



# GDPRiS Platform v2 Guidance for Users

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## DP Staff Bulk Categorisation and Course Enrolment

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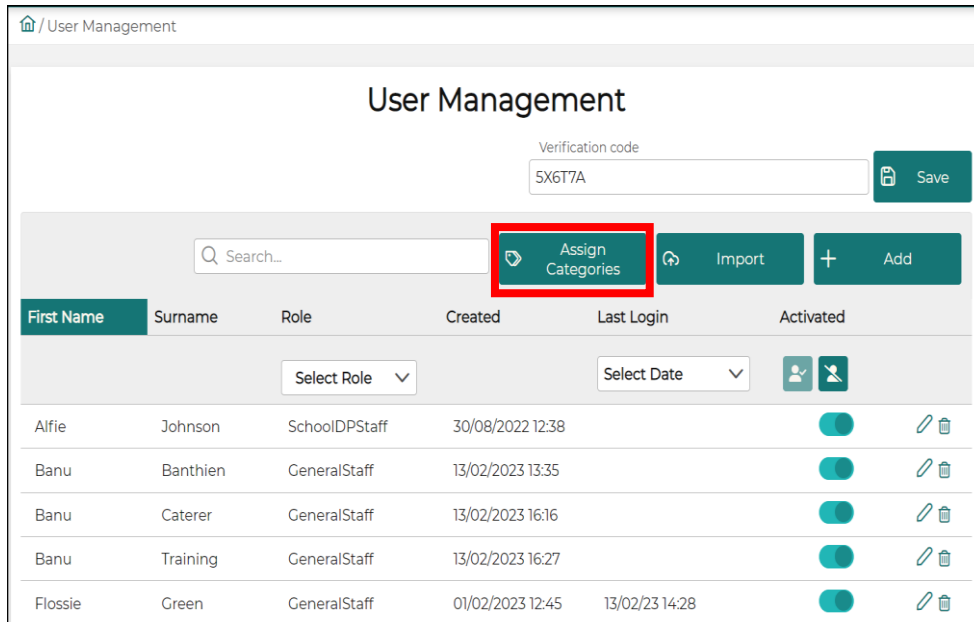
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## Bulk Categorisation

### Assign Categories

Navigate to the **User Management** area via **Administration** on the **Navigation Pane**.



Click on the **Assign Categories** button

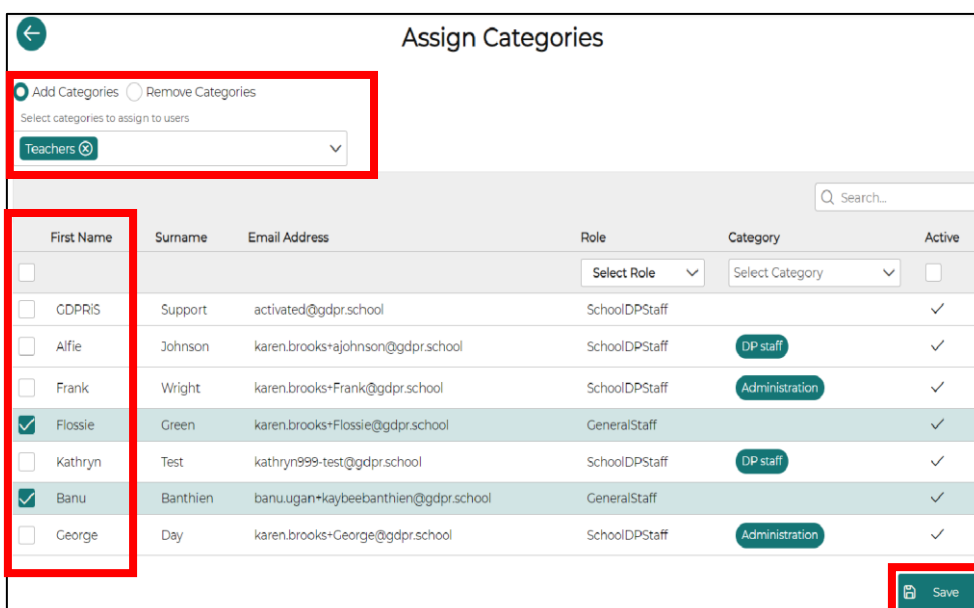
You will see a list of your staff that have accounts on the GDPRiS portal.

Select **Add Categories**

Select the users you wish to add a category to.

Select the category/categories you wish to assign to the selected staff.

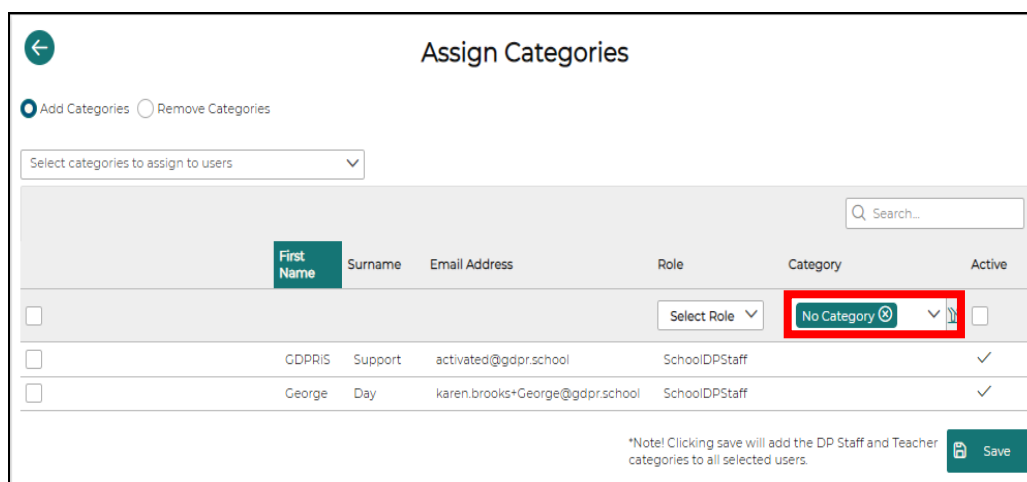
Please check the **confirmation message** and click **SAVE** again



## Filtering

You can filter by categories to check your selections.

If you choose **No Category** it will reduce your list and you will see any staff that you may have missed.



## Remove Categories

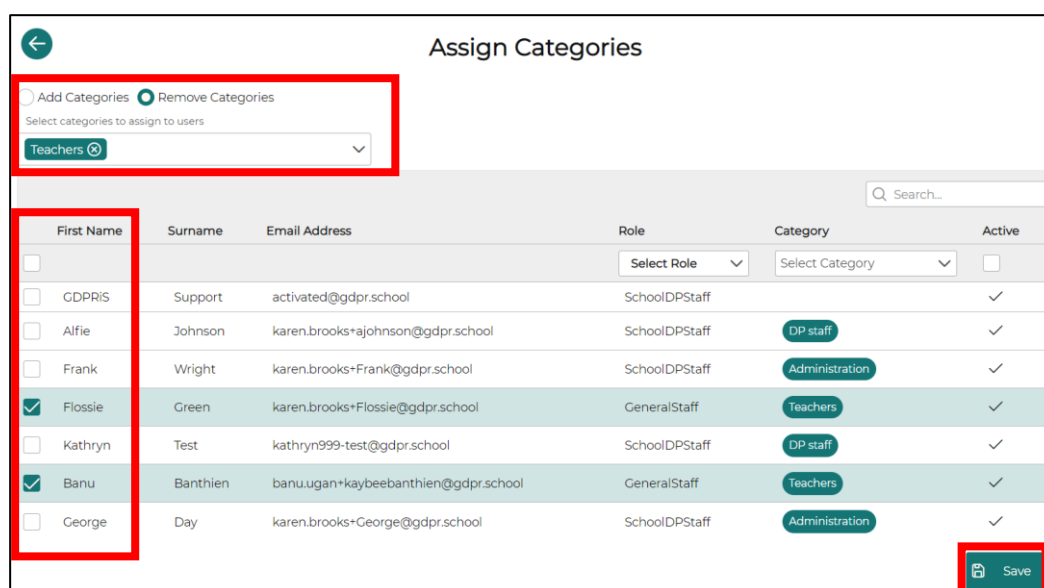
**Note: This process does not unenroll staff from courses**

Select **Remove Categories**

Select the users you wish to remove the category/categories from

Select the category/categories you wish to remove from the selected staff.

Please check the **confirmation message** and click **SAVE** again



## Assign Training Modules to Categories

### Enrolment Wizard

The Enrol Users wizard is broken down into three stages, selecting the course you want your users to be enrolled on, choosing which users you would like to be enrolled on that courses and lastly to confirm your choices.

The enrolment process requires you to do enrolments via a single course. This is done this way because of the user selection options.

Navigate to **Enrolment Settings** via the **Documents and Training** area on the **Navigation Pane**.

### Select Courses

On the Enrol Users page, select the course/s which you want your users to be enrolled on.

The screenshot displays the 'Enrol Users' wizard interface. At the top, there is a progress bar with three steps: 1. Select Course, 2. Select Users, and 3. Confirm. The 'Select Course' step is currently active. Below the progress bar, the title 'Enrol Users' is centered, followed by 'Select Course' and a language selector for 'English' and 'Español'. The main content area shows a list of eight training modules, each with a radio button for selection. The modules are:

- A Leading Schools' Barrister presents: Legal Liabilities in Data Protection B0024**: Knowing your responsibilities and receiving the best appropriate training and advice will position you to manage your legal data protection obligations.
- Back to School after Home Working B0001**: TRY THIS COURSE A task-based activity designed to encourage staff to consider where they may have stored data whilst working from home and prompt them to take appropriate action to securely dispose of that data.
- Cyber Security Expert presents: The risks of Cyberattacks? B0002**: Who'd want to carry out a cyberattack in a school? What on earth have they got to gain?
- Data Protection Essentials for Catering Staff B0004**: This course will give you an understanding of your Data Protection responsibilities, the principles of data protection, the ability to identify data breaches and the key risks to privacy compliance. Both modules required for CPD Accreditation.
- A Leading Schools' Barrister presents: SARs – What to Do and When to Refuse B0025**: The legislation about when a SAR must be produced and when it can be refused is to say the least woolly in places, we'll bring clarity to what's expected of you.
- Cyber Security Awareness B0042**: Everyone who uses technology should be aware of the security and none more so than within schools where a breach of security could harm a child. This course shows you the pitfalls you may encounter in your security, how to rectify and recover.
- Data Protection and Working/Learning from Home B0003**: Working and learning from home brings greater data protection challenges and potential dangers for schools, parents and students. This course will ensure you are aware of these dangers and how to protect against them.
- Data Protection Essentials for Governors B0006**: This course will give you an understanding of your Data Protection responsibilities, the principles of data protection, the ability to identify data breaches and the key risks to privacy compliance. Both modules required for CPD Accreditation.

## Select Users

Section 2 of the enrol users wizard is where you select the users from your school/s to be enrolled on the selected course.

The select users page will show you users from the trust and any linked schools. You can filter the users shown on the page via the following filters:

Categories

Schools

User Added after

User never enrolled to course

Last Enrolled between

Only Incomplete courses

A search feature is also available to find users.

**Enrol Users**

1 Select Course      2 Select Users      3 Confirm

**Select Users**

**Selected Course**

A Leading Schools' Barrister presents: SARs – What to Do and When to Refuse B0025

[Show Help](#)

**Filters**

User Categories: [v] Schools: [v] User added after: [ ]  Only show incomplete courses

Last enrolled between

Start Date: [ ] End Date: [ ]  User never enrolled to course

[Clear Filters](#)

[Clear all selections](#)

<input type="checkbox"/>	First Name	Surname	Email Address	Courses	Latest Enrolment Date	Progress
<input type="checkbox"/>	Craig	DP	craig.southcoat+uattes.tuser1@gdpr.school	A Leading Schools' Barrister presents: SARs – What to Do and When to Refuse C240025	09/11/2023	0
<input type="checkbox"/>	Craig	GS	craig.southcoat+uattes.tuser2@gdpr.school			
<input type="checkbox"/>	Jon	Snow	Craig.southcoat+jon.snow@gdpr.school	A Leading Schools' Barrister presents: SARs – What to Do and When to Refuse C240025	09/11/2023	0
<input type="checkbox"/>	Mike	UatTest	mike.killey+uat@gdpr.school			
<input type="checkbox"/>	Catering	TestUser2	craig.southcoat+uatcat.ering2@gdpr.school			

The **'User Categories'** will show you all those users who have the selected user category. The selection will only show you categories which you have currently applied to any user in your portal. If you have not yet started using the user categories, no categories will show. Please apply user categories in the User Management section to your individual users.

The **'Schools'** selection will allow you to filter your users shown by selected schools.

The **'User added after'** filter allows you to show all those users who have been added to the platform after the selected date.

The **'Last Enrolled between'** date selection will allow you to select a start and end date range which will show you all those users who have previously been enrolled on any version of the selected course within the selected date range. If a user has not ever been enrolled on a version of the course they will not be shown.

The **Never Enrolled** tick box will show you those users who have never been enrolled on the selected course.

The **'Clear Filters'** button will clear any filters you have used in the top part of the page which is narrowing your view of your user selection list.

The **Select All** tick box located below the **'Clear all selections'** button, will select all the users which are currently visible in the current view. If you apply filters and use the select all option, only those users on the page will be selected. If you remove the filter the other users will show up as unselected.

## Confirm Choices

The confirm choices page will show you the course which you have selected, the users which you want to enrol on the course and if they are already enrolled on the course.

The screenshot shows the 'Enrol Users' interface. At the top, there are three numbered steps: 1. Select Course, 2. Select Users, and 3. Confirm. The current step is 'Confirm'. Below the steps, there is a 'Selected Course' section with a thumbnail and title: 'A Leading Schools' Barrister presents: SARs - What to Do and When to Refuse B0025'. Below that is a 'Selected Users (4)' section with a table of users. Each user has a 'Never enrolled' checkbox. At the bottom right, there are three buttons: 'Cancel', 'Back', and 'Save'.

User Name	Never enrolled
Tony Stark (craig.southcoat+tonystark@gdpr.school)	<input type="checkbox"/>
Colonel Rhodes (craig.southcoat+ColRhodes@gdpr.school)	<input type="checkbox"/>
Pepper Potts (craig.southcoat+pepperpots@gdpr.school)	<input type="checkbox"/>
Craig DP (craig.southcoat+uattestuser1@gdpr.school)	<input type="checkbox"/>

If you are not happy with the selections, use the Back option to go back to the relevant stage where you want to make a change. Your selections will remain selected.

If a user has recently been enrolled on the selected course, they will show up in red to indicate that you might not want to enrol this user because they may already be enrolled on the course. Please re-evaluate your user selection and make sure that your user selections are correct before proceeding.

**Users will be notified of the enrolments once they are active on the site and have received their registration details.**

## Adding Users Manually

Occasionally new staff will start part way through the academic year and you have the option of adding them to GDPRiS manually on the User Management page.

Once they have been added you will need to go through the enrolment process again as you did previously but this time just select the new user using the **added after filtering** or **search** option.

## Contact the Customer Success Team

### Office hours

**Mon-Thurs:** 09:00 - 16:30 GMT

**Fri:** 09:00 – 15:30 GMT

If you require assistance regarding any section of this help guide, please do not hesitate to contact us via one of the following methods:

**Tel:** 02039 610 110

**Mail:** [support@gdpris.co.uk](mailto:support@gdpris.co.uk)