Admin User Guide for AAN Portal

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This user guide is designed to help all admin users navigate the AAN portal. Some admin users have a slightly different interface than other users, based on their level of access. As a result, there are some screens that are relevant for only some users, not all. Where this is the case, this is highlighted.

What access do admin users have and why?

Depending on their privilege rights, admin users can create and manage network events and onboard, manage and remove ambassadors. You can find out how to do all of this further on in this guide.

Admin users also have an admin view of users' profiles. This means they can see users' email addresses and network activity, as part of their role of managing ambassadors. This feature will become available shortly after launch. In the interim, hybrid admin users (regional chairs) will need to go through Network Directory to look at member profiles.

The emphasis for the first month is that all members are onboarded successfully.

Different types of admin users

Pure admin

Pure admin users include coordinators as well as partners such as ASK and Amazing Apprenticeships. They have full event admin privileges meaning they can create, update and cancel events.

Hybrid admin/Regional chair

This user group includes the regional chairs that are part of the AAN network but also have some admin duties. As well as admin privileges, they also have AAN profiles like ambassadors do.

Hybrid admin have the same access as the pure admin users in managing events. They also have admin privileges for managing ambassadors. Managing ambassadors include viewing all ambassadors' profile information including when they joined the network, email address and recent activities.

Super admin

This user group is the AAN central team and they have all the same admin rights as hybrid admin users but they do not have an AAN profile. They can be contacted via the Contact us page.

How does someone gain admin access?

Admin users will be given admin rights by the apprenticeships team during the setup process. Admin users who join the AAN portal after this time will need the central team to create an admin account for them. You can do this by emailing helpdesk@manage-apprenticeships.service.gov.uk.

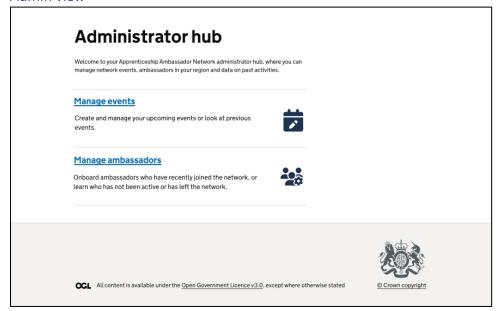
Based on the user's role and admin privilege, they will be given access to the required sections.

If you are stepping down from your engagement with AAN as a regional chair, you must notify helpdesk@manage-apprenticeships.service.gov.uk.

How can an admin access the admin portal?

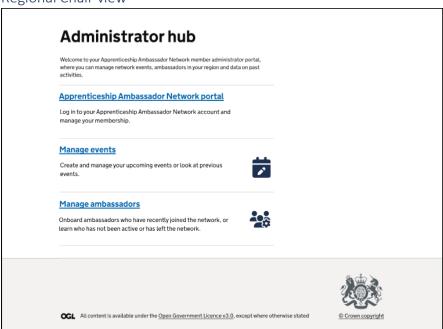
All admin users can <u>sign in to the admin hub</u>. Pure admin users and super admin users will be taken directly to the admin hub. Regional chairs can click the link on the home page of the AAN portal to access the admin hub login page.

Admin view



Once you have logged in as an admin, you will be presented with the 'Administrator hub'. From here you can 'Manage events' and 'Manage ambassadors' if you have both roles. Alternatively, you will only be able to manage events.

Regional Chair view



Once in the Member administrator portal, regional chairs will be able to click back to the 'Apprenticeship Ambassador Network portal', 'Manage events', and 'Manage ambassadors' pages.

How can an admin manage events?

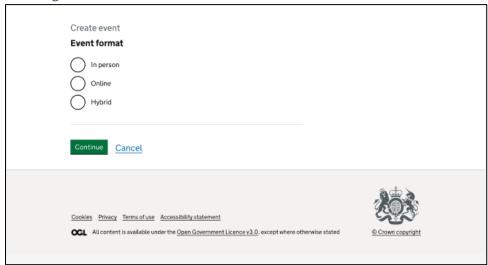


From this page, you can create, update and publish network events. You can also cancel network events.

Using the checkmark in the left-hand panel, you can filter the list of events to only show those that you have created or edited. You can also filter the list of events by date, whether the event has been published or cancelled, the type of event, and the region where the event is located.

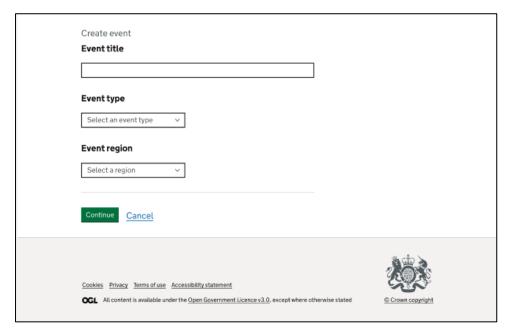
You can click on individual events to manage them.

Creating an event



When creating a new event, you will need to specify whether it will be held in person, online, or as a hybrid event. A hybrid event is one that guests can choose whether they want to attend physically or digitally.

Before you start creating an event, be sure you have all the required information. The only piece of information that doesn't have to be entered when creating the event is the online event link.



You will need to type an event title in the free text box and select the event type and region from the relevant drop-down boxes.

If an event is held online, open to everyone or not attached to a region, select 'National' from the 'Event region' dropdown.

Create event
Event outline
A short description that outlines the event listing.
Vivina and the Annual to Annual to the Annua
You can enter up to 200 characters
Event summary
A summary of the event including an agenda and any pre-event preparation
required. Include any practical information such as how to access the venue, parking and nearest bus/tram/tube/train stop to the venue.
You can enter up to 2000 characters
Does the event include guest speakers?
Yes
○ No
Continue Cancel
a 12 ×
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You will need to provide an outline of what potential attendees can expect from the event. This short text of 200 characters will appear under the event title on the search results page.

You will also need to provide a summary of the event. This text will appear on the event details page and can be up to 2,000 characters, allowing you to provide more information about the event to potential attendees. You can format your text to make it easier to read, and you can include hyperlinks to external websites, including external course material, for additional information.

As well as general information about the event, you can use this space to:

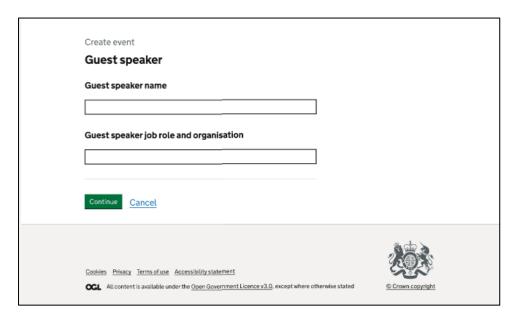
- highlight anything special or irregular about this evening, such as it taking place during the
 evening, or that the ambassadors are required to provide proof of a successful DBS check
- state whether you have a finite number of spaces for example, if you only need two ambassadors to support you at an event
- remind ambassadors that they are expected to contact the event organiser once they have signed up and in the event of an ambassador cancelling their attendance at the event – this is for school or college events only
- let ambassadors know of the expected number or attendees at the event

ASK DELIVERY PARTNERS – IMPORTANT INFORMATION

When creating any event, your event description must include:

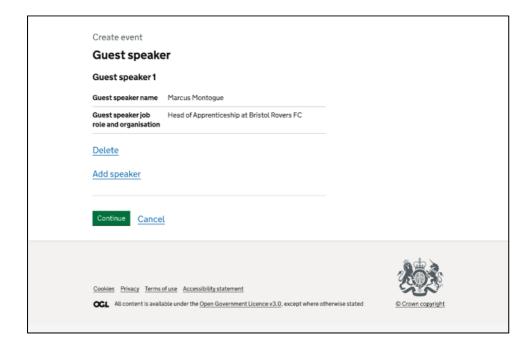
• some information on what type of ambassador would be best suited to support the event – for example, an early careers apprentice, a STEM apprentice or an employer ambassador

- 'the event requires a maximum of XX volunteers, please do not sign up if this has been exceeded'
- 'if you sign up to the event, please contact the event contact directly to confirm attendance and requirements'

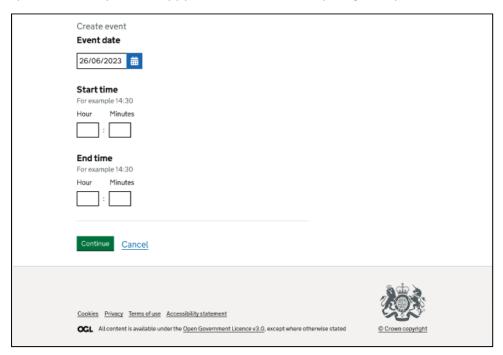


If there is a guest speaker at your event, this page allows you to enter their name, job role and organisation.

If your event has multiple guest speakers, you will be able to add additional speakers by submitting the first speaker's details, selecting 'Continue' and then 'Add speaker'.



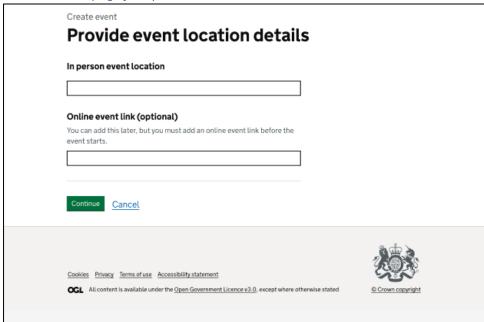
This page allows you to delete the details of existing guest speakers and add additional guest speakers. Once you are happy with the details of all your guest speakers, click 'Continue'.



This page requires you to set the date, start time and end time of your event. To set the date, you can either type it into the box in a DD/MM/YYYY format or click the calendar button and select the correct date. Please enter the start and end times in the relevant boxes using the 24-hour format.

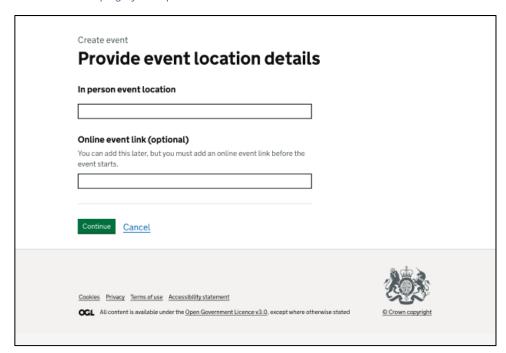
If you are unsure of an end time, please enter 17:00, or an alternative time that you think is most appropriate.

Location detail page for hybrid events



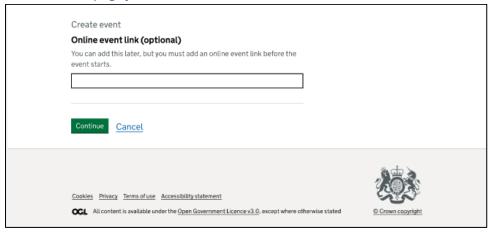
Hybrid events require details of the physical location, for example, a conference hall or hotel, as well as an online link. The online link can be provided later, but it must be provided before the event starts.

Location detail page for in person events



The details of a physical location, for example, a conference hall or hotel, must be provided for an in person event.

Location detail page for online events



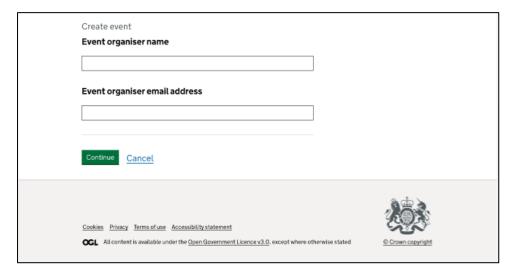
When hosting an online event, you can provide the link to the event later, but it must be provided before the event starts.

Create event Name of the school	
Continue Cancel	
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If you are running an event at a school, you will need to specify the name of the school.

As you type the name of the school, suggestions will appear. You can click these to autofill the full name of the school.

The automatic suggestions also include a Unique Reference Number (URN). If there are multiple schools with the same name, you can make sure you are selecting the correct one by checking against this resource.

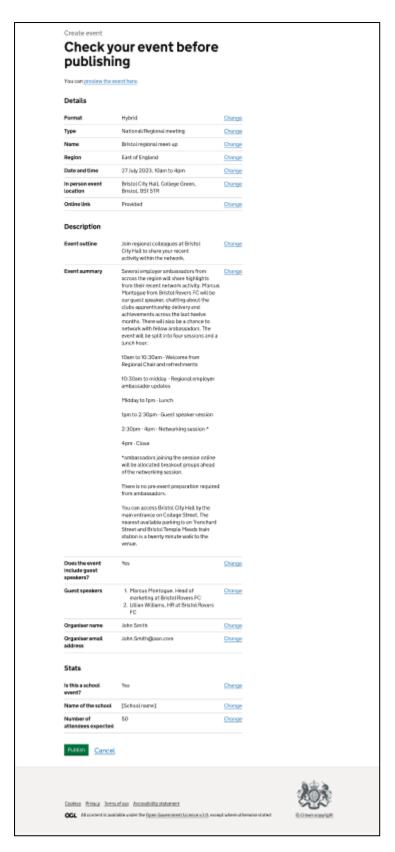


You will need to enter the name and email address of the event organiser, so attendees know who is organising the event. This also allows attendees to contact the event organiser in case they need to ask questions or want to introduce themselves before the event.

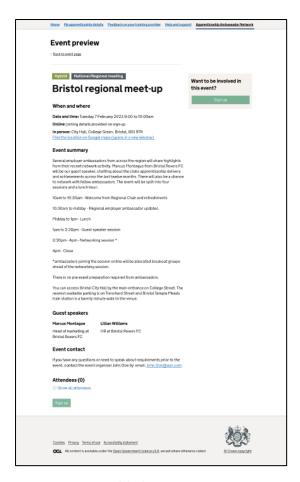
Create event How many attendees do you expect at this event?
This is an estimated number of attendees, guest speakers, volunteers and staff at the event.
Continue Cancel
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You will need to indicate an estimated number of attendees for your event. This number will be used for reporting purposes and won't be shared with the ambassadors.

You can use the event description to let ambassadors know of the anticipated amount of attendees.

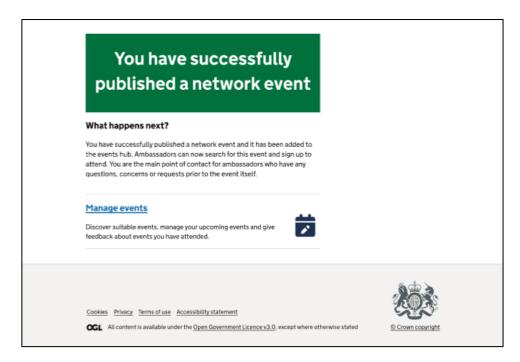


You will be able to review and change your event details before publishing. To make a change, click the blue 'Change' button to the right of the section you want to amend.



Once you have added the required details and made any changes, this page provides a preview of the event as ambassadors will see it.

To publish the event, click the 'Back to event' page button beneath the title to return to the 'Create event' page. Then click 'Publish'.



Once you have published an event, you will be shown this confirmation page.

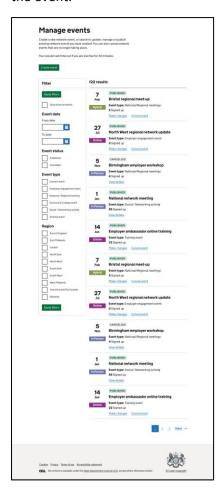
From here, you can return to the events page.

When an ambassador signs up for an event, they will receive an email confirmation which includes all details of the event. The email will also include a reminder that if they cancel within 48 hours of the event, they must notify the event organiser.

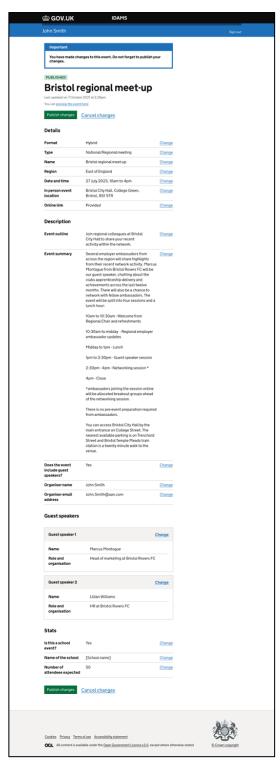
Making changes to an event

Events that have been created can be updated. This can be done right up until the event has started. For instance, if an event starts at 9:00, it can be updated at 8:55 but it can't be updated at 9:05.

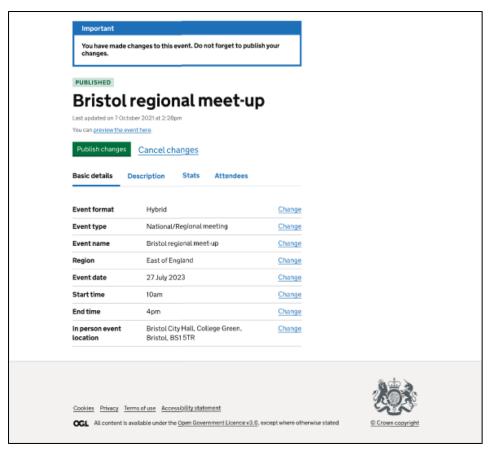
While the portal allows changes to be made up until the start of an event, this should be avoided where possible. Make every effort to avoid making significant changes to events within 48 hours of the event.



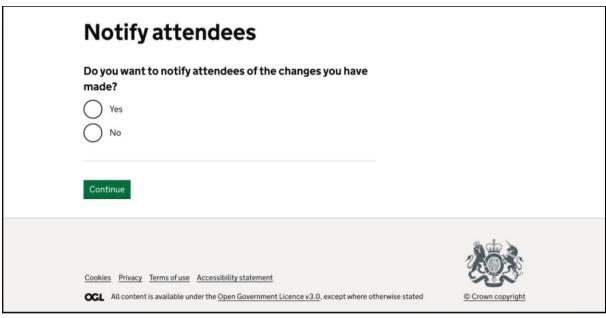
To start with making changes to an event, first you will need to navigate to the 'Manage events' page. Find the event you'd like to update either through the filter options on the left or by browsing through the list using the pagination buttons. Once you have found the event you'd like to update, simply click 'Make changes' next to the event.



This page allows you to make changes to published events. Use the tabs below the 'Publish changes' and 'Cancel changes' buttons to view or edit the event's basic details, description, stats or attendees. Click 'Change' for the detail(s) you'd like to change. Changes cannot be made to an event's page after the event has started.

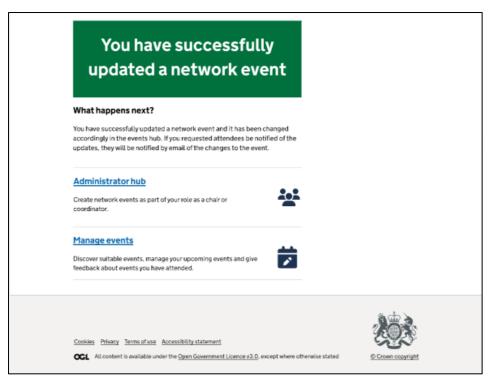


When you have made changes to your event, a box will appear reminding you to publish your changes. The updates will not appear to other users until you publish your changes.



You have the option to notify your attendees of the changes to the event. Please avoid making significant changes to an event within 48 hours of the event.

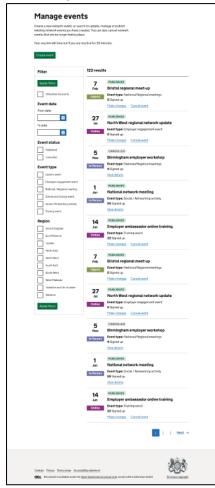
You can also cancel all changes by clicking 'Cancel' update at the bottom of the page.



Once you have updated an event, you will be taken to this confirmation page. Attendees will receive an email confirming that you have updated the event.

From here, you can return to the 'Administrator hub' or 'Manage events' page.

Cancelling an event



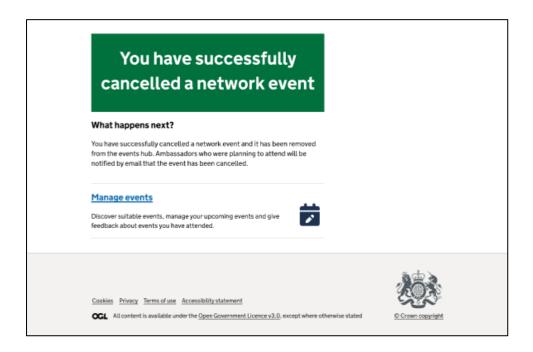
To cancel an event, navigate to the event listings page. Search for the event you'd like to cancel either by using the filter options in the left-hand panel or by clicking through the pages at the bottom of the listings.

When you have found the event you'd like to cancel, click 'Cancel event'.

Cancel event	
You are about to cancel the Bristol regional meet-up	
Upon cancelling this event, all attendees will be notified by email.	
Are you sure you want to cancel this event?	
Yes	
Cancel event Back to manage events	
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To cancel an event, you need to tick the 'Yes' box and click the 'Cancel event' button. This two-step process minimises the chance of events being cancelled accidentally.

Whenever possible, please provide 48 hours' notice to attendees before cancelling an event. If cancelling an event with less than 48 hours' notice, you will need to contact the ambassador(s) directly to let them know.



Once you have cancelled an event, you will be taken to this confirmation page. Attendees will receive an email notifying them that you have cancelled the event.

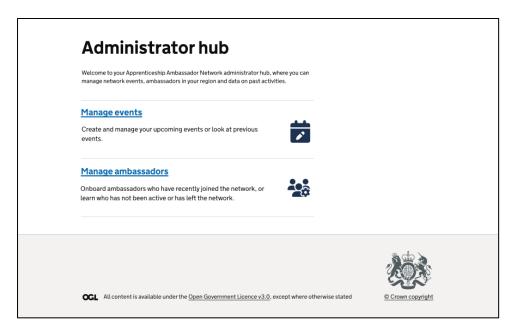
From this page, you can return to the 'Manage events' page.



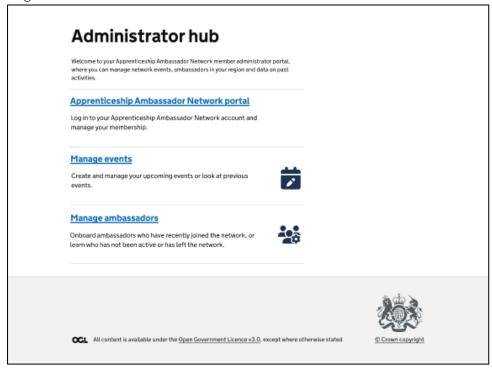
A cancelled event will have a grey box above the event name highlighting that it has been cancelled. Cancelled events can be accessed by an admin who has created or edited the event through their 'Manage events' page. They cannot be edited and viewing them is for reference purposes only.

How can an admin manage ambassadors within the AAN portal?

Admin view



Regional chair view



From the 'Administrator hub', you can click 'Manage ambassadors'. This will present you with a list of all ambassadors.



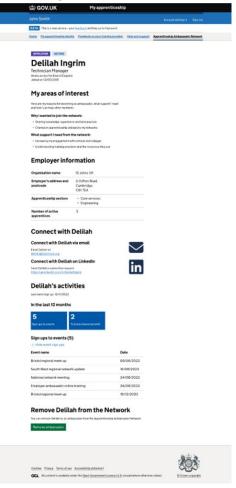
On this page, you can search for specific ambassadors or filter based on their role, status or region to find who you're looking for. You can click on an individual ambassador's name to open their profile and manage their membership.

Selecting the 'New' box under 'Status' will show any ambassadors who have joined the portal in the last 90 days. Admins can onboard these new ambassadors in line with their regional guidance.

Engaging with ambassadors

You can use the above steps to engage with ambassadors after they have been onboarded. You can view their activity details on their profile as well as what they hope to gain by being part of the network. You can contact them through the portal to engage with them.

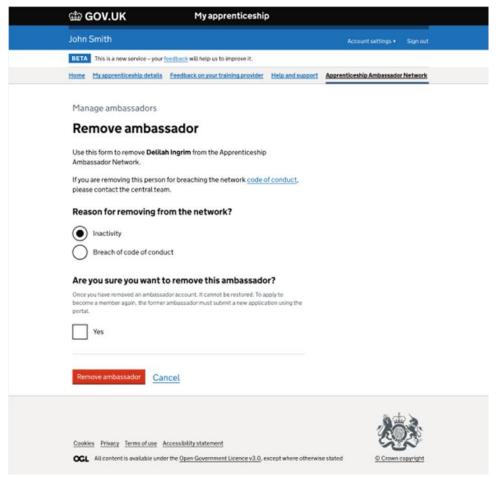
Removing ambassadors



To remove an ambassador from the network, you will need to navigate to their profile through the network directory.

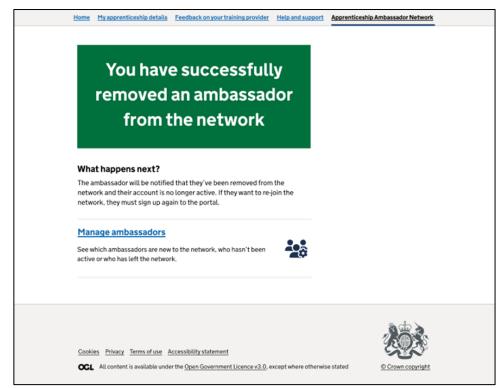
From here you can review their activities over the last 12 months and their reasons for joining the network. If there has been a lengthy period of inactivity or a breach of the AAN code of conduct, you can click 'Remove ambassador' at the bottom of the screen.

The process of removal and period of inactivity are both determined at the discretion of the regional chair.



When removing an ambassador from the network, you will need to indicate whether this is through a prolonged period of inactivity or if they have breached the AAN code of conduct.

You will also need to tick the 'Yes' box before clicking 'Remove ambassador'. This two-step process minimises the chance of ambassadors being removed accidentally.



Once you have removed an ambassador from the network, you will be taken to this confirmation page. If an ambassador has been removed for inactivity, they will receive a notification advising them they have been removed. If the ambassador was removed for breaching the code of conduct, they will not receive a notification.

From this page, you can go directly to 'Manage ambassadors' to see who is new, who has been inactive and who has left the network.

How can I access data reporting?

Email <u>helpdesk@manage-apprenticeships.service.gov.uk</u> if you want access to any reporting data related to AAN activities.