

Creating new centre staff users in OpenAssess - A Guide for Primary and Technical e-volve contacts

Primary and Technical e-volve contacts have automatically been allocated OpenAssess administration accounts with the ability to create users and manage access for their centres.

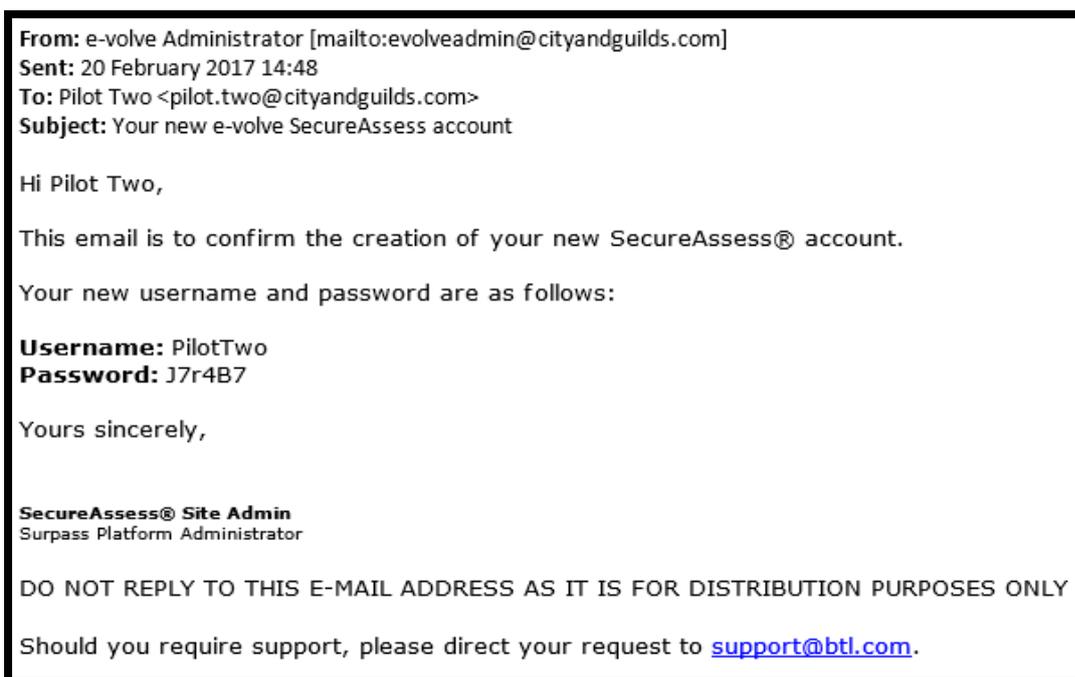
Login details for OpenAssess are the same as those for SecureAssess.

In OpenAssess there are three tabs/steps to set up new users:



- 1) User details
- 2) Associated Qualifications
- 3) Associated Centre Roles

When entering user details it is important that the correct email address is entered as this is where the automatic email, confirming that the account has been created and log in details will be sent. Please see example of email below.



If a user does not received his/her email and the email address is correct, please ask them to check their spam folder. If it is not there, you may need to ask your IT department to make sure the email address evolveadmin@cityandguilds.com or e-volve Administrator openasess_noreply@cityandguilds.com has not been blacklisted as this can sometimes happen with automated emails.

Please note - The email will state SecureAssess but these are the account details for OpenAssess.

1 User details

Using Internet Explorer (Open Assess does not work in Chrome)

Log in to <https://openassess.cityandguilds.com/openassessadmin/> and select the **Users** tab.

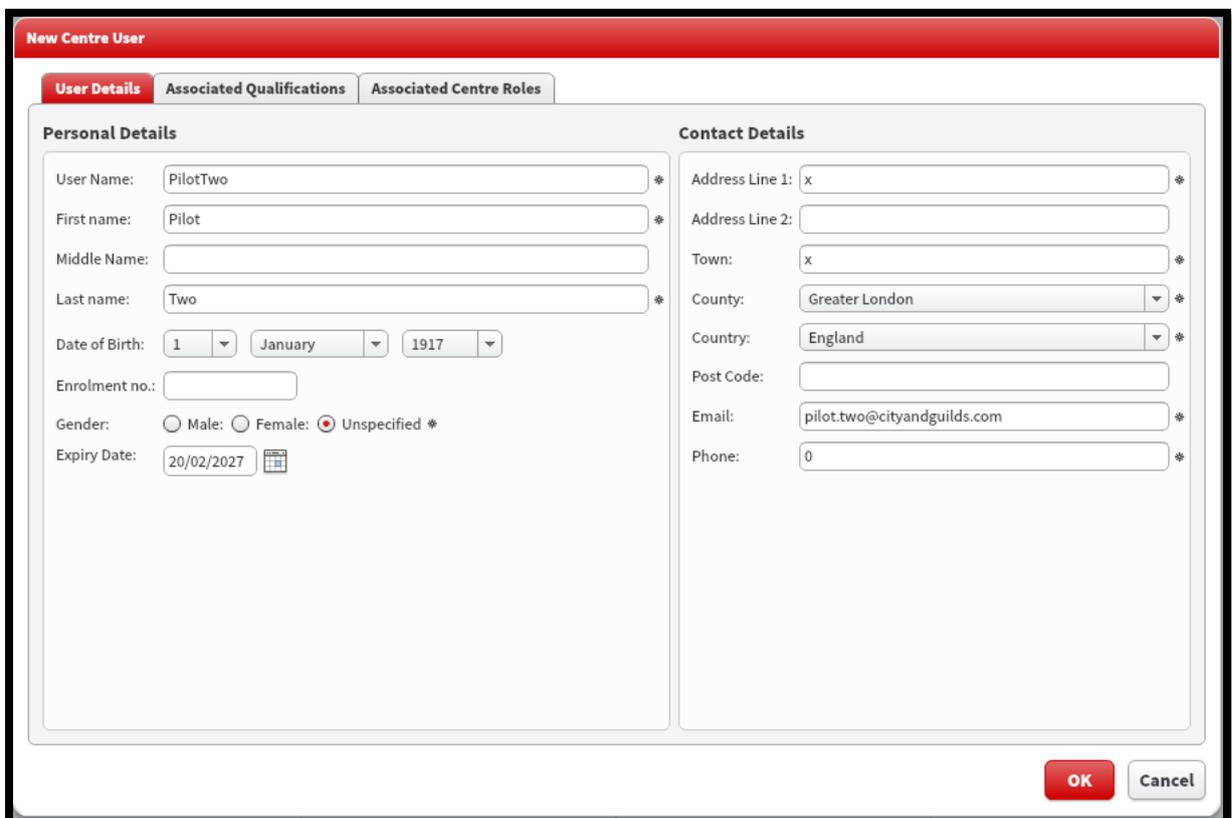


Any existing users will be listed, if only one user account has been created for your centre, this will be blank until you create more users as you cannot see your own personal account here. Your details are held in the Personal Profile Management tab.

From the menu at the bottom right corner, select



The following screen will pop up.

A screenshot of the 'New Centre User' form. The form has a red header with the text 'New Centre User'. Below the header, there are three tabs: 'User Details', 'Associated Qualifications', and 'Associated Centre Roles'. The 'User Details' tab is selected. The form is divided into two columns: 'Personal Details' and 'Contact Details'.
Personal Details:
- User Name: PilotTwo *
- First name: Pilot *
- Middle Name: (empty)
- Last name: Two *
- Date of Birth: 1 January 1917
- Enrolment no.: (empty)
- Gender: Male: Female: Unspecified *
- Expiry Date: 20/02/2027
Contact Details:
- Address Line 1: x *
- Address Line 2: (empty)
- Town: x *
- County: Greater London *
- Country: England *
- Post Code: (empty)
- Email: pilot.two@cityandguilds.com *
- Phone: 0 *
At the bottom right of the form, there are two buttons: 'OK' (red) and 'Cancel' (grey).

Complete the mandatory fields marked with *. Usernames are usually FirstnameLastname but you can choose the format you prefer. You do not have to enter a full postal address unless you want to, City and Guilds will not send you any information based on this. Only the username, name and email address are important in this screen.

When completed please tab to the next screen: Associated Qualifications.

2 Associated Qualifications

The screenshot shows a software window titled "New Centre User" with three tabs: "User Details", "Associated Qualifications", and "Associated Centre Roles". The "Associated Qualifications" tab is active. Below the tabs, there are six filter buttons: "A-D", "E-H", "I-L", "M-P", "Q-T", and "U-Z". The "All" button is highlighted in red. A list of qualifications is displayed, each with a checked checkbox:

- FS Maths Level 1 SAMPLE
- FS Reading Level 1 SAMPLE
- FS Writing Level 1 SAMPLE

At the bottom left of the list area, there is a checkbox labeled "Select/Deselect all" which is also checked. A mouse cursor is pointing at this checkbox. In the bottom right corner, there are two buttons: "OK" (red) and "Cancel" (grey). The page number "3/3" is visible in the bottom right corner of the list area.

You can give access to all of the sample qualifications available or restrict which qualifications you want the user to be able to see e.g. just maths or English, in OpenAssess, either by ticking them one by one or using the select/deselect all tick box at the bottom.

3 Associated Centre Roles

The screenshot shows the 'New Centre User' form with the 'Associated Centre Roles' tab selected. At the top, there are three tabs: 'User Details', 'Associated Qualifications', and 'Associated Centre Roles'. Below the tabs is a 'Filter' section with two input fields: 'Centre Name:' and 'Centre Code:', followed by an 'Apply' button. Underneath is the 'Associated Centre Roles' section, which has a horizontal menu with tabs for 'A-D', 'E-H', 'I-L', 'M-P', 'Q-T', 'U-Z', and 'All'. The 'All' tab is currently selected and highlighted in red. Below the menu, there is a list of roles. The first role is '123456 Pilot Centre - 123456', which has a red background and a checked checkbox to its left. Below this role, there are two unchecked checkboxes: 'OpenAssess Primary Contact' and 'OpenAssess Tutor'.

If you are associated to more than one centre, they will show up here. Choose the centre you wish the new user to be associated to by ticking the box.

Click on the arrow to open the dropdown menu and select which role the user will have by ticking the box.

The screenshot shows a close-up of the 'Associated Centre Roles' dropdown menu. The menu has tabs for 'A-D', 'E-H', 'I-L', and 'M-P'. The 'A-D' tab is selected and highlighted in red. Below the tabs, there is a list of roles. The first role is 'CandG - CandG', which has a red background and a checked checkbox to its left. Below this role, there are two unchecked checkboxes: 'OpenAssess Primary Contact' and 'OpenAssess Tutor'.

The main difference between the two roles is that the Primary Contact can create other Primary Contact and Tutor roles for your centre as well as mark exams and view results.

The Tutor role is unable to create other Primary Contact and Tutor roles but can mark exams and view results.

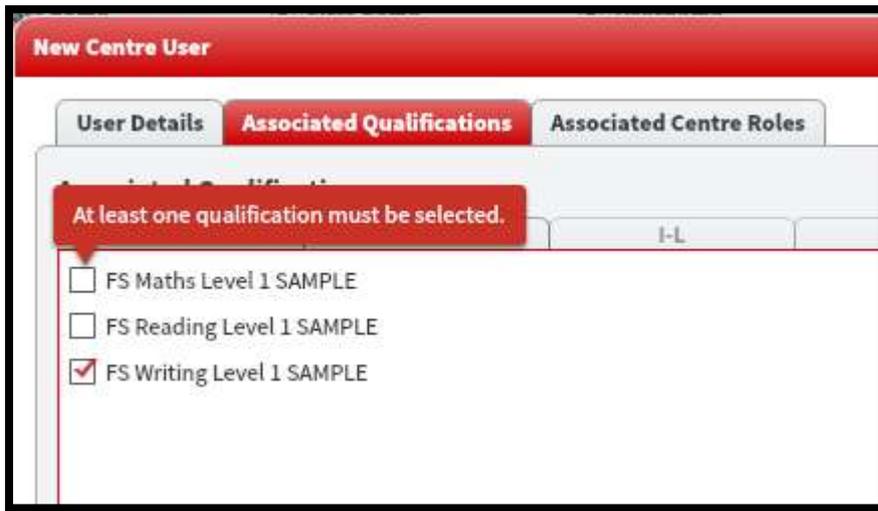
Both roles are able to create accounts on behalf of learners.

Please select only one role per user.

Once you are happy with your selections, click OK to trigger the automated email.

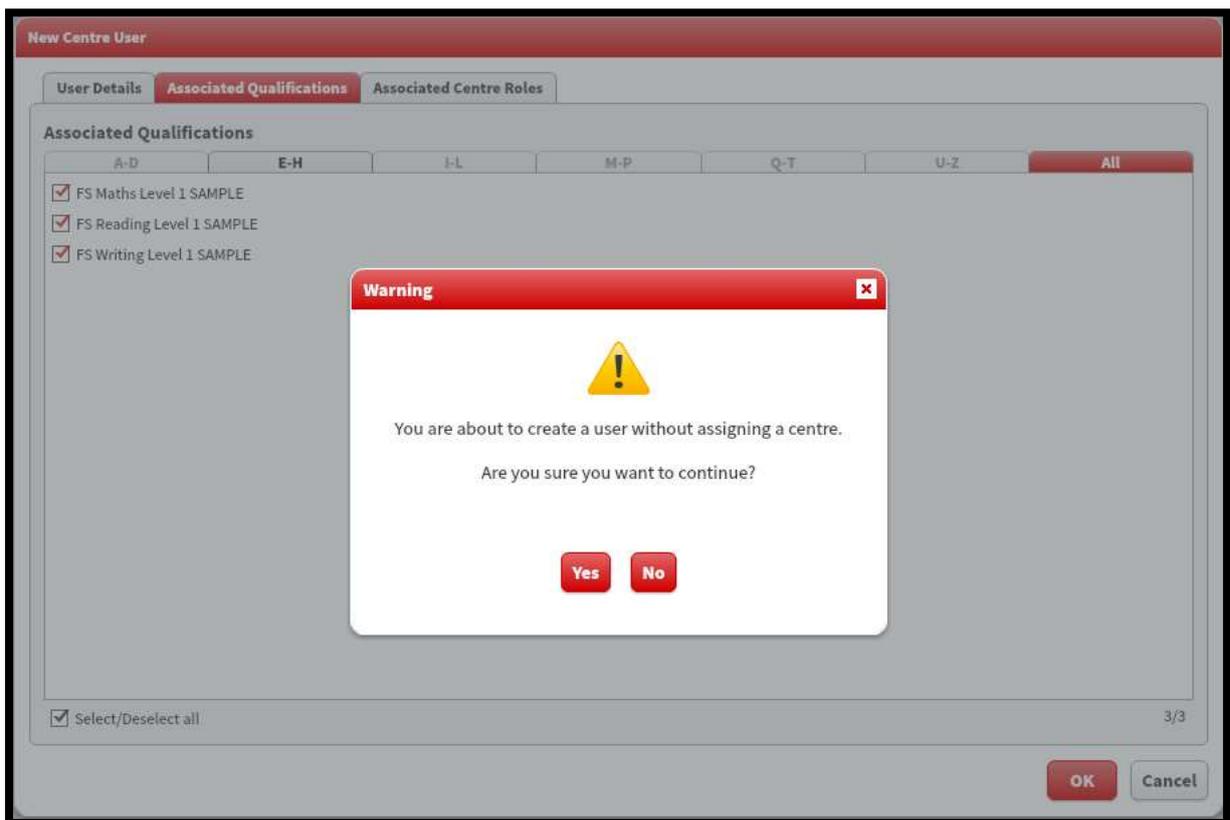
User creation errors

If you have failed to select at least one qualification, it will jump back to that tab so that you can make your selection.

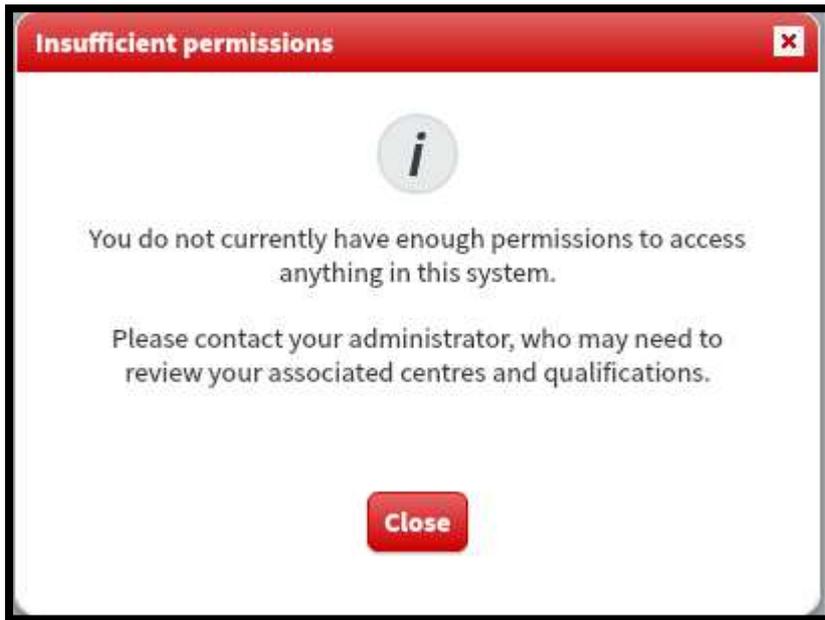


If you have failed to select a centre and role, you will get the following message but the user will still be created if you select **Yes**.

Please select **No** and follow the previous steps to assign a Centre and Role.



If a user tries to log in without a Centre or Role allocation, the following message will appear and you will need to contact centre support at City and Guilds to correct the permissions.



Remember: If a user has not received his/her email and you have verified the email address is correct, check the spam folder. If it is not there, you may need to ask your IT department to make sure the email address evolveadmin@cityandguilds.com has not been blacklisted as this sometimes happens with automated emails.

Please note - The email will state SecureAssess but these are the account details for OpenAssess.