Student and Staff Area

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The student and staff area is accessed by using the Student Portal web application URL. The user is automatically redirected to the default page configured for your site, triggering Shibboleth to authenticate the user on the way.

See below for an example, where the user is redirected to a default page that is set to Payments:

Starting URL: https://apps.college.ac.uk/StudentPortal/

Redirects to:
https://apps.college.ac.uk/StudentPortal/App/Portal/Payments

Portal

Student Details

The Student Details feature of the Portal consists of two pages. The Student Detail page allows a student to submit changes to their personal details. The Student Approval page allows a staff user to approve or reject those changes and is only available to staff users.

When a student submits a change, a notification email is sent to the address configured in Student Portal. The email contains a link allowing a staff user to go directly to the review the change.

The **Student Approval** page displays student changes that have either been approved, rejected, or are still pending review. Clicking the **Review** button of a pending change displays the full details of the change, including the previous and new values for each field.

If a staff user approves a change, the Contact record in Microsoft Dynamics CRM is automatically updated with the requested changes.

Whether the student change is approved or rejected, the staff user should inform the student directly. The student will not receive a notification email from Student Portal.

Student Payments

The Student Payments feature of the Portal consists of three pages. The Payments page displays a student's current statement as determined from their Debtor record in Microsoft Dynamics GP. The student can then review the statement. If they have an outstanding balance, they can make an online payment for the full balance or a partial amount.

The **Payment History** page shows the full payment history for the student, including any online payments that are currently being processed, along with all payments from their Debtor record in Microsoft Dynamics GP.

The **Online Payments Log** page is only available to staff users. It displays any online payments that have successfully been completed through the payment provider, but then subsequently failed to be integrated into Microsoft Dynamics GP. The error message is displayed to assist in troubleshooting. Once the issue has been resolved, the payment integration can be run again from this page.

When a staff user views either the Payments or Payment History pages, they can view the page as any student. The **View as Account** field shows all the student accounts available. Choosing an account will then display the page with all the data from the chosen student.

Auto Apply

The **Auto Apply** page is only available to staff users. It contains a process that works through the open Receivables transactions of a range of Debtor accounts in Microsoft Dynamics GP. For each Debtor, it attempts to automatically apply transactions where the sum of open Credit Notes\Payments matches the sum of open Invoices.

There are two ways of specifying which Debtor accounts to work with. **Debtor Search** is used to enter either a specific Debtor ID, or to use a * wildcard character to use any Debtor ID that matches. **Debtor Range** allows a start and end Debtor ID to be entered, with all Debtors in between being included in the process.

A **Cut-off Date** can be used to restrict which transactions are included in the process. All transactions after the cut-off date are excluded from the Auto Apply processing.

The **Preview Auto Apply** button can be used to display a report of which Debtors and transactions would be updated, without making changes to any Debtor accounts. The **Do Auto Apply** button will run the process and update the Debtor accounts in Microsoft Dynamics GP.