

This brief guide will explain how to assign a licence to a 'Location, Department or a single user' (either manually, or you can set the licence flow to automatically do so) we would strongly recommend you read the entire guide in order to gain a better understanding off all the options.

If this is your first time using webPortal and your account hasn't been set up on your behalf, then you have the following options to set the licence flow to:

Location/ 'Fully Automatic' which assigns a licence to all staff registering into a location and all departments within that location. Once selected each new user when added or registered on the system will be issued a licence for that course selected.

Department only/ 'Fully Automatic' which assigns a licence to all staff registering into a selected department only within that location. Once selected each new user when added or registered on the system within that department will be issued a licence for that course selected.

Single user only/ 'The system requires the administrator to select a user or users within a department and manually assign a licence when required'

If you haven't set the system to Fully automatic, and wish to assign a licence to a whole group within a Location or Department you can now simply do so by selecting this option as detailed below.

Important: once you issue a licence to a group or user, the licence cannot be revoked (once assigned it cannot be retrieved back into your licence count) there is a popup warning before you take this action.

Assigning a licence to ALL users in one go.

As you can see in the image below, the course 'Corporate Manslaughter' has been selected via the Manage Licence button. If you wanted to quickly add a licence to ALL Registered users within Bristol, you simply click this hyperlink.

The screenshot displays the 'Assign Licences for: Corporate Manslaughter' interface. At the top, it shows licence statistics: Total Licences: 100, Active Licences: 66, Licences used by archive users: 3, and Remaining Licences: 31. Below this, there are instructions on how to assign licences to different user groups. The 'Locations and Departments' section lists four locations: Bristol (7), Cardiff (0), Chester (0), and Devon (0). For each location, there is a link to 'Assign licences to registered users' and an 'Expand Location >>' link. A checkbox for 'Assign auto licence to ALL future users' is present for each location, with the checkbox for Chester checked.

Assign Licences for: **Corporate Manslaughter**

Total Licences: 100 Active Licences: 66 Licences used by archive users: 3 Remaining Licences: 31

■ All ■ Partial ■ None

This page shows the current licence number along with both consumed and remaining licences. To assign a licence to a Location and all Departments within that Location, click 'Assign licence to ALL registered users'. This sets a primary trigger making it **fully automatic** for this location and subsequent departments within that Location.

If you wish to only Auto assign a licence to all users within a specific department within a location, do not tick the Location, instead Expand Location, and tick 'Assign licence to ALL registered users'. This sets a primary trigger making it **fully automatic** for this Department only. If you want to assign a licence to a user only; click Expand Location and then 'show users' relevant to their Department.

If you wish to add a licence to all Registered users, but not any future users in a Location and all subsequent Departments click Assign licence to ALL registered users.

If you wish to add a licence to all Registered, but not future users in a Department only; click Expand Location and click Assign licence to ALL registered users in that Department.

Locations and Departments

■ Bristol 7 [Assign licences to registered users](#) | [Expand Location >>](#)
 Assign auto licence to ALL future users.

■ Cardiff 0 [Assign licences to registered users](#) | [Expand Location >>](#)
 Assign auto licence to ALL future users.

■ Chester 0 [Assign licences to registered users](#) | [Expand Location >>](#)
 Assign auto licence to ALL future users.

■ Devon 0

When you click **Assign Licence** a popup to confirm will show as per example below.

Please note, this action does not set the system to Automatically assign a licence to future users, only those registered at that point.

To make this FULLY AUTOMATIC for future users yet to register, you would select the other checkbox option below '**Assign auto licence to ALL future users**'.

This action will issue a licence out to all new registered users throughout all departments under the Bristol location.

The screenshot displays the 'Licence Management' interface. At the top, it says 'Powered by: ATF Solutions Ltd.'. Below this, there are statistics: 'Total Licences: 100', 'Active Licences: 66', and 'Licences used by'. There are also radio buttons for 'All', 'Partial', and 'None'. A large text block explains the licence assignment process, including instructions on how to assign licences to all registered users, to a specific department, or to all future users. A red box highlights the 'Assign licences to registered users' button in the 'Locations and Departments' section, which is currently set to 'Bristol'. A red arrow points from this button to a confirmation popup window. The popup contains the following text: 'You are about to assign licence to **all Registered** users. Please confirm this action by selecting the checkbox and then clicking the Continue button. Please note: Once a licence is assigned can't be revoked.' Below the text is a checkbox labeled 'I Agree', a 'Cancel' button, and a 'Continue' button.

You can apply the same logic to a Department only without. See following examples.

Assigning a licence to ALL users WITHIN a DEPARTMENT in one go.

As you can see in the image below, the course 'Corporate Manslaughter' has been selected via the Manage Licence button. If you wanted to quickly add a licence to ALL Registered users in a department only within Bristol, you simply click **Expand Location** hyperlink.

This will show you the departments within this location.

The screenshot displays the 'Assign Licences for: Corporate Manslaughter' interface. At the top, it shows licence statistics: Total Licences: 100, Active Licences: 66, Licences used by archive users: 3, and Remaining Licences: 31. Below this are radio buttons for 'All' (selected), 'Partial', and 'None'. A light blue informational box explains the licence assignment process, including instructions on how to assign licences to all registered users in a department by clicking 'Expand Location'. The main section, 'Locations and Departments', lists 'Bristol' with 7 departments. Under 'Bristol', there are two department cards: 'C and E dept' with 0 users and 'HR Department' with 7 users. Each department card has a link to 'Assign licences to registered users' and a 'Show Users >>' link. A red box highlights the 'Expand Location' link under the 'Bristol' header, and another red box highlights the 'Assign licences to registered users' link under the 'C and E dept' card. Red lines connect these boxes to the 'Assign Licences for: Corporate Manslaughter' header at the top of the page.

When you click **Assign Licence** a popup to confirm will show as per example below.

Please note, this action does not set the system to Automatically assign a licence to future users, only those registered at that point. You can see how many registered users there are within this department before you confirm.

To make this FULLY AUTOMATIC for future users yet to register, you would select the other checkbox option below '**Assign auto licence to ALL future users**'. This action will issue a licence out to all new registered users within THIS DEPARTMENT ONLY; assuming you wish to grant a licence to this department only

The screenshot displays the 'al Training System' interface. At the top, it says 'Powered by: ATF Solutions Ltd.'. Below this, there are statistics: 'Total Licences: 100', 'Active Licences: 66', and 'Licences used by an'. There are three status indicators: 'All' (green), 'Partial' (orange), and 'None' (red). The main content area contains instructions on how to assign licenses, such as 'If you wish to only Auto assign a licence to all users within a specific department within a location, do not tick the Location, instead Expand Location, and tick 'Assign auto licence to all registered and any future users added within that Department only. This sets a primary trigger making it fully automatic for this Department only. If you want to auto assign...'. A 'Locations and Departments' section is visible, with 'Bristol' expanded to show 'C and E dept' and 'HR Department'. A red box highlights the 'C and E dept' and another red box highlights the 'Assign licences to registered users' button. A confirmation popup is overlaid on the screen, containing the text: 'You are about to assign licence to 26 users.', 'Please confirm this action by selecting the checkbox and then clicking the Continue button.', and 'Please note: Once a licence is assigned can't be revoked.' The popup has an 'I Agree' checkbox, a 'Cancel' button, and a 'Continue' button. A red line connects the 'I Agree' checkbox in the popup to the 'Assign licences to registered users' button in the background interface.

Assign a licence to an individual only:

If however, you don't wish to set any location or department to Auto you can select individuals by **Expanding the Location**, then click on **Show Users** within a department; this will show all users opposite; to assign a licence **tick their name** and then **click update**.

The screenshot shows the 'Assign Licences for: Corporate Manslaughter' interface. At the top, there are summary statistics: Total Licences: 100, Active Licences: 66, Licences used by archive users: 3, and Remaining Licences: 31. Below this are three colored buttons: All (green), Partial (orange), and None (red). A large blue text box provides instructions on how to assign licences to locations, departments, or individual users. The main interface is divided into two panels. The left panel, 'Locations and Departments', shows a tree view with 'Bristol' (7) expanded, containing 'C and E dept' (0) and 'HR Department' (7). The 'C and E dept' is highlighted with a red box. The right panel, 'Users in Bristol/C and E dept', shows a list of users with checkboxes next to their names: A Kearney, Andrew Ship, Ann O'Brien, Ann Graham, Brian Garn, and C Walford. A red box highlights the 'Show Users >>' link in the left panel and the user list in the right panel, with a red arrow pointing from the link to the user list.

Assign Licences for: **Corporate Manslaughter**

Total Licences: 100 Active Licences: 66 Licences used by archive users: 3 Remaining Licences: 31

All Partial None

This page shows the current licence number along with both consumed and remaining licences: To assign a licence to a Location and all Departments within that location, tick 'Assign auto licence to all **Registered** and Future users. This action registers and any future users added within that Location'. This sets a primary trigger making it **fully automatic** for this location and subsequent departments within that location.

If you wish to only Auto assign a licence to all users within a specific department within a location, do not tick the Location, instead Expand Location, and tick 'Assign auto licence to all **Registered** and Future users for that Department. This action registers and any future users added within that Department only. This sets a primary trigger making it **fully automatic** for this Department only. If you want to auto assign to more than one department within that location, repeat where appropriate.

If you want to assign a licence to a user only; click Expand Location and then 'show users' relevant to their Department.

If you wish to add a licence to all Registered users, but not any future users in a Location and all subsequent Departments click Assign licence to ALL registered users.

If you wish to add a licence to all Registered, but not future users in a Department only; click Expand Location and click Assign licence to ALL registered users in that Department.

Locations and Departments

Bristol 7

Assign licences to registered users | Collapse Location <<

Assign auto licence to ALL future users.

C and E dept 0

Assign licences to registered users | Show Users >>

Assign auto licence to ALL future users.

HR Department 7

Assign licences to registered users | Show Users >>

Assign auto licence to ALL future users.

Users in Bristol/C and E dept

A Kearney

Andrew Ship

Ann O'Brien

Ann Graham

Brian Garn

C Walford