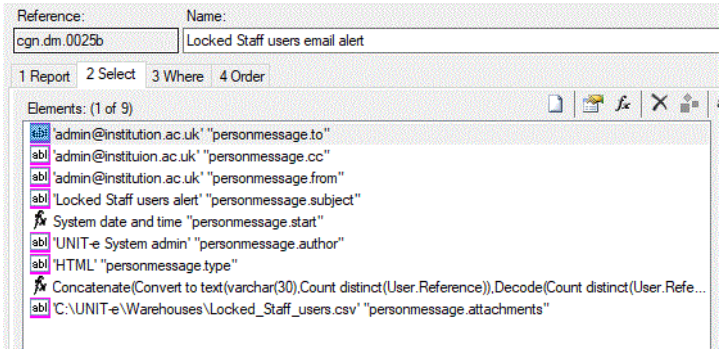


Figure 12 shows the Select statement of the 'Locked Staff users email alert' report as an example. Amend the following (in red) as required:

'admin@institution.ac.uk' "personmessage to" - defines the email recipient (e.g. the person with rights to unlock the account).

'admin@institution.ac.uk' "personmessage cc" - defines the email address of anyone cc-ed in the message.

'admin@institution.ac.uk' "personmessage from" - defines the sender email address.

By default this process sends emails. SMS functionality could be made available by adding columns to these reports.

IICL methods for Task Scheduler

The following IICL methods are provided:

- **CreateOnlineMembershipForStudent:** Enables you to create online accounts for students as part of a scheduled task.



Refer to *Creating online membership accounts using Microsoft Task Scheduler* (see page 152) for further information.

- **GenerateQuickEnrolmentEmails:** Enables you to generate emails containing enrolment QR codes for students.



Refer to *QR code generation* (see page 175) for further information.

Network credentials for Pay360 web services

In order to process payments via Pay360, the OS web service needs to call the Pay360 web services directly (i.e. this isn't done via the browser as it is with the initial implementation of payments). This means that if access to the internet is via a proxy, the OS web service needs to identify itself to the proxy. The 'anonymous user' or network account associated with the application pool will not have been given rights to use the proxy, so the OS web service needs to impersonate a network user to be able to access the internet.

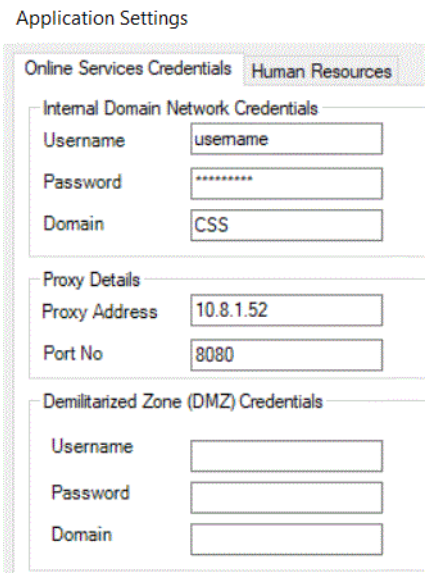
To enable this to happen, network credentials and proxy details must be stored in **Application Settings**.

To store network credentials

1. Open the **Application Settings** form via the **Tools | Application Settings** option in Information Interface and go to the **Online Services Credentials** tab (Figure 13).

User permissions for **Application Settings** are granted via **System | System | Application settings** in UNIT-e Database Manager (Users) [UDMUS.exe].

Figure 13: Online Services Credentials



2. Populate the fields with the details of the 'anonymous user' or appropriate network user. It's important that this is a user with a password that never expires.

Access to UNIT-e Messaging

UNIT-e Messaging must be set up correctly so that confirmation emails and other email messages may be sent to students.

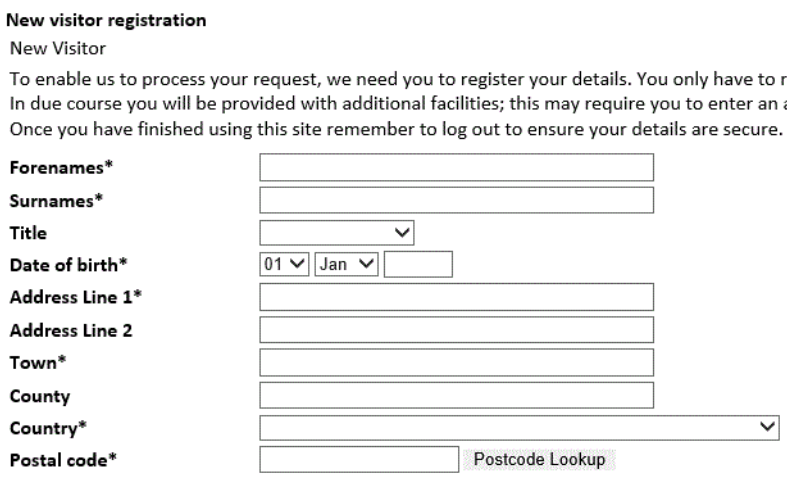


Refer to the *Managing UNIT-e Messaging* handbook (MSMS.pdf) for further details.

Setting up AFD Postcode Internet functionality in Online Services

The **Postcode Lookup** button on the **New visitor registration (students)** page (Figure 14) gives the student access to AFD Postcode Internet functionality, a third-party product that can be integrated with UNIT-e to display an address when a postcode or partial address and postcode combination is entered.

Figure 14: New visitor registration with AFD



In order to use this third party software you must ensure that the following are in place:

- *AFD Postcode Internet licence requirements* (see page 63)
- *AFD Postcode Internet lookups* (see page 63)
- *AFD Postcode Internet settings* (see page 63)
- *AFD Postcode Internet installation* (see page 65)
- *Modifying the registration web page for AFD Postcode Internet* (see page 66)
- *Retrieving Adult Education Budget (AEB) data* (see page 66)



AFD software notes are also available in the *Managing UNIT-e* handbook (MU.pdf) but the notes in this section apply specifically to UNIT-e Online Services.

AFD Postcode Internet licence requirements

AFD Postcode Internet requires the AFDW licence key. This enables you to connect UNIT-e Online Services to the AFD service over the internet. You may also purchase additional functionality from AFD that stores Adult Education budget and source information as part of the student address record (see page 154).

AFD Postcode Internet lookups

Check that the lookups listed in Table 28 are in place.

Table 28: AFD Postcode Internet lookups

Lookup	Notes
Adult education budget area	This lookup is provided for institutions that have purchased AEB data. These values are provided and should not be altered. **Note:** The 'Adult education budget' lookup is not currently used.
Country	To enable the postcode lookup process to deal with addresses from outside the UK, the software references the **CDD 2** field in this lookup. This is populated with a value if the country is non-UK. For UK countries this value is null. These values are provided and should not be altered.

AFD Postcode Internet settings

The postcode lookup software includes formatting options that enable you to control how addresses are generated. This ensures that all users generate addresses in the same format. Table 29 shows how the settings are used.

Table 29: AFD Postcode Internet settings

Key	Notes
Application\Postcode\PopulateFields	Defines the method used to populate the address fields when carrying out a postcode lookup. • **As Now** - populates the 'Address' and 'Postcode' properties (i.e. all address lines apart from the postcode are in one field). • **As Future** - populates individual address lines ('Address Line 1', 'Address Line 2', 'Address Line 3' etc.). • **Both** - populates all properties. **Note:** If you enter an invalid value the system defaults to **As Now** to ensure that the postcode search functionality continues to work.
Application\Postcode\allupper	Defines whether the addresses should be displayed in mixed or upper case. • -1 = Yes, display in upper case. • 0 = No, display in mixed case.
Application\Postcode\country	Defines whether the 'Country' property should be included in the address. • -1 = Yes, include country. • 0 = No, don't include country.
Application\Postcode\county	Defines whether the 'County' property should be included in the address. • -1 = Yes, include county. • 0 = No, don't include county. **Note:** This key must be set to '-1' to display a **County** field on the **New visitor registration** page (see page 62).
Application\Postcode\organisation	Defines whether the organisation name should be included in the address when dealing with an organisation address. • -1 = Yes, include organisation name • 0 = No, don't include organisation name
Application\Postcode\separator	Specify a separator for address lines to replace a carriage return (e.g. '', '').
Application\Postcode\townupper	Defines whether the 'Town' property should be displayed in upper case. • -1 = Yes, display the town in upper case. • 0 = No, don't display the town in upper case.

AFD Postcode Internet installation

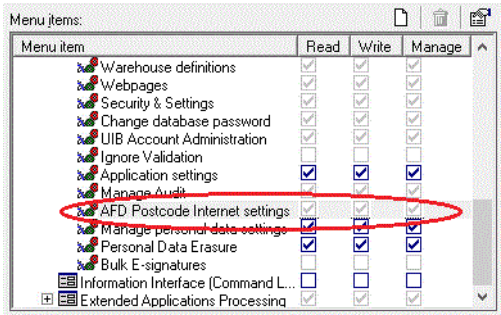
The underlying technology for AFD Postcode Internet is hosted by AFD. UNIT-e Online Services has an interface to this hosted service, which is usually licensed for a fixed number of calls/requests. To make calls to AFD's remote server you must set the appropriate credentials.

Refer to the AfD web site (http://www.afd.co.uk) for further information about your options.

To install AFD Postcode Internet

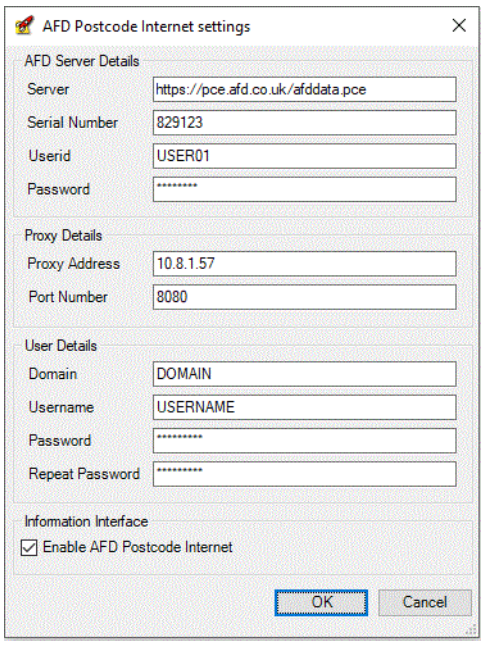
1. Make sure that you have Read, Write and Manage user permissions against the **System** | **System** | **AfD Postcode Internet settings** process on the **Menus** tab in UNIT-e Database Manager (Users) [UDMUS.exe] (Figure 15).

Figure 15: AfD Postcode Internet process



2. Select **Tools | AFD Postcode Internet Settings** from the menu in UNIT-e Workplace to open the **AFD Postcode Internet settings** form (Figure 16).

Figure 16: AFD Postcode internet settings



3. Complete the fields with the information provide by AFD and enter the domain user information in the **User Details**. Make sure that you tick the **Enable AFD Postcode Internet** check-box to enable AFD Postcode Internet for II applications and UNIT-e Online Services.

Make sure that the **Server** field is completed correctly, otherwise any online address search will fail. For example, if the correct entry is **https://pce.afd.co.uk/afddata.pce** and you enter an extra forward slash (**https://pce.afd.co.uk/afddata.pce/**) the search will fail.

Modifying the registration web page for AFD Postcode Internet

You must modify the following page to display the **Postcode Lookup** button:

- \\WebSite\OnlineServices\register.master

Uncomment the line of code highlighted in Figure 17 ('`Uncomment line below to display Postcode Lookup button`') to display the **Postcode Lookup** button.

Figure 17: Registration web page modification

```
    <th class="user">Postal code*
    </th>
    <td class="user">
        <asp:TextBox ID="txtPostcode" ToolTip="Postal code" TextMode="SingleLine" AutoCompleteType="None"
            runat="server" Width="152px"></asp:TextBox>
        <%-- Uncomment line below to display Postcode lookup button --%>
        <asp:Button ID="cmdPostCode" Text="Postcode Lookup" BorderStyle="None" runat="server" OnClick="cmdPostCode_Click" />
        <asp:Label ID="lblPostcode" runat="server" Font-Bold="true" Text=""></asp:Label>
    </td>
    <td class="text">Please don't include spaces
    </td>
```

Refer to *Chapter 3: Configuring web pages* (see page 77) for further information.

Retrieving Adult Education Budget (AEB) data

if you hold an AFDW licence you have the option to purchase additional functionality from AFD that provides Adult Education Budget (AEB) data with the address details. To accommodate this the 'Person address' class has properties for the following:

- Adult education budget area (aebarea) - Lookup values are provided.

- Adult education budget source (aebsource) - The ILR source of funding code for the devolved budget areas.

These appear in II applications as **AEB Area** and **AEB Source** fields and are populated when an address is retrieved. They are stored, but not displayed, when an address is retrieved in UNIT-e Online Services.

Creating questions

The **Additional questions** page (see page 233) presents students with questions that are created in UNIT-e Questions Manager. Answers to these questions may be viewed using UNIT-e Answers Manager. Questions may be categorised as follows:

- Questions that are applicable to all modules (e.g. generic questions such as 'How did you hear about this course?').
- Questions relating to a specific module (e.g. 'What grade did you achieve in this subject at GCSE level?').
- Questions applicable to all students, such as those that enable you to comply with GDPR requirements.

Enabling document uploads to support answers

You can configure Online Services to allow students to upload file attachments to their applications as hotlinks. These hotlinks can be applied to individual modules to capture any information that supports an application or enrolment - for example, an applicant might upload copies of their exam results. An **Upload** button appears against the appropriate question if you make this facility available to students, as shown in Figure 18.

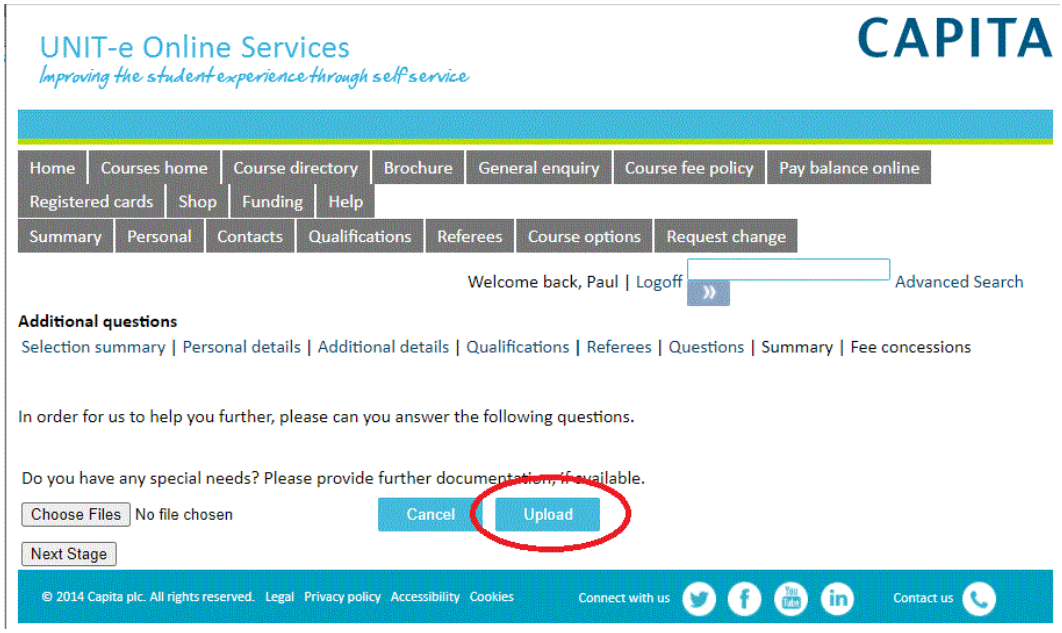
Using setting keys, you can tailor the process to suit the requirements of your institution. For example, you can define maximum file size, accepted file formats (PDF, JPEG, DOCX etc.) and the final location for uploaded files.

The preferred method is to use File Uploader to stream files to a Blob, but uploading to SharePoint is also covered in this section.



You can also allow applicants to supply documents in support of award applications. Refer to the *UNIT-e Support Funds* handbook (USF.pdf) for further information.

Figure 18: Upload button



This section covers the following:

- *Defining the 'Upload' Module Question Type lookup* (see page 70)
- *Enabling the upload functionality for individual modules* (see page 70)
- *Using File Uploader with a Blob to upload documents* (see page 71)
- *Using the SharePoint Online upload service* (see page 74)

Defining the 'Upload' Module Question Type lookup

Access:	UNIT-e Database Manager (Lookups) [UDMLK.exe]
Screens	*Lookups*

You must have a 'Module Question Type' lookup value for questions that have an upload option and this value must have a **National 1** value of 'UPLOAD'.

To define the Module Question Type lookup

1. Open UNIT-e Database Manager (Lookups) [UDMLK.exe] and find the 'Module Question Type' lookup.
2. Create an upload lookup that has a **National 1** value of 'UPLOAD' (in upper case) and save the changes.

Enabling the upload functionality for individual modules

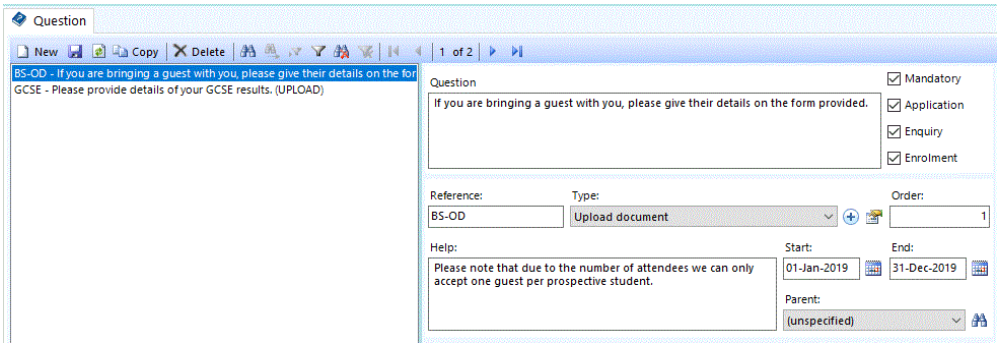
Access:	UNIT-e Questions Manager.exe
Screens	*Questions Manager - Module and Question tab*
Additional information:	Refer to the *Using Questions Manager and Answers Manager* handbook (UQAM.pdf) for further information.

This section explains how to link an **Upload** button to a module, enabling students to upload documents in support of enquiries, applications or enrolments associated with that module.

To enable uploads

1. Open UNIT-e Questions Manager and go to the **Module and Question** tab.
2. Select the appropriate module and enter your question in the **Question** pane (Figure 19).

Figure 19: Question Manager - Module and Question



3. Select a **Type** from the pick-list that corresponds to the 'Module Question Type' lookup value created for uploads (see page 70). All questions of this type have an associated **Upload** button (see Figure 18 on page 69).

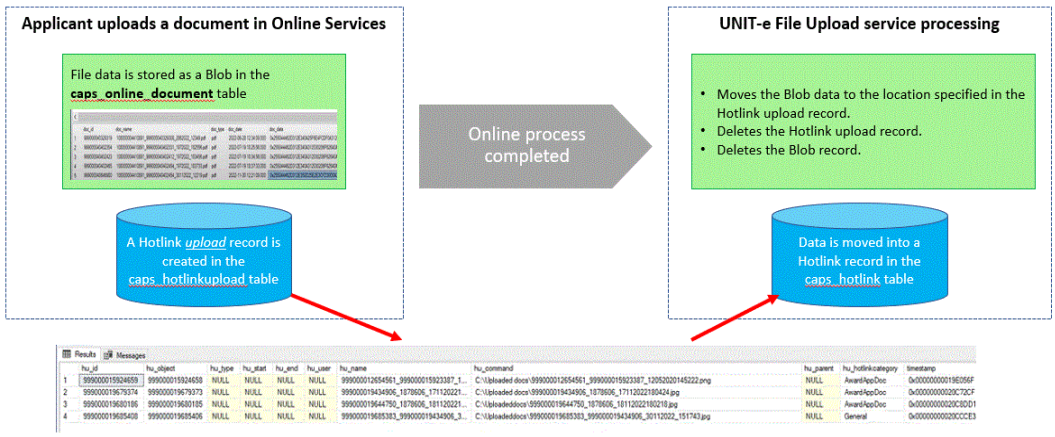
4. When the student clicks **Upload** they're taken into the **Choose file** form where they can browse to the location of the file they wish to upload.

Using File Uploader with a Blob to upload documents

The IICL Migrate Hotlinks process is no longer the recommended method for dealing with general documents.

The stages of this process are shown in Figure 20.

Figure 20: The Online Services Document Upload process

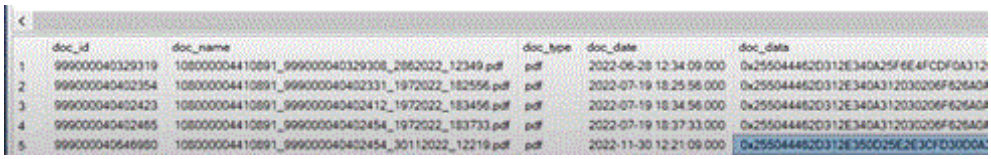


1. At the point when the student uploads their document in Online Services (by clicking **Upload** on the **Additional questions** screen (see page 233)), the website streams that document into the **caps_online_document** table in your database as a Blob, using the **service.UploadDocumentToBlob** web service.

   The **caps_online_document** table contains various information about the document including the generated **doc_name**, which is based on a unique document ID and the

upload date and time, and the **doc_data**, which represents the file contents (Figure 21).

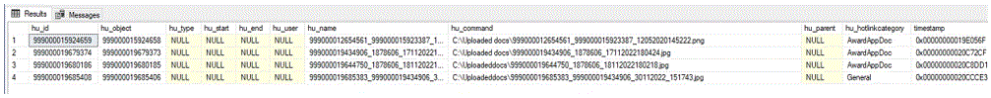
Figure 21: caps_online_-document table



	doc_id	doc_name	doc_type	doc_date	doc_data
1	9990000040329319	10800000441089l_9990000040329308_2862022_12349.pdf	pdf	2022-06-28 12:34:09.000	0x255044462D312E340A25F6E4FCDF0A312
2	9990000040402354	10800000441089l_9990000040402331_1972022_182556.pdf	pdf	2022-07-19 18:25:56.000	0x255044462D312E340A312030206F626A0A
3	9990000040402423	10800000441089l_9990000040402412_1972022_183456.pdf	pdf	2022-07-19 18:34:56.000	0x255044462D312E340A312030206F626A0A
4	9990000040402465	10800000441089l_9990000040402454_1972022_183733.pdf	pdf	2022-07-19 18:37:33.000	0x255044462D312E340A312030206F626A0A
5	9990000040646960	10800000441089l_9990000040402454_30112022_12219.pdf	pdf	2022-11-30 12:21:09.000	0x255044462D312E350D25E2E3CFD30D0A

2. When the applicant confirms their application by clicking **Proceed** on the **Summary** screen (see page 234), a Hotlink upload record is created in the **caps_hotlinkupload** table (Figure 22).

Figure 22: caps_hotlink-upload table



Results | Messages

	hu_id	hu_object	hu_type	hu_start	hu_end	hu_user	hu_name	hu_command	hu_parent	hu_hotlinkcategory	timestamp
1	9990001592465 9	9990001592465 8	NULL	NULL	NULL	NULL	9990000012654561_9990000015923387_1...	C:\Uploaded docs\9990000012654561_9990000015923387_12052020145222.png	NULL	AwardAppDoc	0x00000000019E056F
2	9990000019679374	9990000019679373	NULL	NULL	NULL	NULL	9990000019434906_1878606_171120221...	C:\Uploaded docs\9990000019434906_1878606_171120221180424.jpg	NULL	AwardAppDoc	0x00000000020C72CF
3	9990001968018 6	9990001968018 5	NULL	NULL	NULL	NULL	9990000019644750_1878606_181120221...	C:\Uploadeddocs\9990000019644750_1878606_181120221802 18.jpg	NULL	AwardAppDoc	0x00000000020C8DD1
4	9990001968540 8	9990001968540 6	NULL	NULL	NULL	NULL	9990000019685383_9990000019434906_3...	C:\Uploadeddocs\9990000019685383_9990000019434906_30112022_151743.jpg	NULL	General	0x00000000020CCCE3

This has the same properties as the **caps_hotlink** table, including the following:

- The Hotlink category (**hu_hotlinkcategory**), which is 'General' in the example. This category is applied by Online Services and is defined by the 'Application\OS\Upload Hotlink Type\Type' setting key value.

- A command (**hu_command**) that provides the final location for the document, based on the Hotlink category and the 'Application\OS\Question Attachments\Final File Location Category' setting key.



Refer to *Blob storage prerequisites* (see page 73) for further information about the settings.

3. The **caps_online_document** table and the **caps_hotlinkupload** table now both contain data relating to the uploaded file but there is note yet anything in the **caps_hotlink** table or the file system.

4. When the UNIT-e File Upload service runs, it finds the Blob record in the **caps_online_document** table and the equivalent Hotlink upload record in the **caps_hotlinkupload** table (by matching the **doc_name** and **hu_name**) and saves the content of the file (**doc_data**) to the specified location (**hu_command**).

   At the same time, a Hotlink record is created from the Hotlink upload record details, the Hotlink upload record is deleted from the **caps_hotlinkupload** table and the Blob is deleted from the **caps_online_document** table.



If the applicant uploads a document but doesn't complete the application/enrolment process, the Blob remains in the **caps_online_document** table.

Errors are generated by the following situations:

- No setting is found that matches the file Hotlink category.
- A setting is found but the path specified in the setting is invalid.
- The path specified is valid but there is insufficient space in the destination folder for the file. In this situation the error is reported by email to the address specified

against the 'Application\FileUploader\FaultEmails\To' setting key, with a 'From' email address taken from the 'Application\FileUploader\FaultEmails\From' setting key.



Hotlink upload records associated with files that have generated errors remain in the database.

Blob storage prerequisites

The full setup details for File Uploader are included in the *Managing UNIT-e* handbook (MU.pdf). in brief, the following must be in place before you can begin to use File Uploader with Blob storage:

- The UNIT-e File Upload Service must be installed.



The process of installing Windows Services is covered in the *Managing UNIT-e Messaging* handbook (MSMS.pdf).

- The following setting values MUST be defined for Blob storage:
  - **Application\FileUploader\BLOB\StoreFilesInBlob**: Set to -1 to switch on upload to Blob.
  - **Application\FileUploader\FinalFileLocationCategories\General:** Specify the final location for uploaded files.



Make sure that uploaded documents are stored in a directory that's accessible to others.

  - **Application\OS\Question Attachments\Final File Location Category:** This identifies the key within the 'Application\FileUploader\FinalFileLocationCategories' setting that defines the final location for uploaded files. For example, if this setting key value is 'General', the process references the 'Application\FileUploader\FinalFileLocationCategories**General**' setting key to find the location.



This connection between the two settings is required because it's possible to add multiple keys to the 'Application\FileUploader\FinalFileLocationCategories' setting.

  - **Application\OS\Upload Hotlink Type\Type:** Specify the 'Hotlink' lookup value to be applied to hotlinks added via Online Services.

- The following setting keys have default values that may be amended, or are optional:
  - **Application\FileUploader\FaultEmails\From:** The 'From' email address to be used for emails reporting file upload space issues.

- **Application\FileUploader\FaultEmails\To:** The 'To' email address of the person who should be notified of space issues encountered by users uploading files.
- **Application\OS\Question Attachments\Files format:** Defines the file types that may be uploaded. A default of 'pdf,doc,docx,jpg,jpeg,PNG' is provided.
- **Application\OS\Question Attachments\Max File Size:** Defines the maximum file size (in KBs) that may be uploaded. A default of '5000' is provided.



The maximum file size is also controlled by the 'Application\FileUploader\FileSize\Max File Size' setting key. If the two values differ, the lower of the two is used as the maximum file size. The 'OS\Question Attachments\Max File Size' value should always be the lower value if there's a difference but ideally they should contain the same values.

Using the SharePoint Online upload service

Although there is no default functionality to enable you to upload documents to SharePoint Online, the following WCF service is provided to enable you create your own process.

bool uploadToSharepoint = service.UploadToSharePoint(fileContent, fileName, ddlType.SelectedValue, "student", stu.Id);



If you enable uploads to SharePoint the file is uploaded immediately; no Hotlink record is created, no Blob is created and the UNIT-e File Upload Service is not employed.

SharePoint upload prerequisites

- The following setting keys should be defined:
  - **Application\OS\Question Attachments\SharePoint Hotlink Mapping:** Specify the hotlink mapping to use when uploading files into SharePoint.
  - **Application\OS\Question Attachments\Use SharePoint:** Set to '-1' to use SharePoint.
- Data must be entered correctly on the **Security and Settings** form - **SharePoint** tab (access from the **Tools** menu in II). The following points should be noted:
  - The server **Reference** in the **Servers** frame must match the **Server** value in the **Hotlink Mappings** frame.

- The **URL** in the **Servers** frame must be the SharePoint online login page URL.
- On the **Advanced Settings** form accessed from the **Advanced** column in the **Servers** frame, enter the details of the user with permissions to login and upload to the SharePoint Online website. Make sure that the **Always use this account** check-box is ticked.
- On the **Advanced Hotlink Settings** form accessed from the **Advanced** column in the **Hotlink Mappings** frame, make sure that the **Document Library** is the library set up in SharePoint Online.
- The report specified in the **Folder Report** field should return the 'Student reference' property, which is substituted in the **Folder** field structure using the [] brackets.



Your report should use System headings and the class used must match the class in the application used to upload the documents.

Chapter 3:

Configuring web pages

You can customise your Online Services web pages so that they meet the requirements of your institution. For example, you can add and remove images, amend the fonts and styles used, edit text, make fields mandatory and add or remove fields. All of these tasks require varying degrees of HTML knowledge and should only be undertaken if you have the appropriate skills.



Any changes to the UNIT-e Online Services web pages may result in the pages not being compliant with the Equality Act 2010 and WCAG 2.0. We recommend that you seek advice before making any amendments.



By default, ASP.NET Web pages and code files are compiled dynamically when users first request a resource, such as an ASP.NET page (.aspx file), from a web site. After pages and code files have been compiled the first time, the compiled resources are cached so that subsequent requests to the same page are efficient. During development of the Online Services website, a change can result in a re-compile and an apparent delay loading the website.

This chapter includes the following:

- *A note about browsers* (see page 79)
- *Web page file types* (see page 80)
- *Changing the appearance of the web pages* (see page 81)
- *Changing the structure of web pages* (see page 83)
- *Making web page fields mandatory* (see page 84)
- *Adding and removing fields* (see page 86)
- *Maintaining case style* (see page 88)

- *Dealing with the New Visitor Register check boxes* (see page 89)
- *Deciding how to record student qualifications* (see page 90)
- *Editing email text* (see page 91)
- *Customising enrolment fees* (see page 93)
- *Creating student events* (see page 94)
- *The ImportXML function* (see page 95)

A note about browsers

Safari and possibly other web browsers restrict the use of cookies for 3rd party domains when accessed via an iFrame, unless the browser has a previously declared trust for this domain. With this in mind we do not recommend using an iFrame to host a call to the Pay360 portal.

Pay360 specialises in the processing of online card payments and deals with payments made via Online Services.

Instead, call the external page and then redirect back to the payment confirm page once completed. Please refer to the following links for guidance and advice:

- **Chrome:** https://support.google.com/chrome/answer/95647?hl=en-GB

By default Chrome allows third party cookies.

- **Internet Explorer:** http://support.microsoft.com/kb/260971
- **Mozilla:** http://www.computerworld.com/s/article/9240218/Mozilla_again__postpones_Firefox_third_party_cookie_blocking_this_time_for_months
- **Safari:** http://support.apple.com/kb/PH17191

Web page file types

A list of web page file types employed in Online Services is shown in Table 30.

Table 30: Web page file types

File	Description
*.aspx	The content of a web page.
*.aspx.cs	Program functions required by the *.aspx page.
*.master	The layout of a web page.
*.master.cs	Program functions required by the *.master page.
*.cs	Additional program functions used by the web application.
*.gif	Image files
unite.css	This is the UNIT-e style sheet. You are advised NOT to amend this file, but if you feel that you need to amend it, take a copy first. **Note:** Future upgrades may replace this file with a new file containing additional features, therefore you should always take a copy of your amendments before carrying out an upgrade.

Changing the appearance of the web pages

You can change the appearance of your web pages by making amendments to the images used, the colours and styles used and the textual content.

A low to medium knowledge of HTML is required to make the changes in this section.

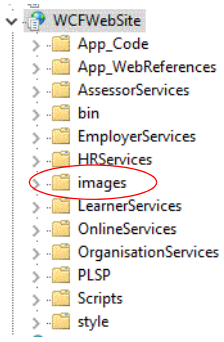
The format of the web pages is governed by the following:

- *Images* (see below)
- *Style* (see page 82)
- *Textual content* (see page 82)

Images

Image files are available from the web site **images** folder (Figure 23). These may be GIFs, JPGs or PNGs. By changing the images or the size of the images you can affect the look of the web application.

Figure 23: The images folder

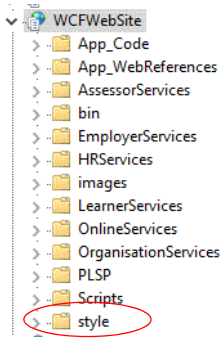


It's important that the name of the image file is preserved, otherwise you'll need to change the structure of the web pages to reference the new name. Refer to *Changing the structure of web pages* (see page 83) for more details.

Style

A style sheet (unite.css) is available from the web site **style** folder. This style sheet should not be changed unless you first take a copy. Even if you take a copy you should be aware that future upgrades might replace this file with a new file containing additional features, therefore you should always keep a copy of your amendments.

Figure 24:
The style folder



You can make changes that alter where a style is used and which element within the style sheet is used for a specific purpose.

Refer to *Appendix B: Colours used in the style sheet* (see page 284) for further details.

Textual content

You can usually change the textual content of the web pages by amending the *.master files, but you may also need to amend the *.master.cs files in some cases. Any text shown in the web pages can be amended. An example for Default.master.cs is shown below.

```
<td width="50%" valign="top">

    <br />

    <b><font color="#a51e39">Cotswold College</font> </b>offers
    over five hundred courses each year. In this section you can
    explore our range of provision and learn more about the subjects
    that interest you.

    <br />
```

Changing the structure of web pages

It's possible for you to totally rewrite the Online Services web pages while still preserving the basic interactions with the UNIT-e database. No advice on how to do this is included in this handbook due to the potentially diverse requirements of different institutions. You are advised to seek help from your Applications Consultant.



A very high knowledge of HTML is required to change the structure of web pages.

Making web page fields mandatory

You can make certain web page fields mandatory by using the function **ValidateForm()**. If it's in use it can be found in the *.master.cs files. The example below is taken from the register.master.cs page.



A medium knowledge of HTML is required to edit a function that's already in place.

A high knowledge of HTML is required to add a new function.

Example from register.master.cs

```
private string ValidateForm()
  {
        Regex objAlphaPattern = new Regex("[^a-zA-Z]");
        //Regex objAlphaNumericPattern = new Regex("[^a-zA-Z0-9]");

        if (String.IsNullOrEmpty(txtForenames.Text))
            return "Please complete the Forenames field";
        if (objAlphaPattern.IsMatch(txtForenames.Text))
            return "Please complete the Forenames field with a valid entry";
        if (String.IsNullOrEmpty(txtSurname.Text))
            return "Please complete the Surname field";
        if (objAlphaPattern.IsMatch(txtSurname.Text))
            return "Please complete the Surname field with a valid entry";
        if (txtDOBYear.Text.Length != 4)
            return "Please complete the Date of Birth Year field with a valid four
            digit year";
        try
        {
            DateTime.Parse(cmbDOBDay.SelectedValue + "-" +
            cmbDOBMonth.SelectedValue + "-" + txtDOBYear.Text);
```

```
        }
        catch
        {
            return "Please complete the Date of birth field with a valid date";
        }
        if (String.IsNullOrEmpty(txtAddress.Text))
            return "Please complete the Current address field";
        if (String.IsNullOrEmpty(cmbCountry.SelectedValue))
            return "Please complete the Country field";
        if (String.IsNullOrEmpty(txtEmail.Text))
            return "Please complete the Email field";
        if (String.IsNullOrEmpty(txtEmail2.Text))
            return "Please re-type your email in the Re-type email field";
        if (txtEmail.Text != txtEmail2.Text)
            return "Email fields do not match";
        if (txtEmail.Text.Contains("@") == false || txtEmail.Text.Contains(".") ==
        false)
            return "Please complete the Email field with a valid entry";
        if (String.IsNullOrEmpty(txtPassword.Text))
            return "Please complete the Password field";
        if (String.IsNullOrEmpty(txtPassword2.Text))
            return "Please re-type your password in the Re-type password field";
        if (txtPassword.Text != txtPassword2.Text)
            return "Password fields do not match";
        if (txtPassword.Text.Length < 5 || txtPassword.Text.Length > 16)
            return "Your password does not match required criteria";
        return "";
    }
```

Adding and removing fields

You can add fields to web pages and remove fields from them. The fields that are shown on the web pages can be configured by amending the *.master and *.master.cs files. In this context:

- *.master - determines which fields are presented on the web page and how they are presented.
- *.master.cs - determines where the data is retrieved from (if already saved to the database) and where it is saved.



A low knowledge of HTML is required to edit how fields appear on web pages.

A medium knowledge of HTML is required to remove fields from web pages.

A high knowledge of HTML is required to add fields to web pages.

Example from contact.master.cs

The web page contact.aspx is configured via the contact.master file. The following shows the details for email, address and postcode and how these are shown on the web page.

```
<tr>

    <th class="user">

        Email address</th>

    <td class="user">

        <%--<asp:TextBox ID="txtEmail" TextMode="SingleLine"
        AutoCompleteType="None" runat="server" Width="304px"
        Enabled="false"></asp:TextBox>--%>

        <asp:Label ID="txtEmail" Font-Bold="true" runat="server"></asp:Label>

        </td>

            <td> </td>

</tr>

<tr>

    <th class="user">

        Current address</th>

    <td class="user">
```

```
            <asp:TextBox ID="txtAddress" TextMode="Multiline"
            AutoCompleteType="None" runat="server" Height="60px" Width="304px"></
            asp:TextBox></td>

                <td> </td>

    </tr>

                <tr>

        <th class="user">

        Post code</th>

        <td class="user">

             <asp:TextBox ID="txtPostcode" TextMode="SingleLine"
            AutoCompleteType="None" runat="server" Width="152px"></asp:TextBox>

            </td>

            <td> </td>

    </tr>
```

The contact.master.cs file manages the interaction with the database. The following shows part of the text for address, email and telephone.

```
if (Session["UOSCurrentAddress"] != null)

    {

        OSWS.PersonAddress currentAddress = Session["UOSCurrentAddress"] as
        OSWS.PersonAddress;

        txtAddress.Text = currentAddress.AddressDetails;

        txtPostcode.Text = currentAddress.Postcode;

        cmbCountry.SelectedValue = currentAddress.Country;

    }

    if (Session["UOSEmailAddress"] != null)

    {

        OSWS.PersonAddress emailAddress = Session["UOSEmailAddress"] as
        OSWS.PersonAddress;

        txtEmail.Text = emailAddress.AddressDetails;

    }

    if (Session["UOSCurrentTelephone"] != null)

    {

        OSWS.PersonTelephone currentTelephone = Session["UOSCurrentTelephone"] as
        OSWS.PersonTelephone;

        txtTelephone.Text = currentTelephone.Number;

    }
```

Maintaining case style

There are no controls over how the online user enters text (unless they are selecting from lists). However it is possible to force a case style when the data is saved by amending the *.master.cs files with the **FormatString()** property.



A medium knowledge of HTML is required to maintain case styles.

There are two ways of calling FormatString:

- Pass in the string you wish to format - FormatString("text") - and amend the function to always return upper case, lower case or initial capitals.

  This is function from the code:

```
public static string FormatString(string text)

{

    return FormatString(text, false, false, false);

}
```

  The function receives the text you wish to format as a string and then calls another function. This second function takes the string to format as well as three flags (upper case, lower case and initial capitals respectively). If you wish to always convert everything to upper case you could change the code as follows:

```
public static string FormatString(string text)

{

    return FormatString(text, true, false, false);

}
```

- Call the second function directly and specify which formatting you would like - FormatString("text", false, false, true) would return "Text" or FormatString("text", true, false, false) would return "TEXT".

Dealing with the New Visitor Register check boxes

On the **New Visitor Register** web page (register.aspx) (Figure 25) there are two check boxes relating to GDPR issues. These are displayed unless you choose to remove them.

A low knowledge of HTML is required to remove the check boxes.

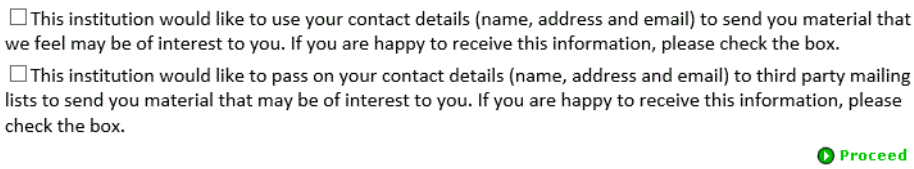


Figure 25: New visitor registration check boxes

If you don't want these check boxes to appear on your web page, amend register.master.cs to remove them and save your changes.

The flag set against the **This institution would like to use your contact details** check box is stored in the 'College' property of the 'Personal details' class.

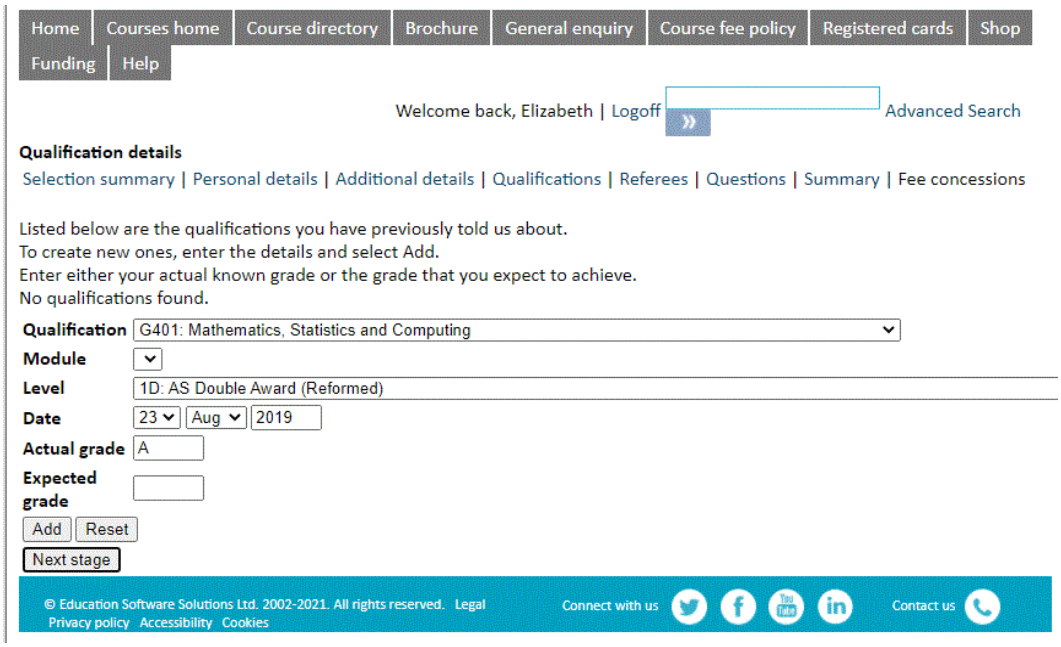
The flag set against the **This institution would like to pass on your contact details** check box is stored in the 'Third party' property of the 'Personal details' class.

Deciding how to record student qualifications

On the **Qualification details** web page (qualifications.aspx) there are two pick-lists from which the student can select their qualifications (Figure 26):

- **Qualification** - this lists qualifications from the Subject lookup.
- **Module** - this lists modules as qualifications using the report gn.os.qualmodules.

Figure 26: Qualification details



By default it's the value selected in the **Module** list that's saved as the Qualification Name, but you may wish to make amendments to suit the requirements of your institution.

A high knowledge of HTML is required to amend the qualifications lists.

There's a Where clause in the gn.os.qualmodules report that restricts the list of qualifications.

To amend qualification lists

1. Amend Qualification.master and qualifications.master.cs according to the requirements of your institution.
2. Save your amendments.

Editing email text

It's possible to edit the standard text used in emails sent out to enquirers and applicants.

- *Amending the signature* (see below)
- *Amending body text* (see page 92)



A low knowledge of HTML is required to amend the email text.

Amending the signature

A default signature is provided but you can amend it to suit the requirements of your institution.



To amend the signature

1. Go to **C:\Program Files (x86)\Education Software Solutions Ltd\UNIT-e Windows Services** and open the **UNIT-e Windows Service.exe.config** file.
2. Find "Your signature" within this file and replace the existing entry with the appropriate signature.
3. Save the amendment.

Amending body text

A default message is provided for emails to enquirers and applicants but you can amend this to suit the requirements of your institution.



To amend body text

1. Go to C:\inetpub\wwwroot\Website\App_Code and open the OnlineService.cs file.
2. Within this file are the following methods:
   - **CompleteEnquiry** - for enquiry emails
   - **CompleteApplication** - for applicant emails
   - **CompleteEnrolment** - for enrolment emails

   These contain a call to the methods EnquiryConfirmation, ApplicationConfirmation or EnrolmentConfirmation, each of which uses a string called "body" as a parameter. If this string is blank (see the bold text in the example below), the default email message is used. If you populate this string with text, the whole email body will be as defined by the C# code.

```
//can create own body of email if required
string body = "";

//create confirmation email
if (result)
{
    OSWS.Student stu = session ["UOSStudent"} as OSWS Student;
    string salutation = "Dear " + stu.Forenames + ",";
    serviceOws.ApplicationConfirmation(stu.Id, salutation, onlineReference,
    modules.ToArray(), body);
}
```



The **ApplicationConfirmation** method (shown in green) uses the **body** string (also shown in green) as a parameter.

3. Save your amendments.

Customising enrolment fees

The **EnrolmentPayFees** function enables you to customise the way in which enrolment fees are dealt with. Functionality includes:

- The ability to create credit notes rather than negative invoice lines so that credit notes can be allocated to the original invoice.
- The ability to deal with booking amendments.



Refer to *EnrolmentPayFees Web method* (see page 108) for further information about this function.

Creating student events

The **CreateStudentEvent** method enables you to create Student Event records in memory which can then be inserted into the database by using the **InsertStudentEvent** method. Both of these methods perform the standard Online Services licence check (for OSEQ, OSAP, OEN, OSEA or OSMA).



The **CreateNewStudentEvent** method is a non-standard method used by the UNIT-e Personal Learning Support Plan software. It should not be used in UNIT-e Online Services as it requires a PLSP licence.

The ImportXML function

The **ImportXML** function updates your UNIT-e database using a UNIT-e Report Generator report. The information to be updated is passed to the ImportXML function as an XML document. The report reference, the database name, UNIT-e username, UNIT-e password, reverse links and import options are used as parameters.

Currently this method won't work with external classes.

This section covers the following areas:

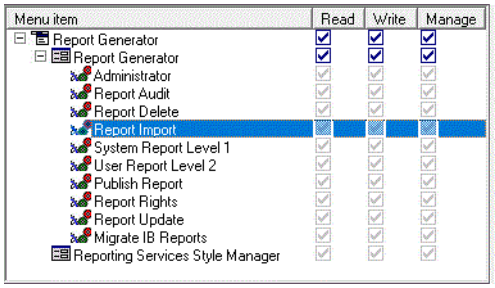
- *ImportXML prerequisites* (see below)
- *Using the ImportXML function* (see page 96)

ImportXML prerequisites

Before using this functionality you must make sure that the user logging in has the following:

- The Report Web Services Writeback licence (RWSW).
- Write access to the **Report Generator | Report Generator | Report Import** menu item in UNIT-e Database Manager (Users) [UDMUS.exe] (Figure 27).

Figure 27: Import XML user rights



- You must create a Report Generator report that indicates which records should be updated. This should have a unique reference with your customer shortcode as a prefix.

Using the ImportXML function



- This section assumes that you are a Microsoft WCF user.
- 'clientReportReference' in blue in the example below indicates the name of the UNIT-e Report Generator import report that determines which record to update. You must create this report (see page 95).

clientOptions values;

1 = insert new record (Rg report only has fields to populate not id

3 = if no id then will insert new record, if id will update existing record

4 = only id required in the RG report will delete existing record

Example WCF code;

```
{
    lblInfo.Text = string.Empty;
    lblInfo.Text += "InitWebService";
    lblInfo.Text += "<br />";
    UNITeServiceClient service = InitWebService(session);

    string clientReportReference = "mst.TRNotesImp";
    string clientXml = "<UNITe><mst.TRNotesImp><trackingreview.grade1>1</
    trackingreview.grade1></mst.TRNotesImp></UNITe>";
    int clientOptions = 1;
    string reverse = string.Empty;
    lblInfo.Text += "Calling ImportXML";
    lblInfo.Text += "<br />";
    lblInfo.Text += service.ImportXML(clientReportReference, clientOptions, clientXml,
    reverse);
    lblInfo.Text += "<br />";
    lblInfo.Text += "Done";
    lblInfo.Text += "<br />";
}
```

Chapter 4:

Data requirements for Online Services

UNIT-e Online Services represents the 'front end' of the UNIT-e suite of applications, capturing student and organisation data at source. Your back-office applications must therefore be ready to receive and process the information and information presented in Online Services must be available. For example, Module and Brochure information must be defined.

In addition, UNIT-e Finance Manager must be correctly set up if you intend to use the credit card payment functionality, and UNIT-e Messaging is needed to correspond with students via email. Figure 28 shows how these elements interlink.

Figure 28: Online Services within the UNIT-e suite of software



This chapter covers the following areas:

- *Setting up module data* (see page 99)
- *Dealing with student data* (see page 111)
- *Flagging brochures to appear online* (see page 114)

Setting up module data

Certain Module data must be in place to enable courses and their associated information to appear on the **Course directory** page in Online Services. This section covers the following:

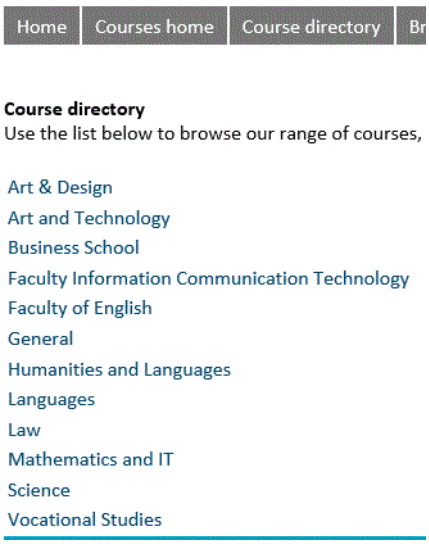
- *Showing departments on the Course directory page* (see below)
- *Flagging modules to appear on the web site* (see page 100)
- *Associating modules with departments* (see page 102)
- *Specifying places available on a module* (see page 103)
- *Displaying module fees on the web site* (see page 104)
- *Flagging module options to appear on the web site* (see page 110)

Showing departments on the Course directory page

Access:	UNIT-e Institution Manager.exe
Screens:	*Institution Manager - Department* tab

The **Course directory** tab (Figure 29) shows a list of departments that you can search to find associated courses. All department details created in UNIT-e Institution Manager (Institution Manager.exe) automatically appear in the **Course directory**.

Figure 29: Departments on Course directory page



Flagging modules to appear on the web site

Access:	UNIT-e Modules Manager.exe or UNIT-e ILR Modules Manager.exe or UNIT-e Curriculum Manager (Courses) [UCMCO.exe] UNIT-e Student Manager (Modules) [USMMO.exe] **View | Module**
Screens:	*Modules Manager* - *Module 1* tab - *Definition* sub-tab or *ILR Modules Manager* - *Module* tab - *Definition* sub-tab or *Curriculum/Student Manager (Modules)* - *Module* - *Module (1)* tab (VB)

By default, a Module is only available for enquiries, applications and/or enrolments on your web site if you've set the appropriate flags.

A module must also be associated with a department. Refer to *Associating modules with departments* (see page 102) for details.

To flag modules to appear in Online Services

As part of this process you should ensure that the Application\OSEN\Payment\Enable Payment setting is set to '-1' if you want to enable online enrolment for modules, even if you don't intend to allow online payments. Refer to *Application|OSEN|Payment* (see page 27) for further details.

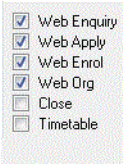
1. Open one of the above applications, retrieve the module details and locate the web check-boxes. In II applications these are on the **Definition** sub-tab (Figure 30).

Figure 30: II web check-boxes



In VB applications these are on the **Module (1)** tab of the **Module** form (Figure 31).

Figure 31: VB web check-boxes



2. Select one or more of the following check-boxes.
   - **Online enquiry/Web Enquiry:** Allows students to make enquiries about the module.
   - **Online application/Web Apply:** Allows students to apply for a place on the module.
   - **Online/Web Enrol:** Allows students to enrol on the module.
3. Save your changes.

Points to note

- If the plus (+) symbol is included in any module name, it's replaced with the word 'plus' when the module is displayed on your web site. This is because Pay360, the providers of the Online Services payment validation service, had problems accepting module names containing the + symbol.
- If you want to prevent enrolment on an online module because it's now closed, select the **Close** check-box on the **Module 1/Module (1)** tab but leave the other check-boxes selected. This allows you to view existing enrolments but prevents the creation of any new enrolments. To make it clear to system users that the module is unavailable you should also use the 'Application\OSEN\Text\Course Unavailable' setting (see page 28) to specify an appropriate message.

Associating modules with departments

Access:	UNIT-e Modules Manager.exe or UNIT-e ILR Modules Manager.exe or UNIT-e Curriculum Manager (Courses) [UCMCO.exe] UNIT-e Student Manager (Modules) [USMMO.exe] **View | Module**
Screens:	*Modules Manager* - *Module 1* tab - *Structure* tab or *ILR Modules Manager* - *Module* tab - *Structure* sub-tab or *Module* - *Module (2)* tab (VB)

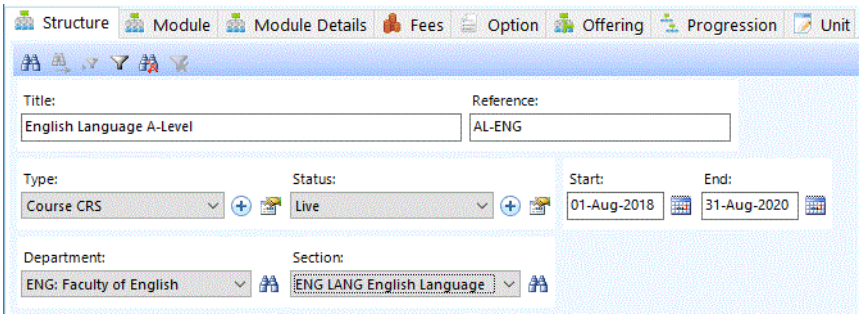
Modules must be associated with a department in order to appear in any course search list accessed from the **Course directory** tab.

A module must also have the appropriate web check-boxes ticked. Refer to *Flagging modules to appear on the web site* (see page 100) for details.

To associate a module with a department

1. Open one of the above applications, retrieve the module details and go to the **Structure** tab (II) (Figure 32) or **Module (2)** tab (VB).

Figure 32: Associating a module with a department



2. Enter a **Department** and save your changes.

Specifying places available on a module

Access:	UNIT-e Modules Manager.exe or UNIT-e ILR Modules Manager.exe or UNIT-e Curriculum Manager (Courses) [UCMCO.exe] UNIT-e Student Manager (Modules) [USMMO.exe] **View | Module**
Screens:	*Modules Manager* - *Module 1* tab - *Enrolments/Income* tab or *ILR Modules Manager* - *Module* tab - *Enrolments/Income* sub-tab or *Module* - *Module (3)* tab (VB)

It's important that you enter the maximum number of places available on a module, as it's not possible to enrol on a module online if this property isn't populated.

At various stages of the course search process (see below), UNIT-e Online Services counts the number of enrolments on the course and compares the total with the maximum number of students that can enrol. If the course is full, the online learner is informed accordingly.

- The first place that this is indicated is on the **Course Search Results** page; a message appears if a course is already fully subscribed. The online user may continue with their enquiry or application, as a place may become available, or your institution may decide to run an additional course due to its popularity.
- As it's possible that a course is not yet full when the online user carries out a search but becomes full before they complete their selection, a further check is undertaken at the point of completing the selection. At the end of the selection process, when the **Summary** page appears, the online user is informed that the course is full.



If you have transferred enrolments against a course as well as active ones, the message may appear when the course isn't actually full. To prevent this you should change the way enrolments are counted in the Online Services Search Results Enrolments (gn.os.searchenrol) report. Refer to the *UNIT-e Report Generator* handbook (URG.pdf) for information on amending reports.



To enter the maximum number of places on a module

1. Open one of the above applications, retrieve the module details and go to the **Enrolments/Income** tab (II) or **Module (3)** tab (VB).
2. Enter a value in the **Maximum students/Maximum** field and save your changes.

Displaying module fees on the web site

Access:	UNIT-e Modules Manager.exe or UNIT-e ILR Modules Manager.exe or UNIT-e Curriculum Manager (Courses) [UCMCO.exe] UNIT-e Student Manager (Modules) [USMMO.exe] **View | Module**
Screens:	*Modules Manager* - *Fees* tab or *ILR Modules Manager* - *Module* tab - *Fees* sub-tab or *Module* - *Fees* tab (VB)

The fees that appear on the web site are determined by the following:

- *Defining the Fee band lookup* (see page 105)
- *Using the FeeBand key* (see page 105)



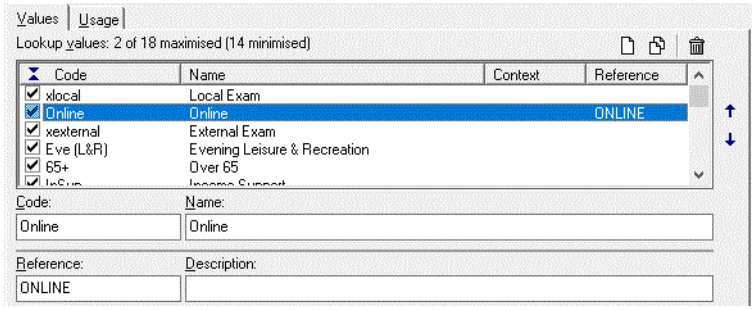
As an alternative to using a fee band you can use an EnrolmentPayFees Web method within the Web Service. Refer to *EnrolmentPayFees Web method* (see page 108) for further details.

- *Varying fees by student type* (see page 106)
- *Defining currency & VAT rates* (see page 107)
- *About the Online Services fees reports* (see page 107)
- *The link to Pay360 card payments* (see page 108)
- *EnrolmentPayFees Web method* (see page 108)

Defining the Fee band lookup

Make sure that you have a 'Fee band' lookup value that identifies fees for online enrolments. This must have a **Reference** of 'ONLINE' (Figure 33).

Figure 33: Fee band lookup



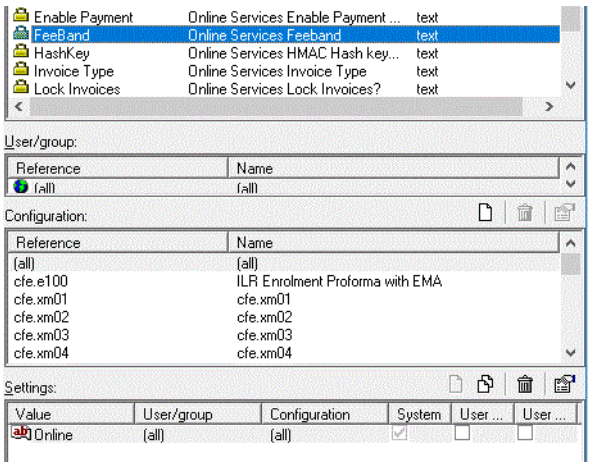
Using the FeeBand key

The setting key below uses the 'Fee band' lookup to define the default fee band used for students when they enrol online:

- Application\OSEN\Payment\FeeBand (see page 27)

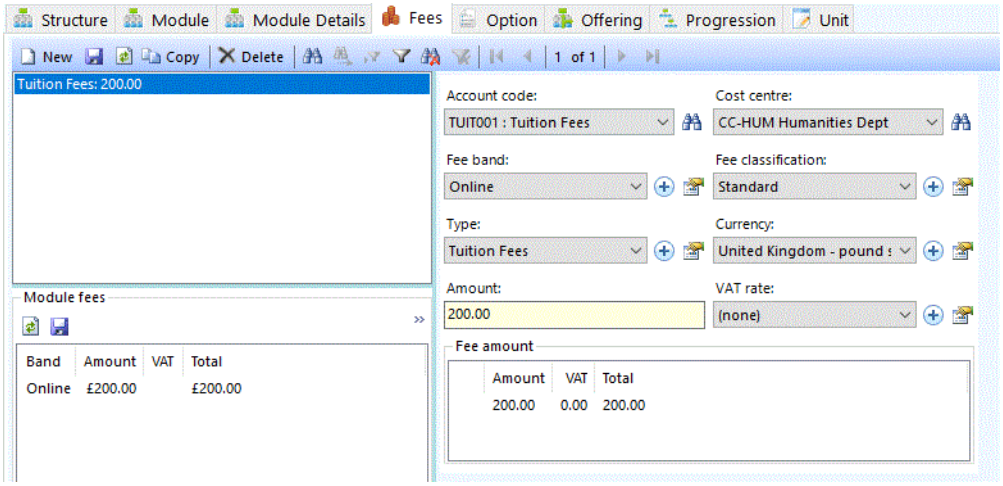
You must ensure that a value is specified against this setting key (Figure 34) so that when a student enrols on a module, the software will pick up all of the fees appropriate to online enrolments. The process also picks up any fees where the fee band is null.

Figure 34: The FeeBand setting key



The **Fee band**/**Feeband** field on the Module **Fees** tab must match the FeeBand key value, as shown in Figure 35.

Figure 35: Module fees



Varying fees by student type

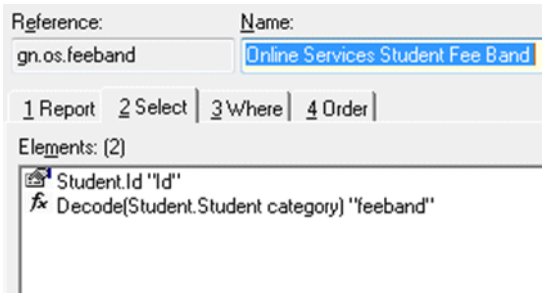
You can link a fee band to any student lookup that defines a feature of a student, making it possible to change the amount charged for an enrolment depending different characteristics. For example, if you link a fee band to the 'Student category' lookup you can charge different rates for Home and Overseas students.

The II Enrolment Tool always includes fees with no fee band, and fees with no fee band are displayed in the selection basket.

To base fees on a student characteristic

1. Open the 'Online Services Student Feeband' report (gn.os.feeband) in UNIT-e Report Generator and amend the **Select** tab to use a specific student-related lookup, such as 'Student Category' (Figure 36).

Figure 36: Amending the gn.os.feeband report



2. Make sure that you have the required student-related lookup values (e.g. for the Student category lookup you may have codes for 'H - Home' and 'O - Overseas').

3. Create 'Fee band' lookups with the same values as the student lookup (e.g. 'H - Home' and 'O - Overseas').

4. Use the **Fee band** field on the **Fees** tab in any Module application to associate modules with each of the new fee bands, each fee band being associated with a different fee **Amount**.



If you use this method of defining fees you must carefully consider the student characteristic that you use as the basis for fee definition, because not all characteristics are captured online. For example, a student may register and enrol online before the relevant characteristic (such as 'Student category') is entered, meaning that the correct fee would not be applied.

Defining currency & VAT rates

Online Services relies on the entry of **Currency** and **VAT rate** information for the following reasons:

- Modules that are flagged for online use must have an associated currency and VAT rate. We suggest that you have a 'VAT rate' lookup value of 0 (zero) for zero-rated courses, so that even if the VAT rate is zero you can make an entry in the **VAT rate** field.



As you need to specify currency and VAT rates for modules that appear in Online Services, for consistency you should enter this data for all other modules as well.

- The currency of modules that are viewable online must match the currency defined in the 'Application\OSEN\Payment\Currency' setting (see page 27).
- Only invoices that have an associated currency and VAT rate may be viewed and paid online in UNIT-e Online Services using the subsequent payments functionality.

About the Online Services fees reports

- '**Online Services Student Feeband' report (gn.os.feeband):** This runs automatically as part of every course search. It's supplied in a template format that you can modify to return different fee bands for each student enrolling online (e.g. by decoding the 'Student category' as explained in *Varying fees by student type* (see page 106)).

  You can manipulate this report to suit the needs of your institution, though changes should be made with care and you must specify the Student ID (or Organisation ID) in the first column and the required Feeband in the second column.

- **'Online Services Search Results Fees' report (gn.os.searchfees):** Once the fee band used to identify an online enrolment fee is established, the module ID and fee band are passed to this report. The report looks at which fees are attached to the

module for the fee band passed to it and calculates the fee amount using a formula against the VAT rate stored in the **Reference** field of the VAT rate lookup.



There's no check on whether the VAT rate is set up, so it's important to check that the formula will give you the expected results.

If the amount returned in null (as opposed to 0 (zero)), this will cause an exception in the web site.

The link to Pay360 card payments

When a student enrols online, the appropriate fee is determined by the 'Online Services Student Feeband' report (gn.os.feeband) (see page 107). The 'Online Services Module Fees' report (gn.osmodulefees) then displays the fees in the **Selection summary**.

When the student goes on to process their payment, the fees information is converted to an XML string which is then posted to the Pay360 portal.



Refer to *About card payments & End of Day files* (see page 185) for further details.

EnrolmentPayFees Web method

This Web method receives a list of Enrolment fees rather than using a fee band. The ExtendedEnrolmentFees function in the Enrolment.cs file builds a list of fees to pass on to the EnrolmentPayFees Web method, which takes the following parameters.

- Student id
- List of modules (plus a list of fees per module)
- Method of payment
- Authorisation code
- Total amount paid
- Source
- Promotion code
- Notes
- XML from Academy to derive CAN from



The web method process

The web method goes through the following steps:

1. Creates a receipt for the total amount.
2. Creates an invoice for the total amount.
3. Derives the structure of the modules using offerings.
4. Enrols a student on module(s).
5. Creates enrolment fees.
6. Creates enrolment invoice lines.
7. Creates any negative receipt lines (discounts, vouchers etc.) and allocates to invoice line.
8. Creates any required positive receipt lines to counteract negative receipt lines and allocates to invoice line.
9. Creates remaining receipt lines and allocates to invoice lines.
10. Rebuilds debtor balance.
11. Logs an exceptions in the amount allocated and total amount paid.
12. Returns a list of enrolments.

Flagging module options to appear on the web site

Access:	UNIT-e Modules Manager.exe or UNIT-e ILR Modules Manager.exe or UNIT-e Curriculum Manager (Courses) [UCMCO.exe] UNIT-e Student Manager (Modules) [USMMO.exe] **View | Module**
Screens:	*Modules Manager - Option* tab or *ILR Modules Manager - Option* tab or *Curriculum/Student Manager (Modules) - Option* tab (VB)

The options associated with modules must be flagged to appear online.



To flag module options to appear in Online Services

1. Open one of the above applications and retrieve the module details.
2. Go to the **Option** tab and create or retrieve the appropriate option(s).
3. Make sure that the **Web** check-box is ticked and **Save** your changes.

Dealing with student data

This section explains how Student data entered via Online Services is stored in your database.

- *Understanding the Stranger check-box* (see below)
- *Storing student addresses* (see page 112)
- *Storing student email addresses* (see page 112)
- *Links between enquiries, applications & enrolments* (see page 113)
- *Using the Qualification Online Entry check-box* (see page 113)

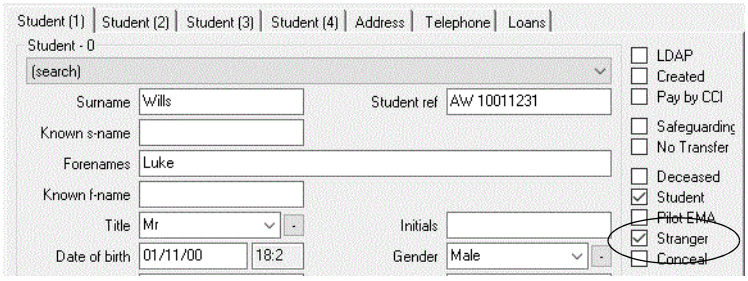
Understanding the Stranger check-box

When a new student registers online their details are saved to your UNIT-e database and the **Stranger** check-box is ticked automatically (Figure 37). Although the flag doesn't restrict what you can do with the record, it's a visual indication that the information entered hasn't yet been checked to see if it's a duplicate of an existing record and it also enables the Stranger Mapping processes to identify strangers.



Refer to *Converting strangers to new students using Online Stranger Mapping* (see page 128) for further information.

Figure 37: Stranger check-box



This indicates that the information entered hasn't yet been checked to see if it's a duplicate of an existing Student record. You can convert strangers to students using the following methods:

- You can manually remove the **Stranger** flag. For further details refer to *Manually converting strangers to students* (see page 127).

- The **Stranger** check-box is unticked automatically when you successfully process the student via UNIT-e Online Stranger Mapping (see page 128).
- You can merge the Stranger record with an existing Student record that has matching details. For further details refer to *Merging stranger and Student records* (see page 130).



You may find it useful to apply a global filter or business rule that prevents students flagged as strangers from appearing in other UNIT-e applications until they've been processed.

For more information refer to the following:

- Global filters - *UNIT-e Database Manager (Settings)* handbook (UDMSE.pdf)
- Business rules - *UNIT-e Database Manager - Tools* handbook (UDMTL.pdf)

Storing student addresses

The 'Application\OS\Update Address\Type' setting key (see page 32) enables you to control whether students can add new addresses online, whilst retaining the old address details, or whether they can only update an existing address.

If the setting is '-1', any change that the student makes to the address on the **Contact details** page (see page 256) is added as a new address. This new address inherits the reverse links from the previous record. The original address is retained for audit purposes but has no reverse links.

If the setting value is '0' or blank, the existing address is overwritten by the new details.

Storing student email addresses

Student email addresses are stored in two places:

- As an Address record with a **Type** of 'email'.
- In the Online Membership class.

The email address that the student uses when logging in online is saved in the Online Membership class. As a result, it's possible for the email address held in the student's Address record to be different from the email address that the student uses to log into UNIT-e Online Services.

Links between enquiries, applications & enrolments

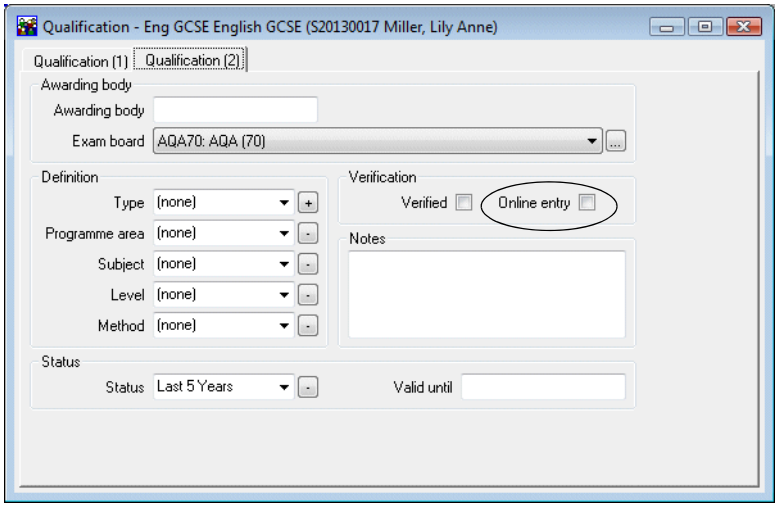
Online Services monitors the progress of a student through the online enquiry, application and enrolment process, dealing with the information in the following ways:

- When a student saves an application online, the process checks to see if they have already enquired about the course. If so, the system creates a link between the Enquiry record and the Application. Similarly, when a student saves an Enrolment, the process checks to see if the student has already applied, and if so links that Enrolment record to the Application.
- If a student has already enquired about, applied for or enrolled on a course, the text 'currently enquired', 'currently applied' or 'currently enrolled' appears against the module details when they are displayed online.
- The system remembers the details of any unfinished application and displays them as the student steps through the process when they log back into UNIT-e Online Services. Details are remembered as long as the student has clicked **Next Stage** before leaving the current session.

Using the Qualification Online Entry check-box

Students are able to add details of their qualifications online via Online Services. When these are saved to the database, the **Online entry** check-box is automatically selected on the **Qualification** form, **Qualification (2)** tab (Qualification:Online entry) (Figure 38). Depending on the procedures followed within your institution, you could remove this flag when the qualifications have been verified.

Figure 38: Qualification - Qualification (2)



Flagging brochures to appear online

Access:	UNIT-e Student Manager (Brochures) [USMBR.exe]
Screens:	*Brochure - Brochure (1)* tab (Figure 39)

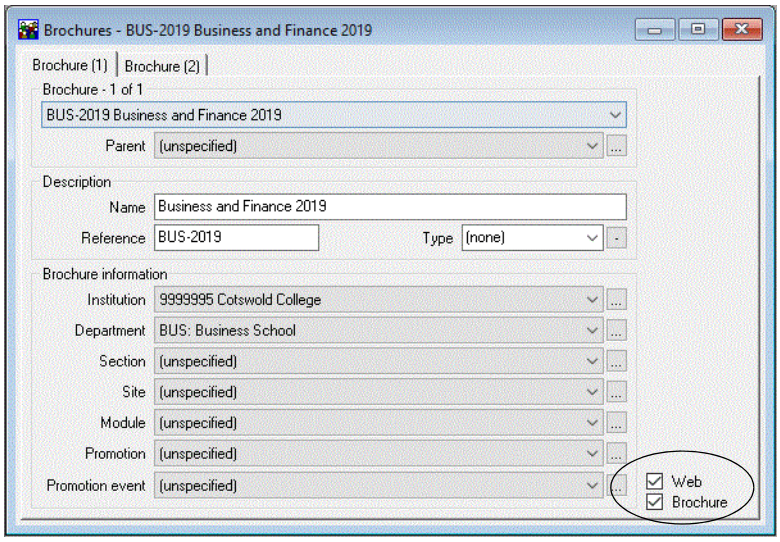
A student can only request a brochure via Online Services if it's been flagged to appear as a selectable item online.

To configure brochures for Online Services

1. Open UNIT-e Student Manager (Brochures) [USMBR.exe] and go to the **Brochure (1)** tab (Figure 39).
2. Select the **Web** check-box and save the changes.

When a request for a brochure is saved to your database it's saved as an enquiry and an enquiry item. As part of the process of generating an enquiry item, an institution link must also be generated, therefore the brochure must be associated with an **Institution** on the **Brochure (1)** tab (Figure 39).

Figure 39: Brochure - Brochure (1)



Chapter 5:

Creating students from strangers

When a prospective student registers with your institution via Online Services they're initially given the status of 'stranger', giving you the opportunity to check the information to see if the stranger is a duplicate of an existing Student record. If you're dealing with a small number of strangers this can be done manually, as explained on page 127.

If you're dealing with a large number of strangers you can automate the process using the UNIT-e Online Stranger Mapping application. This provides the following functionality:

- You can view a list of all strangers and select those that you wish to add to the database as students.
- You can identify strangers that are potential duplicates of student records already held on your database and merge them with the existing records.
- It provides you with a batch process that creates online accounts for Year 2 students who did not use UNIT-e Online Services to enrol on Year 1 but who have an email address in your database.



Refer to *Bulk creating online accounts for existing students* (see page 146) for further information.

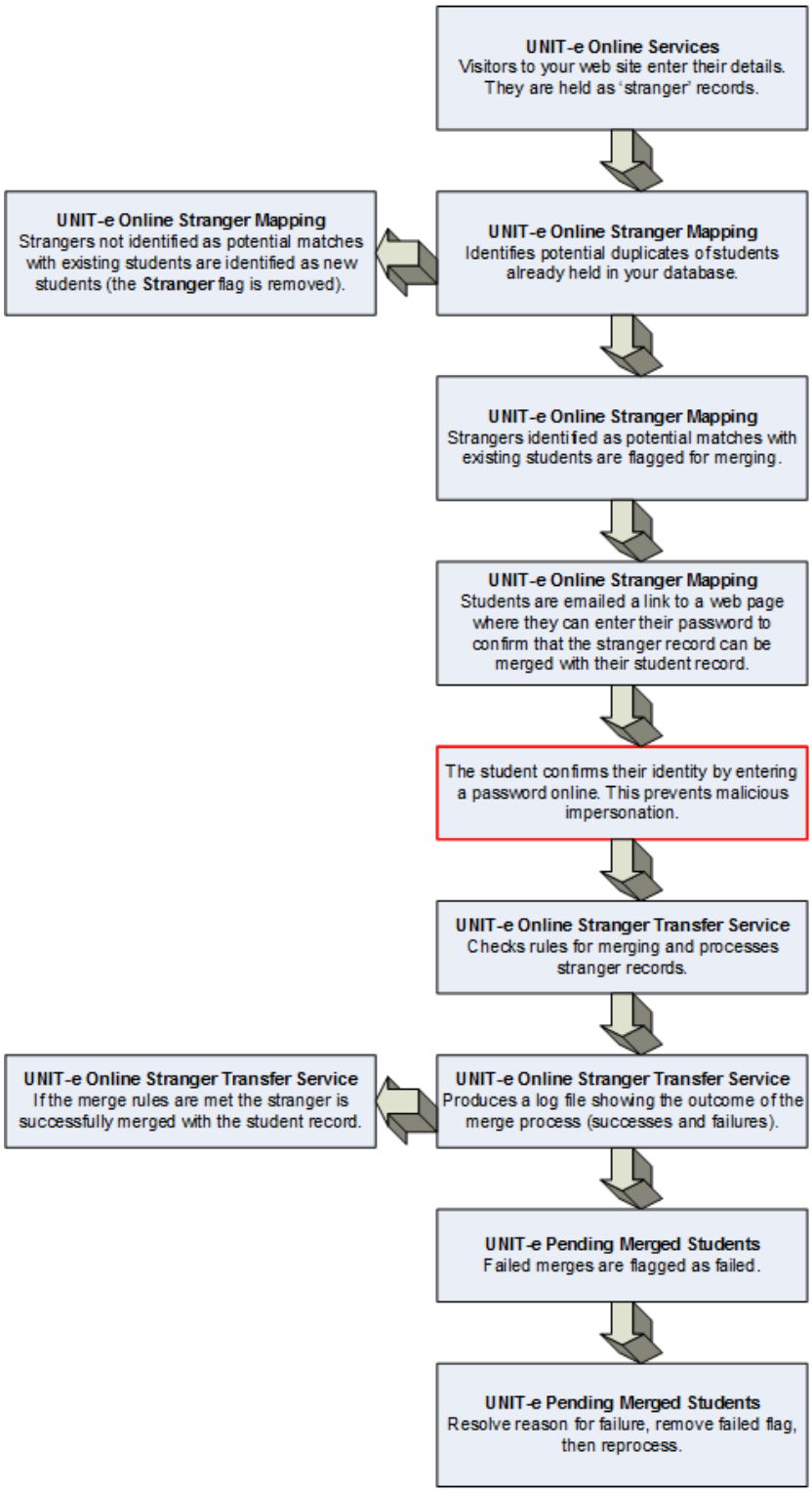
This chapter covers the following areas:

- *The Online Stranger Mapping process* (see page 117)
- *Online Stranger Mapping prerequisites* (see page 118)
- *Amending Online Stranger Mapping reports* (see page 119)
- *Navigating the Online Stranger Mapping form* (see page 123)
- *Manually converting strangers to students* (see page 127)

- *Converting strangers to new students using Online Stranger Mapping* (see page 128)
- *Merging stranger and Student records* (see page 130)
- *Dealing with multiple stranger matches to a student* (see page 135)
- *The Online Stranger Transfer process* (see page 137)

The Online Stranger Mapping process

Figure 40: The Online Stranger Mapping process



Online Stranger Mapping prerequisites

Before using Online Stranger Mapping, make sure that you have completed the following setup requirements:

- The user has access to the **Online Stranger Mapping** menu item (see page 20).
- The appropriate setting values have been defined (see page 41).
- Personal data properties are defined for strangers (see page 50).
- UNIT-e Messaging is set up correctly so that authorisation emails may be sent to students.



Refer to the *Managing UNIT-e Messaging* handbook (MSMS.pdf) for further details.

Amending Online Stranger Mapping reports

The stranger information on the left-hand side of the screen is provided by the 'Stranger pick list report' (gn.os.strangers) and the student information on the right-hand side of the screen is provided by the 'Student pick list report' (gn.os.students). You can amend either of these reports if you want to include additional stranger or student information for comparison.

Refer to *Preserving mandatory properties in reports* (see page 121) before making any changes.

- *Amending the Stranger pick-list report* (see below)
- *Amending the Student pick list report* (see page 121)
- *Preserving mandatory properties in reports* (see page 121)

Amending the Stranger pick-list report

The 'Stranger pick list report' (gn.os.strangers) provides the stranger details on the left-hand side of the **Online Stranger Mapping** form (Figure 41).

Figure 41: Online Stranger Mapping - expanded stranger details



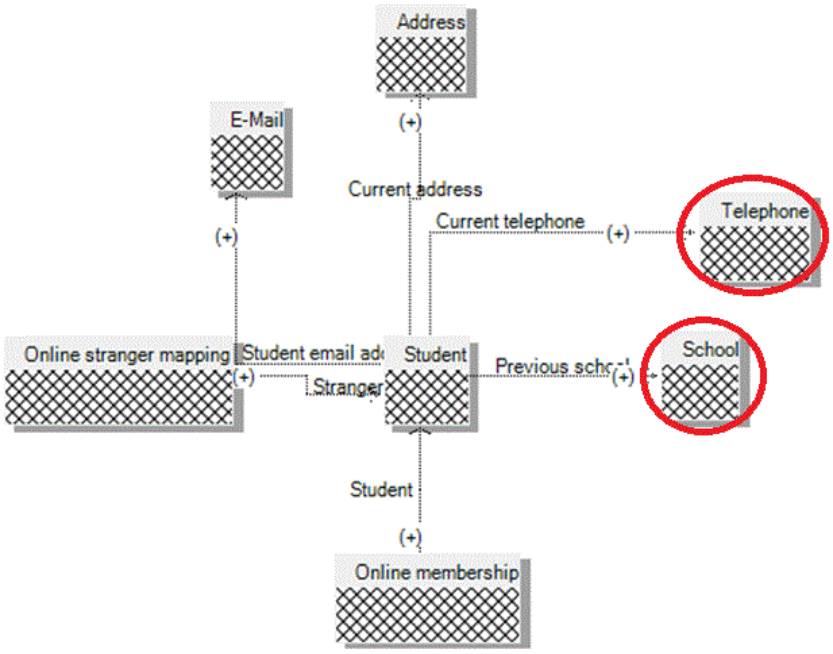
You can make amendments to this report if you want to include additional stranger information in the stranger details. For example, the addition of the stranger's previous school and telephone number may help to identify matches.

To amend the Stranger pick-list report

1. Open the 'Stranger pick list report' (gn.os.strangers) in UNIT-e Report Generator.

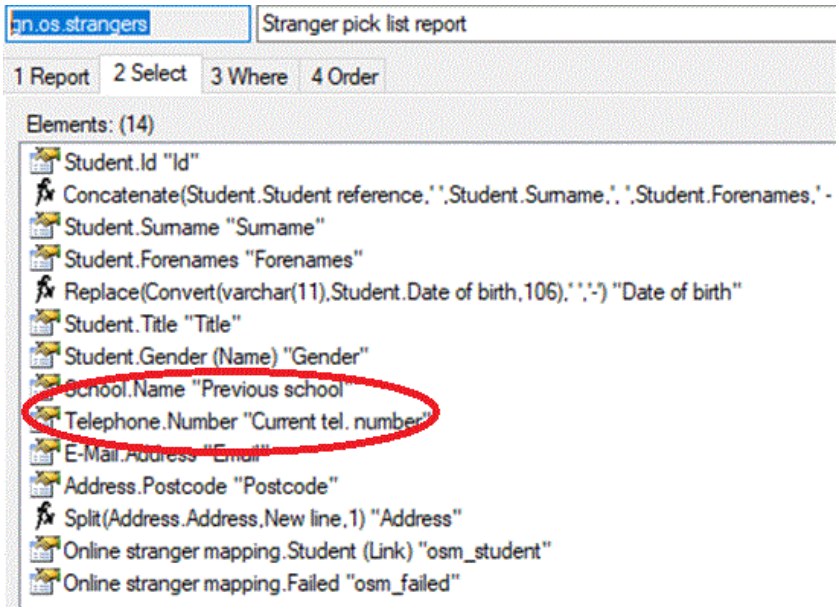
2. Add the required classes. Telephone and School classes are added in the example in Figure 42.

Figure 42: Classes added to Stranger pick list report



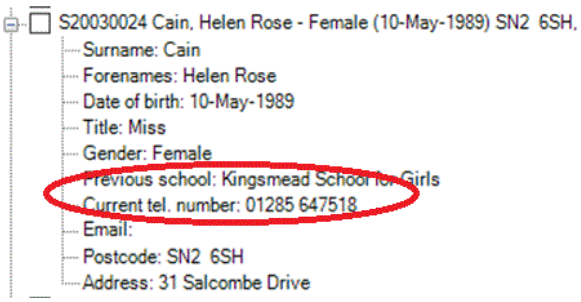
3. Update the Select clause to include the required properties (Figure 43).

Figure 43: Stranger pick list report Select clause



4. The new fields appear in the stranger details (Figure 44).

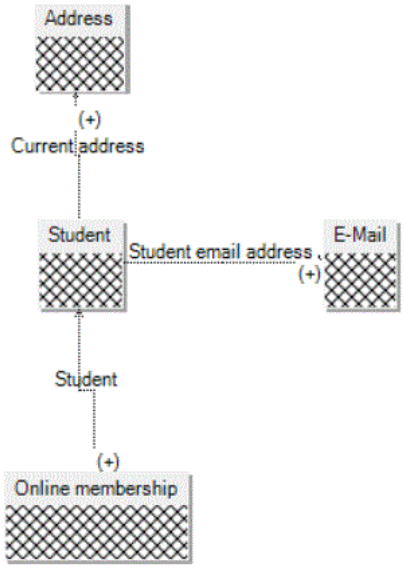
Figure 44: Online Stranger Mapping - additional stranger details



Amending the Student pick list report

The 'Student pick list report' (gn.os.students) (Figure 45) can be amended in the same way as the Stranger pick list report (see page 119) to add fields to the student details.

Figure 45: Student pick list report



Preserving mandatory properties in reports

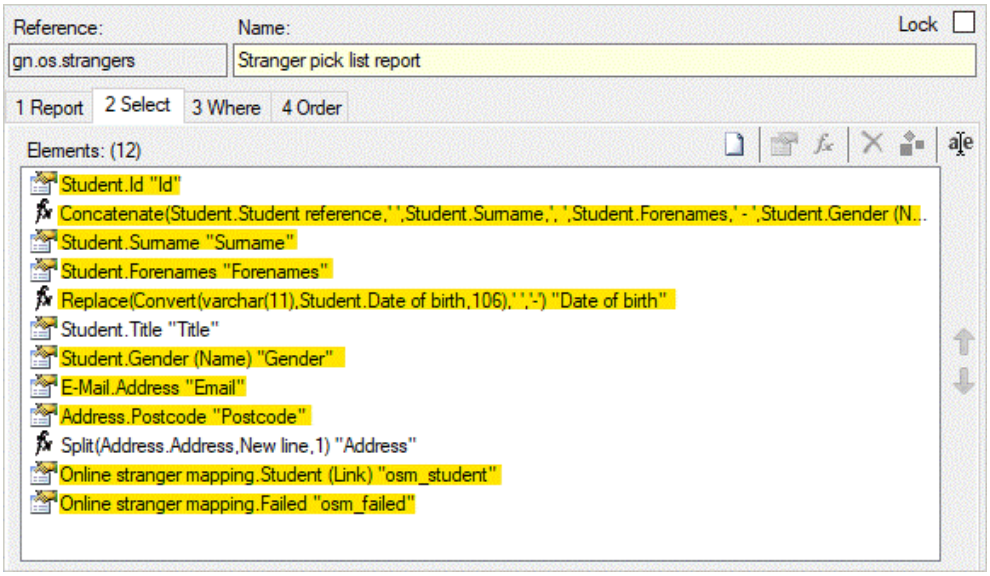
If you make amendments to the Stranger pick list report or Student pick list report, you should note that the **Select** clause properties highlighted in yellow in Figure 46 are mandatory and should not be removed. You should also note the following:

Student.Id "Id" - This isn't displayed when the node is expanded.

Concatenate(Student.Student reference,' ',Student.Surname,', ',Student.Forenames,' - ',Student.Gender (Name),' (',Replace(Convert(varchar(11),Student.Date of birth,106),' ','-'),') ',Address.Postcode,', ',Online membership.Email,' ',Null value(Student.Previous system reference,' ')) "Student" - This defines the text displayed as the node name.

Online stranger mapping.Student (Link) "osm_student" and **Online stranger mapping.Failed "osm_failed"** - (Stranger pick list report only) these must always be the last two items in the list.

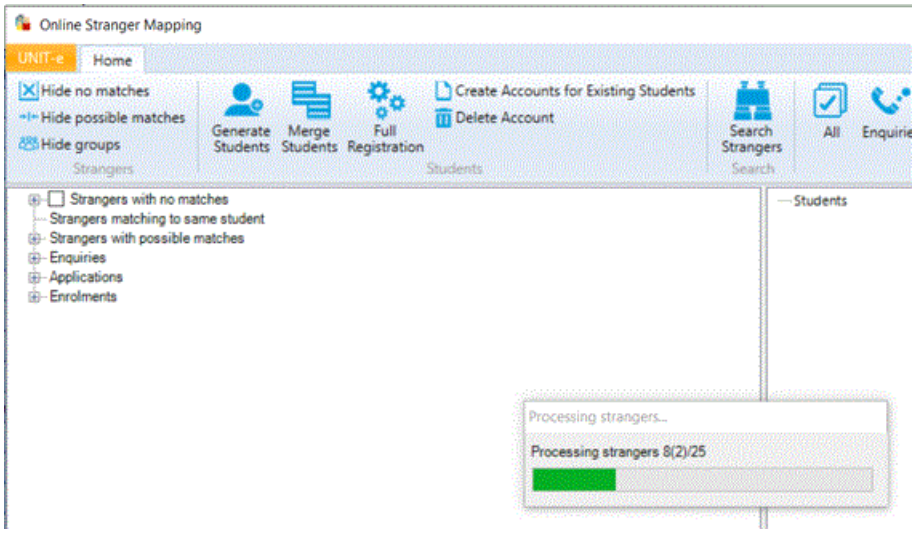
Figure 46: Stranger pick list report



Navigating the Online Stranger Mapping form

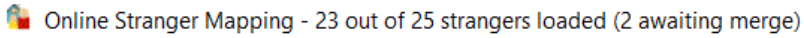
Online Stranger Mapping retrieves records in batches of 50 so that the opening of the form isn't delayed when there are a large number of records to process. When the form is opening you briefly see the first batch of records being retrieved (Figure 47).

Figure 47: Online Stranger Matching batch retrieval



When the first batch is displayed, the figures alongside the form title explain how many of the records have been downloaded. In Figure 48 there are 25 records in total, of which 23 are displayed and 2 are awaiting merge. By default the two awaiting merge aren't displayed but can be displayed by clicking on the Hide matched records button.

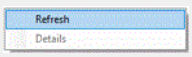
Figure 48: Online Stranger Mapping - records count



if you have more than 50 strangers awaiting processing, the form is topped up to 50 records when you process the first batch.



If there's a large number of strangers and you're viewing the first 50 but then apply a further filter (e.g. by clicking the **Enrolments** button), the form will show a blank page. In the left-hand pane, right-click and select **Refresh** to view the first 50 strangers that meet the criteria of the selected filter (e.g. the first 50 enrolment strangers).



The left-hand pane of the **Online Stranger Mapping** form (Figure 49) lists all strangers that haven't yet been processed, with the strangers initially categorised as follows:

- **Strangers with no matches** - Strangers with no matches found in your UNIT-e database when the default matching criteria defined by the settings are applied.

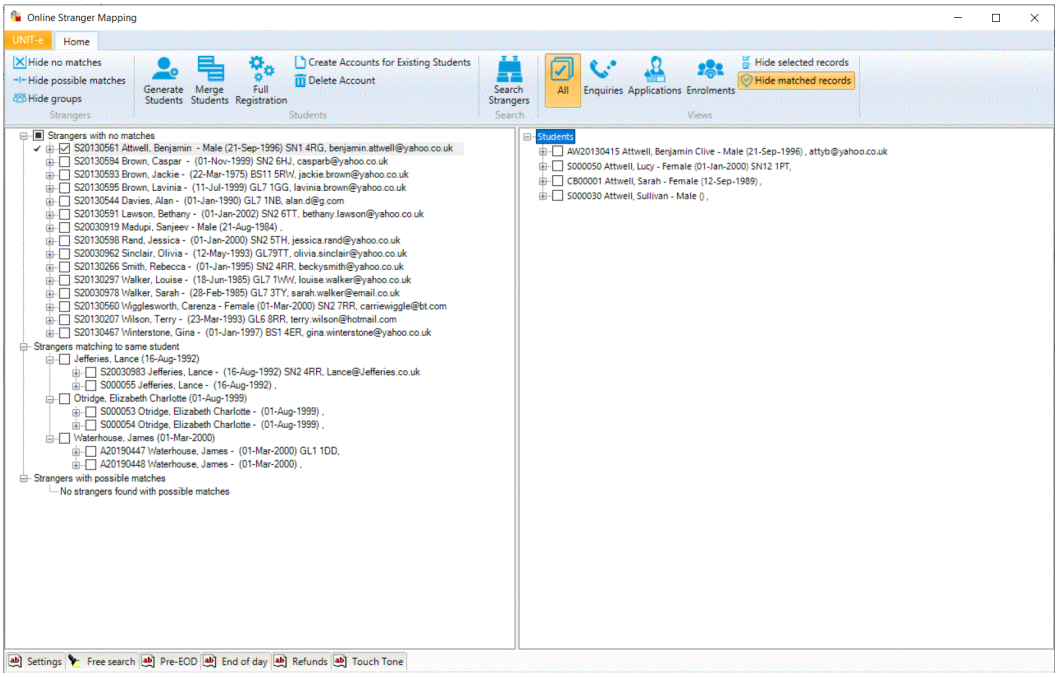
- **Strangers matching to same student** - Shows multiple strangers that have a possible match with a single student.

- **Strangers with possible matches** - Shows strangers with a possible match in your UNIT-e database.

These groups may be displayed or hidden using the **Hide no matches**, **Hide possible matches** and **Hide groups** buttons on the **Home** menu tab. You also have the option to view strangers associated with enquiries, applications and/or enrolments by using the **Enquiries**, **Applications** and **Enrolments** buttons, or you can search for a specific stranger or group of strangers using the **Search Strangers** button.

Click the **All** button to revert to the listing above.

Figure 49: Online Stranger Mapping



Viewing stranger and student data

If you highlight a stranger in the **Strangers matching to same student** or **Strangers with possible matches** category, the right-hand pane lists existing student(s) that have a potential match with that stranger. More than one potential match may be listed.

There are two ways of viewing additional details about a stranger or student:

- You can expand the information on the form (Figure 50).

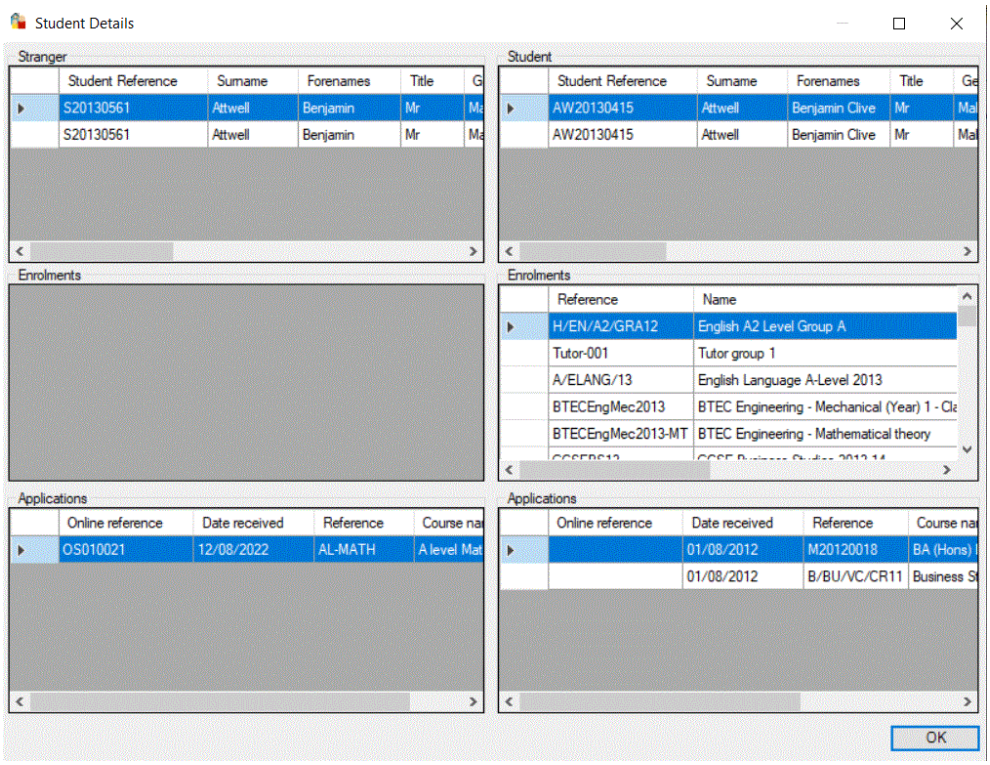
Figure 50: Expanded stranger details



The 'Stranger pick list report' (gn.os.strangers) provides the stranger details and the 'Student pick list report' (gn.os.students) provides the student details.

- You can right-click on the stranger or student name and selecting **Details** from the pop-up menu. This opens the **Student Details** form (Figure 51), which gives additional information to enable you to make a decision.

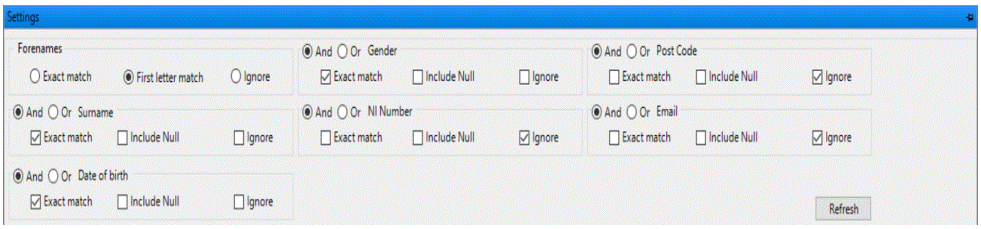
Figure 51: Online Stranger Mapping - Student Details



Temporarily changing the search criteria

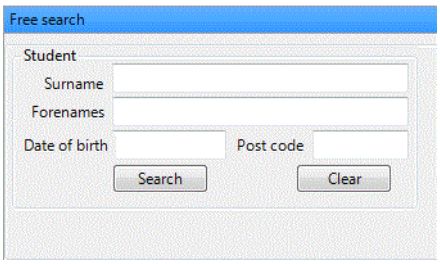
The potential matches are identified by a process that uses settings; refer to *Settings for Student Merging* (see page 41) for further information. You can temporarily override these settings by using the **Settings** tab (Figure 52) at the bottom of the form to 'fine tune' the match parameters.

Figure 52: Online Stranger Mapping - Settings



You can also use the **Free Search** tab (Figure 53) to enter alternative matching criteria.

Figure 53: Online Stranger Mapping - Free Search



Manually converting strangers to students

Access:	UNIT-e Student Manager (Enrolments) [USMEN.exe] **View | Student**
Screens:	*Student - Student (1)* tab
Institution-specific variables:	You can also use your market-specific version of the **Student** form.

If you're only dealing with a small number of strangers and you're confident that there are no matching records already held in your database, you can convert them to students manually.



To manually convert a stranger to a student

1. Open one of the above applications and retrieve the Student record.
2. If you're confident that you're dealing with an entirely new student, deselect the **Stranger** check-box.

   The 'active' address and telephone details supplied by the student are retained and the appropriate check-boxes remain selected (for example, if the Online Student enters a current address, the check-box for **Current** is selected against that address).
3. Save your changes.

Converting strangers to new students using Online Stranger Mapping

Access:	UNIT-e Online Stranger Mapping.exe
Screens:	*Online Stranger Mapping* (see page 266)

When a prospective student enters their details via UNIT-e Online Services they're held as stranger until you identify them as a new student or as a duplicate of an existing Student record. Online Stranger Mapping aids this process by listing all strangers that haven't yet been processed, along with their potential matches.

This section explains the creation of new Student records from stranger records that have no matches (or no viable matches) in your UNIT-e database.

If you're only dealing with a small number of strangers you can convert them to students manually via the **Student** form. Refer to *Manually converting strangers to students* (see page 127) for further details.

To convert strangers to new students using Online Stranger Mapping

1. Open UNIT-e Online Stranger Mapping.exe to display the **Online Stranger Mapping** form (see Figure 49 on page 124).

Online Stranger Mapping retrieves records in batches of 50 so that the opening of the form isn't delayed when there are a large number of records to process. Refer to *Navigating the Online Stranger Mapping form* (see page 123) for further information.

2. To convert strangers with no potential matches with existing students, tick the check-box alongside each relevant stranger record in the **Strangers with no matches** section of the left-hand pane.

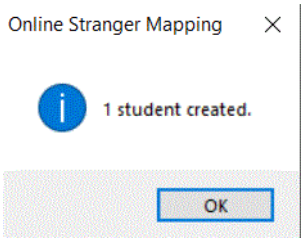
- Tick the **Strangers with no matches** box to automatically tick all of the strangers in that group.



- You can also convert strangers with potential matches to students using this method if none of the potential matches offered seems appropriate.

3. Click **Generate Students** on the **Home** menu tab to convert the strangers to students. The software displays the following message when the process is complete (Figure 54). The **Stranger** flag in the Student record is automatically removed as part of this process.

Figure 54: Online Stranger Mapping - Student created message



Merging stranger and Student records

Online Student Mapping identifies potential matches between a stranger record and Student records already held in your UNIT-e database. These potential matches are listed in the right-hand panel of the **Online Stranger Mapping** form (see Figure 49 on page 124). If you are confident that the match is correct you can merge the stranger and Student details.

There are two ways of doing this:

- *Merging records with student authorisation* (see below) - When you use this method the merge doesn't take place until it's been authorised by the student. This eliminates the possibility of any fraudulent use of the student's details. When you create a link between a stranger and student, a Person message record is generated and emailed to the student to obtain authorisation to merge. Once authorisation is received, the records can be picked up and merged by the Online Stranger Transfer process (see page 137).
- *Merging records without student authorisation* (see page 133) - If you're dealing with a large number of stranger records and are prepared to make manual changes if errors occur, you can merge stranger and Student records without student authorisation. The link that you create between the stranger and an existing Student record is automatically picked up by the Online Stranger Transfer service (see page 137).

The rules that control these processes are explained in the section *Rules governing the merging process* (see page 133).

Merging records with student authorisation

Access:	UNIT-e Online Stranger Mapping.exe
Screens:	*Online Stranger Mapping* (see page 266)

It's recommended that you obtain authorisation from the student before merging a stranger record with an existing Student record, as this eliminates the possibility of any fraudulent use of the student's details. This section takes you through the process of creating a link between a stranger and Student record. The creation of the link prompts the generation of a Person message record that's emailed to the student to obtain authorisation

to merge. Once authorisation is received the records can be picked up and merged by the Online Stranger Transfer process (see page 137).

To merge records after student authorisation

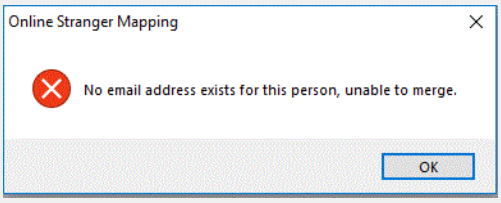
1. Open UNIT-e Online Stranger Mapping.exe to display the **Online Stranger Mapping** form (see Figure 49, page 124).

Online Stranger Mapping retrieves records in batches of 50 so that the opening of the form isn't delayed when there are a large number of records to process. Refer to *Navigating the Online Stranger Mapping form* (see page 123) for further information.

2. Highlight each of the strangers in the **Strangers matching to same student** and **Strangers with possible matches** categories in the left-hand pane in turn to view the potential student matches in the right-hand pane.

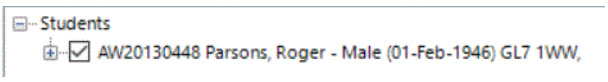
   Select the best match by ticking the check-box against the appropriate Student record in the right-hand pane (Figure 55). You can expand the stranger and student details to make further checks before making your selection - see *Viewing stranger and student data* (see page 124).

- The Student record selected for matching must have an associated email address. The following message is displayed if no email address is found and you're prevented from creating a link.



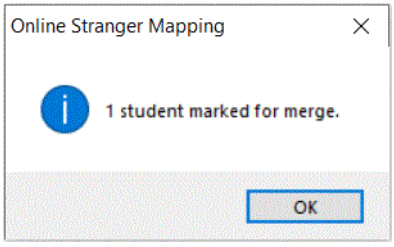
- Don't tick the check-box of the stranger in the left-hand pane if you've found a match with an existing student. This should only be ticked if you're creating an entirely new Student record or if none of the potential matches offered seems appropriate. Refer to *Converting strangers to new students using Online Stranger Mapping* (see page 128) for further details.

Figure 55: Online Stranger Mapping - matching student selected



3. Click **Merge Students** to create a link between the stranger record and Student record (a mapping record). The following message is displayed (Figure 56) and the stranger is removed from the left-hand pane.

Figure 56: Online Stranger Mapping - student marked for merge message

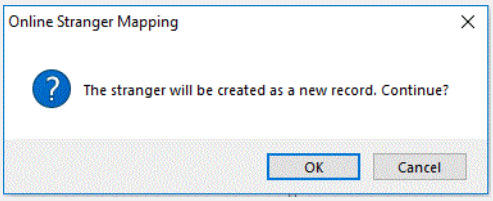


4. Linked strangers are displayed in bold in Online Stranger Mapping (Figure 57) and their details can be viewed in UNIT-e Database Manager Pending Merged Students.exe (refer to *The Online Stranger Transfer process* (see page 137) for details).

Figure 57: Online Stranger Mapping - linked student



If you subsequently decide that you want to create a new record for the matched stranger and you flag the stranger record in the left-hand pane, the system displays the warning message below but doesn't prevent you from continuing, as you may have made an error when flagging the stranger for merging. Note that the process to create a new student overrides the merge process.



Click **Hide Matched Records** if you don't want to see stranger records that have already been matched.

5. A Person message record is created as part of the link process. Use UNIT-e Messaging to email this message to the student. The email contains a link to a web page where the student enters their password to proceed.

- To use this facility you must ensure that you've defined the settings in the *Application|OS|Users* (see page 33). In particular, the **Send Email** value must be set to -1 (enabled).
- Note that the email is sent to the master student record email address (Student.Student email address). The password that the student should use to verify the account is the one stored in the Online membership class (Online membership.Password).

When authenticate link emails are generated from Online Services, the three **Body** fields are concatenated to make the email content and aren't separated out in the email. As a result the text is continuous and will corrupt the auto-generated link. To overcome this problem, format the email in HTML and force line breaks before each section of text.

Refer to the *Managing UNIT-e Messaging* handbook (MSMS.pdf) for further details.

6. When the student has authorised the merge, a **Matched** flag is automatically set against the stranger in UNIT-e Database Manager Pending Merged Students.exe. The records are then ready to be picked up and merged by the Online Stranger Transfer process (see page 137).

Merging records without student authorisation

Access:	UNIT-e Online Stranger Mapping.exe
Screens:	*Online Stranger Mapping* (see page 266)

If you're dealing with a large number of stranger records and are prepared to make manual changes if errors occur, you can merge stranger and Student records without student authorisation.



It's recommended that you obtain authorisation before merging records. Refer to *Merging records with student authorisation* (see page 130) for details.



To merge records without student authorisation

1. Follow steps 1. to 2. as for *Merging records with student authorisation* (see page 130), repeating the process for each stranger to find all of the matches before proceeding to the next step.

2. Run **Full Registration** from the **Home** menu tab. This automatically sets the **Matched** flag against the stranger in UNIT-e Database Manager Pending Merged Students.exe. The records are then ready to be picked up and merged by the Online Stranger Transfer process (see page 137).



It's important that you don't click **Merge Students** at this point, as this would mean that the students become part of the full authorisation process and must authorise the merge before the process can continue.

Rules governing the merging process

- The section on *Settings for Student Merging* (see page 41) covers the setting keys that control the way in which the Online Stranger Mapping and the stranger/student merge process works.

- The 'Application\OS\Online Stranger Mapping\Merge Strangers' setting keys (see page 43) determine which Student values are overwritten with stranger data when records are merged, however, in the case of addresses and telephone numbers, you can choose not to use these settings if you wish to retain a record of all addresses/ numbers. To avoid the creation of duplicate records, the merge process compares the following properties and will not create new records if the details are identical:

    - **Postcode** (address.reference)

- **Country** (address.country) - note that this is mandatory for online registration but it may not be provided for the student.
- **Address** (address.name)
- **Number** (telephone.name)
- **Extension** (telephone.reference)

- The way in which email addresses are stored when a stranger and student are merged are explained in *Storing student email addresses* (see page 112).
- When you merge a stranger with an existing Student record, the details entered online, including those that are not merged with the existing record, are saved in the Student Archive class.
- If a record in your database and its matching stranger record have the same candidate references (as used in UNIT-e Exam Manager), merging is allowed. If both records have candidate references but they are different, the merge is not allowed, as it may cause data problems in UNIT-e Exam Manager.
- The Online Stranger Transfer Service requires specific class permissions. Refer to *The Online Stranger Transfer process - Class permissions* (see page 139) for further information.

Dealing with multiple stranger matches to a student

There are several ways of dealing with multiple strangers that have a potential match with one student.

- *None of the strangers match the student* (see below)
- *One or more of the strangers matches the student* (see below)
- *One of the strangers matches a free search result* (see page 136)

None of the strangers match the student

None of the strangers are matches to the student, therefore you don't want to merge any of the strangers with the Student record. Select all strangers in that group by clicking the top one (Figure 58) and click **Generate Students**. A new Student record is created for each of the strangers.



Figure 58: Multiple possible stranger matches to a student - no match

One or more of the strangers matches the student

If one or more of the strangers is a genuine match to the student you can choose to merge a sub-set of the group or only one of the group with the student. Tick individual strangers (Figure 59) and click **Merge Students**.



Figure 59: Multiple possible stranger matches to a student - matches

The remainder of the strangers should either be created as new students (select and click **Generate Student**) OR you might carry out a free search (see below).

One of the strangers matches a free search result

If you think that one of the strangers in the group is a match to a student who isn't offered as a possible match, tick that stranger and carry out a **Free search**. When you select a student from the results, only the ticked stranger is linked to the student identified by the **Free search**. You can then click **Merge Students**. If you click on another stranger in the group you still have the option to merge them with the original possible match provided by the software, or you can choose to create new Student records from their details.

The Online Stranger Transfer process

The UNIT-e Online Strangers Transfer Service is an automated process that deals with student information entered online, whether these are entirely new records or potential duplicates of existing students. The diagram showing *The Online Stranger Mapping process* (see Figure 40, page 117) illustrates how the process works to:

- Change the status of any new student entered online from 'stranger' to 'student'.
- Merge a student entered online with a student record that already exists in your database.

This process is triggered by your instructions when using the Online Stranger Mapping process.



Refer to *Converting strangers to new students using Online Stranger Mapping* (see page 128) and *Merging stranger and Student records* (see page 130) for further information.

If all flagged stranger records are successfully processed, no further intervention is required on your part, however, you may need to deal with failed transfers using the UNIT-e Database Manager Pending Merged Students.exe.

This section covers the following areas:

- *Prerequisites* (see below)
- *How the Online Stranger Transfer Service works* (see page 141)
- *Dealing with failed transfers* (see page 142)

Prerequisites

The following must be in place in order to use the Online Stranger Transfer process:

- *Application|OS|Online Stranger Mapping|Merge Strangers* (see page 43)
- *Installation of the Online Stranger Transfer Service* (see page 138)
- *Location of the Online Stranger Transfer service log file* (see page 138)
- *Class permissions* (see page 139)

Installation of the Online Stranger Transfer Service

The process of installing and configuring the UNIT-e Online Strangers Transfer Service is covered in detail in the *Managing UNIT-e Online Services Website Installation* handbook (MOSWSI.pdf). In brief, the stages are as follows:

- **Installation:** The UNIT-e Online Strangers Transfer Service must be installed on your main UNIT-e server. This process does not require access to the External Web Server or the Internet, it only requires access to the UNIT-e database. The **setup.exe** in the **Software Setup\Online Strangers Transfer Service Setup** folder in the latest release image launches the Setup Wizard.
- **Amending the config file:** The UNIT-e Online Strangers Transfer Service configuration file (**UNITe Online Strangers Transfer Service.exe.config**) must be updated to specify your database and the location for error files produced by the process. You may also adjust the default service running frequency.
- **Copying the CAPITA.LIC file:** You must place a copy of the CAPITA.LIC licence file in the directory where the Online Strangers Transfer Service has been installed, which is by default **C:\Program files (x86)\Education Software Solutions Ltd\UNIT-e Online Strangers Transfer Service**.
- **Defining UNIT-e settings for MAC Address authentication:** The Online Strangers Transfer Service connects to the UNIT-e database through MAC Address authentication. This provides a level of security to ensure that only authorised users can access the system. These settings must be activated via the **Windows Services** tab in **Security and Settings**.



The **Username** specified on the **Windows Services** tab in **Security and Settings** must have the class permissions shown in Table 31 (see page 139) and the **UNITeUser** must be a member of the 'Windows Services user group' so that it has the correct class permissions.

Location of the Online Stranger Transfer service log file

The location of the log file created by the Online Stranger Transfer Service is defined in the **UNITe Online Stranger Transfer Service.exe.config** file (Figure 60), which is located in the folder **C:\Program Files (x86)\Education Software Solutions Ltd\UNIT-e Online Strangers Transfer Service** on the server running the merge service.

Figure 60: Online Stranger Transfer Service log file path

```
<setting name="LogDefaultPath" serializeAs="String">
 <value>C:\</value>
```

You can amend this location to suit your requirements but you should be aware that it will be over-written by upgrades and must therefore be redefined after each upgrade.



The **Online Stranger Transfer Service.exe.config** file is explained in more detail in the *Managing UNIT-e Online Services Website Installation* handbook (MOSWSI.pdf).

Class permissions

The user running the Online Stranger Transfer/Pending Merged Students processes must have the class permissions shown in Table 31. Not all of these classes are covered by the 'Online Services web config user' user group, therefore they must be added manually to the user permissions.

Table 31: Class permissions for Online Stranger Transfer

Class	Access type
Candidate	Select, Update
Candidate archive	Select, Insert, Update
Merge link	Select, Insert
Online organisation mapping	Select, Update
Online stranger mapping	Select, Update
Organisation	Select, Update
Staff	Select, Update
Staff archive	Select, Insert, Update
Staff HESA	Select, Update
Staff HESA archive	Select, Insert, Update
Staff SIR	Select, Update
Staff SIR archive	Select, Insert, Update
Staff WSIR	Select, Update
Staff WSIR archive	Select, Insert, Update
Student	Select, Update
Student archive	Select, Insert, Update
Student FES/SQA	Select, Update
Student FES/SQA archive	Select, Insert, Update
Student HEA	Select, Update
Student HEA archive	Select, Insert, Update
Student HESA	Select, Update
Student HESA archive	Select, Insert, Update
Student ISR/ILR	Select, Update

Class	Access type
Student ISR/ILR archive	Select, Insert, Update
Student WSR/LLWR	Select, Update
Student WSR/LLWR archive	Select, Insert, Update



Refer to *Classes* (see page 16) for a full list of the class access required by Online Services.

How the Online Stranger Transfer Service works

1. Visitors to your web site enter their details online. These are identified as strangers until they're processed.

2. Using the UNIT-e Online Stranger Mapping process, you prepare the stranger data for processing by identifying entirely new students and online students that are potential duplicates of student records already held on your database.



Refer to *Converting strangers to new students using Online Stranger Mapping* (see page 128) and *Merging stranger and Student records* (see page 130) for further information.

3. The Online Stranger Transfer Service automatically runs every ten minutes, picking up the mapped strangers from UNIT-e Database Manager Pending Merged Students.exe (see page 275) and processing them in batches of 16.

   The merge process is governed by rules specified in the settings for *Application|OS|Online Stranger Mapping|Merge Strangers* (see page 43) and *Application|Student Merging* (see page 45).



You can alter the elapse time between runs by amending the **UNITe Online Stranger Transfer Service.exe.config** file. This is explained in more detail in the *Managing UNIT-e Online Services Website Installation* handbook (MOSWSI.pdf).

4. A log file is produced showing students that have been successfully created or merged and students that have failed the process. You can also check the Event Viewer in the event of the process failing, which shows the error code, the reason phrase and the base URL of the data service.



The location of this log file must be specified in the **UNITe Online Stranger Transfer Service.exe.config** file (see page 138).

Dealing with failed transfers

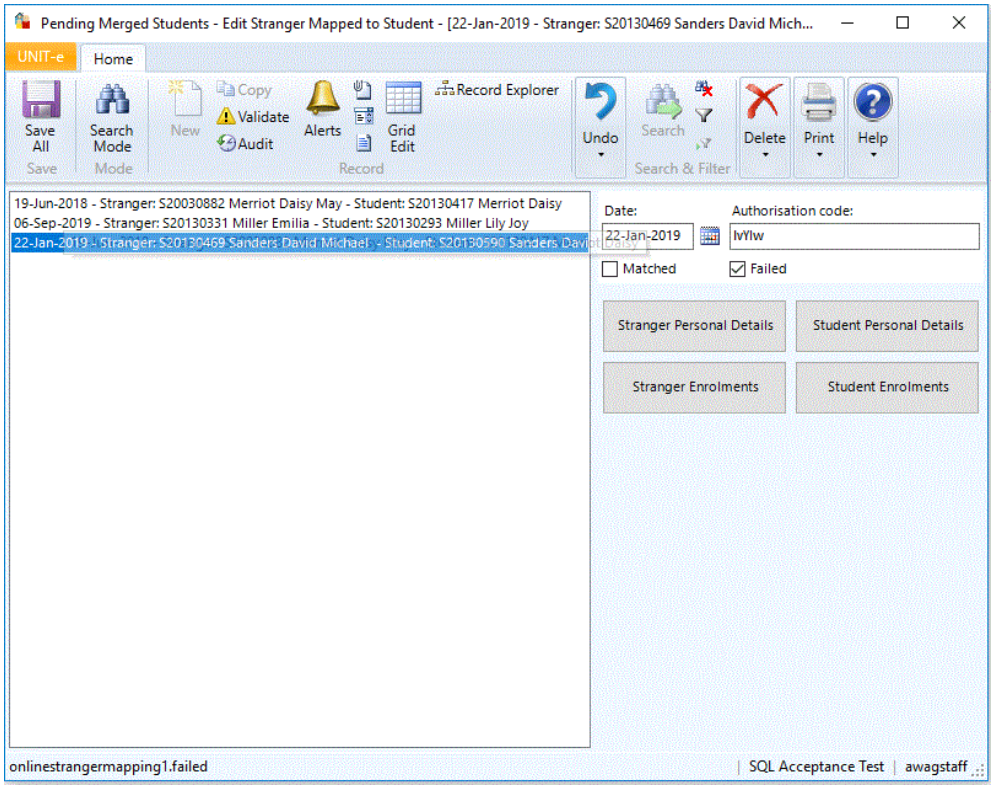
Access:	UNIT-e Database Manager Pending Merged Students.exe
Screens:	*Pending Merged Students* (see page 275)

To deal with failed transfers

1. The log file produced by the Online Stranger Transfer Service lists failed transfers. Check the details and deal with the reasons for failure.

2. Open UNIT-e Database Manager Pending Merged Students.exe to display the **Pending Merged Students** form (Figure 61) and either enter a specific **Date** or leave the date field blank and click **Search** to find all unprocessed strangers.

Figure 61: Pending Merged Students



3. If a stranger transfer has failed, the stranger details are displayed with the **Failed** check-box selected. If you've dealt with the reason for failure, remove the flag from the **Failed** check-box.

4. The Online Stranger Transfer Service picks up the corrected strangers in its next automatic run and reprocesses them.

Click the **Stranger Personal Details**, **Student Personal Details**, **Stranger Enrolments** or **Student Enrolments** button to view further information about the stranger and their mapped student. Examples of these screens are available in *Chapter 12: Screen and field information* (see page 217).

Chapter 6:

Dealing with student online accounts

This chapter explains the process of creating online accounts for existing students and also deals with the on-going maintenance of online accounts.

- *Bulk creating online accounts for existing students* (see page 146)
- *Creating online accounts for individual students* (see page 149)
- *Creating online membership accounts using Microsoft Task Scheduler* (see page 152)
- *Dealing with locked online accounts* (see page 156)
- *Deleting online accounts* (see page 158)
- *Associating an online account with a UNIT-e user* (see page 161)

Bulk creating online accounts for existing students

Access:	UNIT-e Online Stranger Mapping.exe
Screens:	*Online Stranger Mapping* (see page 266)

If you have existing students who didn't enrol via Online Services and therefore don't have online accounts, you can create online accounts for them so that they can re-enrol online.



Students can only be included in this process if they already have an email address in your UNIT-e database, and the **Email** check-box is selected against that email address. Refer to *Storing student email addresses* (see page 112) for further details.

Online accounts can also be created using UNIT-e Online Services Account Manager. Refer to *Creating online accounts for individual students* (see page 149) for further details.

This section covers the following areas:

- *Creating online accounts for existing students with enrolments* (see below)
- *Varying the selection of students* (see page 148)

Creating online accounts for existing students with enrolments

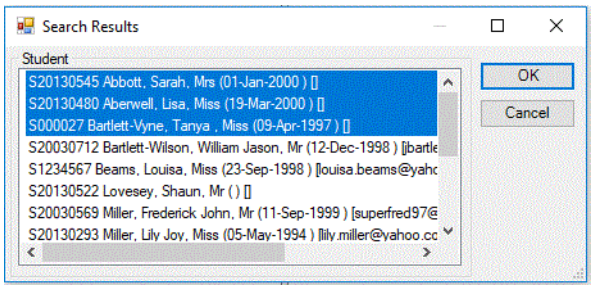


To create online accounts for existing students with enrolments

1. Open UNIT-e Online Stranger Mapping.exe to display the **Online Stranger Mapping** form (see page 266).
2. Make sure that your cursor is positioned in the left-hand pane, then select **File | Create Accounts for Existing Students** from the menu.
3. An **Enrolment Search** form is displayed; enter your selection criteria and click **OK**.
4. The software displays the **Search Results** form (Figure 62), which lists the students matching your selection criteria.

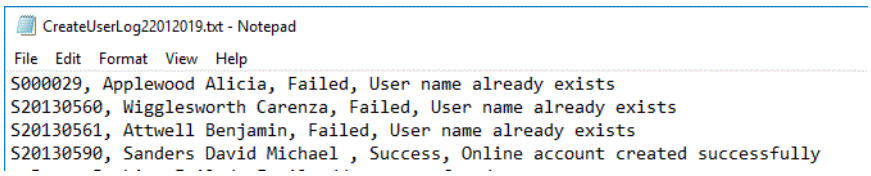
5. Select the student(s) that you want to include in the process and click **OK** to continue.

Figure 62: Online Stranger Mapping - Search Results



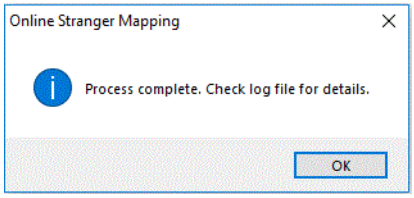
6. The process generates a CreateUserLog(ddmmyyy).csv file showing the selected student(s) and their contact details. This file is placed in the location specified against the 'Application\OS\Online Stranger Mapping\Log File' setting key (see page 31). An example log file is shown in Figure 63.

Figure 63: Online Stranger Mapping - account log file



The system displays the message shown in Figure 64 if a log file is generated. If no log file is generated there is no message.

Figure 64: Online Stranger Mapping - account creation process complete



7. The process also creates a Person message record that's emailed to the student via UNIT-e Messaging. The email contains a link to a web page where the student enters their date of birth to confirm their identify, and a password to proceed.

- To use this facility you must ensure that you've defined the setting keys for 'Application\OS\Users\Existing Student Link' (see page 33). In particular, the **Send Email** value must be set to -1 (enabled).
- When authenticate link emails are generated from Online Services, the three **Body** fields are concatenated together to make the email content and aren't separated out in the email. As a result the text is continuous and will corrupt the auto-generated link. To overcome this problem, format the email in HTML and force line breaks before each section of text.
- In earlier releases of this software the authorisation process was carried out by issuing a code generated by the 'Online Student Authorisation Code Report' (os001). The student then entered this code to authorise the merge. This method of authorisation has been superseded and the report is now obsolete.

Refer to the *Managing UNIT-e Messaging* handbook (MSMS.pdf) for further information about the process of sending emails to students.

Varying the selection of students

If you want to create online accounts for different groups of students (e.g. students who don't yet have enrolments) you can specify different selection criteria by changing the report and/or search form associated with the 'Application\OS\Create New Accounts' setting keys. The default values are as follows:

- Application\OS\Create New Accounts\Report - createonlineaccount
- Application\OS\Create New Accounts\Search Form - gn.moduleenrolment

If you make amendments to the default report, or reference another report, that report must include the Student ID.

Creating online accounts for individual students

Access:	UNIT-e Online Services Account Manager.exe
Screens:	*Learner Online Account tab* (see page 264)

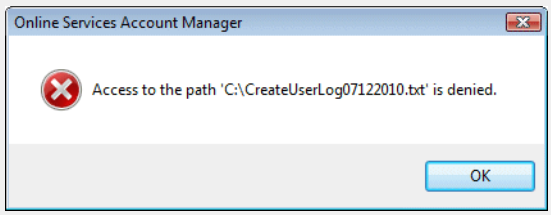
You can create online accounts for individual students via the UNIT-e Online Services Account Manager application.

It's also possible to create an online account for an individual student via UNIT-e Online Stranger Mapping, by selecting just one student on the **Search Results** form. Refer to *Bulk creating online accounts for existing students* (see page 146) for further details.

To create a new online account

This process creates a log file that's stored in the directory specified against the 'Application\OS\Online Stranger Mapping\Log File' setting (see page 31). Make sure that you've specified a location for the log file before continuing.

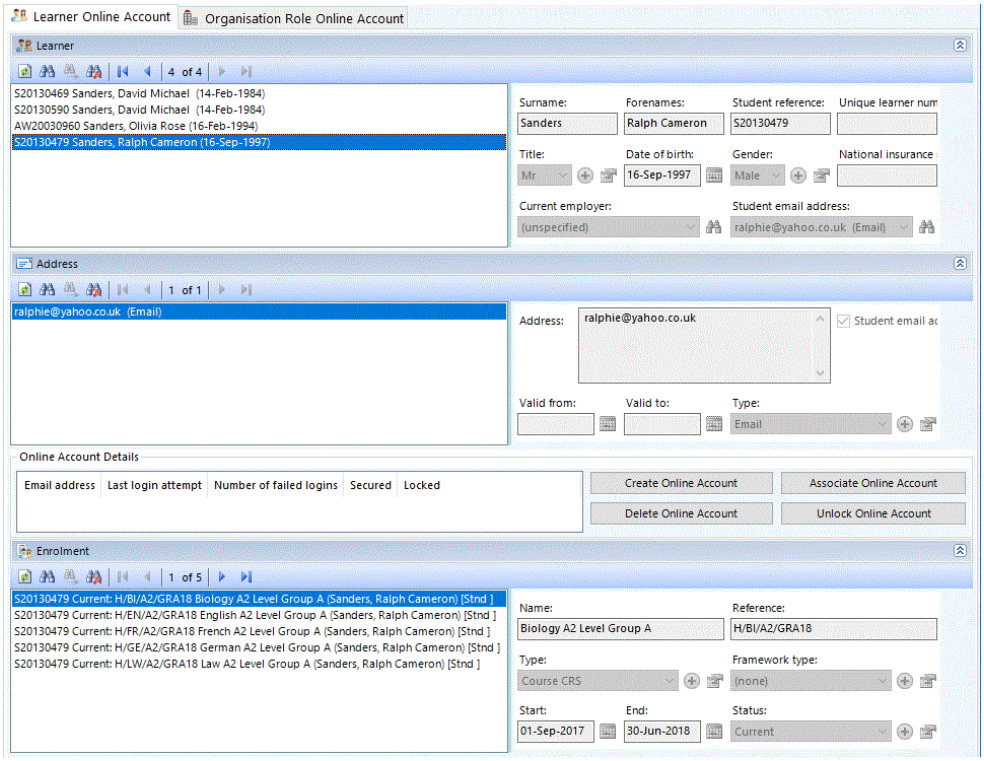
If you don't specify the location for the log file the system prevents you from creating an online account for the student and displays the following message:



1. Open UNIT-e Online Services Account Manager.exe to display the **Learner Online Account** tab (Figure 65) and retrieve the appropriate student details.

It's not possible to add student information on this form - it must already exist in the Student record.

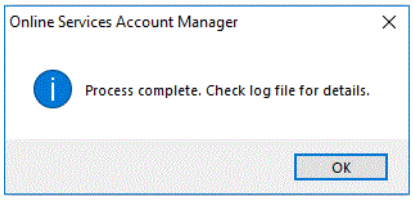
Figure 65: Online Services Account Manager - Learner Online Account



2. Check that the student has an email address and that the **Student email address** check-box is selected. A student can't have an online account without an email address.

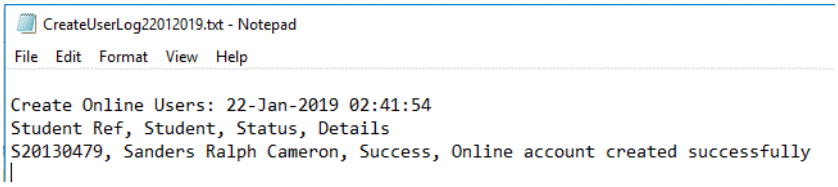
3. Click **Create Online Account**. The system creates an online account for the student and generates a log file that's stored in the location specified against the 'Application\OS\Online Stranger Mapping\Log File' setting key (see page 31). The message shown in Figure 66 is displayed when the process is complete.

Figure 66: Create Online Account process complete message



4. Open the log file (Figure 67) to view the results. Log files have the name 'CreateUserLog' followed by the file creation date.

Figure 67: Create User Log file



5. The student is then automatically emailed a link that takes them to a web page where they enter their date of birth to confirm their identify, and a password to proceed.



There are two settings that define the URL supplied to the student in the confirmation email:

- 'Application\OS\Users\Existing Students Link\URL' - defines the link to Online Services.
- 'Application\OS\Users\Existing Students Link\StudentAdvantage URL' - defines the link to Student Advantage.

If you specify values for both of these settings, the confirmation email generated for the student has links for both of the URLs specified.

Refer to *Application|OS|Users* (see page 33) for further information.

Creating online membership accounts using Microsoft Task Scheduler

A 'CreateOnlineMembershipForStudent' IICL method is provided for Microsoft Task Scheduler to enable you to create online accounts for students as part of a scheduled task. This means that when students have been enrolled using back-office applications they can automatically be given access to UNIT-e Online Services and Student Advantage (if used by your institution), the latter enabling them to view their timetables and other useful information.



By default this process uses the main student email address. You have the option to specify an additional parameter that enables you to use an email address other than the main student email address. Refer to *Using alternative student email addresses* (see page 155) for further information.

- *Reports used by the process* (see below)
- *Using the main student email address* (see page 153)
- *Using alternative student email addresses* (see page 155)

Reports used by the process

The process uses the following reports. These may be amended to suit the requirements of your institution.

- The 'IICL OS eligible students report' (gn.os.iicl.stu) finds the main dataset to process.
- The 'IICL OS eligible students sub report (excluded if existing online membership)' (gn.os.iicl.stu.sub) finds students that already have an online membership account and will therefore be excluded.

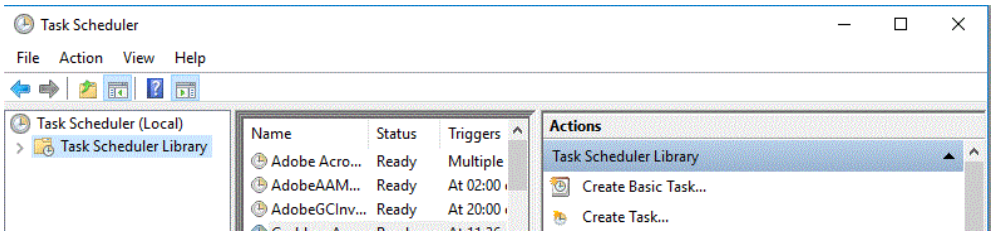
Using the main student email address

By default the update process uses the main student email address (i.e. the email address with a **Type** (personaddress.type) of 'Email').

To set up the IICL 'CreateOnlineMembershipForStudent' IICL method

1. Open Microsoft Task Scheduler, select the **Task Scheduler Library** item in the menu and click **Create Task** (Figure 68).

Figure 68: Task Scheduler - Create Task

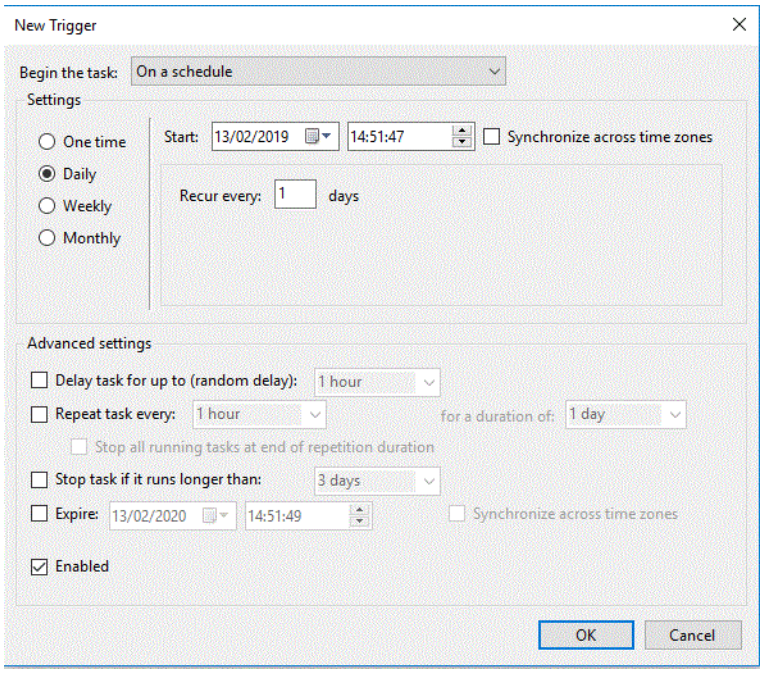


2. This opens the **Create Task** screen at the **General** tab. Enter the **Name** (e.g. 'Create Online Memberships') and a **Description**.

You should also check the **Security** options on the **General** tab to make sure that the appropriate user account will be used. This must be a Windows user able to log into UIICL automatically, either via LDAP or as a result of being mapped in the UNIT-e Information Interface **Advanced Settings** form, which is accessed from the **Tools | Security and Settings** option in UNIT-e Information Interface. The mapping is specified on the **SharePoint** tab by clicking the **Advanced** button.This process is covered in more detail in the *UNIT-e SharePoint Integration* handbook (USPI.pdf).

3. Go to the **Triggers** tab, click **New** to open the **New Trigger** screen (Figure 69) and specify when the process should run (e.g. **Daily**).

Figure 69: Task Scheduler - New Trigger



4. Go to the **Action** tab, click **New** to open the **New Action** screen (Figure 70) and specify the details of the action, as follows:

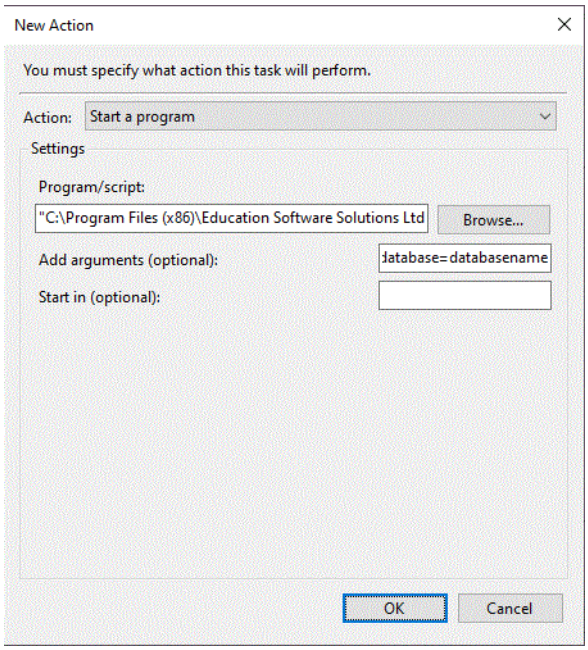
   - **Program/script:** "C:\Program Files (x86)\Education Software Solutions Ltd\UNIT-e Information Interface\UIICL.exe"

   - **Add arguments (optional):** database=(databasename) method=CreateOnlineMembershipForStudent



You have the option to add another parameter if you want to use an email address other than the main student email address. Refer to *Using alternative student email addresses* (see page 155) for further information.

Figure 70: Task Scheduler - New Action



5. Click **OK** to save the details and return to the main **Task Scheduler** screen where your new task is displayed. This will now run automatically at the specified times.

The log file produced by the process is stored in the location specified against the 'Application\OS\OnlineStranger Mapping\Log File\Folder' setting key (see page 42).

Using alternative student email addresses

If you want to provide online access using an email address that isn't the main student email address (personaddress.type = 'Email') you can add the parameter 'reportotheremail'. This enables you to specify the reference of a report that identifies the alternative email address to be used. The specified report must have the following columns:

- Id: Id of the students retrieved
- Otheremail: email address to use to create the online membership account

The **Add arguments (optional)** value would be:

database=(databasename) method=CreateOnlineMembershipForStudent reportotheremail='(report reference)'

If the parameter includes a valid report reference, the IICL method creates online membership accounts for the students selected using the Otheremail select clause to specify the email address.

If you use the new parameter the process still checks that the student has a main email address.

Dealing with locked online accounts

Access:	UNIT-e Online Services (Account Manager) [Online Services Account Manager.exe]
Screens:	*Learner Online Account tab* (see page 264)

Members of staff and online account users have three chances to enter the correct email address and password combination before they are locked out of the system for 20 minutes. If this happens you can unlock their account to allow them immediate access to Online Services.



The **Locked** flag available in the Online membership class is not used in this process and is reserved for future use.

- *Notification reports* (see below)
- *Unlocking online accounts* (see below)

Notification reports

Functionality is available to alert a nominated account holder when a member of staff or online user accidentally locks their account. This enables the nominated account holder to unlock the account immediately, minimising the impact. This functionality is controlled by a warehouse reports. Two of the reports must be amended to reference the correct email addresses. Refer to *Amending the locked account reports* (see page 57) for further information.

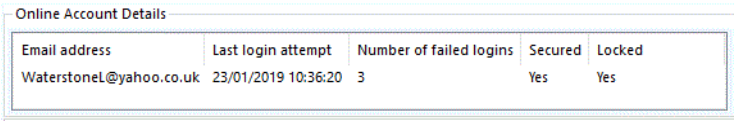
Unlocking online accounts

Once you've identified locked accounts they can be unlocked as follows.

To unlock online accounts

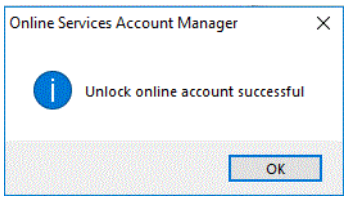
1. Open UNIT-e Online Services Account Manager.exe to display the **Learner Online Account** tab (Figure 65) and retrieve the appropriate student details. If the account is locked, '3' appears in the **Number of failed logins** column in the **Online Account Details** pane and 'Yes' appears in the **Locked** column (Figure 71).

Figure 71: Locked online account



2. Click **Unlock Online Account**. The software displays the following message (Figure 72). If you refresh the data the **Number of failed logins** is reset to zero and 'No' appears in the **Locked** column.

Figure 72: Unlock online account successful message



If an Online Services account is locked and the user goes through the **Forgotten password** process, the system unlocks the account as part of the process of resetting the password.

Deleting online accounts

Access:	UNIT-e Online Services Account Manager.exe or UNIT-e Online Stranger Mapping.exe
Screens:	*Online Services Account Manager - Learner Online Account tab* (see page 264) or *Online Stranger Mapping* (see page 266)

It's possible to delete a student's online account (or one of their online accounts) while retaining the student details within your database. This can be carried out using either of the following:

- UNIT-e Online Services Account Manager (see below)
- UNIT-e Online Stranger Mapping (see page 159)



The Online Stranger Mapping method enables you to delete the accounts of multiple students based on a student search.

Deleting online accounts via Online Services Account Manager

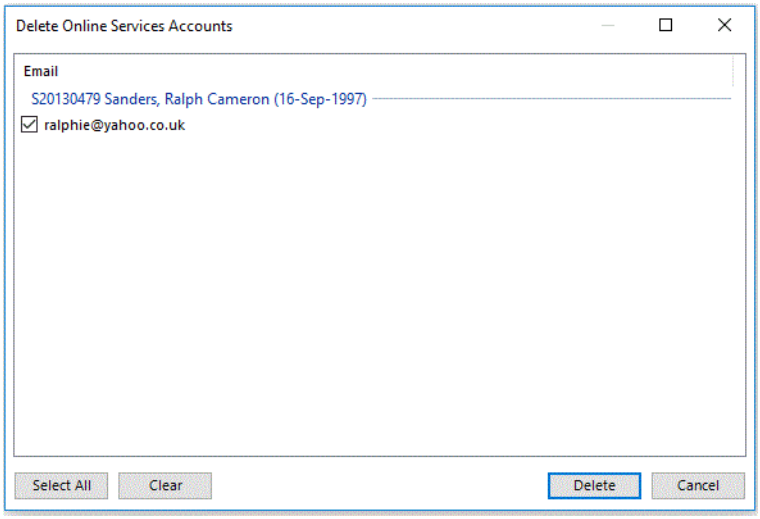
This method enables you to delete the online account(s) of an individual student.



To delete online accounts via Online Services Account Manager

1. Open UNIT-e Online Services Account Manager.exe to display the **Learner Online Account** tab (see Figure 65 on page page 150) and retrieve the appropriate student details.
2. Click **Delete Online Account** to display the **Delete Online Services Accounts** form (Figure 73).

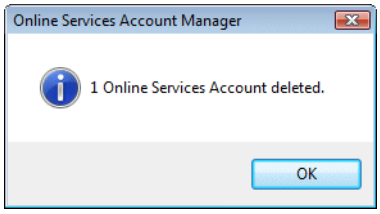
Figure 73: Delete Online Services Accounts



3. Tick the account(s) that you want to delete or use the **Select All** option and click **Delete**. The system displays the following message (Figure 74).

All email addresses are selected by default.

Figure 74: Online account deleted message



Deleting online accounts via Online Stranger Mapping

This method enables you to delete individual accounts or multiple accounts for multiple students.

To delete online accounts via Online Stranger Mapping

1. Open UNIT-e Online Stranger Mapping.exe and click **Delete** account on the **Home** menu tab.

2. Use the **Student Search** form to specify your selection criteria.

3. The **Delete Online Services Accounts** form is displayed (see Figure 73 above). If your search criteria has found multiple students, emails for all students are shown (Figure 75).

Figure 75: Delete online Services Accounts with multiple students



4. Tick the account(s) that you want to delete or use the **Select All** option and click **Delete**. The system displays the message shown in Figure 74 on page 159.

All email addresses are selected by default.

Associating an online account with a UNIT-e user

Access:	UNIT-e Online Services Account Manager.exe
Screens:	*Learner Online Account tab* (see page 264)

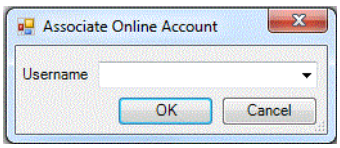
If you use the UNIT-e II Web Client application you need to create a link between an online account and a UNIT-e user. For the majority of online accounts this link is defined by a **Default online membership user** value entered on the **Advanced** tab of the **Configure UNIT-e Information Interface Web Client** form. If a different set of class rights is required you can create a link to any other UNIT-e user via the **Associate Online Account** button in UNIT-e Online Services Account Manager.

Refer to the *Managing UNIT-e Launch Pad and II Web Client* handbook (MLP.pdf) for more details about the configuration of UNIT-e Information Interface Web Client.

To associate an online account with a UNIT-e user via UNIT-e Online Services Account Manager

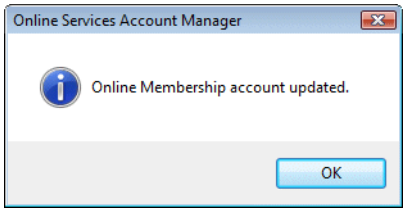
1. Open UNIT-e Online Services Account Manager.exe to display the **Learner Online Account** tab (see Figure 65 on page page 150) and retrieve the appropriate student details.
2. Click **Associate Online Account** to display the **Associate Online Account** form (Figure 76).

Figure 76: Associate Online Account



3. Select a **Username** from the pick-list and click **OK** to make the link.
4. The system displays the message shown in Figure 77 when the process is complete.

Figure 77: Online Membership account updated message



Chapter 7:

Using Referee Manager

Prospective students are asked to submit references as part of their online applications. UNIT-e Referee Manager enables you to view the reference details.



It's possible to create a report that retrieves referee details.

This chapter covers the following area:

- *Retrieving referee details* (see page 164)

Retrieving referee details

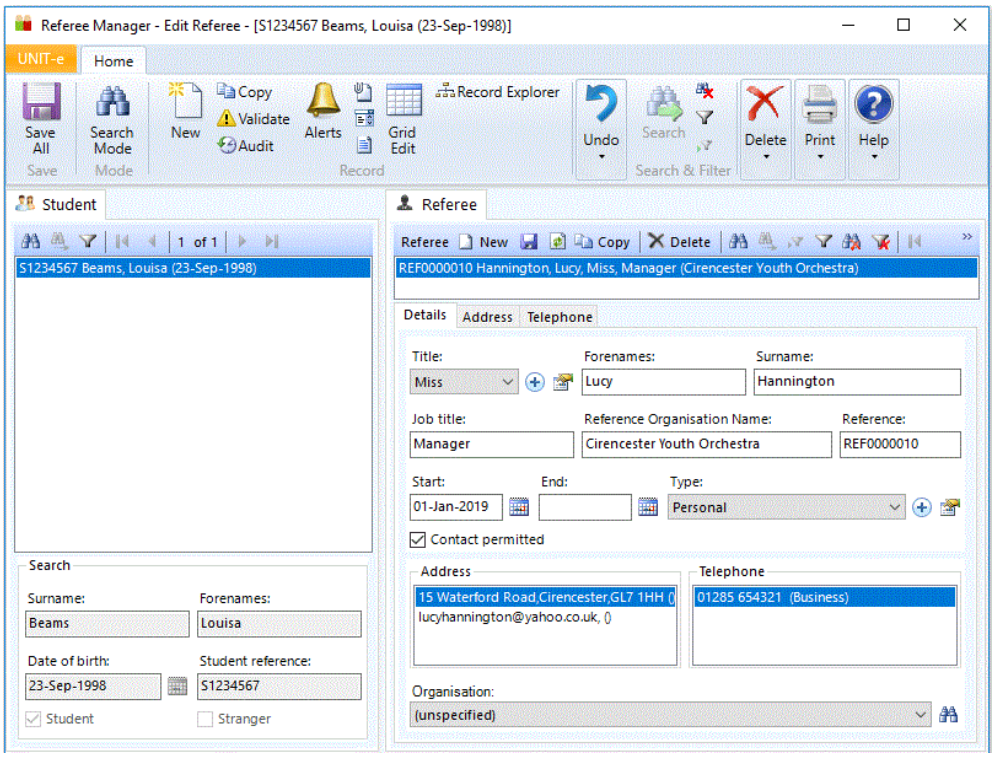
Access:	UNIT-e Online Services (Referee Manager) [Referee Manager.exe]
Screens:	*Referee Manager* (see page 278)

Use UNIT-e Referee Manager to view reference details submitted by prospective students.

To retrieve referee details

1. Open UNIT-e Online Services Referee Manager.exe to display the **Referee Manager** form (Figure 78) and search for the required stranger/student using the fields in the Search frame.

Figure 78: Referee Manager



2. Referee information is displayed on the **Details**, **Address** and **Telephone** sub-tabs. You can use the **Organisation** field to associate the referee with an organisation record that's already held on your database (if applicable).

Chapter 8:

Dealing with online Extended Applications

The UNIT-e Extended Applications product enables you to process student applicant details and monitor the progress of those applications throughout your institution's admissions cycle. At the end of the admissions cycle you're able to identify all successful applicants and convert their Applications to Enrolments.

If your institution uses UNIT-e Extended Applications, you can enable the entry of Extended Applications via Online Services using one of the following methods:

- **The 'On Offer' method:** Until an offer is made, Applications and/or Enrolments are only created for the highest level module in the curriculum structure selected by the student (or selected on behalf of the student by an agent). The process does not drill down into the structure and create Applications and/or Enrolments for lower level modules linked to the top module by routes.

- **The 'On entry' method:** As soon as an online application is entered, Applications and/or Enrolments are created for all modules linked via routes to the highest level module in the curriculum structure selected by the student.

The availability of these options is controlled by the Preference setting 'Module Application\Generation point home\DIRECT', which is accessed via the **Tools | Extended Applications** menu in UNIT-e Database Manager (Settings) [UDMSE.exe] (see Figure 3 on page 25).

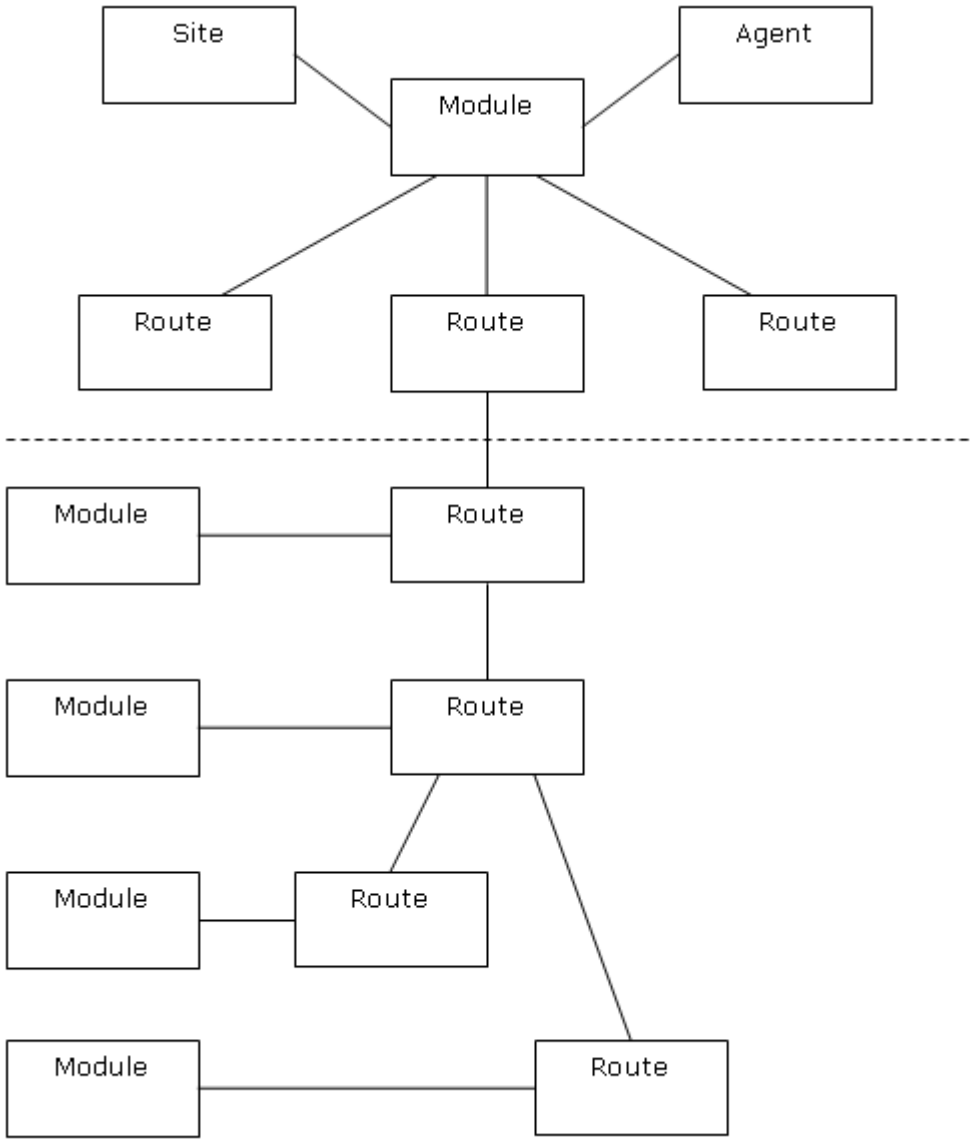
This chapter covers the following areas:

- *Curriculum structure - Extended Applications modules* (see page 167)
- *Using routes in Online Services* (see page 168)
- *Reports and settings used by Extended Applications in Online Services* (see page 169)
- *The Extended Application process* (see page 170)
- *The Extended Applications data structure* (see page 172)

Curriculum structure - Extended Applications modules

A module is identified as an Extended Application module if it has an associated Site, an Agent (with a reference of 'DIRECT') and is linked to at least one route. An example structure is shown in Figure 79.

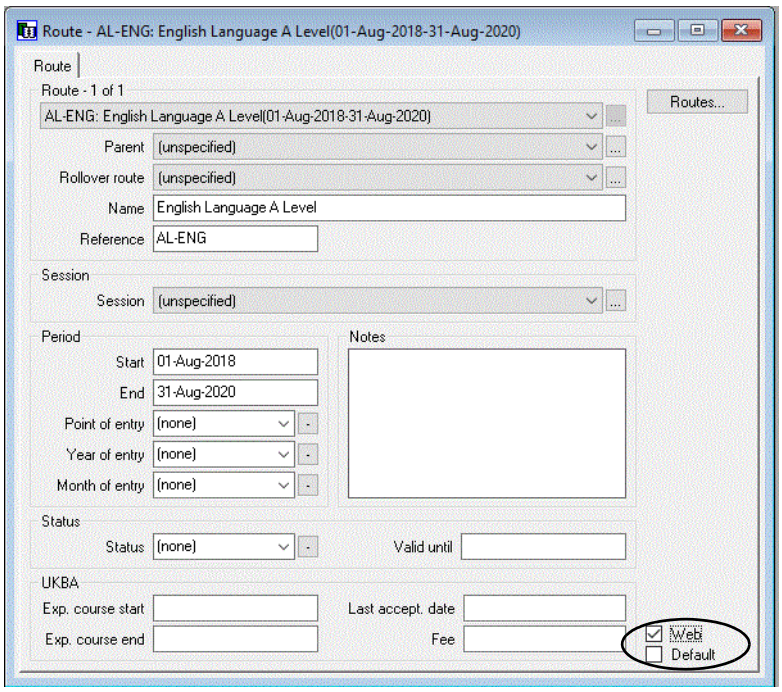
Figure 79: Module/Agent/ Site link for Extended Applications



Using routes in Online Services

Extended Application routes must be flagged for use in Online Services. To do this, select the **Web** check box against the route on the **Route** form in UNIT-e Curriculum Manager (Courses) [UCMCO.exe] (Figure 80).

Figure 80: Route



If only one of the routes associated with an Extended Application module is flagged for web use, that route is automatically selected and the **Route** web page in Online Services isn't displayed to the student. If there are multiple routes the student is prompted to make a selection.

Refer to *The Extended Application process* (see page 170) for further information.

Reports and settings used by Extended Applications in Online Services

- *Reports for Extended Applications* (see below)
- *Settings for Extended Applications* (see below)

Reports for Extended Applications

The following report is provided for the Extended Applications in Online Services. It retrieves details about a student's current Extended Application:

- 'Online Services Student Extended Applications' (gn.os.stuexapplications)



Refer to *Reports* (see page 52) for a full list of Online Services reports.

Settings for Extended Applications

The settings that are specifically provided for Extended Applications in Online Services are listed below.



Refer to *Defining settings - Application|OSEA* (see page 24) for further information.

- Application\OSEA\Process\Enabled
- Application\OSEA\Student Application\Agent Institution
- Application\OSEA\Student Application\Event Type
- The Preference setting 'Generation point home\DIRECT', which is accessed from the **Tools | Extended Applications** menu in UNIT-e Database Manager (Settings) [UDMSE.exe] (see Figure 3 on page 25).

The Extended Application process



How Online Services deals with Extended Applications

1. A student or agent searches for a module using UNIT-e Online Services.



Only the appropriate modules are displayed, as selected by your institution. Refer to *Flagging modules to appear on the web site* (see page 100).

2. When a module is selected the system checks to see if the Extended Applications functionality is enabled and licensed.



Extended Applications functionality is enabled by the 'Application\OSEA\Process\Enabled' setting key (see page 24) and is licensed by the OSEA licence key (see page 14).

3. If Extended Applications functionality is enabled, the module is checked to see if it's linked to a Site and an Agent (with the reference of 'DIRECT') and has at least one Route. This indicates that it's an Extended Applications module.

4. If the Extended Application module is linked to a single Route, this Route is automatically selected and the Module, Route, Agent and Site IDs are stored in the 'selection' to be used later in the process.

5. If more than one Route is linked to the Module, all the top level Routes (those without parents) are displayed so that the student or agent can select a route. As above, the selected Module, Route, Agent and Site IDs are then stored in the 'selection' to be used in the application process later.

6. The student enters further information requested by Online Services.

7. At the end of the process the information entered is displayed. If the student proceeds with the application, records are created for the following classes:

   - **Agent application** - This record is only created if one doesn't already exist for the Student\Session\Agent combination. Refer to *The Extended Applications data structure* (see page 172) for further details.
   - **Extended student application**
   - **Module application**
   - **Student application event**
   - **Extended student application history**

8. If you're using the 'on entry' functionality (see page 165), the following records are also created for all Modules linked to the lead Module via Routes, and for any mandatory Offerings attached to those Modules (i.e. the Modules and Offerings shown below the dashed line in Figure 79 on page 167).

   - **Module application**
   - **Student application event**
   - **Extended student application history**



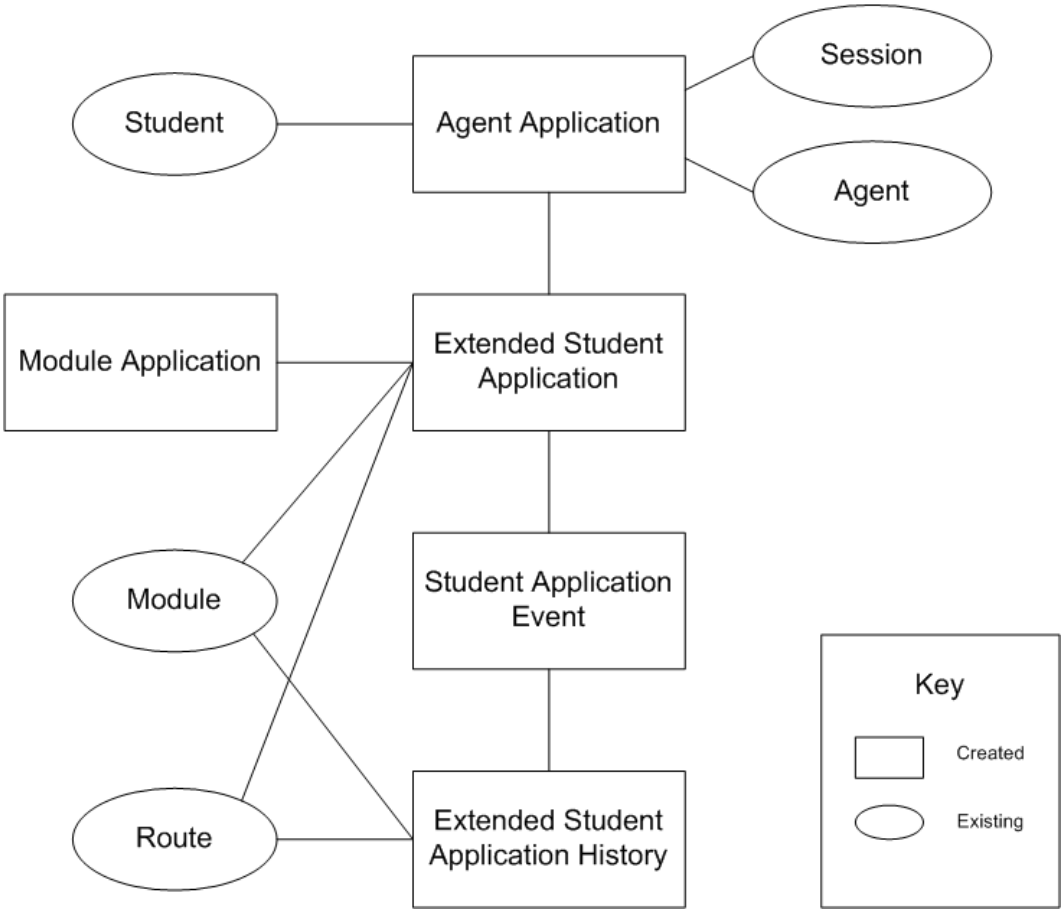
If a single Route within the structure has more than one associated child Route, the process stops and you must complete it manually.

The Extended Applications data structure

When an Extended Application is generated online, records are created in the following classes. Figure 81 shows how these classes are linked.

- **Agent application** This record is only created if one doesn't already exist for the Student\Session\Agent combination.
- **Extended student application**
- **Module application**
- **Student application event**
- **Extended student application history**

Figure 81: Curriculum structure for Extended Applications



The classes and properties are shown in more detail in Table 32.

Table 32: Classes and properties for Extended Applications

Class	Properties used	Notes
Agent application	Start - from Session End - from Session Agent Student Session Applicant reference - Student reference Allow agent transfer - Must be null	If required.
Module application	Student Student application Module Reference - from Module Name - from Module Route	One or more, as required.
Extended student application	Date - today's date Student Reference - system reference? Module application Agent application Agent Clearing - 0 Choice number Allow agent transfer - 0 Home elsewhere - H Course - agency course reference from Module Modular course - 0 Campus - external campus reference from Site Year of entry - from Route Month of entry - from Route Point of entry - from Route Live at home - 0 Residential accommodation - 0 Agent institution - from Setting Module Route	One or more, as required.

Class	Properties used	Notes
Extended student application (continued)	Source Method Promotion code	
Extended student application history	Date - today's date and time Date received - date now Extended student application Student application event Student Reference - system reference? Module application Agent application Agent Choice number Allow agent transfer - 0 Home elsewhere - H Course - agency course reference from Module Modular course - 0 Campus - external campus reference from Site Year of entry - from Route Month of entry - from Route Point of entry - from Route Live at home - 0 Residential accommodation - 0 Agent institution - from Setting Module Route	One or more, as required.
Student application event	Start - today's date and time Student Type - entry	One or more, as required.

Chapter 9:

QR code generation

This functionality enables you to generate emails containing QR codes that identify the selected group of students. The student information is extracted from your UNIT-e database using a report and a scheduled IICL method generates emails containing QR codes for each of those students. The students may then present their QR codes at your institution to facilitate enrolment.

Although underlying settings and reports are currently designed to enable quick enrolment on courses, the reports are configurable, offering the potential to use this functionality in other ways.



For the purposes of these notes it's assumed that you are generating QR codes for student enrolment.

This chapter covers the following areas:

- *QR code generation prerequisites* (see page 176)
- *Generating emails with QR codes* (see page 179)
- *Enrolling students with QR codes* (see page 181)

QR code generation prerequisites

The following must be available:

- *User group access* (see below)
- *QR code settings* (see below)
- *QR code lookups* (see page 177)
- *QR code reports* (see page 177)
- *IICL method - GenerateQuickEnrolmentEmails* (see page 178)
- *UNIT-e Windows Messaging Services* (see page 178)
- *QR code reader* (see page 178)

User group access

The web config user running the process must be a member of the 'HR Online Services Web Config user' (hr_online) user group as well as the 'Online Services web config user' (os_online) user group.



Refer to *The Online Services web config user* (see page 15) for further information.

QR code settings

Define the 'Application\OS\QuickEnrolment\Email' setting keys.



Refer to *Settings for QR codes functionality* (see page 48) for further information.

QR code lookups

- **Module type:** You may wish to consider creating a specific Module type for courses that students can enrol on with a QR code (e.g. 'Open day' or 'Taster day'), so that this value can be specified in the 'QR Code Enrolment - Module' report (gn.qr.module) (see below).

- **Student status**: By default the 'Find students to send QR emails' report (gn.qr.findstudent), which is used to identify the students you want to email, searches for students with a **Status** (Student.status) that has a **UNIT-e** value of 'INVITE'. This indicates that they are in a cohort of students who are interested in being invited to events and ad hoc courses. You should consider how you want to identify different groups of students, create an appropriate 'Student status' lookup and associated **UNIT-e** value and amend the 'Find students to send QR emails' report (gn.qr.findstudent) to reference that **UNIT-e** value.

QR code reports

Make sure that the following reports are available:

- **'Find students to send QR emails' (gn.qr.findstudent):** Retrieves the required cohort of students. By default the report searches for students with a **Status** (Student.status) that has a **UNIT-e** value of 'INVITE' (see *QR code lookups*, above) but it's likely that you will need to amend this to suit the requirements of your institution.

- **'Email template for QR Emails' (gn.qr.template):** Defines the format of the email sent out to students. Amend this to suit the requirements of your institution.

- **'QR Code Enrolment - Module' (gn.qr.module):** Provides the list of Modules displayed when a student is enrolled by QR code. By default all Modules are retrieved, so you may need to amend this report to suit the requirements of your institution (e.g. by specifying a Module type).

- **'QR Code Enrolment - Student' (gn.qr.student):** Retrieves student details when the student is enrolled using a QR code. By default the student's **Forenames**, **Surname**, **Address** and **Date of birth** are retrieved but you may wish to amend report to suit the requirements of your institution.

IICL method - GenerateQuickEnrolmentEmails

The 'GenerateQuickEnrolmentEmails' IICL method must be available to run in Microsoft Task Scheduler to generate student emails. Refer to *Generating emails with QR codes* (see page 179) for further information.

UNIT-e Windows Messaging Services

The UNIT-e Windows Messaging Services must be set up correctly so that emails are picked up and sent to students.



Refer to the *Managing UNIT-e Messaging* handbook (MSMS.pdf) for further details.

QR code reader

A QR code reader is required. No particular QR code reader is recommended.

Generating emails with QR codes

The 'Find students to send QR emails' (gn.qr.findstudent) report is used to identify the required cohort of students. An IICL method is then used to generate emails containing QR codes that will identify those students when they present themselves at your institution to enrol on a course. These emails are automatically picked up by the Windows Messaging Service and sent to students.

To generate emails with QR codes

1. Check that the 'Find students to send QR emails' report (gn.qr.findstudent) report will pick up the correct cohort of students. By default the report searches for students with a 'Student status' **UNIT-e** value of INVITE, but this must be adjusted to suit the requirements of your institution.

2. Open Microsoft Task Scheduler, select the **Task Scheduler Library** item in the menu and click **Create Task** (see Figure 68 on page 153).

3. This opens the **Create Task** screen at the **General** tab. Enter the **Name** (e.g. 'QR code emails') and a **Description**.

You should also check the **Security** options on the **General** tab to make sure that the appropriate user account will be used. This must be a Windows user able to log into UIICL automatically, either via LDAP or as a result of being mapped in the UNIT-e Information Interface **Advanced Settings** form, which is accessed from the **Tools | Security and Settings** option in UNIT-e Information Interface. The mapping is specified on the **SharePoint** tab by clicking the **Advanced** button.

4. Go to the **Triggers** tab, click **New** to open the **New Trigger** screen (see Figure 69 on page 154) and specify when the process should run (**One time**, **Daily**, **Weekly** or **Monthly**).

5. Go to the **Action** tab, click **New** to open the **New Action** screen (see Figure 70 on page 154) and specify the details of the action, as follows:

   - **Program/script: "**C:\Program Files (x86)\Education Software Solutions Ltd\UNIT-e Information Interface\UIICL.exe"

   - **Add arguments (optional):** method="GenerateQuickEnrolmentEmails" database="DATABASE" report="gn.qr.findstudent"

Note that there's a space at the end of the method and at the end of the database name but no other spaces.

6. Click **OK** to save the details and return to the main **Task Scheduler** screen where your new task is displayed. This will now run automatically at the specified time.



The log file produced by the process is stored in the location specified against the 'Application\OS\QuickEnrolment\Email\LogFileLocation' setting key (see page 48).

7. The generated emails are automatically picked up and sent by the Windows Service.



Refer to the *Managing UNIT-e Messaging* handbook (MSMS.pdf) for further details.

Enrolling students with QR codes

Students receive an email containing a QR code that identifies them, enabling them to enrol quickly on a course (Figure 82).

The size of the QR code is determined by the 'Application\OS\QuickEnrolment\Email\QRPixelsPerModule' setting key (see page 48). By default it's set to give the best presentation on a mobile but may be adjusted.

Figure 82: Example QR code enrolment email



To enrol a student by QR code

1. On the day of the course a member of staff scans the QR codes of each student attending the course. The QR code scanning software that you use is at the discretion of your institution.

2. The QR code contains the URL of the Quick Enrolment web page (by default \WCFWebSite\OnlineServices\qrEnrolment.aspx), which opens the login page (Figure 83).

You may change the URL embedded in the QR code by amending the default value specified against the 'Application\OS\QuickEnrolment\Email\QREnrolmentPage' setting key. Refer to *Settings for QR codes functionality* (see page 48) for further details.

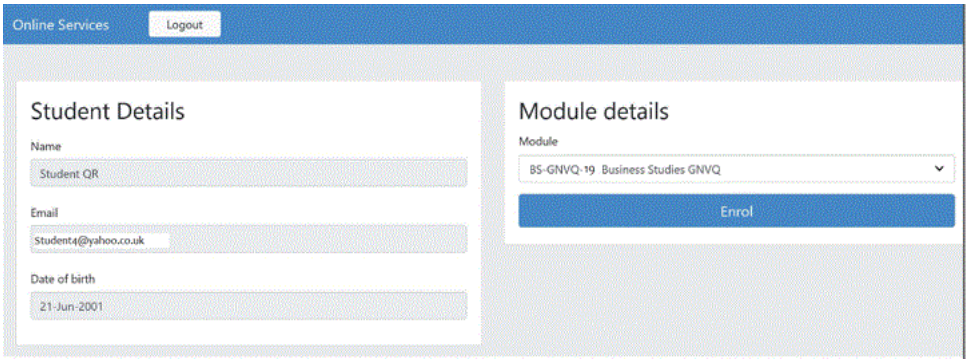
Figure 83: Quick Enrolment login



The member of staff logging into the web page must be a member of the 'Online Services web config user' (os_online) and 'HR Online Services Web Config user' (hr_online) user groups.

3. The enrolment page is displayed (Figure 84), showing the **Student Details**. The **Module details** provide a drop-down list of Modules from which the member of staff can select the appropriate course.

Figure 84: Quick Enrolment

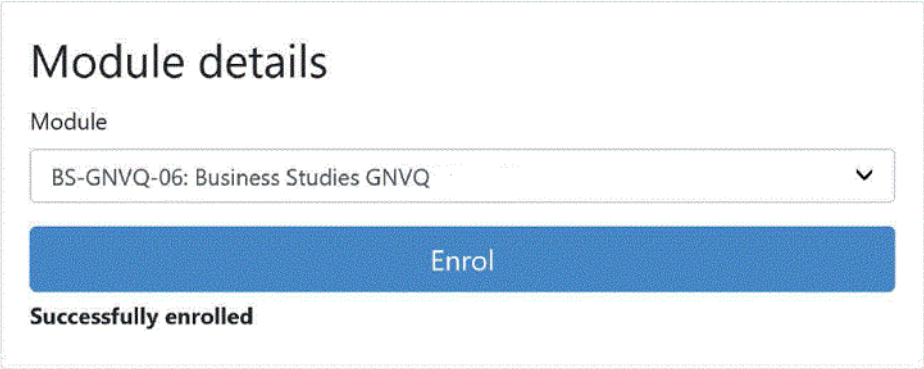


The student details are provided by the 'QR Code Enrolment - Student' report (gn.qr.student) and the Module list is provided by the 'QR Code Enrolment - Module' report (gn.qr.module). By default the latter retrieves all modules. You should amend the report to suit the requirements of your institution. Refer to the *UNIT-e Report Generator* handbook (URG.pdf) for further information on how to amend reports.

4. When the member of staff clicks **Enrol** the student is enrolled on the course (Figure 85). An Enrolment record is created and if the Module has associated fees, an Invoice and Invoice lines are also created.

As with other online enrolments, the Module must have a **Fee band** of 'Online', otherwise no fees are generated. Refer to *Defining the Fee band lookup* (see page 105) and *Using the FeeBand key* (see page 105) for further information.

Figure 85: Quick Enrolment complete



Chapter 10:

About card payments & End of Day files

When a student enrols on a course via UNIT-e Online Services they have the option of paying their course fees online by credit or debit card (**Pay now**) or deferring payment (**Pay later**). Depending on the functionality licensed to your institution, they may also be able to **Pay by instalment** and manage their invoices via the Subsequent Payments functionality. This enables a student to manage their accounts online and also gives them the opportunity to make part-payments against selected invoice lines.

If the student opts to pay online, their card details are passed to and validated by Pay360 (formerly Axis), which specialises in the processing of online card payments.

The Pay360 response triggers the creation of records for an Enrolment and Enrolment fee, an Invoice and Invoice line(s) and a Receipt and Receipt line(s), enabling you to view the card payments in UNIT-e Finance Manager. It's also possible to generate partial or full refunds of card payments by logging into Pay360. Refunds are created via the Pay360 portal, with details being imported into UNIT-e via an End of Day file.

End of Day (EoD) files are produced at 4pm every day by Pay360 as part of the process of dealing with card transactions generated through UNIT-e Online Services.

These files contain details of all transactions processed online, including payments that were made online and processed by Pay360 but weren't received correctly back into your UNIT-e database. These missing transactions can be imported into your UNIT-e database from the End of Day file. If there are missing receipts, all associated enrolments and invoices will also be missing; by importing the End of Day file you can complete the process.

The End of Day files are also used within UNIT-e by the EOD Validation process and the EOD Refunds process to make sure that your UNIT-e database is up-to-date.

You can decide whether you need to download and import the End of Day file by running the **Pre-EOD** routine, which is also available from UNIT-e Online Stranger Mapping. This gives you the opportunity to analyse the Online User Data table (OUD) to identify any

student enrolments and transactions that haven't been successfully created in your UNIT-e database.



- If you use both Online Services for Students and Online Services for Organisations, transaction details from both applications are included in the same daily file. As there are separate import routines for students and organisations (accessed via the Online Stranger Mapping and Organisation Stranger Mapping applications) you must import the file twice to update your database correctly.
- Touch Tone and Call Secure Digital Plus (CSD+) payments are also covered by the End of Day files process.



As card transactions are dealt with in multiple UNIT-e applications they're explained in detail in a dedicated handbook: *Managing UNIT-e Card Payments and Refunds* (MCP.pdf). The use of End of Day files is also covered in that handbook.

Chapter 11:

Using Online Services

The UNIT-e Online Services product is straightforward to use and has associated online help to guide existing and prospective students through the process. This chapter explains how a student can register with your institution, request brochures, select course options, make enquiries, submit applications, enrol on courses and pay fees online.

This chapter covers the following areas:

- *The tabs available in Online Services* (see page 189)
- *Searching for information* (see page 191)
- *Registering as a user* (see page 193)
- *Logging into and out of Online Services* (see page 196)
- *Dealing with email addresses and passwords* (see page 198)
- *Making general enquiries* (see page 203)
- *Requesting brochures* (see page 204)
- *Enquiring about courses* (see page 205)
- *Applying for courses* (see page 207)
- *Enrolling on courses* (see page 208)
- *Completing requests* (see page 209)
- *Selecting course options* (see page 213)

- *Changing student details* (see page 215)
- *Paying for enrolments online* (see page 216)

The tabs available in Online Services

A limited level of functionality is available even if the prospective student hasn't registered or logged into Online Services. The following tabs are available to all visitors to Online Services:

- **Home** (**Welcome to Online Services** page) (see page 220): This is the first page that visitors see. It gives a brief overview of your institution (this can be customised) and enables prospective students to register or login to Online Services and carry out searches.
- **Courses home** (**Welcome to Online Services** page) (see page 225): This is a duplicate of the **Home** page. It's provided so that you can customise either this page or the **Home** page to reflect the requirements of your institution (e.g. you might modify the **Home** page to reflect your institution's branding and retain this page for login purposes).
- **Course directory** (see page 226): this page lists departments within your institution. Prospective students can drill down to view courses associated with those departments. All departments are shown. Refer to *Showing departments on the Course directory page* (see page 99) for further information.
- **Brochure** (**Brochure search** page) (see page 238): This page enables prospective students to search for and request brochures. Refer to *Flagging brochures to appear online* (see page 114) for further information.
- **General enquiry**: Although this tab is displayed when a student opens Online Services, they must log in to make an enquiry. See below.
- **Course fee policy** (see page 241): This tab, which can be customised, explains the methods of payment available and lists concession categories.
- **Help**: Provides to access online help for the current page.

The following additional tabs become available when a student registers or logs into Online Services:

- **General enquiry** (see page 240): Enables students to raise general enquiries about anything to do with your institution or courses.
- **Pay balance online** (see page 242): This tab is only available if your institution offers online payment. It enables students to pay any outstanding balance online.
- **Registered cards** (**Pay by CC Instalments** page) (see page 248): This tab is only available if your institution offers online payment. It enables students to enter the details of credit card(s) that they wish to use for online payments.

- **Shop:** This tab is only displayed if you've purchased the Online Shop (OLSH) licence. It gives students access to an online shop where they can purchase sundry items (clothing, stationery etc.) not necessarily associated with an enrolment.



Online Shop functionality is included in the *UNIT-e Online Shop* handbook (UOLS.pdf).

- **Funding:** This tab is displayed if your institution has purchased the Support Funds Online Services (SFOS) licence and uses UNIT-e Support Funds. It enables students to apply for financial assistance, including payable awards, loans, non-payable awards (where payment is made to a third party such as a provider of nursery care) and items such as meal cards.



This functionality is covered by the *UNIT-e Support Funds* handbook (USF.pdf).

- **Summary** (see page 251): This tab enables students to view (but not amend) all of the information they've entered online. This includes their personal details, contact information, qualification and referee details as well as any enquiries, applications and/or enrolments made online.
- **Personal** (**Personal details** page) (see page 253): This tab enables students to amend their personal details, including their login email address and password.
- **Contacts** (**Contact details** page) (see page 256): This tab enables students to view and amend their contact details.
- **Qualifications** (**Qualification details** page) (see page 257): This tab enables students to view and amend their qualification details.
- **Referees** (**Referee details** page) (see page 258): This tab enables students to view and amend their referee details.
- **Course options** (see page 259): This tab shows the student the courses that they're currently enrolled on and lists the options available for those courses. They can select the options that they want to take and validate their choices.



All enrolments are shown, including those not created online.

- **Request change** (see page 261): This tab enables the student to request changes to details that they're unable to update themselves.

Searching for information

Access:	*Welcome to Online Services* (see page 220) **Search** or **Advanced Search**
Screens:	*Course Search Results* (see page 227) or *Advanced course search* (see page 223)

There are several ways in which the student can search for information:

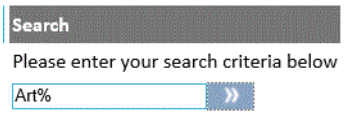
- *Using the search field* (see below)
- *Using Advanced Search* (see page 192)
- Using the **Course Directory** tab. Refer to *Enquiring about courses* (see page 205) for further details.

The student doesn't have to be a registered user to carry out a search in Online Services, but the functionality available to them is restricted until they register or log in.

Using the search field

The student can use the search field on the **Home | Welcome** page (Figure 86) to search for courses.

Figure 86: Search field



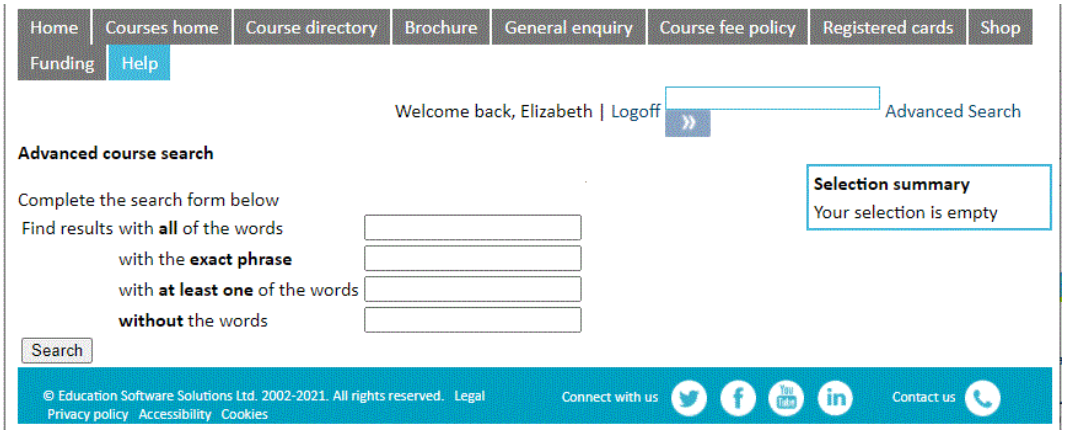
They can either enter the full course name if they know it, or they can use a wildcard to search for a range of courses. For example, an entry of 'Art%' retrieves all courses with 'Art' in the title.

Search results are displayed on the **Course search results** page (see page 227).

Using Advanced Search

The student can click **Advanced Search** on the **Home | Welcome** page (either alongside the **Login | Register** field or in the **Search** area) to open the **Advanced course search** page (Figure 87). This page enables them to enter additional selection criteria to retrieve course details.

Figure 87: Advanced course search



Registering as a user

Access:	*Welcome to Online Services* (see page 220) **Register**
Screens:	*New visitor registration* (see page 222)

Once a student has registered as a user they have access to additional functionality and can apply for and enrol on courses. This section covers the following areas:

- *Recording personal details* (see below)
- *Using the Postcode Lookup functionality* (see page 195)
- *About Student periodic records (applies to English FE sites only)* (see page 195)

Recording personal details

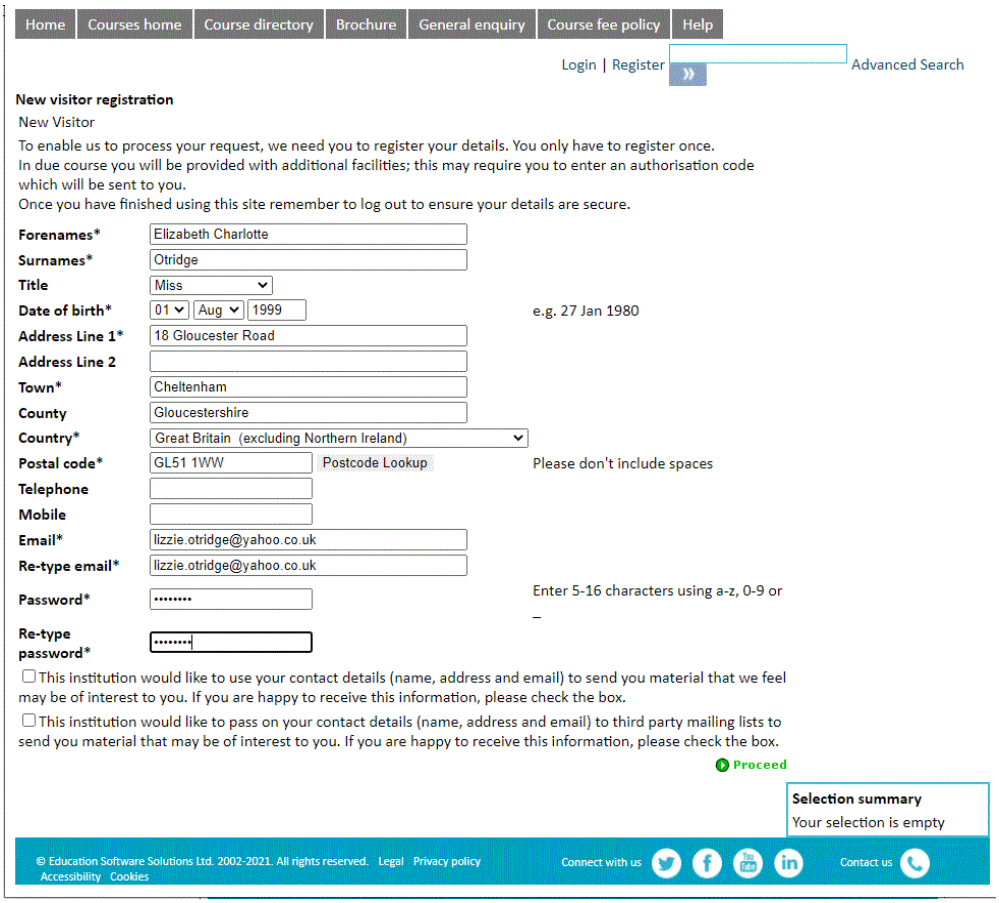
A prospective student must enter some basic personal details in order to register with your institution.



To record personal details

1. Click **Register**. There are two places where the student can do this - one in the top right-hand corner of the **Home | Welcome** page and one in the text.
2. The **New visitor registration** page opens (Figure 88), enabling the student to enter their personal details by following the instructions on screen.

Figure 88: New visitor registration



3. The fields at the bottom of the page enable the student to indicate whether they wish to receive unsolicited material. These may be removed or amended. Refer to *Dealing with the New Visitor Register check boxes* (see page 89) for further information.

4. The student clicks **Proceed** to register their details.

At this stage of the process the student is regarded as a 'stranger' and your institution must compare their details with the UNIT-e database student records, either to confirm that they aren't already held on the database or to merge them with an existing record. Refer to *Creating students from strangers* (see page 115) for further information.

5. Once registered the student can request a brochure (see page 204), make a general enquiry (see page 203), enquire about courses (see page 205), submit applications (see page 207) and enrol online (see page 208).

Using the Postcode Lookup functionality

With the appropriate prerequisites in place it's possible to set up your software so that students can use postcode lookup functionality to retrieve their address details.



Refer to *Setting up AFD Postcode Internet functionality in Online Services* (see page 62) for further information.

About Student periodic records (applies to English FE sites only)

If you're an FE site using the UNIT-e ILR XML Single Return software, Student periodic records can be created automatically in Online Services when creating Applications and/or Enrolments.

The following setting keys allow you to enable/disable this process for both Applications and Enrolments. The default value is '0', meaning that applying or enrolling online won't create a student periodic record.

- Application\ILRToolsXML\StudentPeriodicILRCreation\Automated\ EnableforApplications
- Application\ILRToolsXml\StudentPeriodicILRCreation\Automated\ EnableforEnrolments

If the above settings are set to '-1' the following steps take place:

1. The web service looks for the current academic year (identified by 'CY' in the **Reference** field of the 'Academic year' lookup).
2. The current year is derived from the **UNIT-e** value of that lookup (e.g. '2019').
3. The start and end dates are worked out as 01-Aug-(Current year) to 31-Jul-(current year+1).
4. The web service retrieves the Session record(s) that are linked to the current academic year and have the value specified against the setting 'Application\OS\General\Student Periodic\Session Type' in UNIT-e Database Manager (Settings) [UDMSE.exe] (see page 30).
5. The web service then creates a Student Periodic ILR record with a session link, an academic year code and a start and the end date.

Logging into and out of Online Services

Access:	*Welcome to Online Services* (see page 220) **Login**
Screens:	*Welcome page Login* (see Figure 89 below) or *Login* (see page 221)

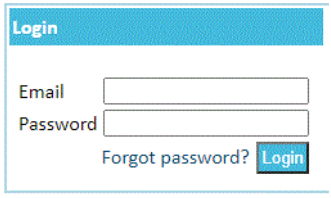
- *Logging into Online Services* (see below)
- *Logging out of Online Services* (see page 197)

Logging into Online Services

Once a student has registered they can log in at any time. There are two methods:

- Using the **Login** section of the **Home | Welcome** page (Figure 89).

Figure 89: Welcome page Login



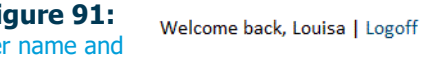
- Clicking **Login** (Figure 90) at the top of the **Home | Welcome** page (see page 220). This opens a **Login** page in the same format at the **Login** section.

Figure 90: Login button



For either method the student enters their login **Email** address and **Password** and clicks **Login**. Their name is then displayed at the top of the page (Figure 91) and additional tabs become available to them. Refer to *The tabs available in Online Services* (see page 189) for details.

Figure 91: User name and logoff button



The login expires if the student doesn't carry out any action for a period of time. If this happens they must login again. By default an elapsed time of 20 minutes is used, but you can change this time period if required. Refer to the *Managing UNIT-e Online Services Website Installation* handbook (MOSWSI.pdf) for further details.

Logging out of Online Services

To log out of Online Services the student clicks **Logoff** at the top of the page, as shown in Figure 91 above.

Dealing with email addresses and passwords

When a student registers they're asked to supply an email address and password. This section covers what they should do if they forget their password or want to change their email address or password.

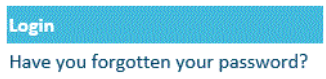
- *Forgotten passwords* (see below)
- *Changing passwords* (see page 199)
- *Changing contact or login email addresses* (see page 200)

Forgotten passwords

Access:	*Welcome to Online Services* (see page 220) **Have you forgotten your password?**
Screens:	*Forgotten password?* (see page 224)

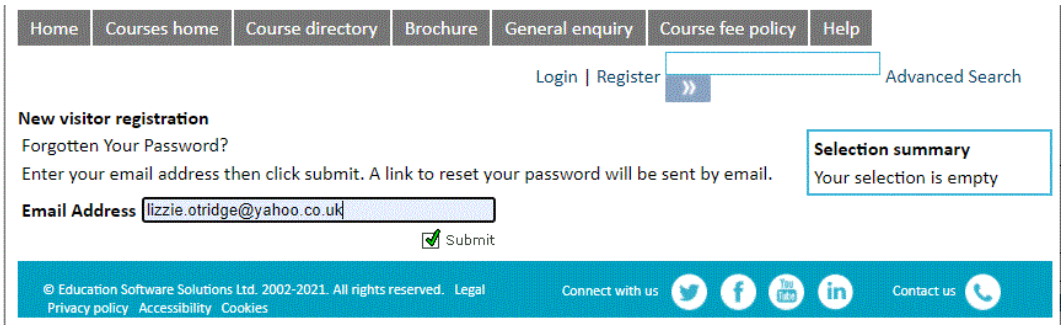
If a student has forgotten their password they click **Have you forgotten your password?** in the **Login** section of the **Home | Welcome** page (Figure 92).

Figure 92: Have you forgotten your password?



This opens the **Forgotten your Password?** page (Figure 93).

Figure 93: Forgotten password



The student enters their **Email Address** and clicks **Submit**. The system then sends them an authorisation link via email so that they can specify a new password.

If an Online Services account is locked and the student goes through the **Forgotten password** process, the system unlocks the account as part of the process of resetting the password.

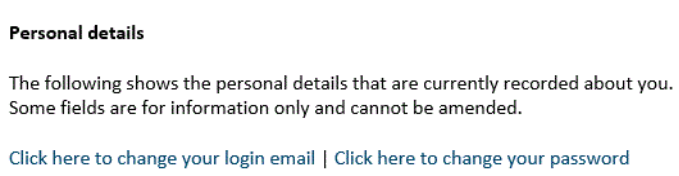
If a student enters the wrong **Date of Birth** on the **Password Reset** page (i.e. it does not match that of the Student record linked to the Online Membership record), an Event Viewer error is logged with the message 'PasswordReset: invalid authorisation details entered'.

Changing passwords

Access:	*Personal details* (see page 253) **Click here to change your password**
Screens:	*Change password* (see page 255)

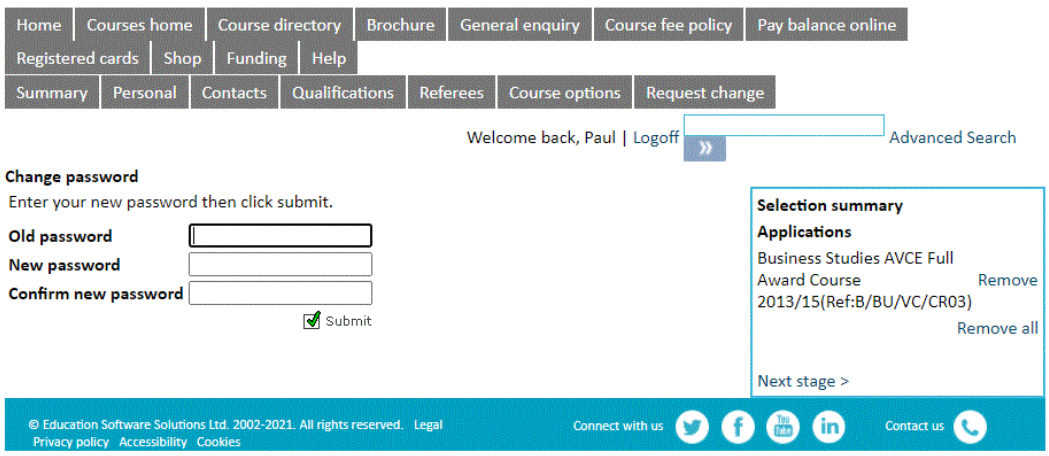
Once a student has logged into Online Services they can change their password at any time by using the **Click here to change your password** option on the **Personal** tab (Figure 94).

Figure 94: Click here to change your password



This opens the **Change password** page (Figure 95).

Figure 95: Change password



The student enters their **Old password** first and then their **New password**. They then have to enter their new password again in the **Confirm new password** field and click **Submit** to confirm the change.

Changing contact or login email addresses

A student's email address serves two purposes in UNIT-e Online Services and is stored in two different places to accommodates these uses.

- It's used by the institution to communicate with them via email
- It's used as their login ID.



Refer to *Storing student email addresses* (see page 112) for details.

If they want to change their email address they have the option of updating it for either of these purposes or both.



They can only amend their email address once they've been converted from a stranger to a student.

This section covers the following:

- *Changing a contact email address* (see below)
- *Changing a login ID* (see page 201)

Changing a contact email address

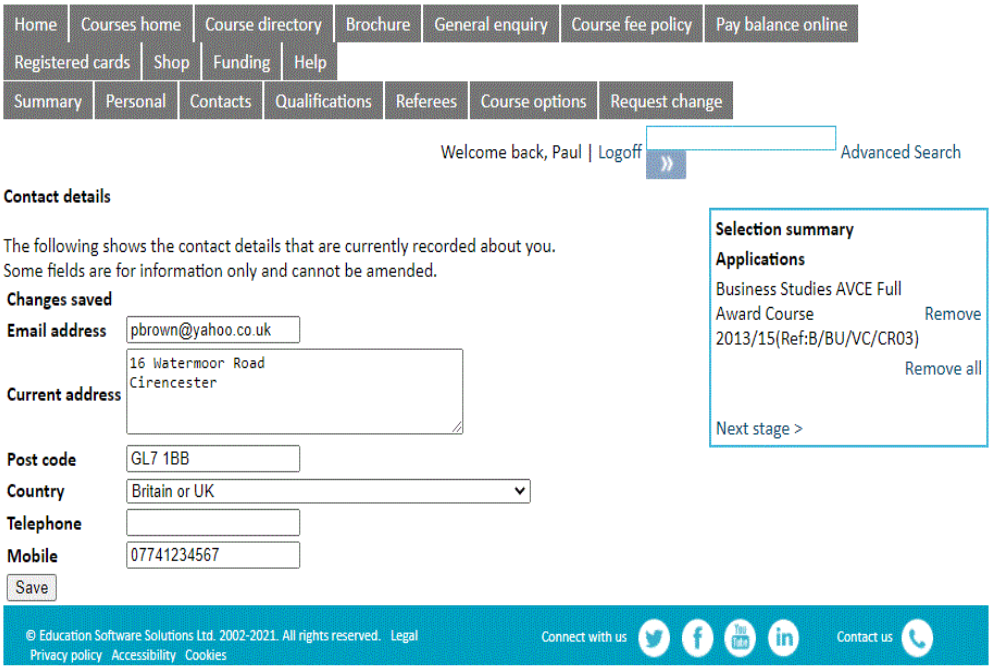
Access:	UNIT-e Online Services - **Contacts** tab
Screens:	*Contact details* (see page 256)



To change a contact email address

1. The student logs into UNIT-e Online Services and selects the **Contacts** tab (Figure 96).

Figure 96: Contacts



2. They edit the **Email address** field and click **Save**.

3. The next step depends on whether the contact and login email addresses are the same:

    i. If the contact email address and login ID are the same, the system displays the **Change login email** page (see page 254), giving them the option to update their login ID to match their new contact email address. To do this they must enter their **Password**. If they don't want to do this they can simply navigate away from the page.

    ii. If the contact email address and login ID aren't the same the change is saved and they don't need to take any further action.

If the contact email address and login ID aren't the same but the student changes their contact email address so that it once again matches their login, the system recognises this and prompts the student to change their login ID (as explained in step 3i above) if they change their contact email address again.

Changing a login ID

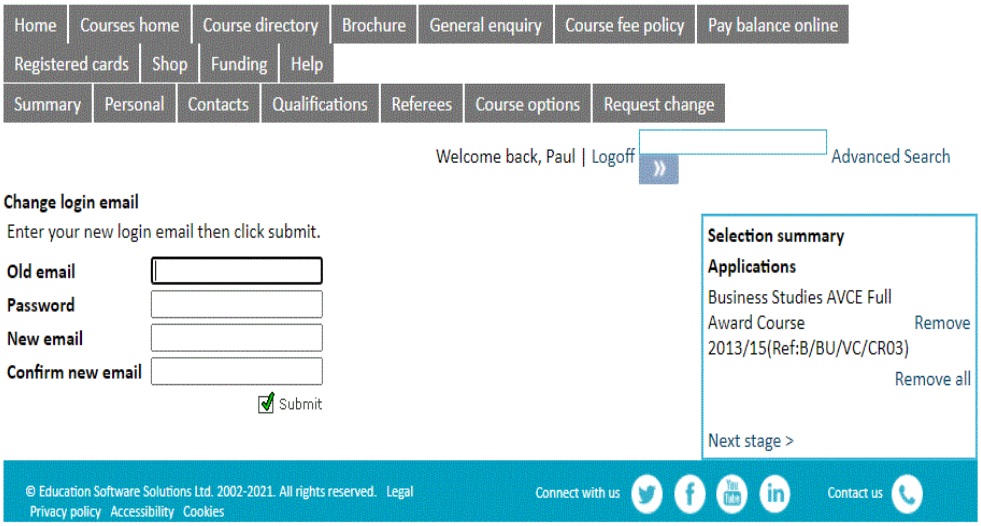
Access:	UNIT-e Online Services - **Personal** tab
Screens:	*Personal details* (see page 253)

To change a login ID

1. The student logs into UNIT-e Online Services and selects the **Personal** tab.

2. They click **Click here to change your login email** (see Figure 94 on page 199) to open the **Change login email** page (Figure 97).

Figure 97: Change login email

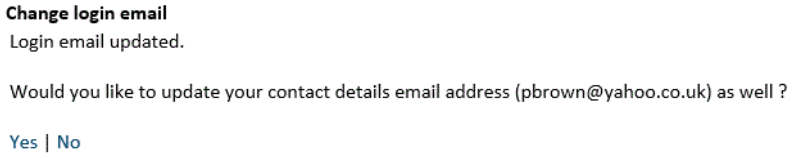


3. They complete all of the fields and **Submit** the change.

4. The next step depends on whether their contact and login email addresses are the same:

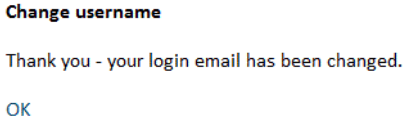
   i. If their login ID and contact email address are the same, the system displays the message shown in Figure 98, asking the student if they want to update their contact email address to match their login ID. The student clicks **Yes** to update their contact email address or **No** if they don't want to update it. In both cases they're returned to the **Personal details** page.

Figure 98: Login email updated



   ii. If their login ID and contact email address aren't the same the change is saved (Figure 99) and they don't need to take any further action.

Figure 99: Change username



If the login ID and contact email address aren't the same but the student changes their login ID so that it once again matches their contact email address, the system recognises this and prompts the student to change their contact email address (as explained in step 4i above) if they change their login ID again.

Making general enquiries

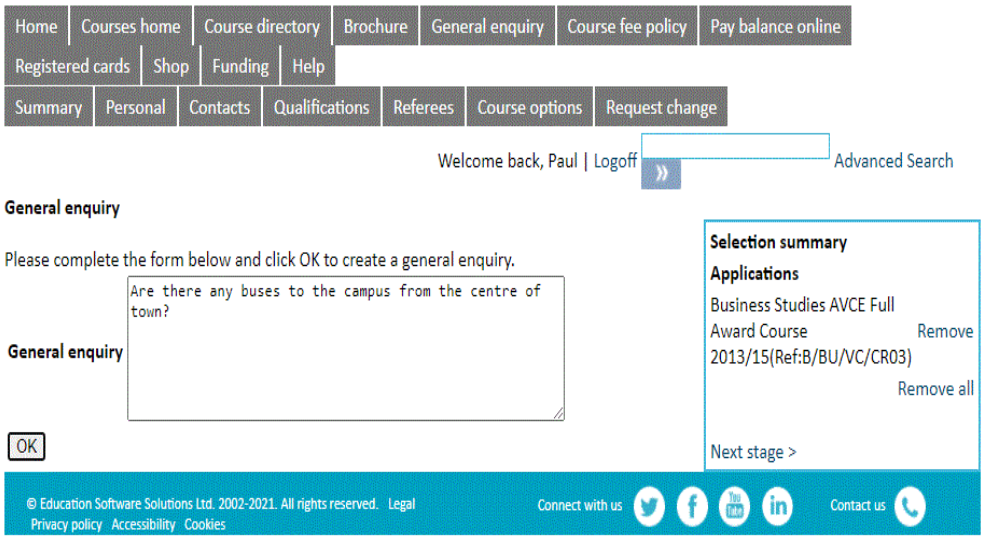
Access:	UNIT-e Online Services - **General enquiry** tab
Screens:	*General enquiry* (see page 240)

A student can raise a general enquiry about anything to do with your institution or courses but they must login or register first, as their details and email address are needed in order to reply.

To make a general enquiry

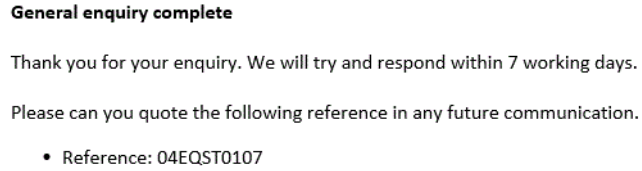
1. Go to the **General enquiry** page (Figure 100).

Figure 100: General enquiry



2. Type a question into the **General enquiry** field and click **OK** to submit the enquiry.
3. The system generates an enquiry reference (Figure 101) and a reply is emailed to the student when the enquiry has been dealt with by someone within your institution.

Figure 101: General enquiry complete



Requesting brochures

Access:	UNIT-e Online Services - **Brochure** tab
Screens:	*Brochure search* (see page 238)

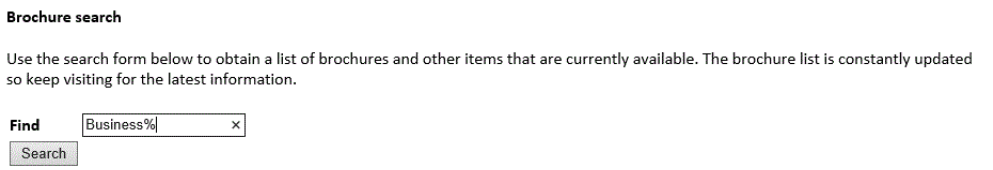
A student can search for brochures and other literature provided by your institution via the **Brochure** tab.

Brochures must be flagged to appear in Online Services. Refer to *Flagging brochures to appear online* (see page 114) for further information.

To request a brochure

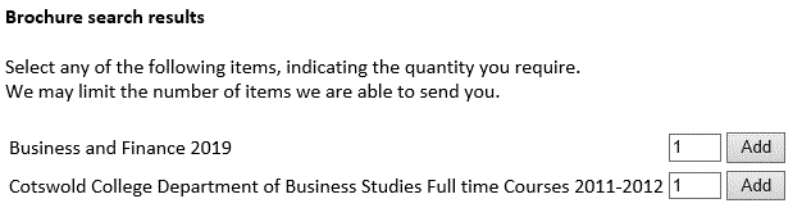
1. The student goes to the **Brochure search** page (Figure 102) and searches for brochures and other literature by entering part of the brochure or document name in the **Find** field. Alternatively the student can leave the **Find** field blank to view a list of all brochures.

Figure 102: Brochure search



2. Click **Search**. The results are displayed on the **Brochure search results** web page (Figure 103).

Figure 103: Brochure search results



3. Enter the number of brochures required and **Add** them to the **Selection summary** on the right of the page. If the student is logged into the system they can then proceed to the next stage, otherwise they need to login (see page 196) or register (see page 193) so that the system has their contact details.

Refer to *Completing requests* (see page 209) for further information about the **Selection summary** and the process of completing brochure requests, enquires, applications and enrolments.

Enquiring about courses

Access:	*Welcome to Online Services* (see page 220) **Search** or **Advanced Search** or **Course Directory** tab
Screens:	*Course Search Results* (see page 227)

If the **Online enquiry**/**Web Enquiry** check box is ticked against a Module, a student can generate an online enquiry about that module.



Refer to *Flagging modules to appear on the web site* (see page 100) for further details.

This process works in different ways, depending on how your system has been set up:

- If the selected module is linked to a brochure, the enquiry automatically generates a brochure request.
- If the module isn't linked to a brochure, the system creates an Enquiry record, but as this record has no enquiry details the enquiry must be followed up by your institution and supplemented with more information via UNIT-e Student Manager (Enquiries and Applications) [USMEA.exe] or an equivalent UNIT-e application.

  In this situation you could use the 'Application\OSEQ\Confirmation\CC' setting key to copy the confirmation email to a member of staff responsible for dealing with enquiries. Alternatively you could write a report to retrieve all unprocessed online enquiries, as online enquiries have an 'Online enquiry reference' property and are generated with a **Status** of '(none)'.



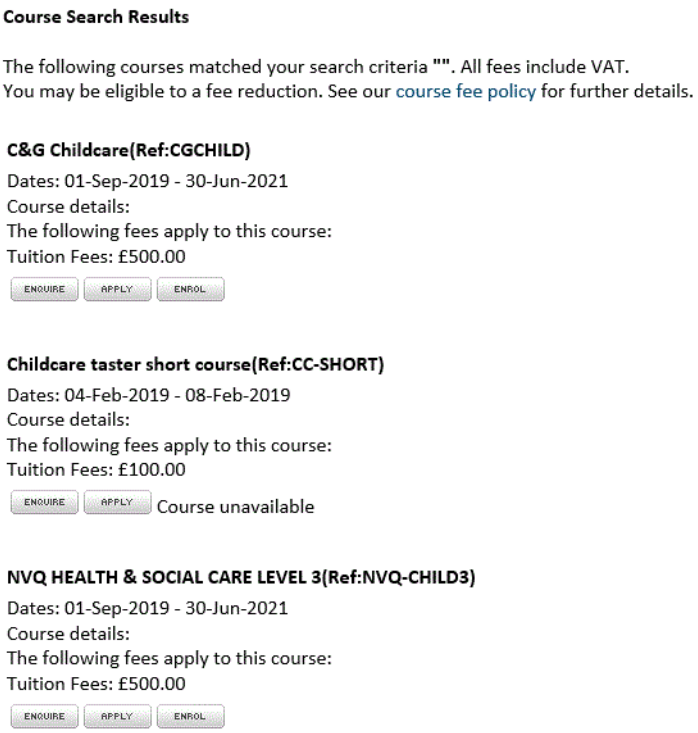
Refer to *Application|OSEQ|Confirmation* (see page 28) for further details about settings and the *UNIT-e Report Generator* handbook (URG.pdf) for further information about writing reports.



To enquire about a course

1. Search for a course using one of the search methods (refer to *Searching for information* (see page 191)). The results of the search are displayed on the **Course search results** page (Figure 104).

Figure 104: Course search results



2. The student clicks **ENQUIRE** and the course is added to the **Selection summary** on the right of the page, along with any other requests (brochures, general enquiries etc.).



Refer to *Completing requests* (see page 209) for further information about the **Selection summary** and the process of completing brochure requests, enquires, applications and enrolments.

Applying for courses

Access:	*Welcome to Online Services* (see page 220) **Search** or **Advanced Search** or **Course Directory** tab
Screens:	*Course Search Results* (see page 227)

If the **Online application**/**Web Apply** check box is ticked against a Module, a student can apply online for that course by clicking the **APPLY** button.



Refer to *Flagging modules to appear on the web site* (see page 100) for further details.

The application process is the same as for an enquiry (see page 205).

Enrolling on courses

Access:	*Welcome to Online Services* (see page 220) **Search** or **Advanced Search** or **Course Directory** tab
Screens:	*Course Search Results* (see page 227)

If the **Online enrolment**/**Web Enrol** check box is ticked against a Module and the number of spaces on the course are defined, a student can enrol online on that course by clicking the **ENROL** button.



Refer to *Flagging modules to appear on the web site* (see page 100) and *Specifying places available on a module* (see page 103) for further details.

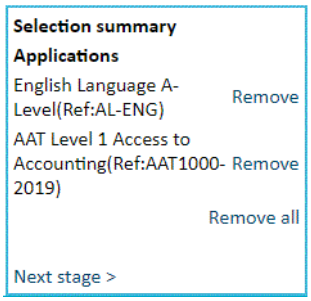
The enrolment process is the same as for an enquiry (see page 205).

Completing requests

Access:	UNIT-e Online Services - **Selection summary**
Screens:	*Selection summary* (see page 227)

As a student enters brochure requests, enquiries, applications and/or enrolments they're displayed in the **Selection summary** (Figure 105), which is situated on the right-hand side of the page. When they've completed all of their requests they must complete the process by proceeding with the selection.

Figure 105: Selection summary



A student's progress through this section of the web pages is shown at the top of the page



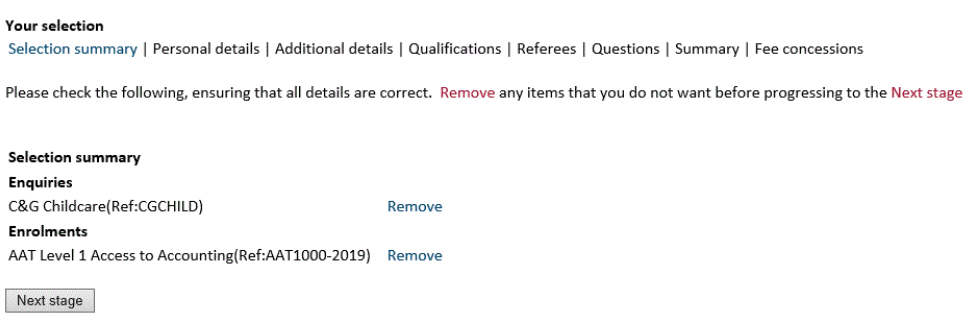
They can click any of the options to go back to that page.

To complete requests

Not all of the following steps are required for enquiries and applications.

1. The student clicks **Next stage** in the **Selection summary** (Figure 105) to display the **Your selection** page (Figure 106), which list all their requests. They can click **Remove** to remove any item from the list if it's no longer required.

Figure 106: Your selection



2. Click **Next stage** to move on to the **Your details** page (see page 229), which shows a summary of the student's personal details. Most of the information should already be in place but they can add any missing fields.



If you're a Scottish customer and you've loaded FES disability questions, the **Disability** field is replaced by those questions. Refer to the *Managing FES and More Choices More Chances returns* handbook (MFES.pdf) for further information about loading these questions.

3. Click **Next stage** to continue to the **Additional details** page (see page 230), which gathers information about how the student found out about the course and records any promotional code associated with their enrolment. Complete any missing fields.

4. Click **Next stage** to continue to the **Qualification details** page (see page 257). Any qualifications that they've previously entered or provided to your institution are shown here. They can enter the details of any qualifications not shown and click **Add** after each one to clear the screen for another. They can click **Reset** if they want to clear what they've just entered without saving it.

5. Click **Next stage** to continue to the **Referee details** page (see page 258). Any referees that they've previously entered or provided to the institution are shown here. They can enter the details of any referees not shown and click **Add** after each one to clear the screen for another. They can click **Reset** if they want to clear what they've just entered without saving it.

6. Click **Next stage** to continue to the **Additional questions** page (see page 233) and answer the questions, some of which may be mandatory. Their answers are used to process their enquiry, application or enrolment.



- Refer to the *Managing UNIT-e Questions Manager & Answers Manager* handbook (MQAM.pdf) and the *Using UNIT-e Questions Manager & Answers Manager* handbook (UQAM.pdf) for further information about the creation of questions and the retrieval of answers.
- The system may be configured to allow students to upload file attachments as hotlinks. Hotlinks can be applied to individual modules to capture any information that supports an application or enrolment - for example a student might upload a copy of a research paper. If this facility is available, the **Upload** button appears against the appropriate question. Refer to *Enabling document uploads to support answers* (see page 69) for further details.

7. Click **Next stage** to continue to the **Summary - please check your details** page (see page 234). This is a summary of all of the details that the student has entered, including their personal details, contact, qualification and referee details as well as enquiries, applications and enrolments. They can't amend any of their details here but can make changes once they've been converted from a stranger to a student (refer to *Changing student details* (see page 215)).

8. Click **Proceed**.

    - If the student has only made enquiries and/or applications, the process continues at step 9.

- If the student is dealing with an enrolment they're taken to the **Fee concessions** page (see page 236) where they can apply concessions and/or promotional vouchers to reduce their fees.

Refer to the *UNIT-e Fees* handbook (UFEES.pdf) for further information about concessions and promotional vouchers.

i. Each enrolment displayed in the **Concessions** section has an adjacent pick-list so that the student can apply different concessions to different enrolments.

ii. If required they can also apply a promotional voucher by keying the code in the **Promotions** section.

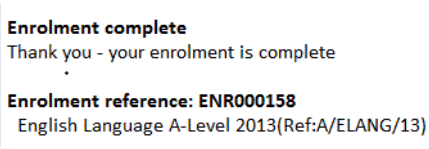
iii. Click **Apply** to apply the discounts. The **You Pay (Detail)** section shows a breakdown of the fees with concessions and promotions applied.

This section of the page is only displayed if the setting key 'Application\OSEN\Payment\Display Concessions Fee breakup' is set to '-1'. Refer to *Application|OSEN|Payment* (see page 27) for further details.

iv. Click **Proceed**.

9. If your institution doesn't take payment online, or if the student is making an enquiry or application, the process is now complete and the system either displays the **Confirmation** page (see page 235) or displays an **Enrolment complete** message (Figure 107).

Figure 107: Enrolment complete



If your institution allows online payments, the **Confirmation with payment options** page is displayed (see page 235), offering the student the following options:

- **Pay now:** Offers the option to pay the entire fee, now, by credit card.

If the **Pay now** button is missing, check the 'Application\OSEN\Payment\Enable Payment' setting key. Refer to *Application|OSEN|Payment* (see page 27) for further details.

- **Pay later:** The student can opt to pay the fees at a later date (e.g. by making a MOTO payment or by sending a cheque).
- **Pay by Instalment:** The student can register their credit card details and choose to pay by instalments. This functionality is controlled by the UNIT-e Finance Manager Credit Card Instalments licence (FMCI).

An invoice and invoice lines are raised automatically in UNIT-e Finance Manager when the student opts to 'pay later' or when a payment is generated. The invoice details such as **Type** and **Currency** are defined by settings. Refer to *Application|OSEN|Payment* (see page 27) for further details.

10. If the 'Application\OSEQ\Confirmation', 'Application\OSAP\Confirmation' and 'Application\OSEN\Confirmation' settings are in place (refer to *Defining settings* (see page 23)) the system automatically generates a confirmation email showing the details of the enquiry, application or enrolment.



The payment processes are covered in detail in the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf).

Selecting course options

Access:	*Welcome to Online Services* (see page 220) **Course options** tab
Screens:	*Course options* (see page 259)

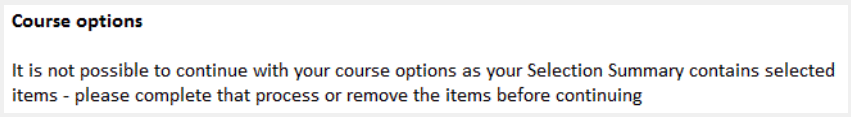
The **Course options** tab (see page 259) lists the courses that the student is enrolled on and lists the options available for those courses. The student can then select the options that they want to take.

Options must be flagged to appear online. Refer to *Flagging module options to appear on the web site* (see page 110) for further details.

To select course options

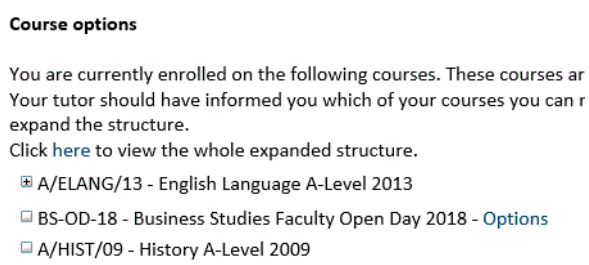
1. The student selects the **Course options** tab (Figure 108), which shows their enrolments in tree format. They can expand the tree for each course by clicking the + sign alongside it.

If the student has unprocessed enquiries, applications or enrolments in their **Selection summary** the system displays the following message.



The student must either process or clear those items before re-opening the **Course options** page.

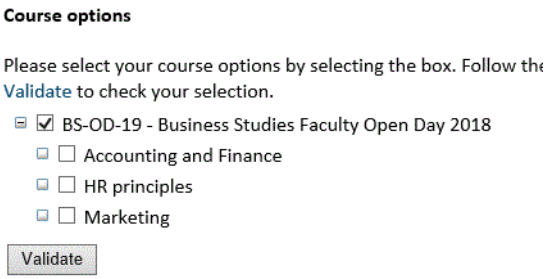
Figure 108: Course options



2. An **Options** button appears alongside the course if there are associated options. The student clicks this to view and select options (Figure 109).

If there are rules covering the number or type of selections the student can make, they're listed here. For example, if the student must select one option from three different groups of options, the options are shown in those groups.

Figure 109: Course options selection



3. The student clicks **Validate** to validate the choices. Their choices will fail validation if they don't select options from the required groups, or if they exceed the number of options that they're allowed to take. They can continue if they select less than the required number of options, but their choice of options won't be complete so they'll have to add further options at a later date.

Changing student details

Once a student has been converted from a stranger to a student they can update their personal details and other information such as qualifications.



Refer to *Creating students from strangers* (see page 115) for more information about the process of converting a stranger to a student.

The **Summary** tab (see page 251) enables a student to view (but not amend) all of the details that they've entered, including their personal details, contact, qualification and referee details as well as their enquiries, applications and enrolments.

They can use the following tabs to amend their details.

- **Personal** (see page 253)
- **Contacts** (see page 256)
- **Qualifications** (see page 257)
- **Referees** (see page 258)
- **Course options** (see page 259)
- **Request change** (see page 261)



Refer to *Changing passwords* (see page 199) and *Changing contact or login email addresses* (see page 200) for information about how to change passwords and contact or login email addresses.

Paying for enrolments online

Depending on the functionality provided by your institution, a student may be able to pay enrolment fees online as part of the enrolment process. An overview of this process is given in *About card payments & End of Day files* (see page 185) but the full details are explained in a dedicated handbook - *Managing UNIT-e Card Payments & Refunds* (MCP.pdf) - which also covers the use of End of Day files.

Chapter 12:

Screen and field information

This chapter provides detailed information about each screen referenced in the procedures. The web pages are listed in the order in which they appear. Other related applications are listed alphabetically at the end of the chapter.

- **Home -** *Welcome to Online Services* (see page 220)
  - *Login* (see page 221)
  - *New visitor registration* (see page 222)
  - *Advanced course search* (see page 223)
  - *Forgotten password?* (see page 224)
- **Courses home -** *Courses home* (see page 225)
- **Course directory -** *Course directory* (see page 226)
  - *Course Search Results* (see page 227)
    - *Selection summary* (see page 227)
    - *Your selection* (see page 228)
    - *Your details* (see page 229)
    - *Additional details* (see page 230)
    - *Qualification details* (see page 231)
    - *Referee details* (see page 232)
    - *Additional questions* (see page 233)

- *Summary - please check your details* (see page 234)
- *Confirmation* (see page 235)
- *Confirmation with payment options* (see page 235)
- *Fee concessions* (see page 236)

- **Brochure -** *Brochure search* (see page 238)
  - *Brochure search results* (see page 239)
- **General enquiry -** *General enquiry* (see page 240)
- **Course fee policy -** *Course fee policy* (see page 241)
- **Pay balance online -** *Pay balance online* (see page 242)
  - *Online Payments (Card details)* (see page 244)
  - *Online Payments (Address confirmation)* (see page 245)
  - *Payment Confirmation Page* (see page 246)

  OR

  - *Online Payments (E-Commerce payment options)* (see page 244)
  - *Online Payments (Card details)* (see page 244)
  - *Online Payments (Address confirmation)* (see page 245)
  - *Payment Confirmation Page* (see page 246)
  - *Online Payments (Verified by Visa)* (see page 246)
  - *Choose an account* (see page 247)
  - *Your Wallet* (see page 247)
- **Registered cards -** *Pay by CC Instalments* (see page 248)
- **Shop -** *Catalogue* (see page 249)
- **Funding -** *Funds* (see page 250)
- **Summary -** *Summary* (see page 251)
- **Personal -** *Personal details* (see page 253)
  - *Change login email* (see page 254)
  - *Change password* (see page 255)
- **Contacts -** *Contact details* (see page 256)
- **Qualifications -** *Qualification details* (see page 257)
- **Referees -** *Referees details* (see page 258)

- **Course options -** *Course options* (see page 259)
- **Request change -** *Request change* (see page 261)

Other applications

- *AFD Postcode Internet Settings* (see page 262)
- *Online Services Account Manager* (see page 264)
- *Online Stranger Mapping* (see page 266)
- *Pending Merged Students* (see page 275)
- *Referee Manager* (see page 278)

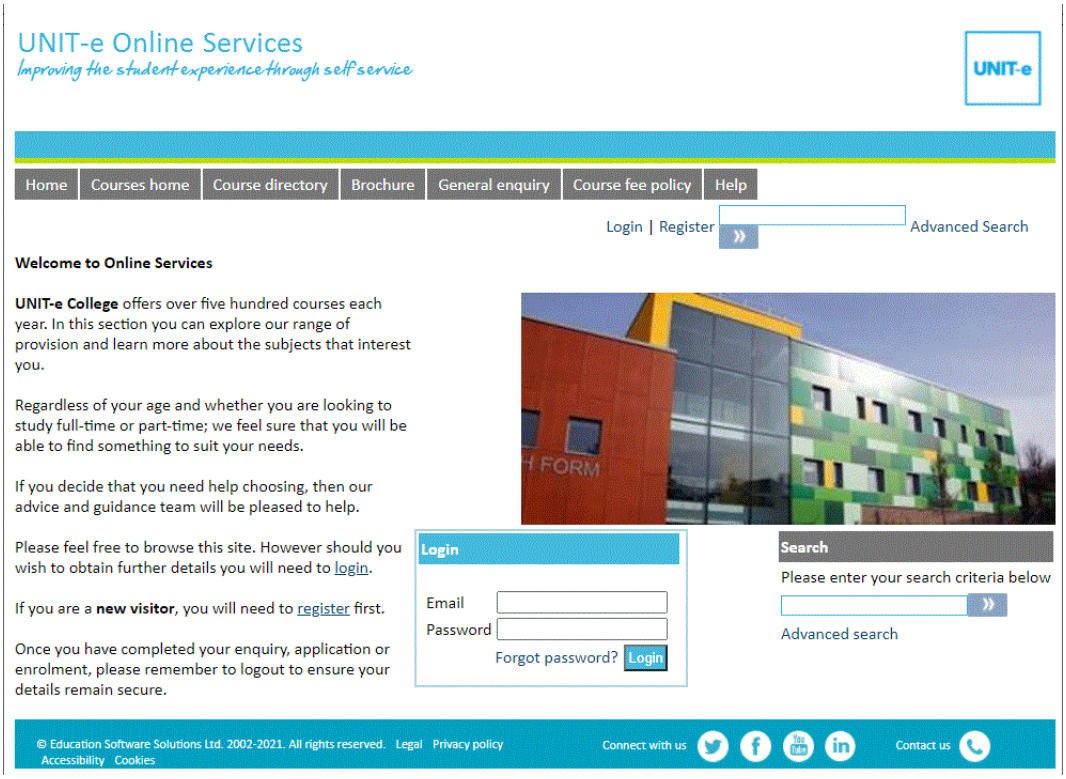
Welcome to Online Services

Access:	UNIT-e Online Services - **Home** tab

The **Welcome to Online Services** page gives students and prospective students access to Online Services. They can use it as a search facility or can register as a user, enabling them to request a brochure, make a general enquiry, enquire about courses and submit applications and enrolments online.

Refer to *Using Online Services* (see page 187) for further details.

Figure 110: Welcome to Online Services

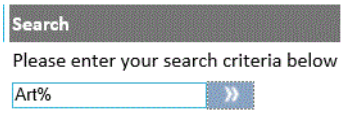


Login | Register: If a student is already registered as a user, they click **Login** to open the **Login** page (see page 221) or alternatively use the **Login** section at the bottom of the page. If they're new to Online Services they click **Register** to open the **New visitor registration** page (see page 222) where they can register their details.

Refer to *Logging into and out of Online Services* (see page 196) and *Registering as a user* (see page 193) for further details.

The student can use the search field (Figure 111) alongside the **Login | Register** links and the **Search** section at the bottom of the page to carry out an immediate search without logging in or registering.

Figure 111: Search field



Advanced Search: This gives the student access the **Advanced course search** page (see page 223) where they can enter additional search criteria.



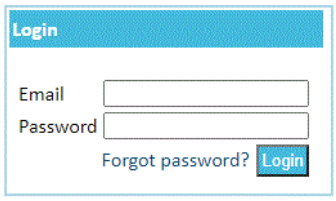
Refer to *Searching for information* (see page 191) for further details.

Have you forgotten your password?: if a student has forgotten their password they click to access the **Forgotten password?** page (see page 224).

Login

Access:	*Welcome to Online Services* (see page 220) **Login**

Figure 112: Login



Have you forgotten your password?: Gives access to the **Forgotten password?** page (see page 224) where the student can request a reminder.

Email/Password: The student enters their email address and password.

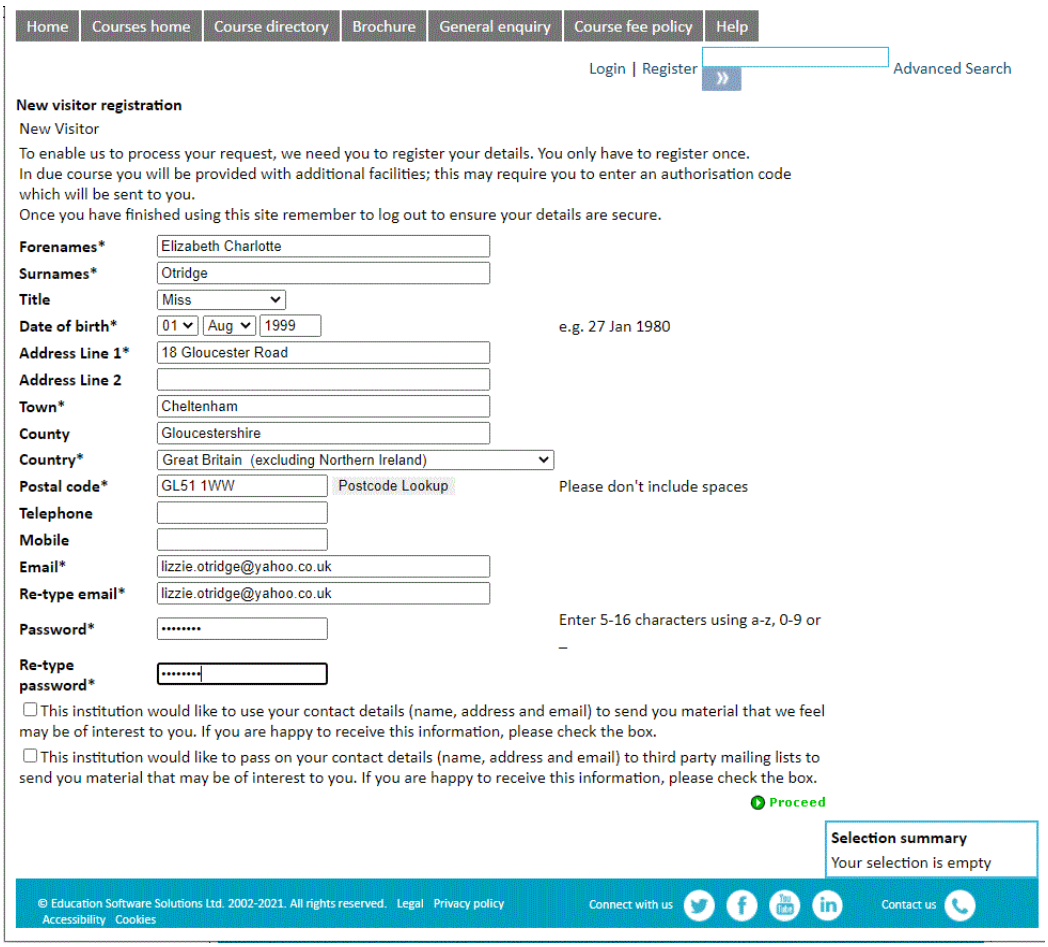
Login: Click to log into Online Services.

Selection summary: Refer to *Selection summary* (see page 227) for further details.

New visitor registration

Access:	*Welcome to Online Services* (see page 220) **Register**

Figure 113: New visitor registration



A student registers their details so that they can request a brochure, make a general enquiry, enquire about courses and submit applications and enrolments online. They only have to register once; when they visit the web site again they only need to login and the system will recognise them and retrieve all of their details. A student should:

- Enter as much information as possible, making sure that they complete all fields marked with an asterisk (*). The system doesn't accept a registration if these fields are incomplete.
- Refer to the notes alongside each of the fields, as these tell them how to enter the information in the format required.
- When entering their address, use the **Postcode Lookup** functionality. Refer to *Using the Postcode Lookup functionality* (see page 195) for further information.

- Make sure that the email address and password are entered correctly and in the correct format. The system forces them to retype their email address and password for security reasons - they aren't able to copy from one field to another.

The flag set against the **This institution would like to use your contact details** check box is stored in the 'College' property of the 'Personal details' class.

The flag set against the **This institution would like to pass on your contact details** check box is stored in the 'Third party' property of the 'Personal details' class.

Click **Proceed** to continue with the registration.

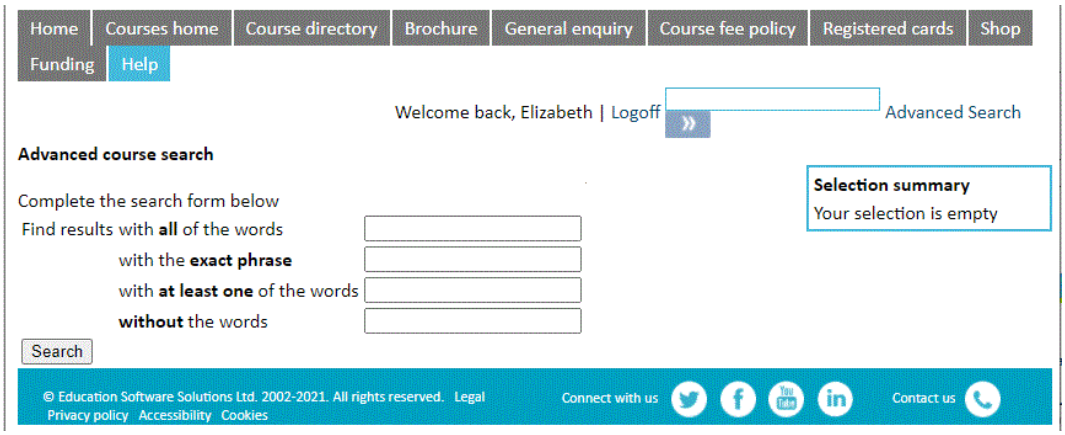
If the student clicks **Close** the registration isn't processed.

Selection summary: Refer to *Selection summary* (see page 227) for further details.

Advanced course search

Access:	Available from all screens apart from **Catalogue** (the **Shop** tab) and **Funds** (the **Funding** tab). **Advanced search**

Figure 114: Advanced course search



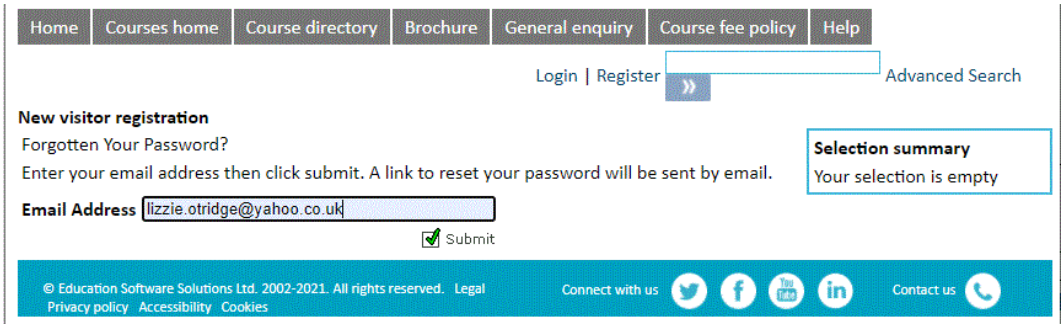
This page offers fields for additional search criteria. Results are displayed on the **Course search results** page (see page 227).

Selection summary: Refer to *Selection summary* (see page 227) for further details.

Forgotten password?

Access:	*Login* (see page 221) **Have you forgotten your password?**

Figure 115: Forgotten password?



A student enters their **Email Address** and clicks **Submit**. Your institution then sends them an authorisation link via email so that they can specify a new password.

Selection summary: Refer to *Selection summary* (see page 227) for further details.

Courses home

Access:	UNIT-e Online Services - **Courses home** tab



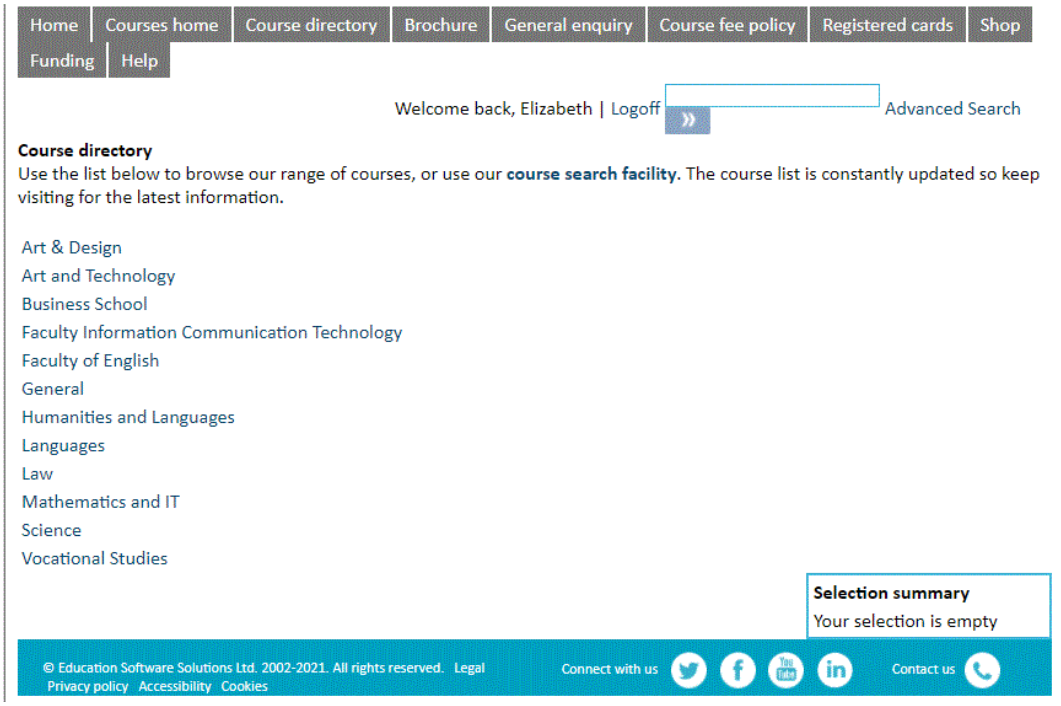
This page is the same as *Welcome to Online Services* (see page 220).

It's provided to give you the opportunity to customise a page to reflect the requirements of your institution. Refer to *Configuring web pages* (see page 77) for further information.

Course directory

Access:	UNIT-e Online Services - **Course directory** tab

Figure 116: Course directory



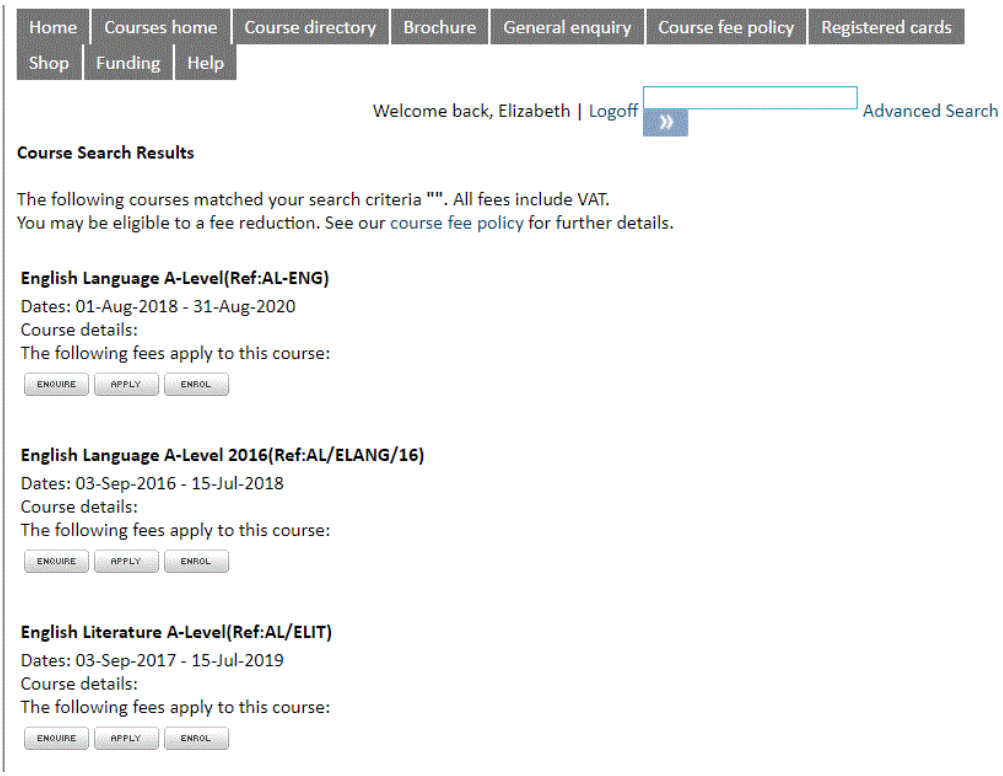
Course options are grouped by department to make it easier for students to select the type of course they're interested in. Click one of the departments listed to view the associated courses on the **Course search results** page (see page 227).

All departments created in UNIT-e Institution Manager appear here. Refer to *Showing departments on the Course directory page* (see page 99) for further details.

Selection summary: Refer to *Selection summary* (see page 227) for further details.

Course Search Results

Figure 117: Course Search Results



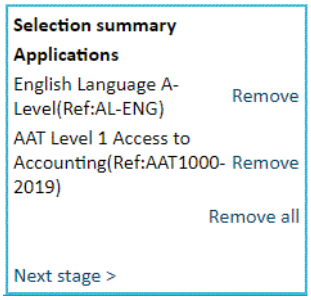
Courses that are flagged to be visible in Online Services (and are associated with the selected department if selected via the **Course directory** page (see page 226)) are displayed here.

Refer to *Flagging modules to appear on the web site* (see page 100) for further details.

Click **ENQUIRE**, **APPLY** or **ENROL** (if available) to add the course to the **Selection summary** (see below) as an enquiry, application or enrolment.

Selection summary

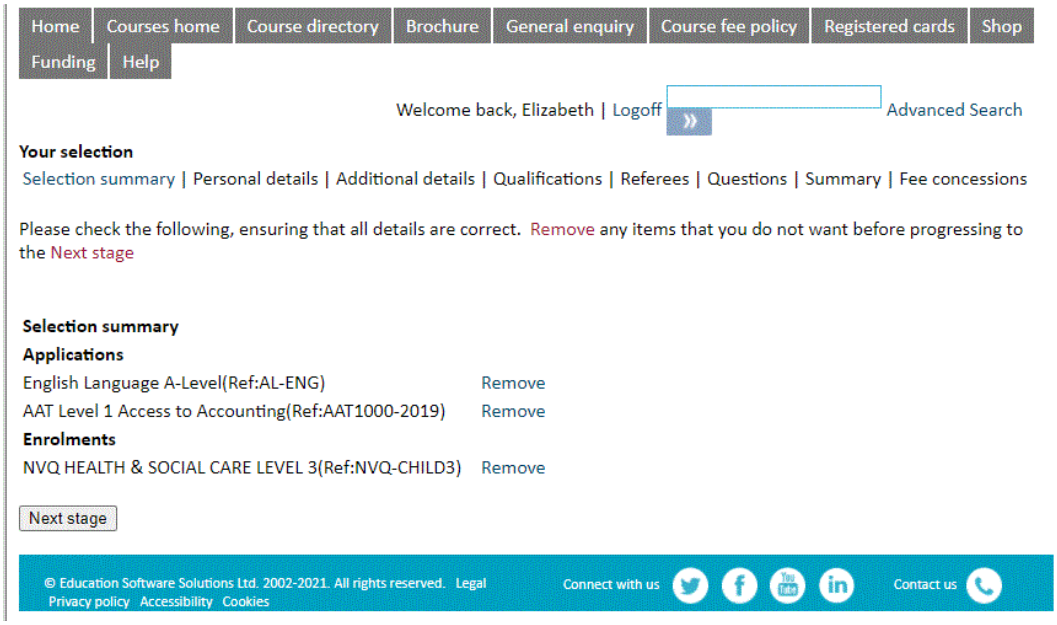
Figure 118: Selection summary



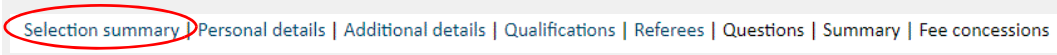
Click **Next stage** to view **Your selection** (see below).

Your selection

Figure 119: Your selection



Once the student is going through the process of creating an enquiry, application or enrolment or requesting a brochure, they can return to this screen by clicking the **Selection summary** option at the top of the page.



This web page lists all of the courses that the student has enquired about, applied for or enrolled on. The list may also contain references to brochures that are associated with the selected courses, or brochures that they've requested via the **Brochure search** web page (see page 238).

If you've the Online Shop (OLSH) licence this page may also show sundry items purchased by the student (clothing, stationery etc.) not necessarily associated with an enrolment.

Online Shop functionality is covered by the *UNIT-e Online Shop* handbook (UOLS.pdf).

Click **Remove** to remove an item from this list.

Click **Next stage** to go to the **Your details** page (see below).

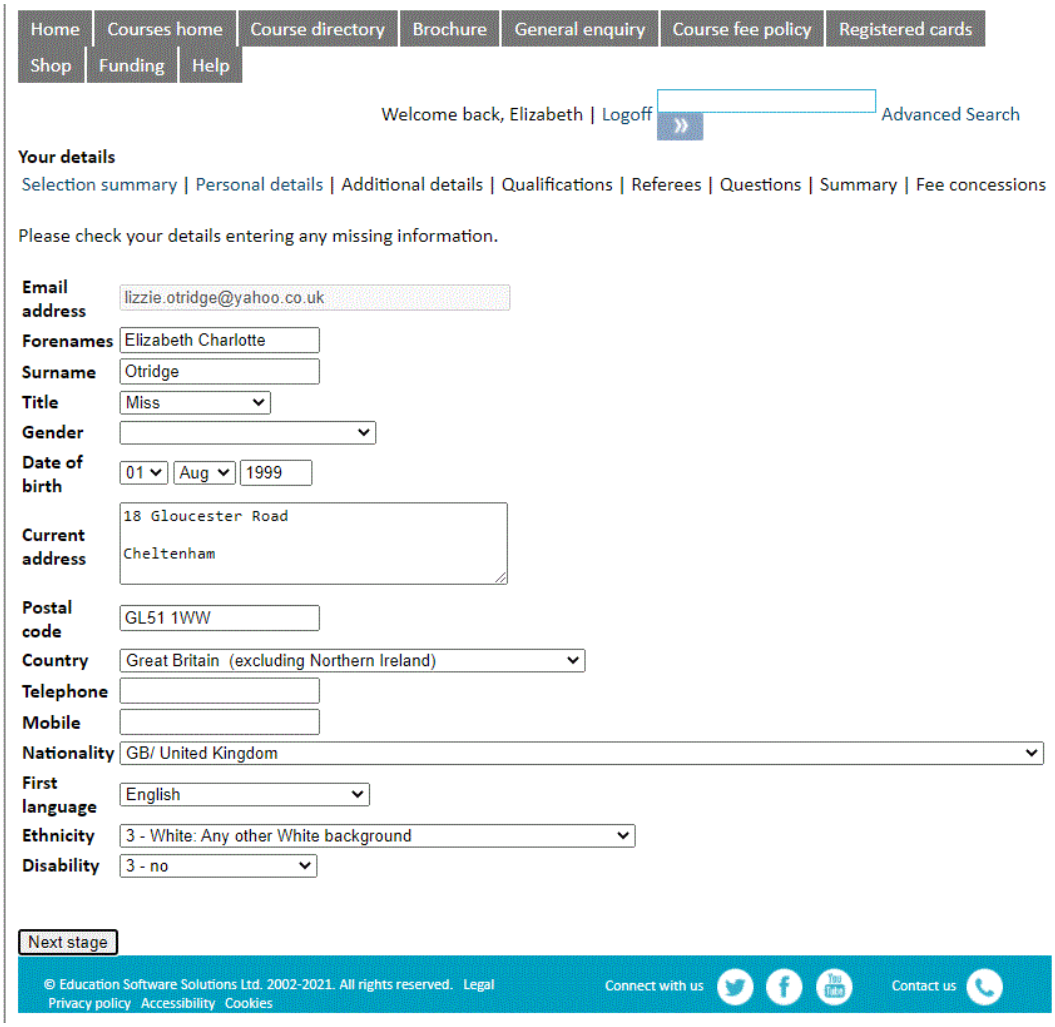
The student's progress through this section of the web pages is shown at the top of the page.



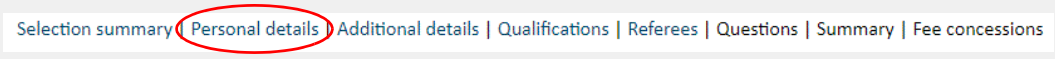
They can click any of the options to go back to that page.

Your details

Figure 120: Your details



Once the student is going through the process of creating an enquiry, application or enrolment or requesting a brochure, they can return to this screen by clicking the **Personal details** option at the top of the page.

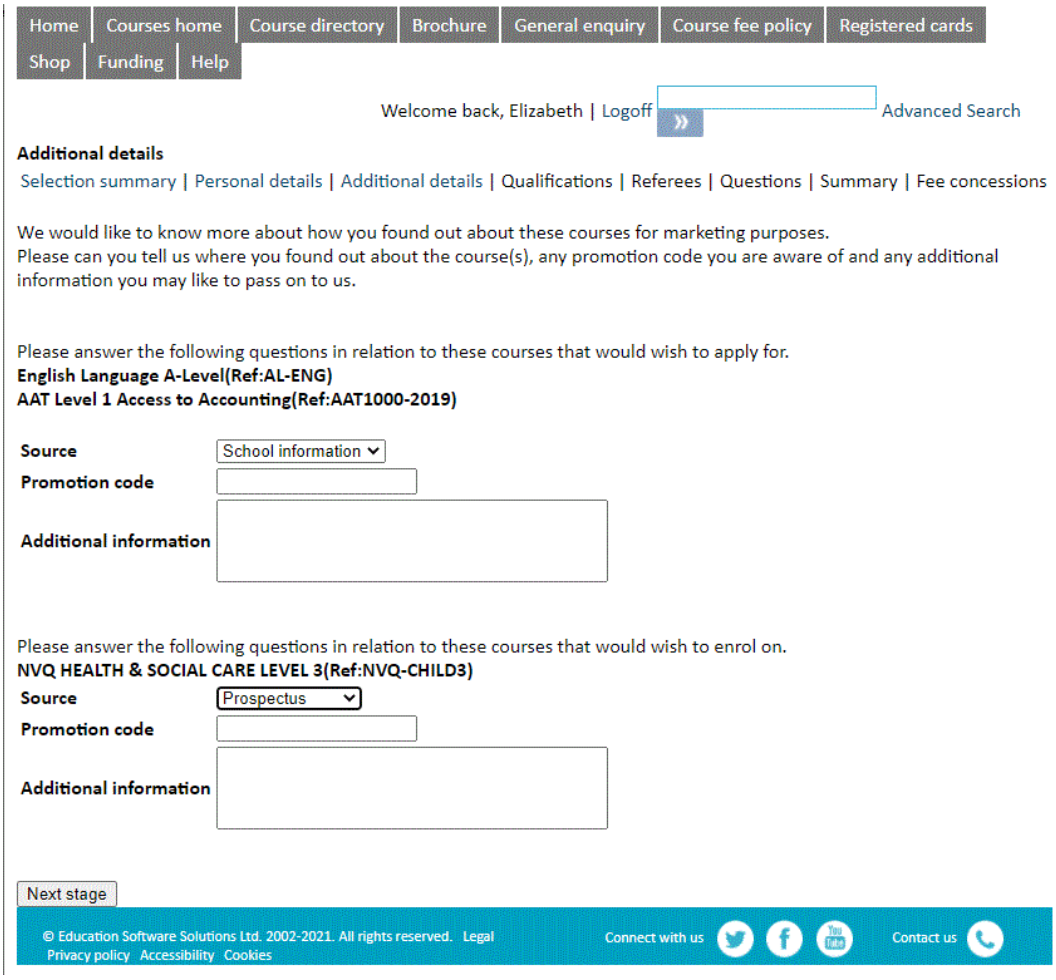


Details already known about the student are displayed. Complete any missing fields and click **Next stage** to continue to the **Additional details** page (see page 230).

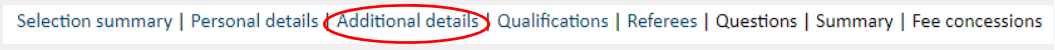
If you're a Scottish institution and you've installed the FS version of Online Services pages, the FES disability questions replace the **Disability** field. Refer to the *Managing FES and More Choices More Chances Returns* handbook (MFES.pdf) for further information about loading these questions.

Additional details

Figure 121: Additional details



Once the student is going through the process of creating an enquiry, application or enrolment or requesting a brochure, they can return to this screen by clicking the **Additional details** option at the top of the page.



Source: The student selects an option from the pick-list to indicate how they found out about the course.

The values available to the student are taken from the 'Source of student enquiry' lookup.

Promotion code: Use this field to record any promotion code associated with the enrolment.

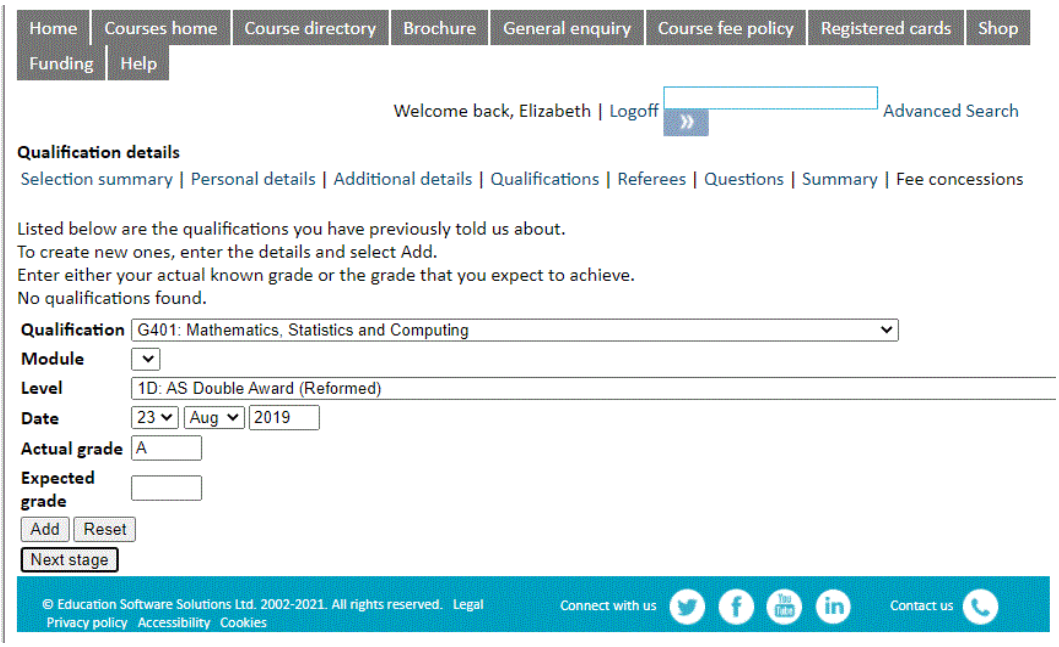
- The **Promotion code** is collected here for information only and isn't used by the Fee Concessions functionality. Refer to *Completing requests* (see page 209) for further details about fee concessions.
- The software doesn't support the application of a business rule to the **Promotion code** field, it must be entered by the student.

Additional information: The student uses this field to record any additional information about their reasons for choosing your institution and the selected courses.

Click **Next stage** to continue to the **Qualification details** page (see below).

Qualification details

Figure 122: Qualification details



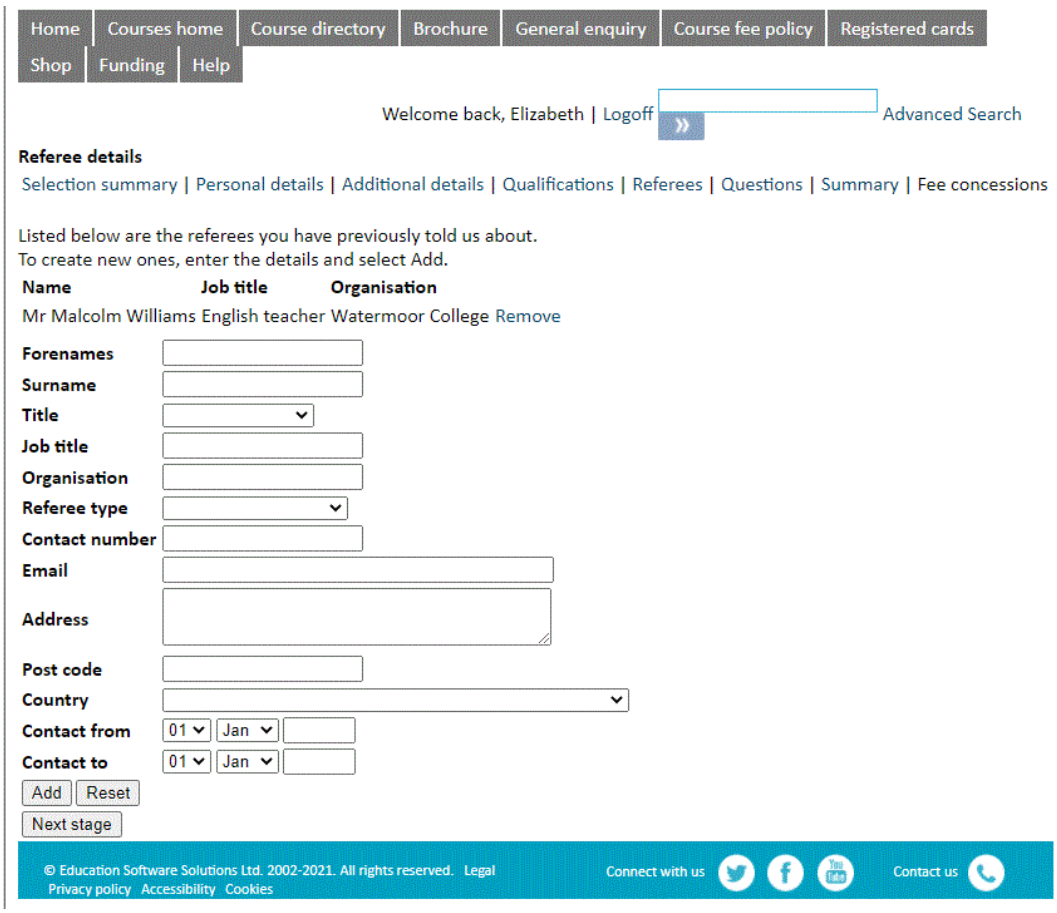
Once the student is going through the process of creating an enquiry, application or enrolment or requesting a brochure, they can return to this screen by clicking the **Qualifications** option at the top of the page.



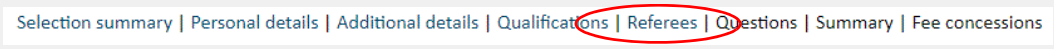
The student enters their qualification details. By clicking **Add** they can submit a qualification but remain on this page to enter another. When all qualifications are entered they click **Next stage** to continue to the **Referee details** page (see page 232).

Referee details

Figure 123:
Referee details



Once the student is going through the process of creating an enquiry, application or enrolment or requesting a brochure, they can return to this screen by clicking the **Referees** option at the top of the page.



Any referees that the student has previously entered or provided to the institution are shown here. They can enter the details of any referees not shown and click **Add** button after each one to clear the screen for another.

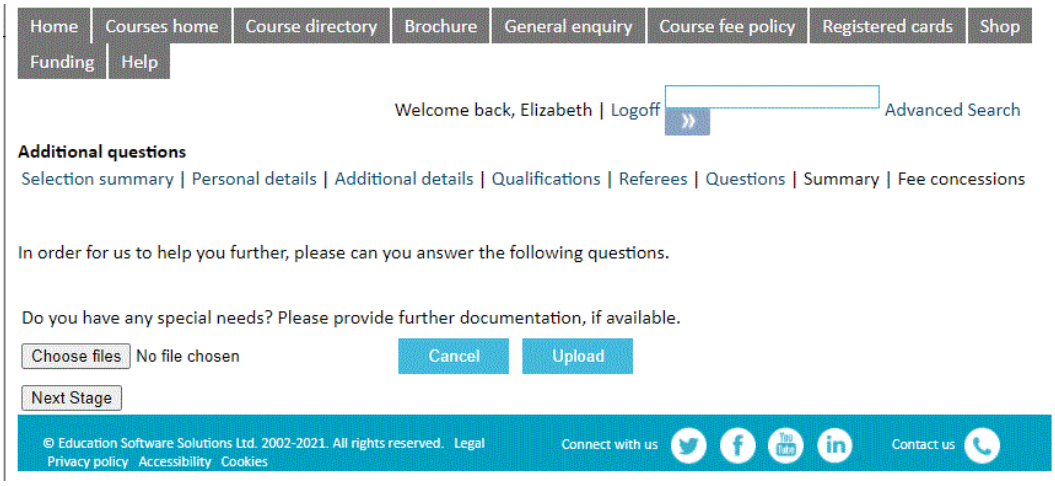
The **Contact from** and **Contact to** dates must be entered.

Reset clears what's just been entered without saving it.

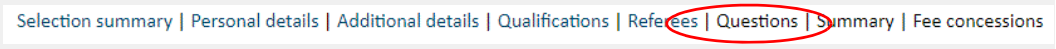
Click **Next stage** to continue to the **Additional questions** page (see page 233).

Additional questions

Figure 124: Additional questions



Once the student is going through the process of creating an enquiry, application or enrolment or requesting a brochure, they can return to this screen by clicking the **Questions** option at the top of the page.



The student enters answers to these additional questions, then clicks **Next stage** to continue to the **Summary** page (see page 234).

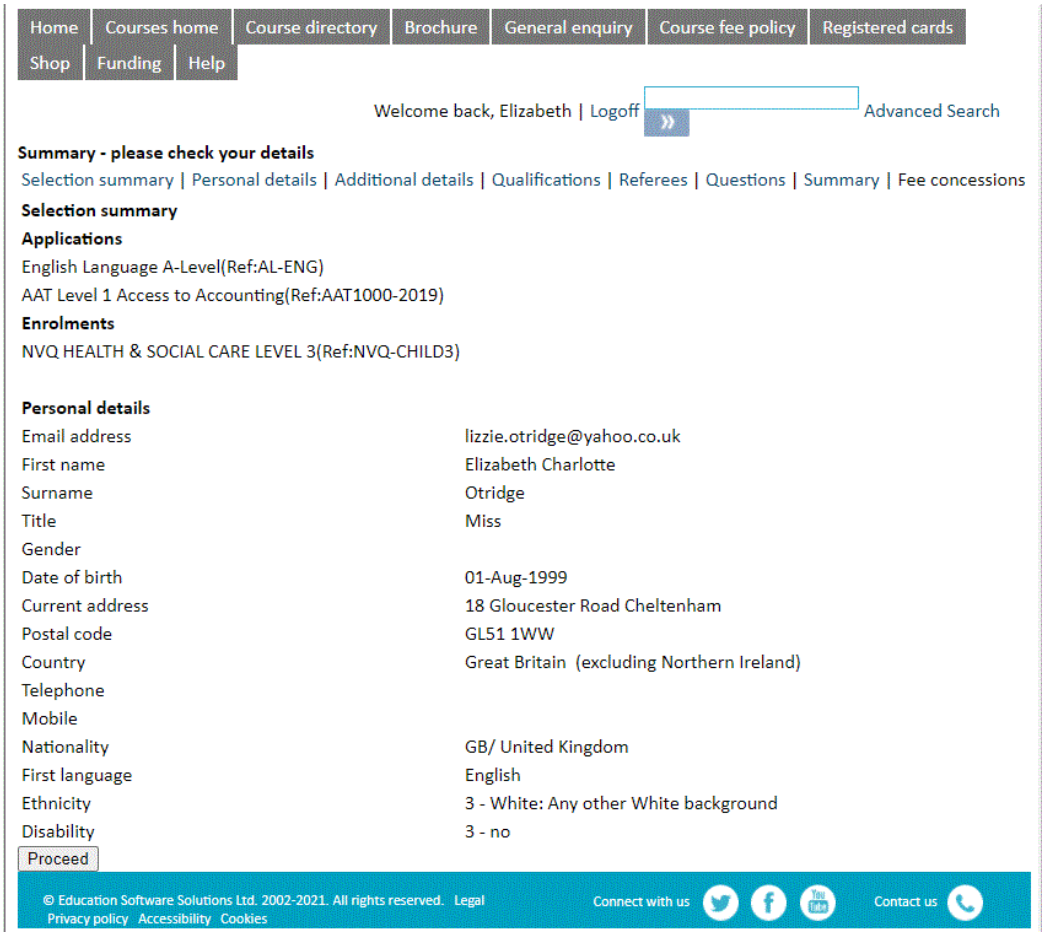
- The questions may go onto two or more pages if there are a large number and you have the option to make a question mandatory.
- Answers are restricted to 2,000 characters.

You can retrieve the answers from UNIT-e Answers Manager.

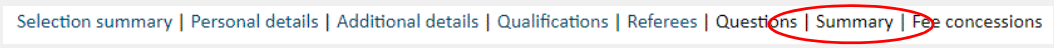
The system may be configured to allow students to upload file attachments as hotlinks. Hotlinks can be applied to individual modules to capture any information that supports an application or enrolment - for example a student might upload a copy of a research paper. If this facility is available, the **Upload** button appears against the appropriate question. Refer to *Enabling document uploads to support answers* (see page 69) for further details.

Summary - please check your details

Figure 125: Summary - please check your details



Once the student is going through the process of creating an enquiry, application or enrolment or requesting a brochure, they can return to this screen by clicking the **Summary** option at the top of the page.



The system displays the enquiry, application and/or enrolment details and the student's personal details so that they can check them before proceeding.

Proceed: Click to complete the enquiry, application or enrolment.

This button becomes inactive as soon as it's clicked, to prevent accidental creation of multiple enquiries/applications/enrolments for the same module.

The next page displayed depends on the functionality licensed to your institution:

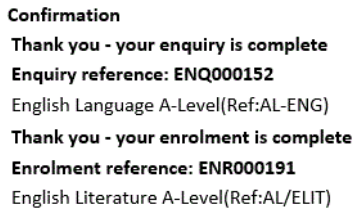
- If online payment isn't available, the process is complete and the student sees the **Confirmation** page (see page 235).
- If online payment is available, the student sees the **Confirmation with payment options** page (see page 235), which offers the options to **Pay now**, **Pay later** or **Pay by Instalment**.

- If online payment is available and you use the UNIT-e Fees product to manage concessions and promotions, the student sees the **Fee Concessions** page (see page 236). On this page they can apply concessions or promotional vouchers to reduce the amount they owe before moving on to the **Confirmation with payment options** page (see page 235).

Refer to the *UNIT-e Fees* handbook (UFEES.pdf) for more information about concessions and promotions.

Confirmation

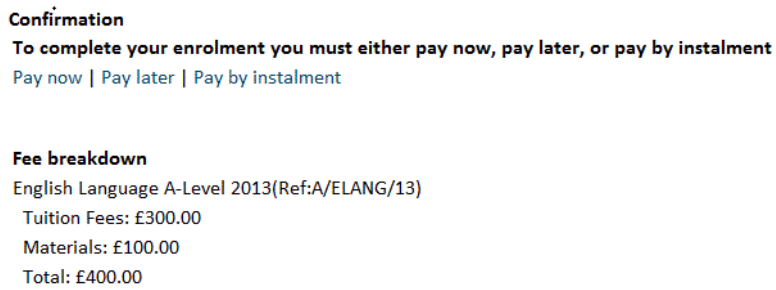
Figure 126: Confirmation



This page is displayed when the online process is complete if your institution doesn't offer online payment.

Confirmation with payment options

Figure 127: Confirmation with payment options



The payment options available to the student depend on the system settings and the licences purchased by your institution.

Refer to *Licence requirements* (see page 14), *Settings for Online Services* (see page 23) and *Settings for online card payments* (see page 46) for further details.

Pay now: The option to pay the entire fee by credit card at the time of enrolment is controlled by the 'Application\OSEN\Payment\Enable Payment' setting key (see page 27).

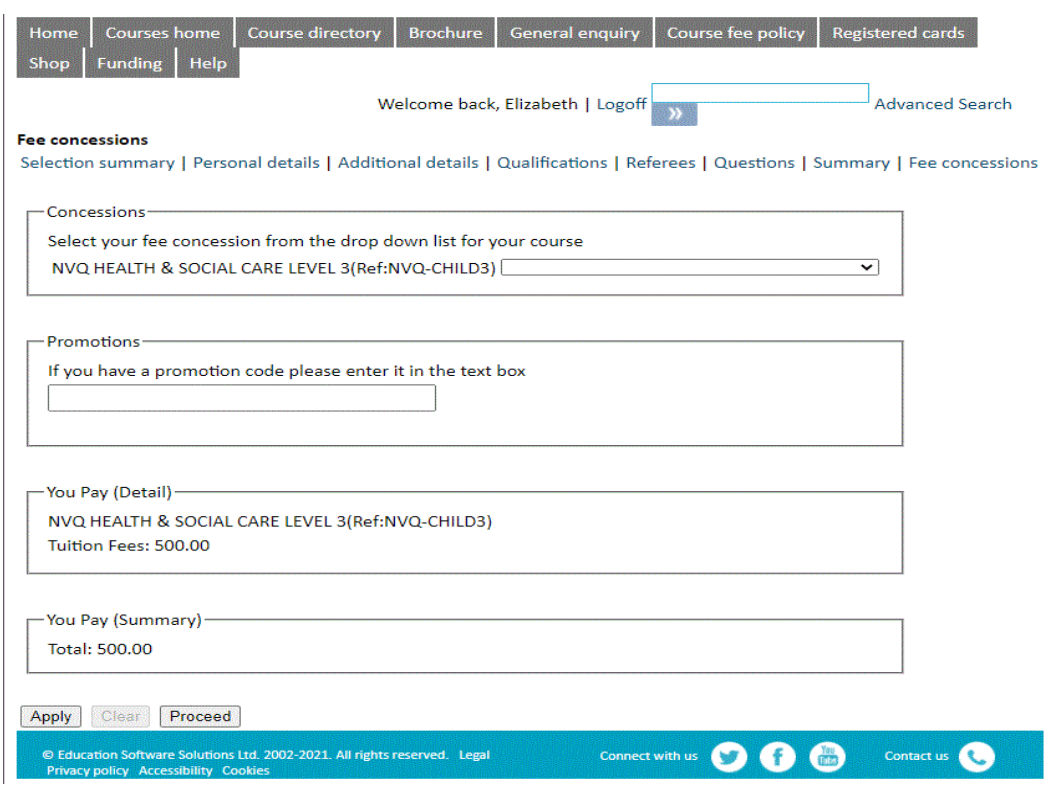
Pay later: The student can opt to pay the fees at a later date (e.g. by making a MOTO payment or by sending a cheque).

Pay by Instalment: The student can register their credit card details and choose to pay by instalments. This functionality is controlled by the UNIT-e Finance Manager Credit Card Instalments licence (FMCI).

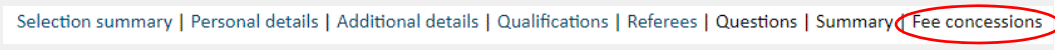
Card payment options are explained in full in the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf).

Fee concessions

Figure 128: Fee concessions



Once the student is going through the process of creating an enquiry, application or enrolment or requesting a brochure, they can return to this screen by clicking the **Fee concessions** option at the top of the page.



Concessions: All of the student's enrolments in this session are displayed. If they believe that a concession applies to their enrolment fees they select the appropriate code from the pick-list for each enrolment.

Eligibility for a concession is assessed by your institution.

Promotions: If the student has a promotional discount voucher they enter the code in this field.

You Pay (Detail): This section of the page shows a breakdown of the fees.



This section of the page is only displayed if the setting key 'Application\OSEN\Payment\Display Concessions Fee breakup' is set to '-1'. Refer to *Application|OSEN|Payment* (see page 27) for further details.

You Pay (Summary): This shows the total amount payable for the enrolment.

Apply: Click to apply the concessions and/or promotion.

Proceed: Click to continue to the **Confirmation with payment options** page (see page 235).

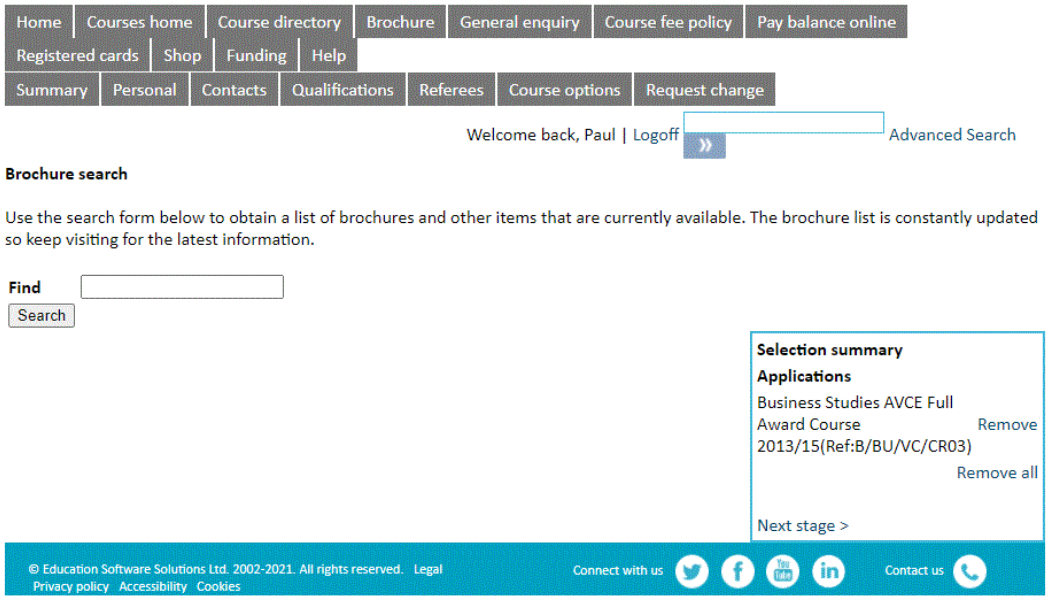


The *UNIT-e Fees* handbook (UFEES.pdf) gives more information about concessions and promotions.

Brochure search

Access:	UNIT-e Online Services - **Brochure** tab

Figure 129: Brochure search

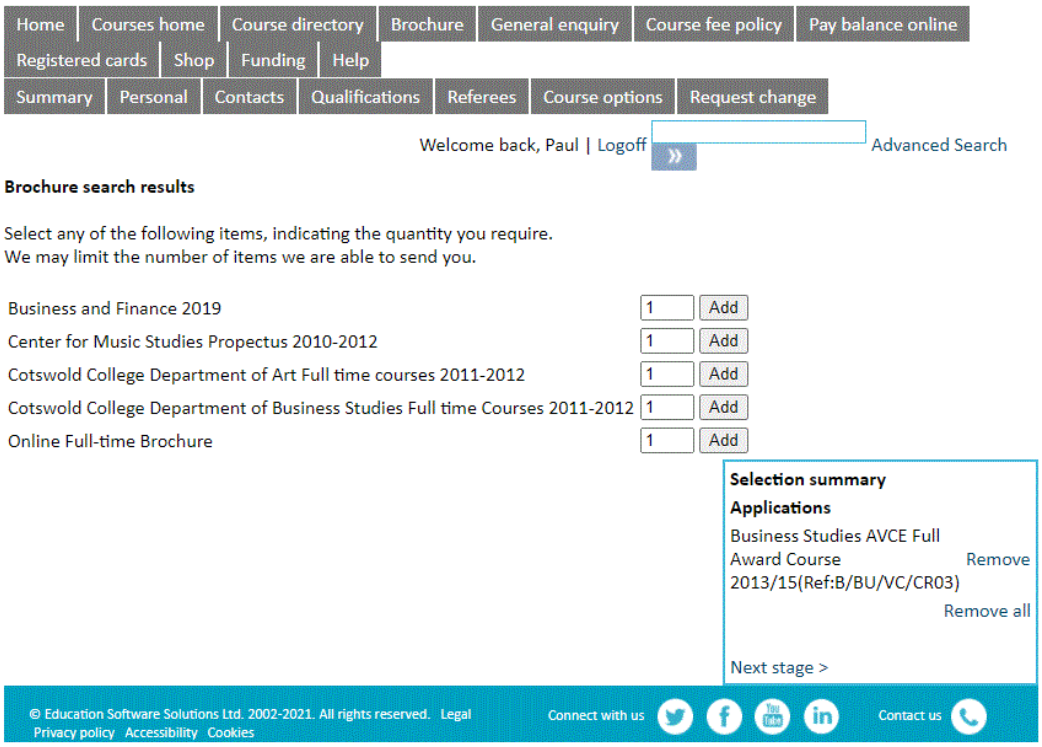


The student searches for brochures and other literature by entering part of the brochure or document name in the **Find** field. Results are displayed on the **Brochure search results** page (see below).

Selection summary: Refer to *Selection summary* (see page 227) for further details.

Brochure search results

Figure 130: Brochure search results



Brochures that match the search criteria are displayed here. For each brochure the student enters the number required and clicks **Add** to add them to the **Selection summary**.

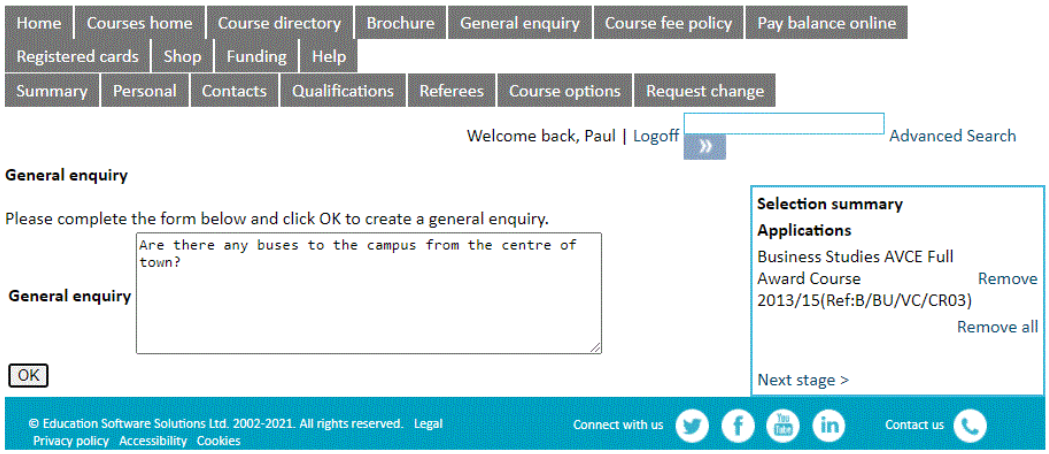
If they're logged into the system they can click **Next stage** to proceed, otherwise they must log in or register so that the system has their contact details.

Selection summary: Refer to *Selection summary* (see page 227) for further details.

General enquiry

Access:	UNIT-e Online Services - **General enquiry** tab

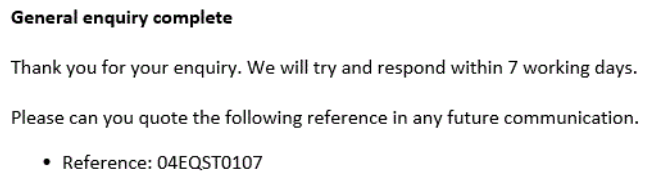
Figure 131: General enquiry



A student can raise a general enquiry about anything to do with your institution or courses but must login or register first, as their details and email address are needed in order to reply.

If they're logged in they can type a question into the **General enquiry** field and click **OK** to submit the enquiry. The system generates an enquiry reference (Figure 132) and a reply is emailed to the student when the enquiry has been dealt with by someone within your institution.

Figure 132: General enquiry complete

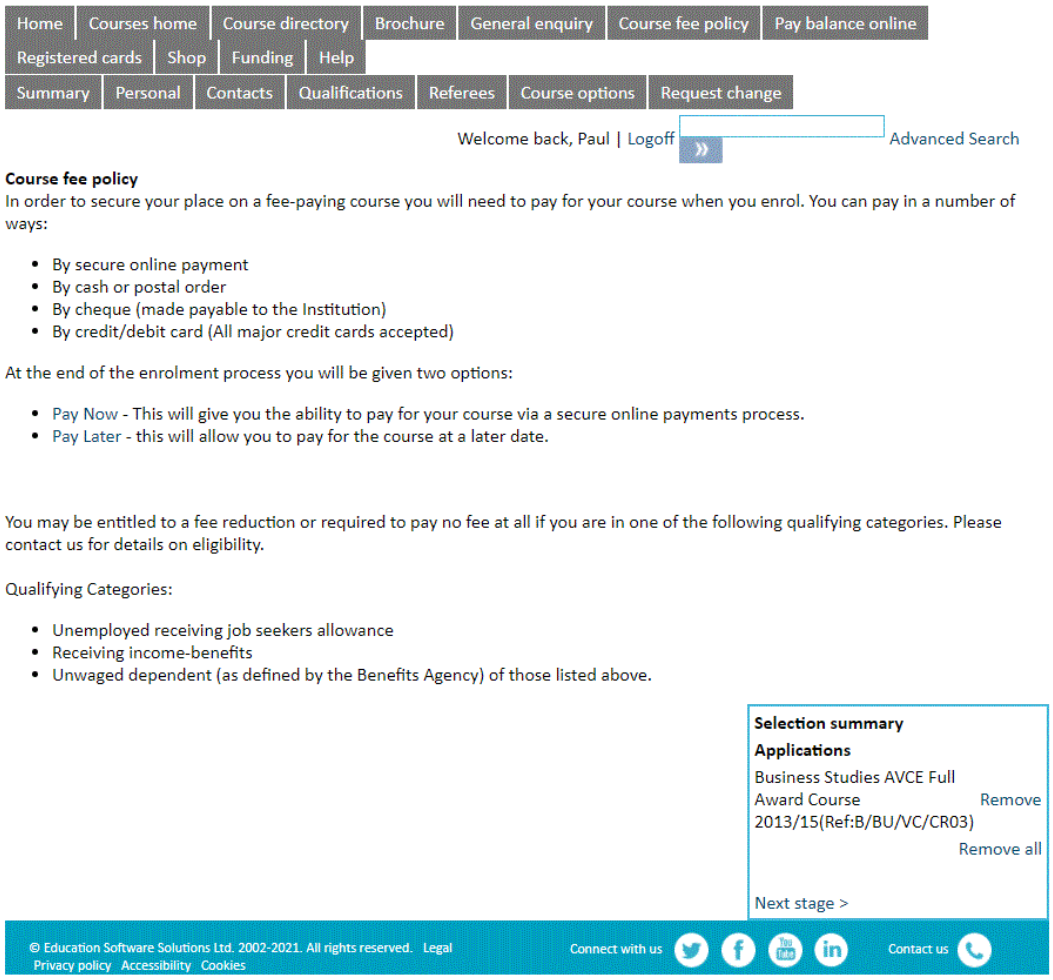


Selection summary: Refer to *Selection summary* (see page 227) for further details.

Course fee policy

Access:	UNIT-e Online Services - **Course fee policy** tab

Figure 133: Course fee policy



This page gives the student more information about how your institution deals with enrolment fees.

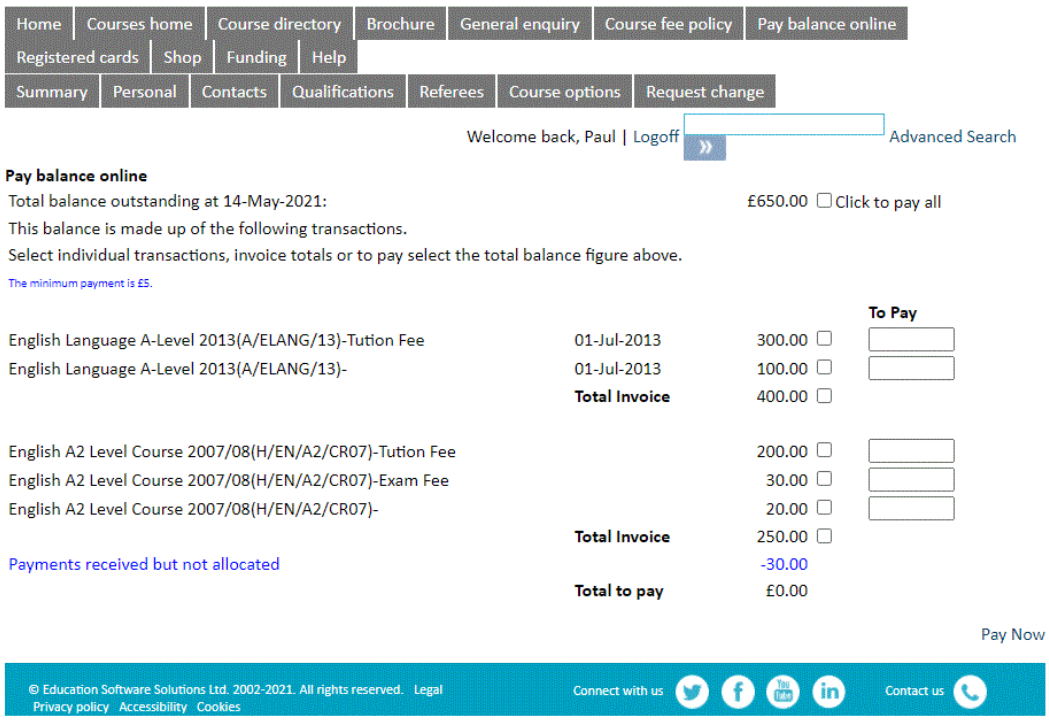
The text shown on this page can be defined by your institution. Refer to *Changing the appearance of the web pages - Textual content* (see page 82) for further details.

Selection summary: Refer to *Selection summary* (see page 227) for further details.

Pay balance online

Access:	*Welcome to Online Services* (see page 220) **Pay balance online** tab

Figure 134: Online payments - Pay Balance online



Total balance outstanding at (date): This is the total value of the invoices displayed on this page.

This may not be the total balance owed by the student. Lines that are payable by another method (e.g. Direct Debit) aren't included.

You can amend the 'The minimum payment is £5' value via the setting key 'Application\OnlinePay\SubsequentPayments\MinimumLimit'. A default of £5 is applied if no other value is defined. Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for more details.

Click to pay all: The student selects this radio button to pay the entire amount displayed. This populates the **Total to pay** field with the same amount.

Invoice details: Invoice details are displayed. The student may select one of more of these lines for payment. The **Total to pay** field is updated as lines are selected.

To pay: This column is displayed if your institution allows part-payment of invoice lines. The student may select an invoice line and enter a reduced payment amount in this column (subject to a minimum value, see notes above).



The option to allow students to make a partial payment is controlled by the 'Application\OnlinePay\SubsequentPayments\Allow Part Pay' setting key. Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for more details.

The **Total to pay** field is updated as lines are selected and values entered.

Total to pay: The total value that the student has opted to pay in this session. This value is updated as lines are selected or deselected.

Payments received but not allocated: If there are unallocated receipts or refunds associated with the student's account, their total value is shown here. This amount is automatically deducted from the **Total to pay** as the student selects invoice lines for payment.

Credit notes received but not allocated: If there are credit notes associated with the student's account, their total value is shown here. This amount is automatically deducted from the **Total to pay** as the student selects invoice lines for payment.

Pay now: This button becomes available when a payment amount is selected or entered. Click to pay the chosen amount.



If the **Total to pay** field is less than the minimum payment permitted, or if the student attempts to over pay, this button remains greyed out.

The page that the student is taken to depends on the payment portal in use:

- If you're using SCP9 with E-Commerce the **Online Payments (E-Commerce payment options)** page is displayed (see page 246).
- If you're using the original payment portal (pre-SCP9) OR if you're using SCP9 without the E-Commerce option, the **Online Payments** (**Card details)** page (see page 244) is displayed.

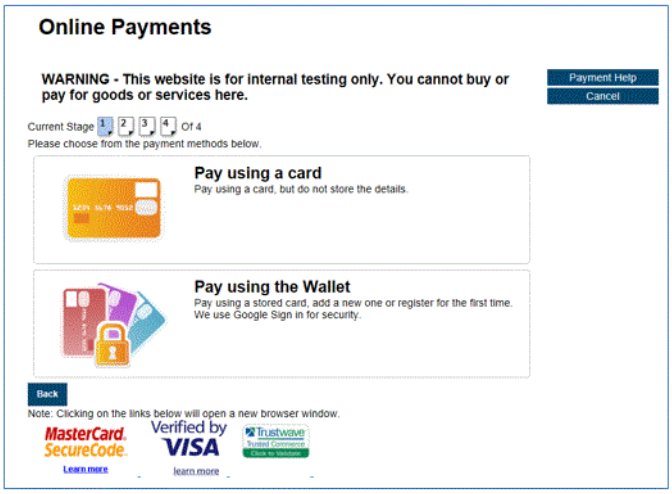
Pay later: This button (if available) gives the student the option of paying at a later date, either by cheque or credit card.



The **Pay now** and **Pay later** options are made available via settings. Refer to *Application|OSEN|Payment* (see page 27) for further details.

Online Payments (E-Commerce payment options)

Figure 135: Online Payments (E-Commerce payment options)



This page is only displayed if you're using SCP9 with E-Commerce.

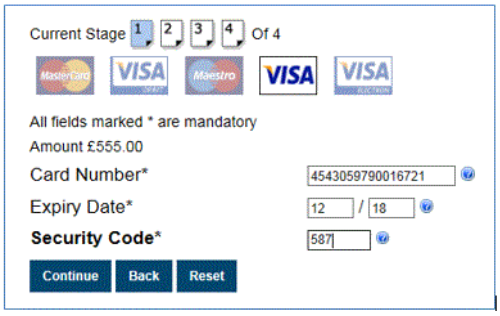
Pay using a card: Select this option to continue to the **Online Payments (Card details)** page (see page 244) where card details are entered.

Pay using the Wallet: Select this option to use previously-stored card details. This option opens the Google **Choose an account** page (see page 247), if required, and then on to the **Your Wallet** page (see page 247).

Use of the **Back** button in the SCP9 version of the Payment Portal takes the student back to the previous page so that they can make amendments. Use of the **Cancel** button cancels the process and clears the basket.

Online Payments (Card details)

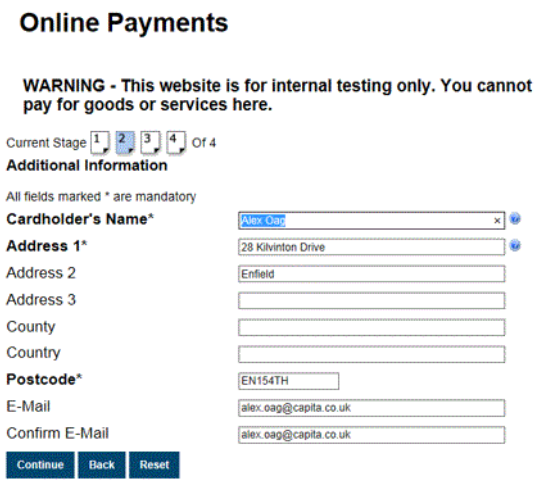
Figure 136: Online Payments (Card details)



This page is displayed whenever the student is required to enter their credit card details. The student enters their payment details and clicks on the **Continue** button to progress to the **Online Payments (Address confirmation)** page (see below). **Reset** removes any details already entered and **Back** takes you back to the **Pay balance online** page (see page 242).

Online Payments (Address confirmation)

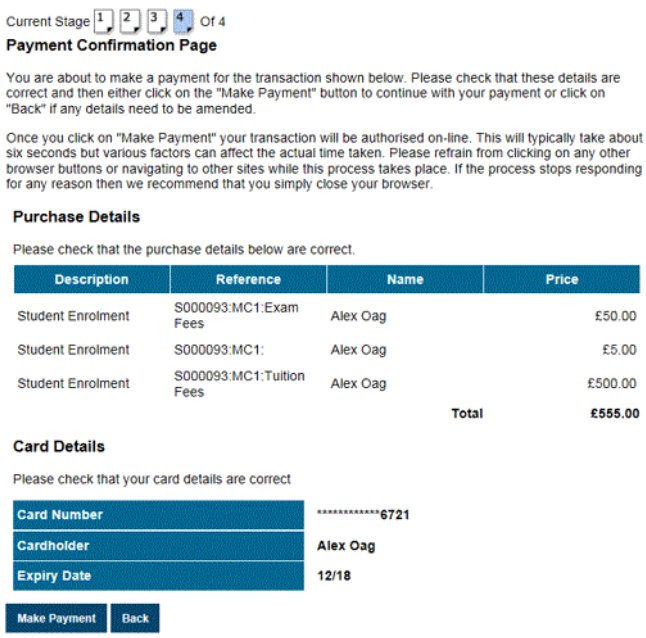
Figure 137: Online Payments (Address confirmation)



The student confirms their address and email details.

Payment Confirmation Page

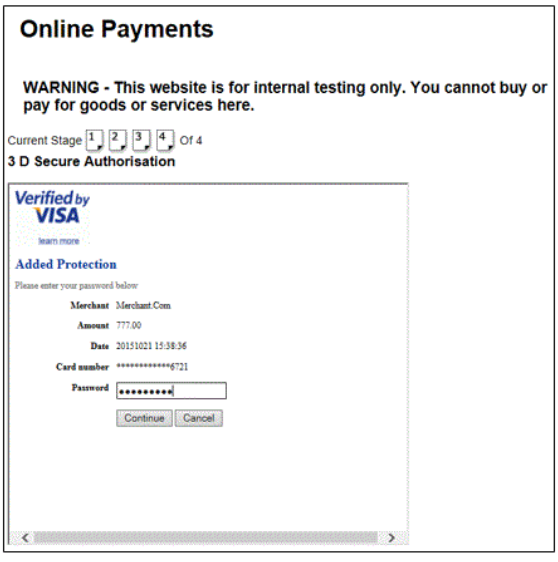
Figure 138: Payment Confirmation Page



This gives the student an opportunity to check the purchase and card details before clicking **Make Payment** to proceed with the payment. If you're using SCP9 the **Online Payments (Verified by Visa)** page is displayed (see below) before the payment is made.

Online Payments (Verified by Visa)

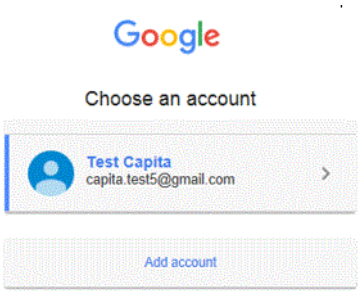
Figure 139: Online Payments (Verified by Visa)



The student verifies the payment.

Choose an account

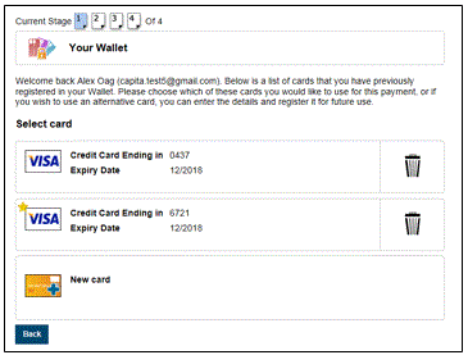
Figure 140: Choose an account



This page is only displayed if you're using SCP9 with E-Commerce. The student can select an existing account or clicks **Add account** to create a new account. If they select an existing account they're taken to the **Your Wallet** page (see below) where they can select the card to be used for payment.

Your Wallet

Figure 141: Your Wallet

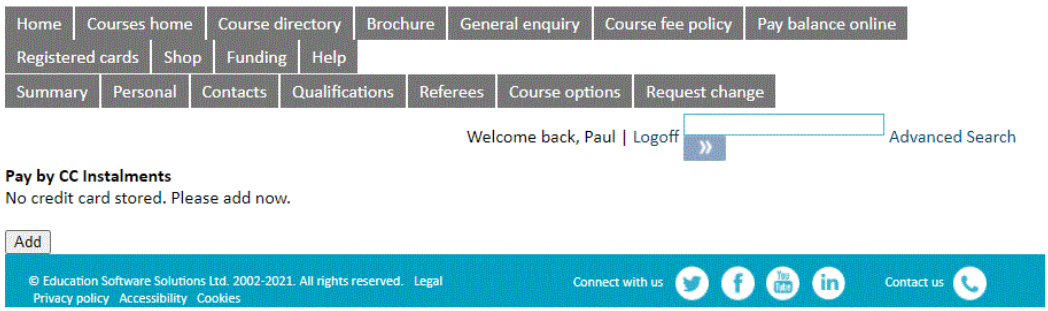


The student selects the card they want to use to make the payment.

Pay by CC Instalments

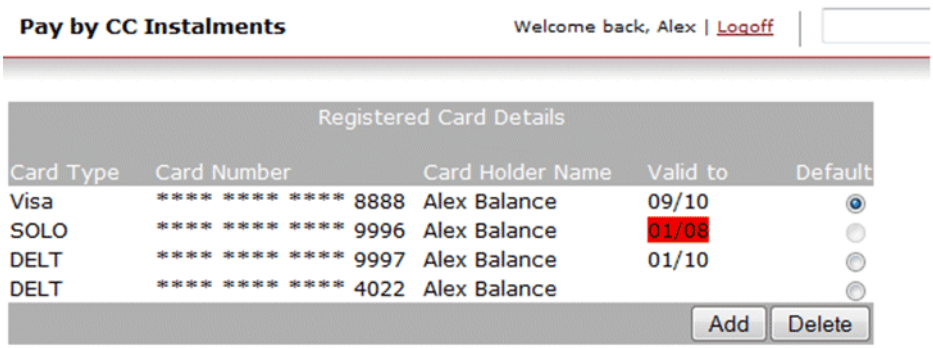
Access:	UNIT-e Online Services - **Registered cards** tab

Figure 142: Pay by CC Instalments



If a student has no registered cards the software displays the page shown in Figure 142. Click **Add** to access the screen shown in Figure 143.

Figure 143: Registered cards showing existing card details



Using the **Add** and **Delete** buttons, students can add and remove credit card details. They can use the **Default** radio buttons to indicate the credit card that should be used by default when paying instalments. When a card has expired, the **Valid to** date is shown in red.

A student can change the default card at any time, even if they're part way through an instalment cycle.

Catalogue

Access:	UNIT-e Online Services - **Shop** tab

This tab is displayed if your institution has purchased the Online Shop (OLSH) licence. It gives students access to an online shop where they can purchase sundry items (clothing, stationery etc.) not necessarily associated with an enrolment.



Online Shop functionality, including the creation of catalogues and sundry items for Online Shop, is included in the *UNIT-e Online Shop* handbook (UOLS.pdf).

Funds

Access:	UNIT-e Online Services - **Funding** tab

This tab gives the student access to funding information (if available). The tab is only displayed your institution has the 'Support Funds Online Services' licence (SFOS).

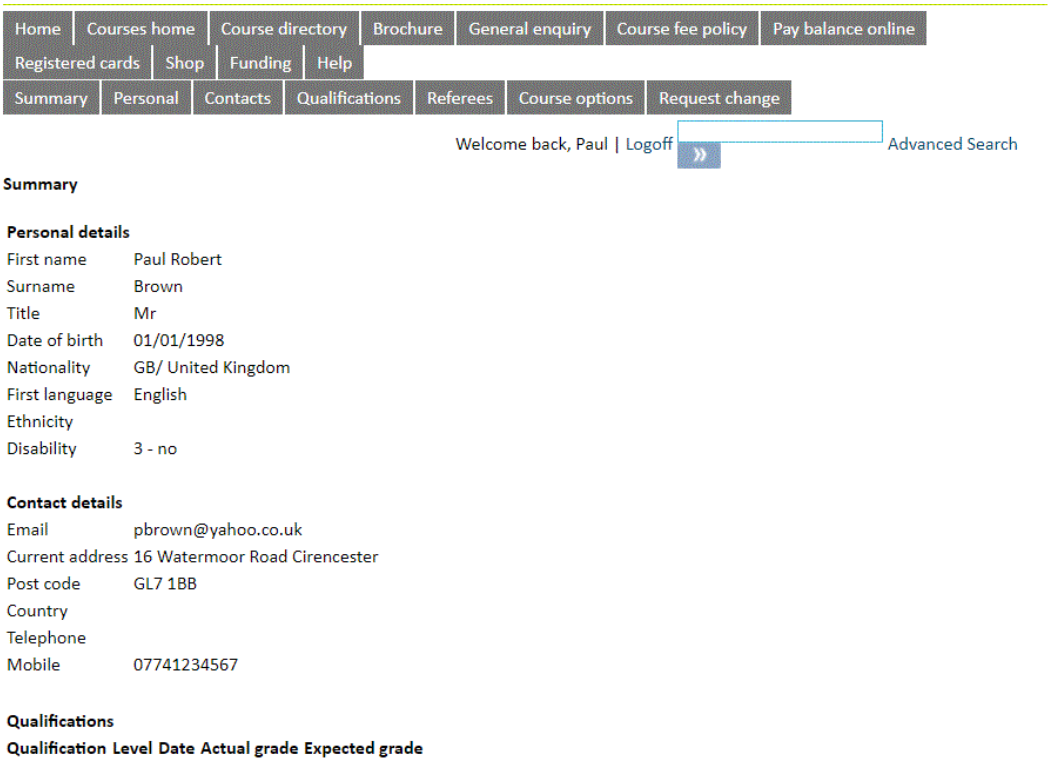


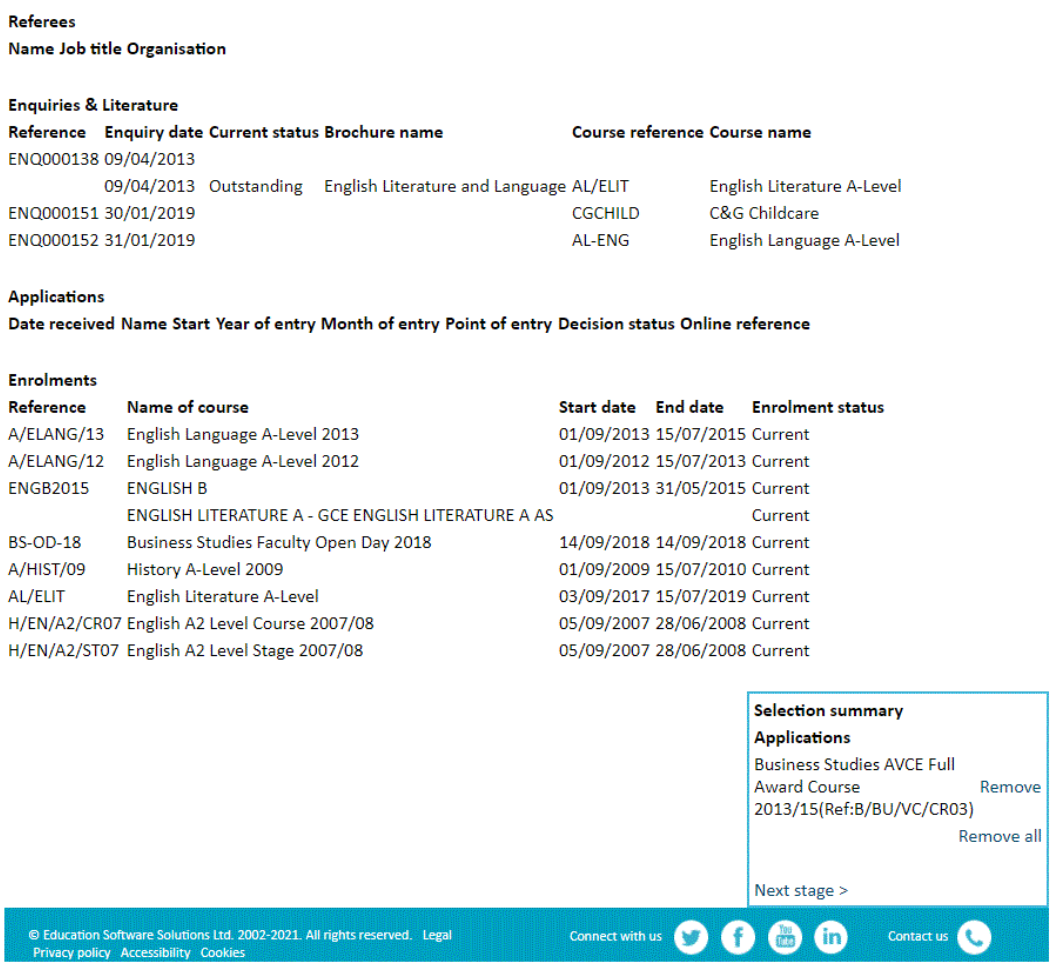
Refer to the *UNIT-e Support Funds* handbook (USF.pdf) for further information about this menu option.

Summary

Access:	UNIT-e Online Services - **Summary** tab **Note:** This tab only becomes available when the student/applicant has a registered Online Services account.

Figure 144: Summary





Referees

Name Job title Organisation

Enquiries & Literature

Reference	Enquiry date	Current status	Brochure name	Course reference	Course name
ENQ000138	09/04/2013				
	09/04/2013	Outstanding	English Literature and Language	AL/ELIT	English Literature A-Level
ENQ000151	30/01/2019			CGCHILD	C&G Childcare
ENQ000152	31/01/2019			AL-ENG	English Language A-Level

Applications

Date received Name Start Year of entry Month of entry Point of entry Decision status Online reference

Enrolments

Reference	Name of course	Start date	End date	Enrolment status
A/ELANG/13	English Language A-Level 2013	01/09/2013	15/07/2015	Current
A/ELANG/12	English Language A-Level 2012	01/09/2012	15/07/2013	Current
ENGB2015	ENGLISH B	01/09/2013	31/05/2015	Current
	ENGLISH LITERATURE A - GCE ENGLISH LITERATURE A AS			Current
BS-OD-18	Business Studies Faculty Open Day 2018	14/09/2018	14/09/2018	Current
A/HIST/09	History A-Level 2009	01/09/2009	15/07/2010	Current
AL/ELIT	English Literature A-Level	03/09/2017	15/07/2019	Current
H/EN/A2/CR07	English A2 Level Course 2007/08	05/09/2007	28/06/2008	Current
H/EN/A2/ST07	English A2 Level Stage 2007/08	05/09/2007	28/06/2008	Current

Selection summary

Applications

Business Studies AVCE Full Award Course 2013/15(Ref:B/BU/VC/CR03) Remove

Remove all

Next stage >

© Education Software Solutions Ltd. 2002-2021. All rights reserved. Legal
Privacy policy Accessibility Cookies
Connect with us
Contact us

This is a summary of all of the details that the student has entered, including their personal details, contact, qualification and referee details as well as their enquiries, applications and enrolments.

They can't amend any of your details here but can make or request changes on the following web pages:

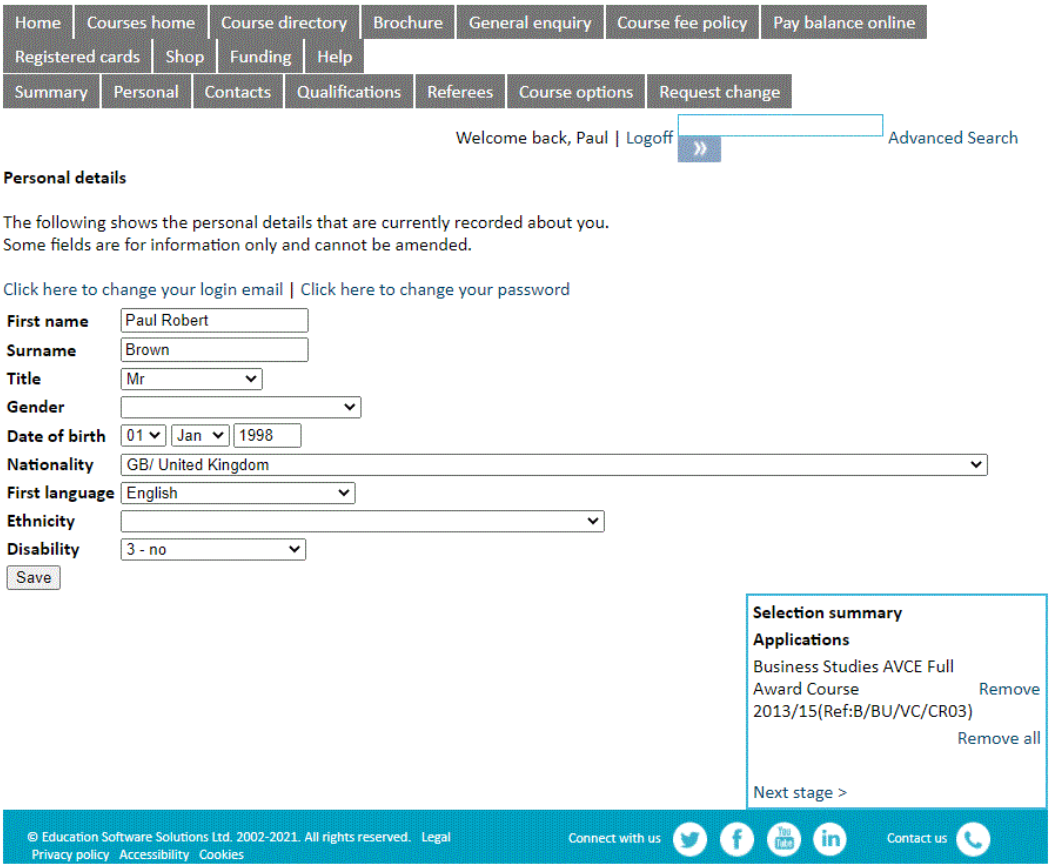
- *Personal details* (see page 253)
- *Contact details* (see page 256)
- *Qualification details* (see page 257)
- *Referees details* (see page 258)
- *Course options* (see page 259)
- *Request change* (see page 261)

Selection summary: Refer to *Selection summary* (see page 227) for further details.

Personal details

Access:	UNIT-e Online Services - **Personal** tab **Note:** This tab only becomes available when the student/applicant has a registered Online Services account.

Figure 145: Personal details



Subject to any customisation carried out by your institution, the student's personal details can be amended here.

By customising this page your institution can decide which fields should be included and whether they're amendable. Refer to *Chapter 3: Configuring web pages* (see page 77) for further details.

If a student can't amend a field, or if information that they want to amend isn't displayed, they can go to the **Request change** tab (see page 261) where they can notify the institution of a change in their details.

Click here to change your login email: This gives access to the **Change login email** page (see page 254) where the student can change their login email address.

Click here to change your password: This gives access to the **Change password** page (see page 255) where the student can change their password.

The fields shown in Figure 146 are only displayed for Scottish sites.

Figure 146: Personal details - FES



FES 2 care experienced: This field identifies anyone who has been or is currently in care or from a looked-after background at any stage of their life.

Type of care setting: This field indicates the applicant's type of care setting if they have been in care.

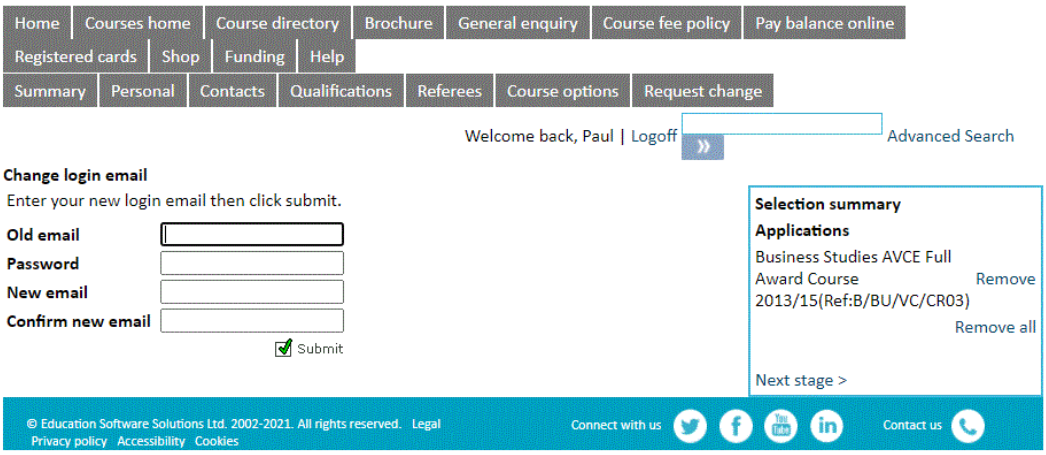
Service student: This field indicates whether the student has or had a parent or carer in military service during the first 25 years of their life.

Save: Click to save the changes.

Selection summary: Refer to *Selection summary* (see page 227) for further details.

Change login email

Figure 147: Change login email



Old email: This is displayed if the student has accessed this page from the **Contact details** page (see page 256). The student should enter their current login ID if they've accessed this page from the **Personal details** page (see page 253).

Password: The student must enter their password to change your login ID.

New email/Confirm new email: These fields are displayed if the student has accessed this page from the **Contact details** page (see page 256). They're prompted to enter their new login ID if they've accessed this page from the **Personal details** page (see page 253).

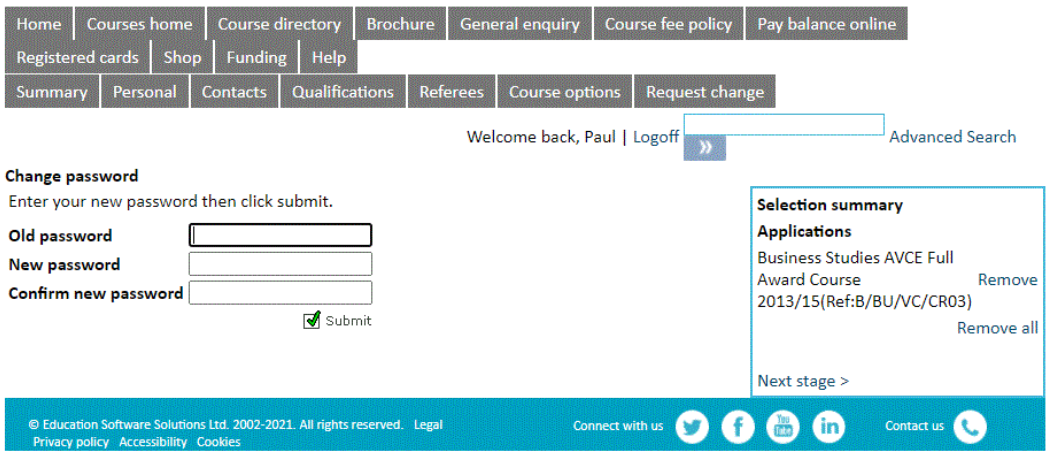
Refer to *Changing a contact email address* (see page 200) and *Changing a login ID* (see page 201) for further details.

Submit: Click to submit the change.

Selection summary: Refer to *Selection summary* (see page 227) for further details.

Change password

Figure 148: Change password



A student can change their password by entering their **Old password** first and then their **New password**. They then have to confirm the change by entering their new password again in the **Confirm new password** field.

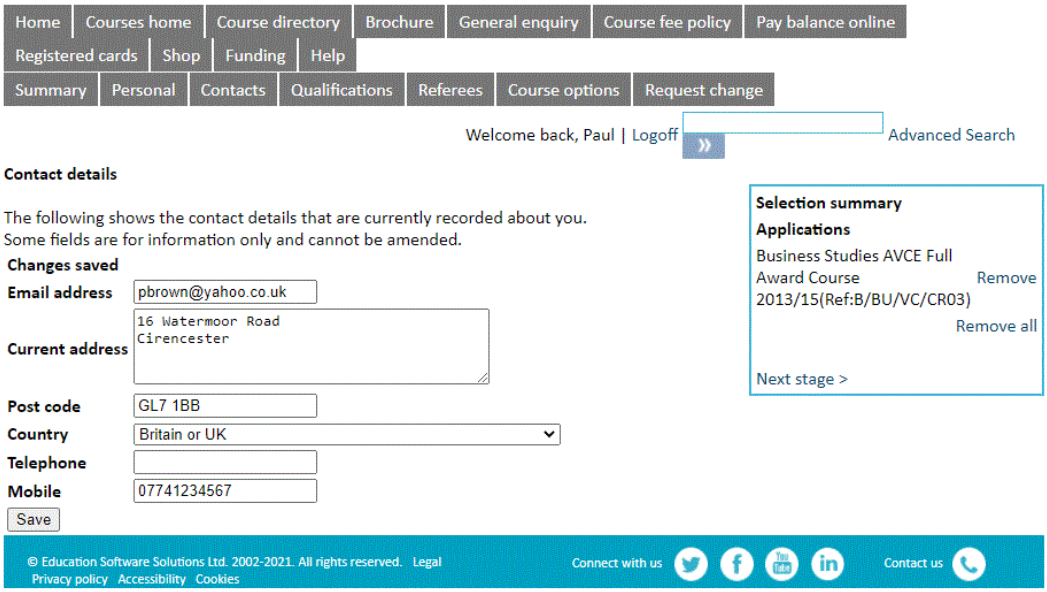
Students can request a reminder of their password by clicking on **Have you forgotten your password?** in the **Login** pane (see page 221). This gives them access to the **Forgotten your password?** page (see page 224).

Selection summary: Refer to *Selection summary* (see page 227) for further details.

Contact details

Access:	UNIT-e Online Services - **Contacts** tab **Note:** This tab only becomes available when the student/applicant has a registered Online Services account.

Figure 149: Contact details



The student's current contact details are shown here. They can amend some of these details but others can only be amended by your institution.

If a student amends their email address the system may take them to the **Change login email** page (see page 254) when they **Save**. Refer to *Changing a contact email address* (see page 200) for further details.

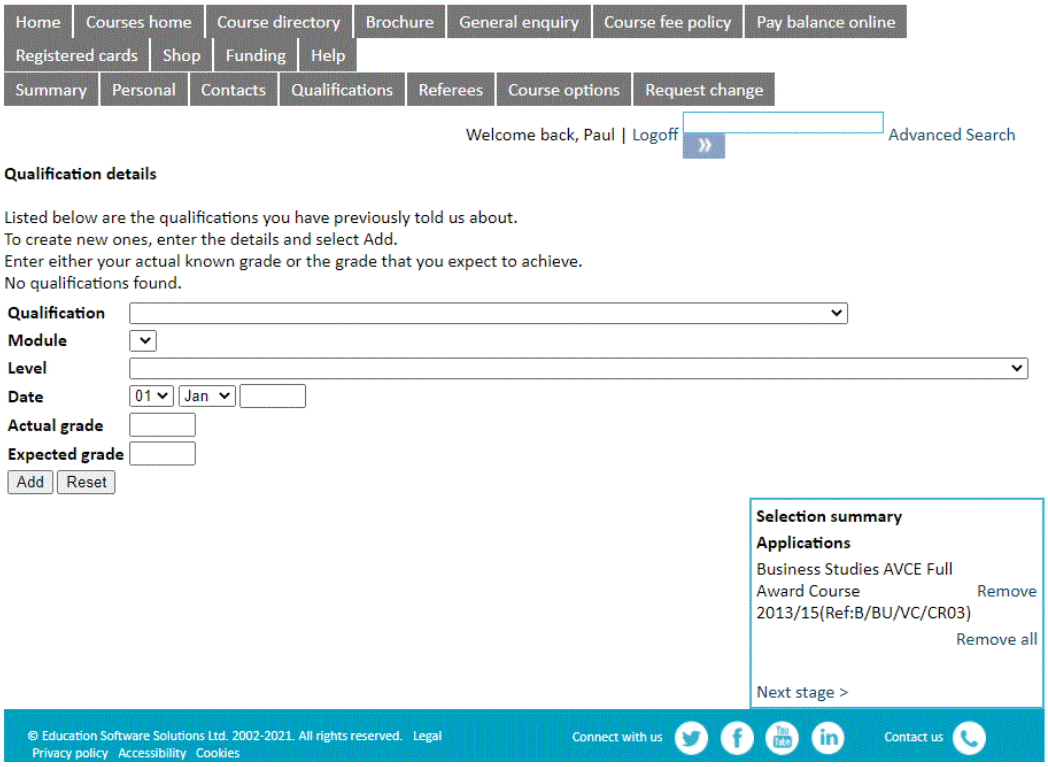
If the student can't amend a field they must go to the **Request change** tab (see page 261) where they can notify the institution of a change in their details.

Selection summary: Refer to *Selection summary* (see page 227) for further details.

Qualification details

Access:	UNIT-e Online Services - **Qualifications** tab **Note:** This tab only becomes available when the student/applicant has a registered Online Services account.

Figure 150: Qualification details



Any qualifications that the student has previously entered or provided to your institution are shown here. They can add the details of any qualifications not shown here and click **Add** after each entry to clear the screen for another.

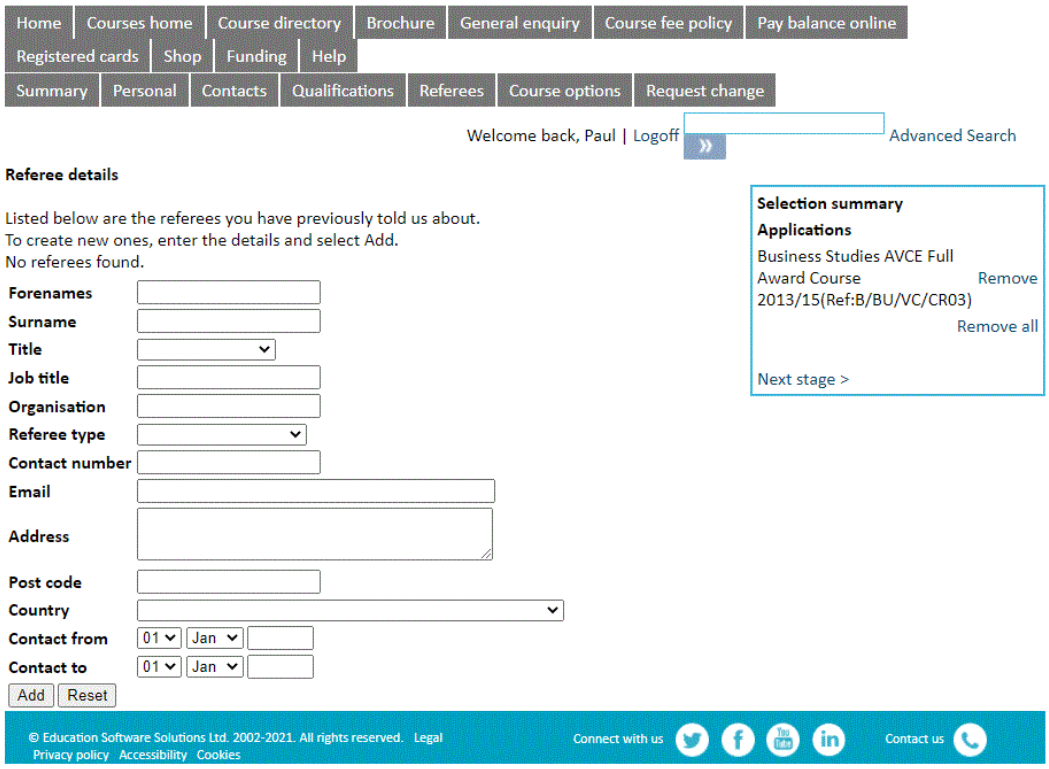
Reset clears what has just been without saving it.

Selection summary: Refer to *Selection summary* (see page 227) for further details.

Referees details

Access:	UNIT-e Online Services - **Referees** tab **Note:** This tab only becomes available when the student/applicant has a registered Online Services account.

Figure 151: Referee details



Any referees that the student has previously entered or provided to the institution are shown here. They can enter the details of any referees not shown and click **Add** button after each one to clear the screen for another.

The **Contact from** and **Contact to** dates must be entered.

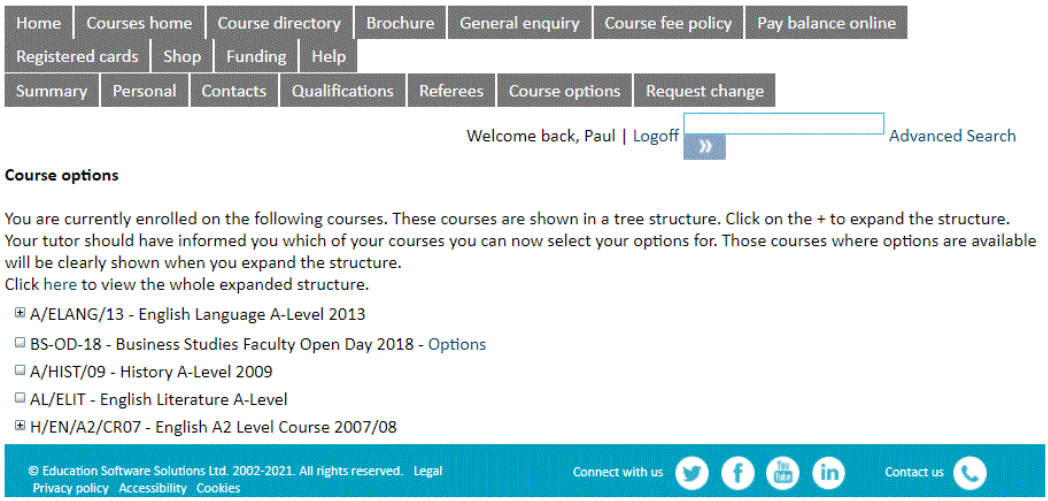
Reset clears what's just been entered without saving it.

Selection summary: Refer to *Selection summary* (see page 227) for further details.

Course options

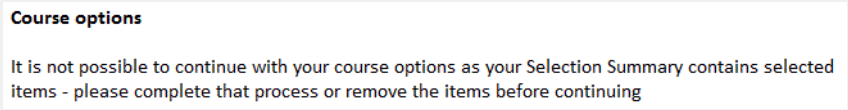
Access:	UNIT-e Online Services - **Course options** tab **Note:** This tab only becomes available when the student/applicant has a registered Online Services account.

Figure 152: Course options



This shows the student the courses that they're enrolled on and lists the options available for those courses. They can then select the options that they want to take.

If a student has unprocessed enquiries, applications or enrolments in their **Selection summary** (see page 227), the system displays the following message.



They must either process or clear those items before re-opening the **Course options** page.

If a course has a + against it, click the + to open up the list of modules within that course.

The student clicks **Options** to view the options available for the module (if available) and selects the options that they want to take.

If there are rules covering the number or type of selections the student may make they're listed here. For example, if they must select one option from three different groups of options, the options are shown in those groups.

Click **Validate** to validate the choices.

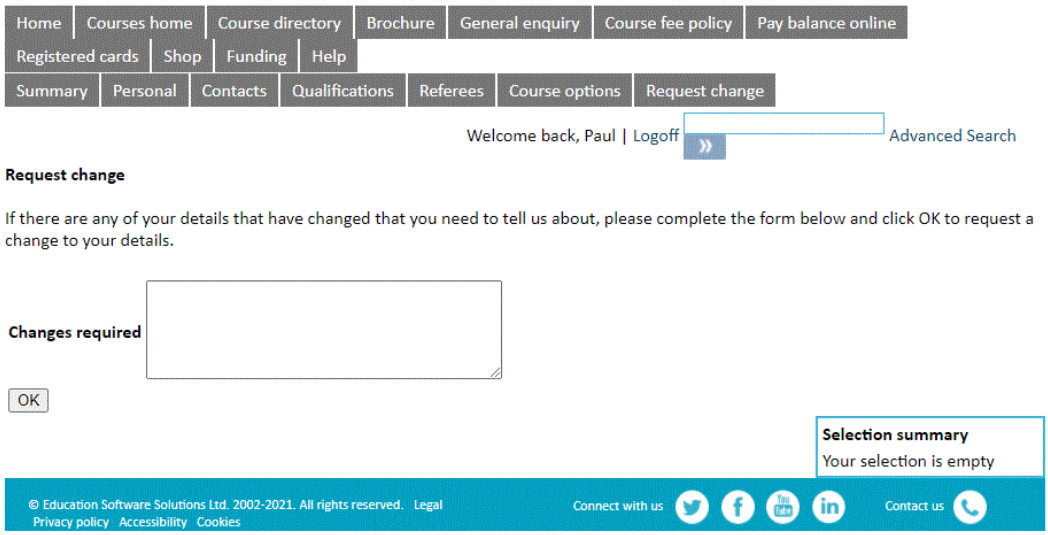


The student’s choices will fail validation if they don't select options from the required groups, or if they exceed the number of options that they're allowed to take. They can continue if they select less than the required number of options, but their choice of options won’t be complete so they'll have to add further options at a later date.

Request change

Access:	UNIT-e Online Services - **Request change** tab **Note:** This tab only becomes available when the student/applicant has a registered Online Services account.

Figure 153: Request change



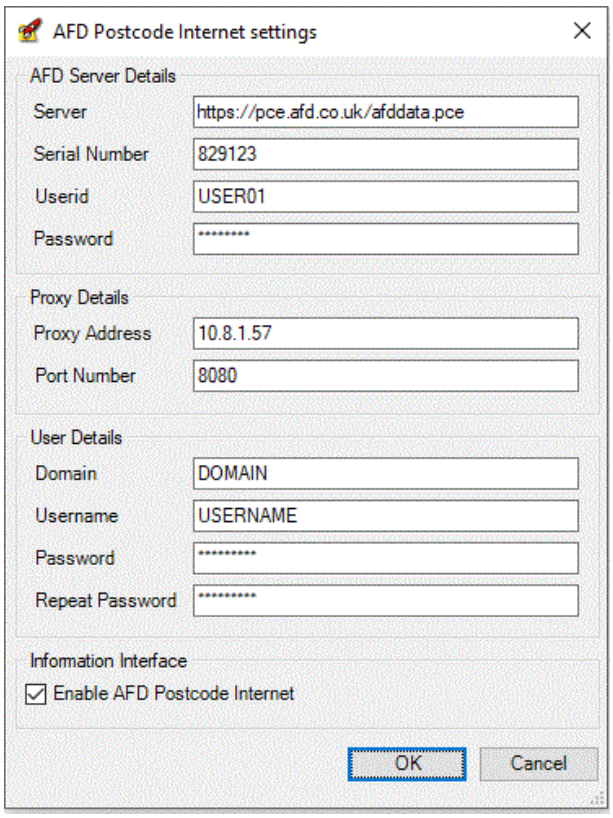
If any of the student's details have changed and they haven't been able to update them they can enter the details of the change here and click **OK** to submit them to your institution. Your institution can then update their records manually, with the changes being displayed on line.

Selection summary: Refer to *Selection summary* (see page 227) for further details.

AFD Postcode Internet Settings

Access:	UNIT-e Workplace **Tools | AFD Postcode Internet Settings**

Figure 154: AFD Postcode Internet Settings



AfD Server Details

This information is provided by AFD. The **Userid** field can be left blank.

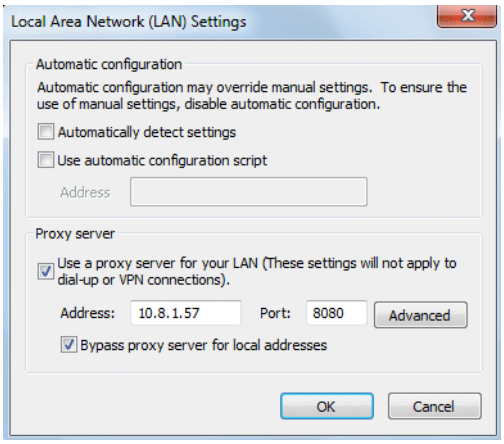
Make sure that the **Server** field is completed correctly, otherwise any online address search will fail. For example, if the correct entry is **https://pce.afd.co.uk/afddata.pce** and you enter an extra forward slash (**https://pce.afd.co.uk/afddata.pce**) the search will fail.

Proxy Details

Use these fields to enter your **Proxy Address** and **Port Number**, if applicable. These are the usual settings given to users to access the internet. They're available from you **Local Area Network (LAN) Settings** form (Figure 155).

Leave these fields blank if you use a default gateway.

Figure 155: Local Area Network (LAN) Settings



User Details

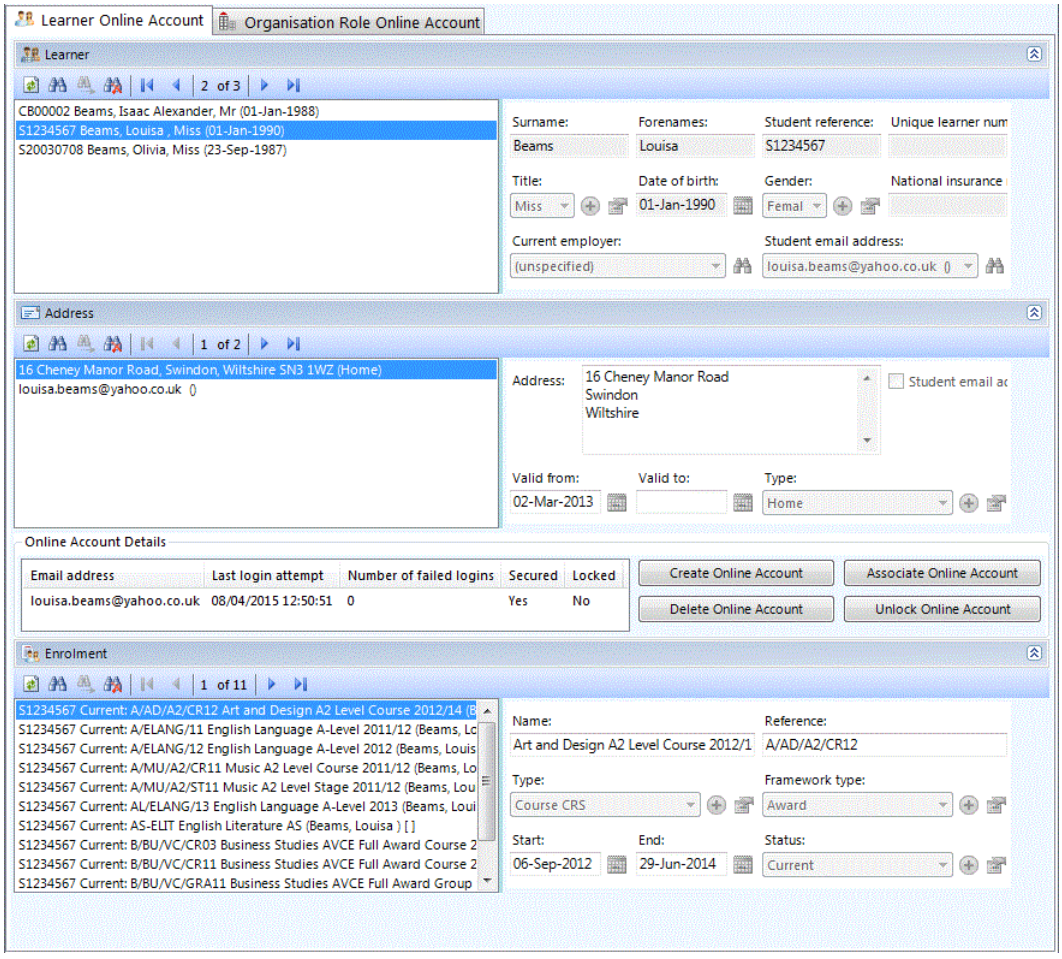
Enter details of the Windows user used to make the internet connection to the AfD service.

Online Services Account Manager

Access:	UNIT-e Online Services Account Manager.exe

Learner Online Account tab

Figure 156: Online Services Account Manager



Learner pane

You can use the fields in this pane to search for students but it's not possible to amend any of the student details here.

Address pane

The address details shown here are for information only and can't be amended.

A student must have an email address before you can create an online account.

Online Account Details pane

Email address: The email address associated with the online account.

Last login attempt: The date of the last login attempt.

Number of failed logins: The number of failed logins since the last successful login.

Secured: A 'Yes' in this column indicates that the online account is linked to a known student. 'No' is shown if the account is linked to a stranger.

Locked: A 'Yes' in this column indicates that the online account has been locked as a result of the student entering three incorrect email address/password combinations when attempting to log into the system. 'No' is shown if the account is unlocked.

Create Online Account: Click to create an online account for the student. Refer to *Creating online accounts for individual students* (see page 149) for further details.

Associate Online Account: Click to create a link between the online services account and a UNIT-e user. The **Associate Online Account** form is displayed (see below). Refer to *Associating an online account with a UNIT-e user* (see page 161) for further details.

Delete Online Account: Click to delete an online account. Refer to *Deleting online accounts* (see page 158) for further details.

Unlock Online Account: Click to unlock a locked account. Refer to *Dealing with locked online accounts* (see page 156) for further details.

Associate Online Account

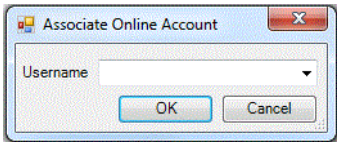


Figure 157: Online Services Account Manager - Associate Online Account

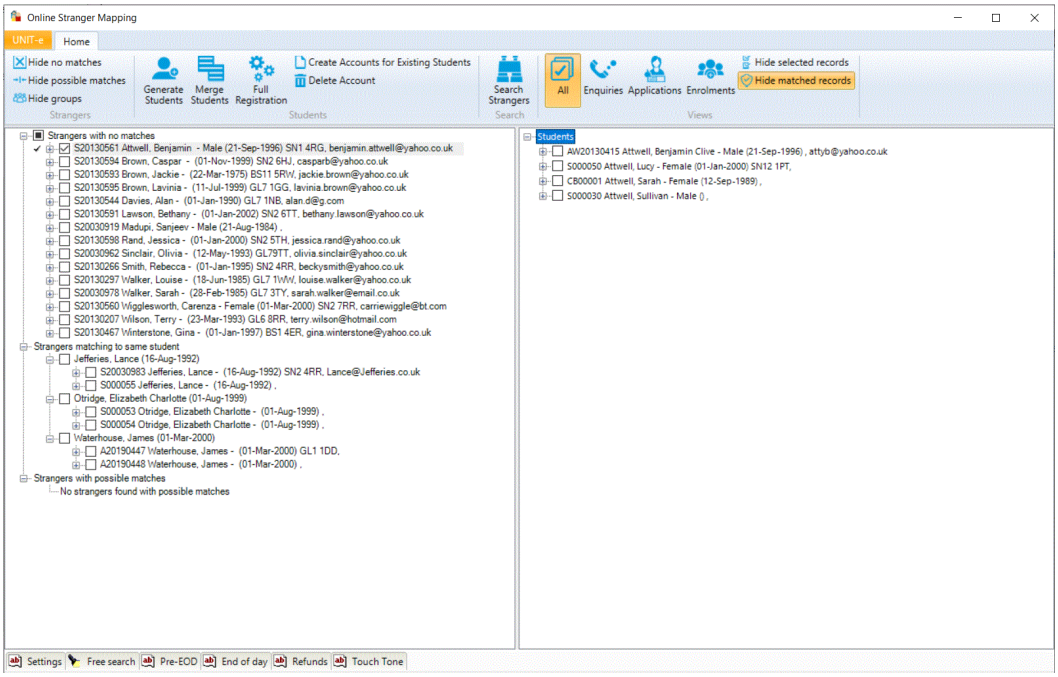
Username: Select an existing UNIT-e user from the pick-list.

The **Organisation Role Online Account** tab is used as part of the UNIT-e Vocational Qualification Management and Tracking functionality and is covered by the *UNIT-e Vocational Qualification Online Services* handbook (UVQOS.pdf).

Online Stranger Mapping

Access:	UNIT-e Online Stranger Mapping.exe

Figure 158: Online Stranger Mapping



Home menu tab

The following functionality is available from the **Home** tab:

Hide no matches: Click to hide the 'Strangers with no matches' list; click again to restore the list.

Hide possible matches: Click to hide the 'Strangers with possible matches' list; click again to restore the list.

Hide groups: Click to hide the 'Strangers matching to same student' list; click again to restore the list.



You can restore the full stranger view by clicking the **All** button (see below).

Generate Students: Select strangers without matches and click this button to convert them to students.



Refer to *Converting strangers to new students using Online Stranger Mapping* (see page 128) for further information.

Merge Students: Select strangers with matches to students in your database and click this button to create a link between each stranger and their matching Student record. This generates an email to the student, requesting their authorisation to merge the two records.



Refer to *Merging records with student authorisation* (see page 130) for further information.

Full Registration: Select strangers with matches to students in your database and click this button to merge the stranger and Student data without requesting authorisation from the student.



Refer to *Merging records without student authorisation* (see page 133) for further information.

Create Accounts for Existing Students: Enables you to create online accounts existing students who didn't enrol via Online Services and therefore don't have online accounts.



Refer to *Creating online accounts for existing students with enrolments* (see page 146) for further information.

Delete Account: Enables you to delete a student's online account (or one of their online accounts) while retaining the student details within your database.



Refer to *Deleting online accounts* (see page 158) for further information.

Search Strangers: Click to search for specific strangers using a standard **Student Search** form.

All: Click to revert to the default stranger display (**Strangers with no matches**, **Strangers matching to same student**, **Strangers with possible matches**) after hiding any of the categories, searching for strangers or viewing enquiries, applications and/or enrolments (see below).

Enquiries: Click to view only stranger records generated by enquiries; click again to redisplay the records.

Applications: Click to hide stranger records generated by applications; click again to redisplay the records.

Enrolments: Click to hide stranger records generated by enrolments; click again to redisplay the records.



- You can use the **Enquiries**, **Applicants** and **Enrolments** buttons in any combination to display the student records (e.g. you can choose to display just enquiries and enrolments).
- The **Hide no matches**, **Hide possible matches** and **Hide groups** buttons are automatically activated when you click the **Enquiries**, **Applicants** or **Enrolments** button, so clicking the **Enquiries**, **Applicants** or **Enrolments** button again doesn't restore the display; you must use the **All** button or manually deactivate the hide buttons.
- A stranger may appear on the stranger list more than once if they have a combination of enquiries, applications and enrolments created via Online Services. When you select one occurrence of the stranger, all others are automatically selected.

Hide selected records: Click to hide selected records; click again to redisplay the records.

Hide matched records: Click to hide matched records; click again to redisplay the records.

Strangers pane

Strangers to your database are listed in the left-hand pane and are categorised as follows:

- **Strangers with no matches** - Lists strangers for which no matches have been found in your UNIT-e database, based on the matching criteria defined by your settings. You can either convert these strangers to students using the **Generate Students** tool (see below) or, if you think that there may be a match that hasn't been identified, you can use the **Settings** (see page 269) and/or **Free Search** (see page 270) tabs at the bottom of the screen to find the matching student.
- **Strangers matching to same student** - Groups multiple strangers that have a possible match with a single student.
- **Strangers with possible matches** - Lists strangers with a possible match in your UNIT-e database.

Select the check box against those that you want to convert from a stranger to a new student and click **Generate/Merge Students** to carry out the conversion. Click the expansion box ⊞ alongside a stranger to view more details, or right-click on a name and select **Details** from the pop-up menu to open the **Student Details** form (see page 273).



When you access this application there may be a short delay while the stranger records are retrieved. If you wish to speed up this process you can do so by amending the 'Stranger pick list report' (gn.os.strangers) (which supplies the stranger data in the left-hand pane) so that the number of records retrieved is restricted.

Students pane

If a stranger has a potential match in your UNIT-e database, the matched students are shown in the right-hand pane. Select the check box against the student that you wish to merge with and click **Generate/Merge Students** to create a link between the stranger

and student in preparation for merging. Click the expansion box ⊞ alongside a student to view more details.

The data in this pane is supplied by the 'Student pick list report' (gn.os.students).

Settings: Click here to open the **Settings** tab (see page 269). Use this tab to temporarily override the matching settings defined by your institution in UNIT-e Database Manager (Settings) [UDMSE.exe].

Free Search: Click to open the **Free Search** tab (see page 270). This enables you to ignore all pre-defined matching settings and carry out a search for a student that you know exists in the database. For example, a student called Elizabeth may have entered Liz as her forename online and the matching process would not find her database entry. By selecting **Ignore** as the **Forenames** option you can identify the match.

Pre-EOD: Click to open the **Pre-EOD** tab (see page 271) where you can view details of records for which the Complete flag is null and/or enrolments don't exist for the module ID included in the line of the OUD. If any records appear on this tab you need to import the End of Day file for the given **Date of Transaction** to correct the omissions.

Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for further details about the Pre-EOD process.

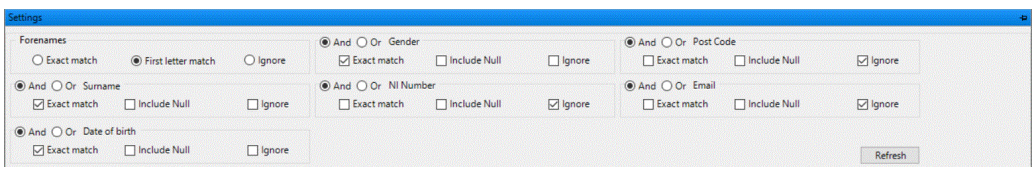
End of Day: Click to open the **End of Day** tab (see page 271). This enables you to find and validate the Pay360 file that confirms acceptance of online payment for online enrolments and rebuilds missing data from Pay360 transactions.

Refunds: Click to open the **Refunds** tab (see page 272). This enables you to find and open the Pay360 file that contains refund details. This then generates refund details in UNIT-e Finance Manager.

Touch Tone: Click to open the **Touch Tone** tab (see page 272). This reads the EOD file to identify and import records with a Touch Tone/Call Secure Digital Plus system code. It captures the unique invoice reference, student date of birth and balance to enable processing of the card payment and creates receipt lines and/or a receipt, depending on the method of import. If there is a only student reference match (that is, if the balance of the payment in the EOD file doesn't match the balance of the invoice), a receipt is created. A receipt and receipt lines are created if the invoice is matched.

Settings tab

Figure 159: Online Stranger Mapping - Settings



The settings that you specify here only apply for the duration of the current session and are only applied to your user ID.

The seven frames on this form enable you specify the combination of elements to be used in the matching process. Use the **And/Or** buttons to specify how the corresponding element should be included. For example, you can choose to match by **Forenames** and **Surname** by selecting the **And** radio button in the **Surname** frame, or you can match by **Forenames** or **Surname** by selecting the **Or** radio button in the **Surname** frame.

Forenames: Select the appropriate radio button to indicate your chosen matching process for forenames. You can only select one option.

- **Exact match:** The entry should be an exact match.
- **First letter match:** Only the first letter needs to match.
- **Ignore:** Ignore forenames.

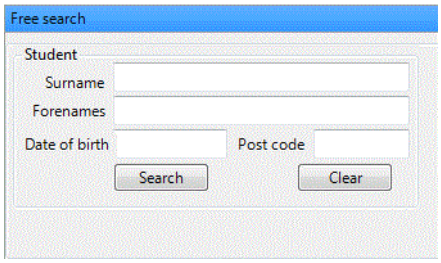
Surname/Date of birth/Gender/NI Number/ Post Code/Email: Select the appropriate check box(es) to indicate the matching process.

- **Exact match:** The entry should be an exact match. You can select this option on its own or select it with **Include Null**.
- **Include Null:** Check records with a blank field. You can select this option on its own or select it with **Exact match**.
- **Ignore:** Ignore this field.

Refresh: Click to apply the temporary settings.

Free Search tab

Figure 160: Online Stranger Mapping - Free Search



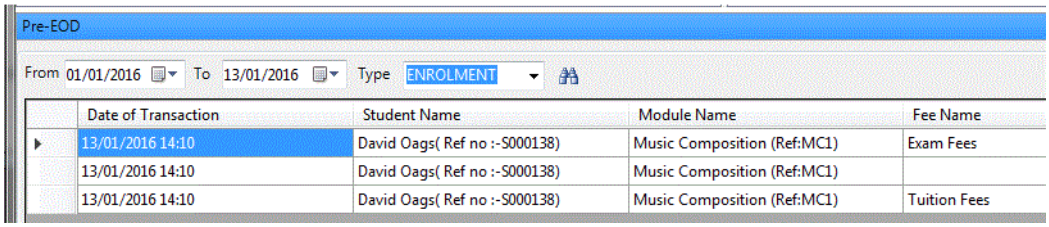
Enter the **Surname**, **Forenames**, **Date of birth** and/or **Post code** of the student you're searching for.

Search: Click to carry out a search.

Clear: Click to clear the form for another search.

Pre-EOD tab

Figure 161: Online Stranger Mapping - Pre-EOD



From/To: These fields display today's date by default but can be amended to report on any period.

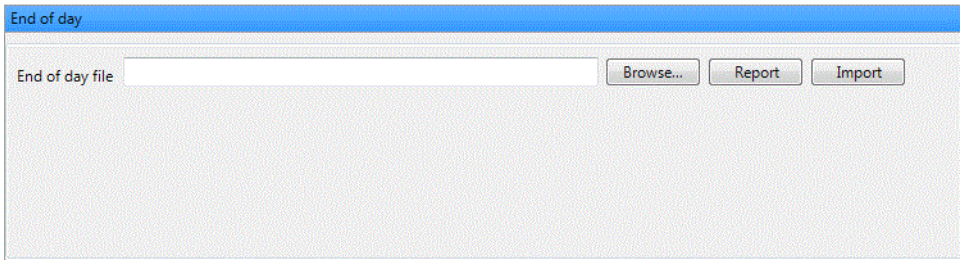
Type: By default a type of 'ENROLMENT' is displayed but this can be amended to 'BALANCE' or 'CHIP' to search for different types of record.

Date of Transaction - Fees: These fields show details of records for which the Complete flag is null and/or enrolments don't exist for the module ID included in the line of the OUD. If any records appear in this pane you need to import the End of Day file for the given **Date of Transaction** to correct the omissions.

Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for further details about the Pre-EOD process.

End of Day tab

Figure 162: Online Stranger Mapping - End of Day



The End of Day file provides you with information about the transactions (payments) that have been carried out via Online Services. It also provides you with a way of dealing with transactions that have been successfully processed by Pay360 but have failed to generate an enrolment, enrolment fee, invoice and receipt in UNIT-e. By retrieving this file from Pay360 you trigger the automatic generation of the missing details in UNIT-e.

Browse: Click to browse for the End of Day file supplied by Pay360. The file confirms acceptance of online payment for online enrolments and subsequent payments.

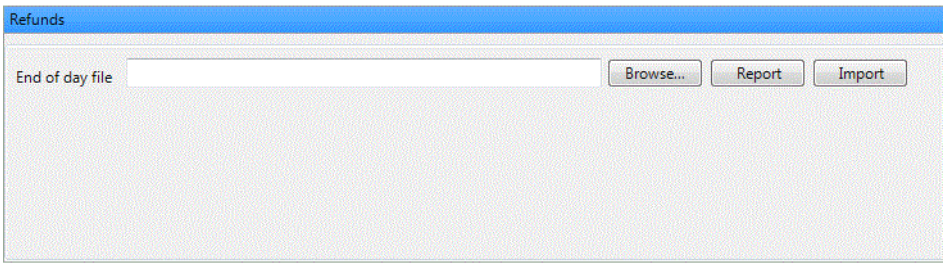
Report: Click to view an on-screen report that shows

Import: Click to import the End of Day file. The system automatically validates the file and updates the records.

Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for more details about the process of retrieving the End of Day file.

Refunds tab

Figure 163: Online Stranger Mapping - Refunds



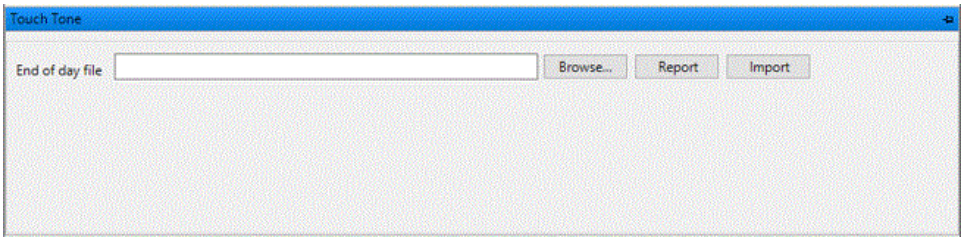
This is a version of the **End of Day** tab (see page 271) that enables you to browse for an End of Day file that includes refunds data. The system automatically validates the file and updates your database with the refund information.

You should always process End of Day file payments via the **End of Day** tab (see page 271) before processing refunds via this tab. This is because the End of Day file may contain a payment *and* its corresponding refund. In this situation it's important that the enrolment and receipt are created in your database before you process the refund.

Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for further information about this refund process.

Touch Tone tab

Figure 164: Online Stranger Mapping - Touch Tone



This is a version of the **End of Day** tab (see page 271) that enables you to browse for an End of Day file that identifies and imports records with a Touch Tone/Call Secure Digital Plus system code.

Refer to the *Managing UNIT-e Card Payments and Refunds* handbook (MCP.pdf) for further information about this refund process.

Student Details

Access:	UNIT-e Online Stranger Mapping.exe **Note:** Select a stranger or student, right-click anywhere on the **Online Stranger Mapping** form (see page 266) and select **Details** from the pop-up menu.

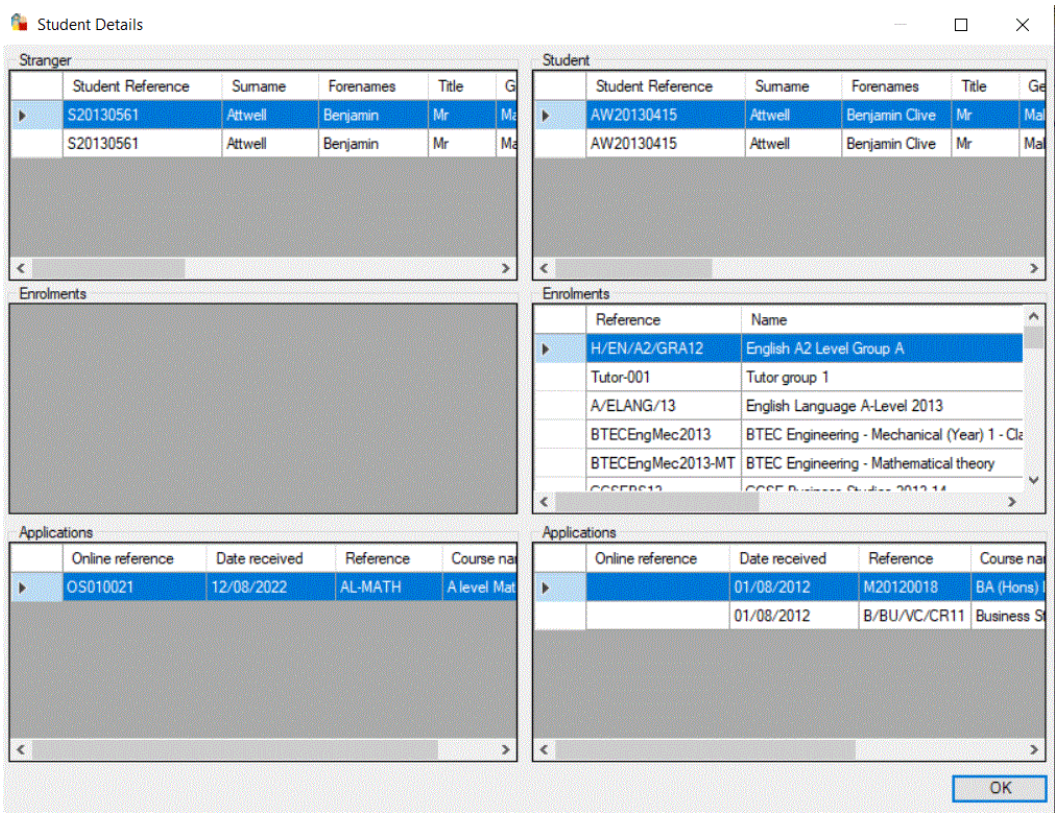


Figure 165: Online Stranger Mapping - Student Details

Use this form to view additional information about a stranger and/or student. None of the information on this screen can be amended but you can sort the data alphabetically by column heading.

The **Stranger** and **Student** frames show the following fields: **Student Reference**, **Surname**, **Forenames**, **Title**, **Gender**, **Date of birth**, **Address Type**, **Address**, **Post Code**, **NI Number**, **Staff Reference**. This information is populated by the 'Online Services Stranger Mapping - Student Details' report (gn.os.studentdetails).

The **Enrolments** frames show the following fields: **Reference**, **Name**, **Start** (date), **End** (date), **Status**, **Type**. This information is populated by the 'Online Services Stranger Mapping - Enrolment Details' report (gn.os.enrolmentdetails).

The **Applications** frames show the following fields: **Online reference**, **Date received**, **Reference**, **Course name**. This information is populated using the 'Online Services Student Applications' report (gn.os.stuapplications).

Pending Merged Students

Access:	UNIT-e Database Manager Pending Merged Students.exe

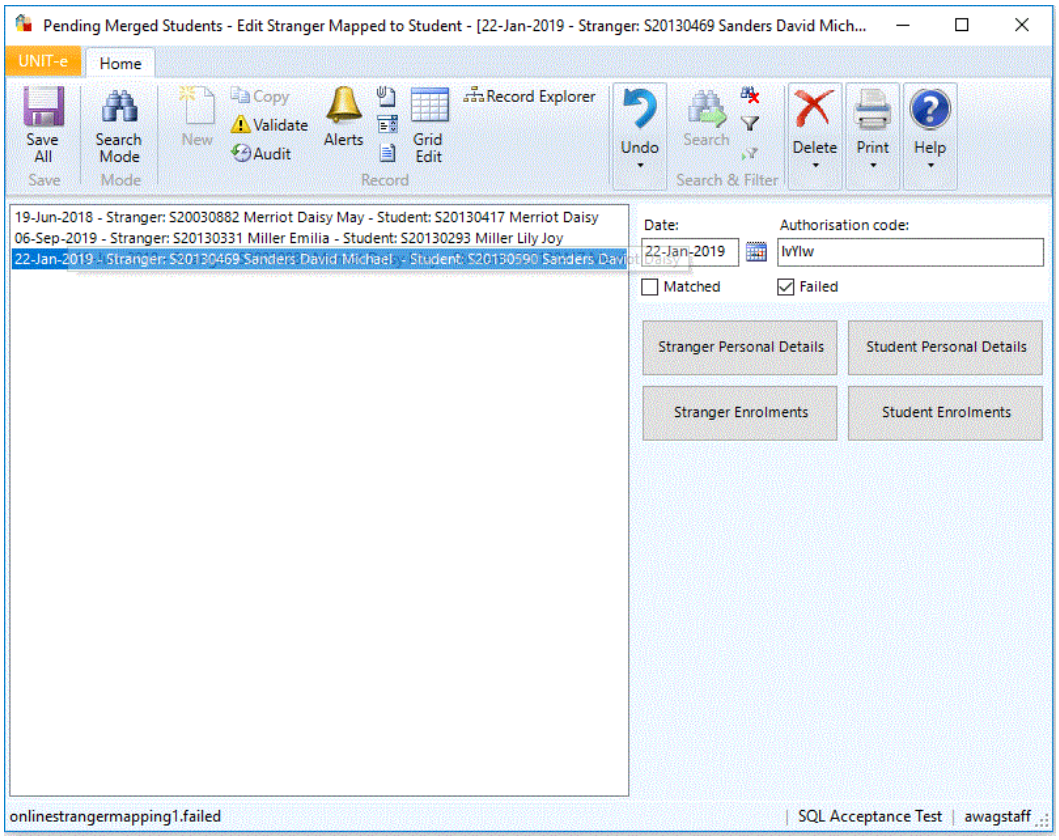


Figure 166: Pending Merged Students

Either enter a specific **Date** or leave the date field blank and click **Search** . All unprocessed strangers are then displayed, together with duplicate students mapped in the generic **Student Merging** form.

Stranger/student list: All unprocessed strangers and students are listed here. These are either strangers that haven't yet been picked up by the Online Stranger Transfer Service, or are strangers that failed the process.

Date: Enter a date in this field if you want to view unprocessed strangers that were mapped by Online Stranger Mapping on a specific date. Alternatively, leave this field blank to retrieve all unprocessed strangers. As you move through the **Stranger list**, their corresponding mapping dates are shown here.

Authorisation code: This field is no longer in use. The authorisation process that used this code has been superseded.

Stranger Personal Details: Click to open the **Stranger Personal Details** screen (see page 276).

Student Personal Details: Click to open the **Student Personal Details** screen (see page 276).

Stranger Enrolments: Click to open the **Stranger Enrolments** screen (see page 277).

Student Enrolments: Click to open the **Student Enrolments** screen (see page 277).

Stranger Personal Details

Figure 167: Stranger Personal Details

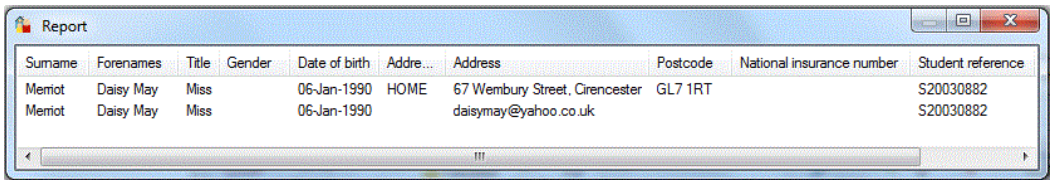


Table 33 shows the information included on this screen.

Table 33: Stranger Personal Details

Surname	Address
Forenames	Postcode
Title	NI Number
Gender	Student Reference
Date of birth	Staff Reference
Address Type	

Student Personal Details

The **Student Personal Details** report is in the same format as the **Stranger Personal Details** report (see above).

Stranger Enrolments

Figure 168: Stranger Enrolments

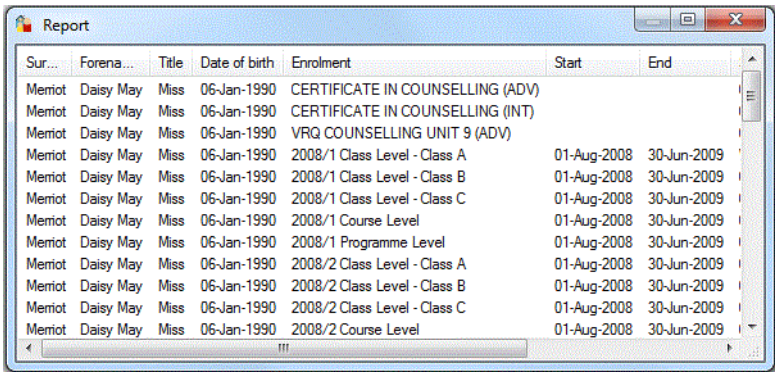


Table 34 shows the information included on this screen.

Table 34: Stranger Personal Details

Surname	Start
Forenames	End
Title	Status
Date of birth	Reference
Enrolment	Type

Student Enrolments

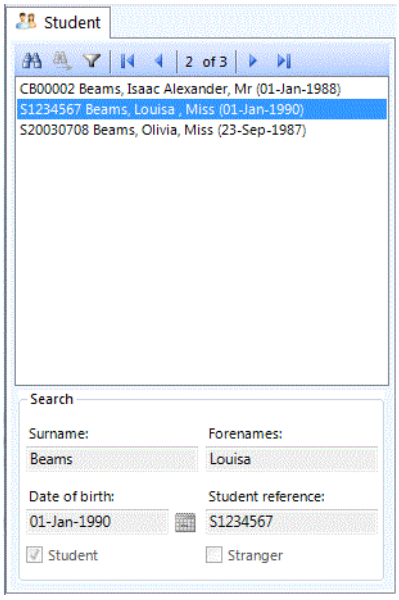
The **Student Enrolments** report is in the same format as the **Stranger Enrolments** report (see above).

Referee Manager

Access:	UNIT-e Referee Manager.exe

Student tab

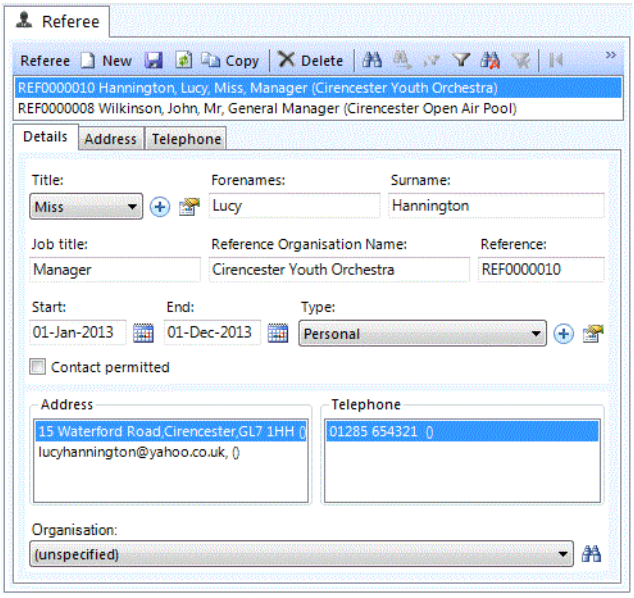
Figure 169: Referee Manager - Student



A list of strangers/students that match your search criteria is shown in the top left of the screen. You can populate this list by entering student search criteria in the **Student search** pane. Select a stranger/student to view their associated details.

Referee tab

Figure 170: Referee Manager - Referee

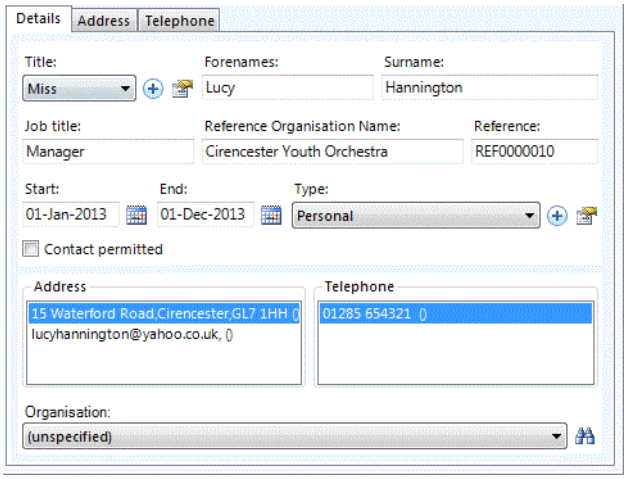


The pane at the top of this tab displays all referees associated with the selected student. Select a referee to view the details.

Organisation: If you know that the referee is associated with an organisation record already held in your UNIT-e database, use this field to access the **Organisation Search** form. You can then search for the organisation and create a link between that organisation and the referee.

Details tab

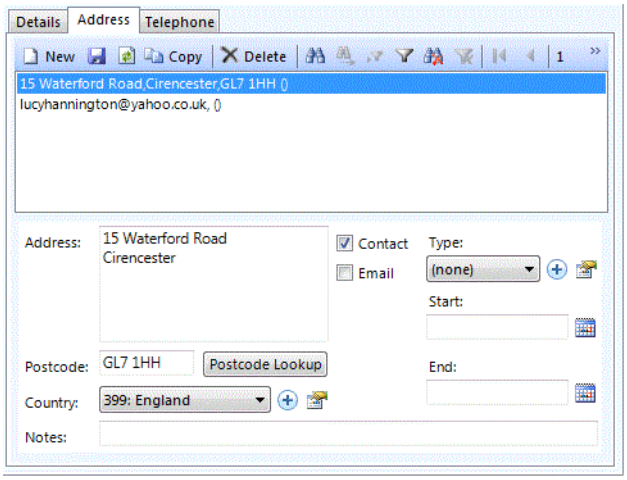
Figure 171: Referee Manager - Details



The referee details are shown here.

Address tab

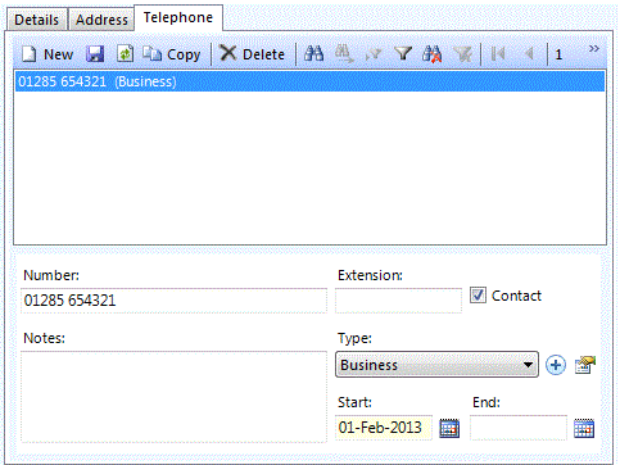
Figure 172: Referee Manager - Address



The referee address details are shown here.

Telephone tab

Figure 173: Telephone details tab



The referee telephone number(s) are shown here.

Appendices

- *Appendix A: Previous enhancements* (see page 282)
- *Appendix B: Colours used in the style sheet* (see page 284)
- *Appendix C: Web page files* (see page 286)

Appendix A: Previous enhancements

The following enhancements were introduced in previous releases:

- *4.60 enhancements* (see below)
- *4.59 enhancements* (see below)
- *4.58 enhancements* (see page 283)

4.60 enhancements

- *Online Services web config user group (os_online)* (see page 16)

  The Online Services web config user (os_online) user group has been updated to include **Select** permissions to the following classes:

  - Credit card instalment invoice line
  - Credit card instalment line
  - Credit card instalment plan

- With the introduction of the UNIT-e Admissions Management Service, the *UNIT-e Extended Applications* handbook (UXAP.pdf) has been retired and replaced by a new Admissions in UNIT-e Core handbook. Cross-references in this handbook have been updated to reflect this change.

4.59 enhancements

- *Settings for Student Merging* (see page 41)

  The **Application\Admissions\DataServiceBaseURL** setting has been added to this section. For Admissions Management Service users only, this is required to ensure that Student Merging works correctly when dealing with applicants from Admissions.

- *AFD Postcode Internet installation* (see page 65) and *AFD Postcode Internet Settings* (see page 262)

References to http://pce.afd.uk have been updated to https://pce.afd.co.uk/afddata.pce.

- *Navigating the Online Stranger Mapping form* (see page 123)

  A note has been added to this section to explain that if there's a large number of strangers and you're viewing the first 50 but then apply a further filter (e.g. by clicking the **Enrolments** button), the form will show a blank page. In the left-hand pane, right-click and select **Refresh** to view the first 50 strangers that meet the criteria of the selected filter (e.g. the first 50 enrolment strangers).

4.58 enhancements

- References to the *UNIT-e Card Payments & Refunds* handbook (UCP.pdf) have been updated to *Managing UNIT-e Card Payments & Refunds* (MCP.pdf).

Appendix B: Colours used in the style sheet

Figure 174 shows the colours used in the style sheet (unite.css) from version 4.26 onwards.

Figure 174: Style sheet colours



Table 35 gives the colour references.

Table 35: Style sheet colour references

Name	RGB	Hex	Websafe
Light Blue	61, 183, 228	#3DB7E4	#44BBDD
Dark Blue	0, 91, 130	#005B85	#005588
Dark Grey	116, 118, 120	#747678	#777777
Light Grey	199, 194, 186	#C7C2BA	#CCBBBB
Rust	152, 50, 34	#983222	#993322

Name	RGB	Hex	Websafe
Deep Green	0, 133, 102	#008566	#008866
Purple	99, 29, 118	#631D76	#662277
Orange	255, 88, 0	#FF5800	#FF5500
Bright Green	190, 214, 0	#BED600	#BBDD00
Gold	240, 171, 0	#F0AB00	#EEAA00
Sky Blue	161, 198, 207	#A1C6CF	#99CCCC
Mustard	215, 169, 0	#D7A900	#DDAA00

Appendix C: Web page files

Table 36 shows the files provided for each of the web pages in Online Services.

Table 36: Web page files

Web page	Web page files
Additional details (see page 230)	additional.aspx additional.aspx.cs additional.master additional.master.cs
Advanced course search (see page 223)	advanced.aspx advanced.aspx.cs advanced.master advanced.master.cs
Application	app_external.aspx app_external.aspx.cs
Authenticate link	authenticate_link.aspx authenticate_link.aspx.cs authenticate_link.master authenticate_link.master.cs
Bank details	bankdetails.aspx bankdetails.aspx.cs bankdetails.master bankdetails.master.cs
Brochure search results (see page 239)	brochure_results.aspx brochure_results.aspx.cs brochure_results.master brochure_results.master.cs
Brochure search (see page 238)	brochure_search.aspx brochure_search.aspx.cs brochure_search.master brochure_search.master.cs
	change.aspx change.aspx.cs change.master change.master.cs

Web page	Web page files
Change complete	change_complete.aspx change_complete.aspx.cs change_complete.master change_complete.master.cs
Change password (see page 255)	change_password.aspx change_password.aspx.cs change_password.master change_password.master.cs
Change password complete	change_password_complete.aspx change_password_complete.aspx.cs change_password_complete.master change_password_complete.master.cs
Change login email (see page 254)	change_username.aspx change_username.aspx.cs change_username.master change_username.master.cs
Change username check	change_username_check.aspx change_username_check.aspx.cs change_username_check.master change_username_check.master.cs
Change username complete	change_username_complete.aspx change_username_complete.aspx.cs change_username_complete.master change_username_complete.master.cs
	check.aspx check.aspx.cs check.master check.master.cs
	complete.aspx complete.aspx.cs complete.master complete.master.cs
Web API Pay360 link	CompleteEnrolment.aspx CompleteEnrolment.aspx.cs **Note:** These pages are provided to demonstrate how to call the Web API to generate enrolments and make payments using Pay360. These are provided in an Online Services sub-folder called **Pay360 Test pages**. Refer to the *UNIT-e Web API* handbook (UWAPI.pdf) for further information.

Web page	Web page files
Contact details (see page 256)	contact.aspx contact.aspx.cs contact.master contact.master.cs
Courses home (see page 225)	courses.aspx courses.aspx.cs courses.master courses.master.cs
Pay by CC Instalments (see page 248)	creditCardDetails.aspx creditCardDetails.aspx.cs creditCardDetails.master creditCardDetails.master.cs
Credit card error	creditCardError.aspx creditCardError.aspx.cs
Welcome to Online Services (see page 220)	Default.aspx Default.aspx.cs Default.master Default.master.cs
Personal details (see page 253)	details.aspx details.aspx.cs details.master details.master.cs
Document checklist	documentchecklist.aspx documentchecklist.aspx.cs documentchecklist.master documentchecklist.master.cs
Enquiry	enq_external.aspx enq_external.aspx.cs
Enrolment	enr_external.aspx enr_external.aspx.cs
Enrolment complete	enrolment_complete.aspx enrolment_complete.aspx.cs enrolment_complete.master enrolment_complete.master.cs

Web page	Web page files
	external.aspx external.aspx.cs external.master external.master.cs
Fee concessions (see page 236)	feeConcessions.aspx feeConcessions.aspx.cs feeConcessions.master feeConcessions.master.cs
Course fee policy (see page 241)	feepolicy.aspx feepolicy.aspx.cs feepolicy.master feepolicy.master.cs
	finance_confirm.aspx finance_confirm.aspx.cs
	finance_tills.aspx finance_tills.aspx.cs
	finance_tills_scp.aspx finance_tills_scp.aspx.cs
Funds (see page 250)	funding.aspx funding.aspx.cs funding.master funding.master.cs
Fund questions	fundquestions.aspx fundquestions.aspx.cs fundquestions.master fundquestions.master.cs
	general.aspx general.aspx.cs general.master general.master.cs
	general_complete.aspx general_complete.aspx.cs general_complete.master general_complete.master.cs

Web page	Web page files
Help	help.aspx help.aspx.cs help.master help.master.cs
	iiwc.aspx wwic.aspx.cs
Instalment complete	instalment_complete.aspx instalment_complete.aspx.cs instalment_complete.master instalment_complete.master.cs
Login (see page 221)	login.aspx login.aspx.cs login.master login.master.cs
Log off	logoff.aspx logoff.aspx.cs
	master.master master.master.cs
Forgotten password? (see page 224)	new_password.aspx new_password.aspx.cs new_password.master new_password.master.cs
Course options (see page 259)	options_check.aspx options_check.aspx.cs options_check.master options_check.master.cs
	options_complete.aspx options_complete.aspx.cs options_complete.master options_complete.master.cs
	options_courses.aspx options_courses.aspx.cs options_courses.master options_courses.master.cs

Web page	Web page files
	options_courses_text.aspx options_courses_text.aspx.cs options_courses_text.master options_courses_text.master.cs
	options_enrolments.aspx options_enrolments.aspx.cs options_enrolments.master options_enrolments.master.cs
	options_enrolments_text.aspx options_enrolments_text.aspx.cs options_enrolments_text.master options_enrolments_text.master.cs
	options_payment_complete.aspx options_payment_complete.aspx.cs options_payment_complete.master options_payment_complete.master.cs
	options_validation.aspx options_validation.aspx.cs options_validation.master options_validation.master.cs
	password.aspx password.aspx.cs password.master password.master.cs
	password_complete.aspx password_complete.aspx.cs password_complete.master password_complete.master.cs
	password_reset.aspx password_reset.aspx.cs password_reset.master password_reset.master.cs
	paybalance.aspx paybalance.aspx.cs paybalance.master paybalance.master.cs

Web page	Web page files
	payment_complete.aspx payment_complete.aspx.cs payment_complete.master payment_complete.master.cs
Personal details (see page 253)	personal.aspx personal.aspx.cs personal.master personal.master.cs
	postcode.aspx postcode.aspx.cs postcode.master postcode.master.cs
	qrEnrolment.aspx qrEnrolment.aspx.cs
	qrError.aspx qrError.aspx.cs
	qrMaster.aspx qrMaster.aspx.cs
	qrStaffLogin.aspx qrStaffLogin.aspx.cs
Qualification details (see page 257)	qualifications.aspx qualifications.aspx.cs qualifications.master qualifications.master.cs
Additional questions (see page 233)	questions.aspx questions.aspx.cs questions.master questions.master.cs
Referees details (see page 258)	referees.aspx referees.aspx.cs referees.master referees.master.cs
New visitor registration (see page 222)	register.aspx register.aspx.cs register.master register.master.cs

Web page	Web page files
	registration_complete.aspx registration_complete.aspx.cs registration_complete.master registration_complete.master.cs
	results.aspx results.aspx.cs results.master results.master.cs
	route.aspx route.aspx.cs route.master route.master.cs
	select.aspx select.aspx.cs
	selection.aspx selection.aspx.cs selection.master selection.master.cs
	session.aspx session.aspx.cs
Catalogue (see page 249)	shop.aspx shop.aspx.cs shop.master shop.master.cs
	summary.aspx summary.aspx.cs summary.master summary.master.cs
	sundry_items.aspx sundry_items.aspx.cs sundry_items.master sundry_items.master.cs
	tandc.aspx tandc.aspx.cs tandc.master tandc.master.cs

Web page	Web page files
Web API Pay360 link	TestApi.aspx TestApi.aspx.cs **Note:** These pages are provided to demonstrate how to call the Web API to generate enrolments and make payments using Pay360. These are provided in an Online Services sub-folder called **Pay360 Test pages**. Refer to the *UNIT-e Web API* handbook (UWAPI.pdf) for further information.

Index



If you are unable to find the information you require, the search facility in Adobe Acrobat enables you to search individual PDFs or the entire UNIT-e documentation catalogue. Refer to the *About UNIT-e documentation* section in the *Working with UNIT-e* handbook (WWU.pdf) for further details.

A

addresses
    overwriting old, 112
    storing new and old, 112
AFD Postcode Internet functionality
    installation, 65
    licence requirements, 63
    lookups, 63
    Registration web page modifications, 66
    retrieving AEB data, 66
    settings, 63
    user permissions, 65
applications
    applying online, 207
    completing requests online, 209
    link with enquiries, 113
    link with enrolments, 113

B

brochures
    availability online, 114
    requesting, 204
browser limitations, 79
business rules
    suppressing strangers in UNIT-e applications, 112

C

Call Secure Digital Plus (CSD+), 186
classes, 16
    needed for the Online Stranger Transfer service, 139
    supported for creating and amending, 52
colours used in style sheet, 284
confidentiality check-boxes, 89
course options
    selecting, 213
courses
    appearing on the course directory page, 99
    applying, 207
    enquiring, 205
    enrolling, 208
    searching for, 191
credit card payments, 185, 216
    part payments, 243
    settings, 46
currency, 107

D

departments
    appearing on the course directory page, 99
document uploads
    defining the 'Upload' Module Question Type, 70
    enabling uploads for individual modules, 70
    installing the File Upload service, 73
    uploading to a Blob, 71
        prerequisites, 73
    uploading to SharePoint, 74
        prerequisites, 74

E

email addresses
    changing contact, 200
    changing login, 200
    storing, 112
email format, 91
    body text, 92
    signature, 91
End of Day files, 185
enquiries
    completing requests online, 209

enquiring online, 205
general, 203
link with applications, 113
enrolments
completing requests online, 209
enrolling online, 208
link with applications, 113
Equality Act compliance, 11, 77
Extended Applications, 165
'On Entry' method, 165
'On Offer' method, 165
curriculum structure, 167
data structure, 172
process, 170
reports, 169
routes - using, 168
settings, 169

F

fees
displaying online, 104
EnrolmentPayFees Web method, 108
Pay360 link, 108
File Upload service *see 'document uploads'*
forgotten passwords, 198

H

hotlinks *see 'document uploads'*

I

IICL methods
CreateOnlineMembershipForStudent, 152
GenerateQuickEnrolmentEmails, 179
ImportXML function, 95
licence requirements, 95
user access requirements, 95

L

licence requirements, 14
locked accounts
notification reports, 57
unlocking, 156
logging into Online Services, 196
logging out of Online Services, 197
lookups, 22
QR code generation, 177

M

menus and menu items, 20
methods
CreateStudentEvent, 94
EnrolmentPayFees, 108
module options
appearing on the web site, 110
modules
appearing on the web site, 100
associating with departments, 102
currency applied, 107
data requirements, 99
feeband details, 105
fees available on the web site, 104
names containing the + symbol, 101
places available, 103
removing from the web site, 101
VAT rate applied, 107

O

online accounts, 145
changing student selection criteria in search, 148
creating
for enrolled students, 146
for individual students, 149
in bulk, 146
using Task Scheduler, 152
deleting, 158
for individual students, 158, 159
for multiple students, 159
log file, 149
UNIT-e user link, 161
unlocking, 156
Online Services
using, 187
Online Shop, 190, 249
licensing, 14
Online Stranger Mapping *see 'strangers'*
Online Stranger Transfer
failed transfers, 142
prerequisites, 137
class permissions required, 139
installation, 138
log file location, 138
process, 141

P

passwords
changing, 199
forgotten, 198
Pay360 link, 11
browser choices, 79

fees, 108
network credentials, 60
Pending Merged Students, 132
postcode software *see 'AFD Postcode Internet functionality'*
prerequisites
brochure links, 114
lookups, 22
module data, 99
network credentials for Pay360 web services, 60
postcode software, 62
questions, 68
settings, 23
student data, 111
UNIT-e Messaging, 61
user access rights, 15

Q

QR code generation, 175
email generation, 179
enrolling students, 181
prerequisites, 176
IICL method, 178
lookups, 177
QR code reader, 178
reports, 177
settings, 176
user group access, 176
qualifications
listings options, 90
Qualification Online Entry check-box, 113
questions
defining, 68
document uploads, 70
quick enrolments *see 'QR code generation'*

R

Referee Manager, 163
referee organisation, 164
retrieving referee details, 164
registering as a user, 193
reports, 52
Online Services Search Results Fees (gn.os.searchfees), 107
Online Services Student Feeband (gn.os.feeband), 107
QR code generation, 177

S

settings, 23
Chip and PIN, 46
online card payments, 46
Online Services, 23
QR codes, 48
Student Merging, 41
strangers
converting to students, 115
automatically, 128
manually, 127
groups potentially matched to one student, 135
free search matches, 136
no matches, 135
one or more matches, 135
merging with existing students, 130
rules, 133
setting keys, 41
with student authorisation, 130
without student authorisation, 133
Online Stranger Mapping
changing the search criteria, 125
navigating the form, 123
prerequisites, 118
process overview, 117
report changes
gn.os.strangers, 119
gn.os.students, 121
preserving mandatory properties, 121
viewing stranger and student data, 124
personal data properties for strangers, 50
stranger check-box, 111
strangers in Pending Merged Students, 132
suppressing strangers in UNIT-e applications, 112
student periodic records, 195
students
addresses
overwriting old, 112
storing new and old, 112
changing details, 215
email addresses, 112
events
creating, 94
funding, 250
online accounts *see 'online accounts'*
registering to use Online Services, 193
style sheet
colours used, 284
Support Funds online, 190
licensing, 14

T

Task Scheduler
CreateOnlineMembershipForStudent, 152
GenerateQuickEnrolmentEmails, 179
Touch Tone, 186

U

UNIT-e Messaging, 61
uploading documents *see 'document uploads'*
user access rights, 15
    classes, 16
    ImportXML, 95
    menus and menu items, 20
    web config user, 15
user groups
    HR Online Services Web Config user (hr_online), 19
    Online Services web config user' (os_online), 16
    Windows Services user group (winservices), 16

V

VAT rate, 107

W

WCAG compliance, 11, 77
web config user, 15
web methods
    EnrolmentPayFees, 108
web pages
    amending structure, 83
    amending UI, 81
        images, 81
        style, 82
        textual content, 82
    case style - enforcing, 88
    confidentiality check-boxes - removing, 89
    configuring, 77
    customising enrolment fees, 93
    fields
        adding, 86
        making mandatory, 84
        removing, 86
    file types, 80
    qualifications list - specifying type, 90

List of figures

Figure 1: Settings - OSAP path 23
Figure 2: Settings - OSEA path 24
Figure 3: Module Application\Generation point home\DIRECT setting key 25
Figure 4: Settings - OSEN path 25
Figure 5: Settings - OSEQ 28
Figure 6: Settings - OS path 29
Figure 7: Settings - OS\Online Stranger Mapping path 41
Figure 8: Settings - OS\Stranger Search path 44
Figure 9: Settings - Student Merging path 45
Figure 10: Settings - FileUploader\FileSize path 47
Figure 11: Edit Personal Data Class Properties 50
Figure 12: Locked Staff users email alert Select statement 58
Figure 13: Online Services Credentials 60
Figure 14: New visitor registration with AFD 62
Figure 15: AfD Postcode Internet process 65
Figure 16: AFD Postcode internet settings 65
Figure 17: Registration web page modification 66
Figure 18: Upload button 69
Figure 19: Question Manager - Module and Question 71
Figure 20: The Online Services Document Upload process 71
Figure 21: caps_online_document table 72
Figure 22: caps_hotlinkupload table 72
Figure 23: The images folder 81
Figure 24: The style folder 82
Figure 25: New visitor registration check boxes 89
Figure 26: Qualification details 90
Figure 27: Import XML user rights 95
Figure 28: Online Services within the UNIT-e suite of software 97
Figure 29: Departments on Course directory page 100
Figure 30: II web check-boxes 101
Figure 31: VB web check-boxes 101
Figure 32: Associating a module with a department 102
Figure 33: Fee band lookup 105

Figure 34: The FeeBand setting key 105
Figure 35: Module fees 106
Figure 36: Amending the gn.os.feeband report 106
Figure 37: Stranger check-box 111
Figure 38: Qualification - Qualification (2) 113
Figure 39: Brochure - Brochure (1) 114
Figure 40: The Online Stranger Mapping process 117
Figure 41: Online Stranger Mapping - expanded stranger details 119
Figure 42: Classes added to Stranger pick list report 120
Figure 43: Stranger pick list report Select clause 120
Figure 44: Online Stranger Mapping - additional stranger details 121
Figure 45: Student pick list report 121
Figure 46: Stranger pick list report 122
Figure 47: Online Stranger Matching batch retrieval 123
Figure 48: Online Stranger Mapping - records count 123
Figure 49: Online Stranger Mapping 124
Figure 50: Expanded stranger details 125
Figure 51: Online Stranger Mapping - Student Details 125
Figure 52: Online Stranger Mapping - Settings 126
Figure 53: Online Stranger Mapping - Free Search 126
Figure 54: Online Stranger Mapping - Student created message 129
Figure 55: Online Stranger Mapping - matching student selected 131
Figure 56: Online Stranger Mapping - student marked for merge message 131
Figure 57: Online Stranger Mapping - linked student 132
Figure 58: Multiple possible stranger matches to a student - no match 135
Figure 59: Multiple possible stranger matches to a student - matches 136
Figure 60: Online Stranger Transfer Service log file path 138
Figure 61: Pending Merged Students 142
Figure 62: Online Stranger Mapping - Search Results 147
Figure 63: Online Stranger Mapping - account log file 147
Figure 64: Online Stranger Mapping - account creation process complete . 147
Figure 65: Online Services Account Manager - Learner Online Account 150
Figure 66: Create Online Account process complete message 150
Figure 67: Create User Log file 150
Figure 68: Task Scheduler - Create Task 153
Figure 69: Task Scheduler - New Trigger 154
Figure 70: Task Scheduler - New Action 154
Figure 71: Locked online account 157
Figure 72: Unlock online account successful message 157

Figure 73: Delete Online Services Accounts 159
Figure 74: Online account deleted message 159
Figure 75: Delete online Services Accounts with multiple students 160
Figure 76: Associate Online Account 161
Figure 77: Online Membership account updated message 161
Figure 78: Referee Manager 164
Figure 79: Module/Agent/Site link for Extended Applications 167
Figure 80: Route 168
Figure 81: Curriculum structure for Extended Applications 172
Figure 82: Example QR code enrolment email 181
Figure 83: Quick Enrolment login 182
Figure 84: Quick Enrolment 182
Figure 85: Quick Enrolment complete 183
Figure 86: Search field 191
Figure 87: Advanced course search 192
Figure 88: New visitor registration 194
Figure 89: Welcome page Login 196
Figure 90: Login button 196
Figure 91: User name and logoff button 197
Figure 92: Have you forgotten your password? 198
Figure 93: Forgotten password 198
Figure 94: Click here to change your password 199
Figure 95: Change password 199
Figure 96: Contacts 201
Figure 97: Change login email 202
Figure 98: Login email updated 202
Figure 99: Change username 202
Figure 100: General enquiry 203
Figure 101: General enquiry complete 203
Figure 102: Brochure search 204
Figure 103: Brochure search results 204
Figure 104: Course search results 206
Figure 105: Selection summary 209
Figure 106: Your selection 209
Figure 107: Enrolment complete 211
Figure 108: Course options 213
Figure 109: Course options selection 214
Figure 110: Welcome to Online Services 220
Figure 111: Search field 221

Figure 112: Login 221
Figure 113: New visitor registration 222
Figure 114: Advanced course search 223
Figure 115: Forgotten password? 224
Figure 116: Course directory 226
Figure 117: Course Search Results 227
Figure 118: Selection summary 227
Figure 119: Your selection 228
Figure 120: Your details 229
Figure 121: Additional details 230
Figure 122: Qualification details 231
Figure 123: Referee details 232
Figure 124: Additional questions 233
Figure 125: Summary - please check your details 234
Figure 126: Confirmation 235
Figure 127: Confirmation with payment options 235
Figure 128: Fee concessions 236
Figure 129: Brochure search 238
Figure 130: Brochure search results 239
Figure 131: General enquiry 240
Figure 132: General enquiry complete 240
Figure 133: Course fee policy 241
Figure 134: Online payments - Pay Balance online 242
Figure 135: Online Payments (E-Commerce payment options) 244
Figure 136: Online Payments (Card details) 244
Figure 137: Online Payments (Address confirmation) 245
Figure 138: Payment Confirmation Page 246
Figure 139: Online Payments (Verified by Visa) 246
Figure 140: Choose an account 247
Figure 141: Your Wallet 247
Figure 142: Pay by CC Instalments 248
Figure 143: Registered cards showing existing card details 248
Figure 144: Summary 251
Figure 145: Personal details 253
Figure 146: Personal details - FES 254
Figure 147: Change login email 254
Figure 148: Change password 255
Figure 149: Contact details 256
Figure 150: Qualification details 257

Figure 151: Referee details 258
Figure 152: Course options 259
Figure 153: Request change 261
Figure 154: AFD Postcode Internet Settings 262
Figure 155: Local Area Network (LAN) Settings 263
Figure 156: Online Services Account Manager 264
Figure 157: Online Services Account Manager - Associate Online Account 265
Figure 158: Online Stranger Mapping 266
Figure 159: Online Stranger Mapping - Settings 269
Figure 160: Online Stranger Mapping - Free Search 270
Figure 161: Online Stranger Mapping - Pre-EOD 271
Figure 162: Online Stranger Mapping - End of Day 271
Figure 163: Online Stranger Mapping - Refunds 272
Figure 164: Online Stranger Mapping - Touch Tone 272
Figure 165: Online Stranger Mapping - Student Details 273
Figure 166: Pending Merged Students 275
Figure 167: Stranger Personal Details 276
Figure 168: Stranger Enrolments 277
Figure 169: Referee Manager - Student 278
Figure 170: Referee Manager - Referee 279
Figure 171: Referee Manager - Details 279
Figure 172: Referee Manager - Address 280
Figure 173: Telephone details tab 280
Figure 174: Style sheet colours 284