University of Dundee

Agent Portal

A user guide for agents

Version 3 (September 2024)

Contents

Using Agent Portal

Introduction

We are very pleased to give you access to our Agent Portal. From our Agent Management dashboard all agent portal users will be able to:

- create and submit new applications from the Agent Portal
- carry out tasks on behalf of your applicants, e.g. upload documentation
- view all applications submitted to us by you via the Agent Portal
- edit your own contact details

Agency managers will also be able to:

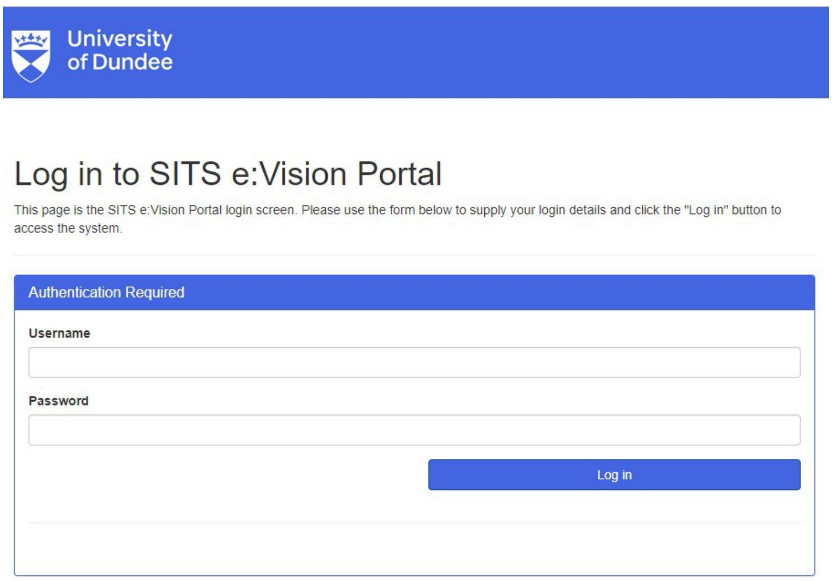
- view and edit the contact details we hold for your agency
- edit agency staff contact details
- create Agent Portal accounts for other members of staff from your agency
- view all applications submitted to us via the agent portal by all staff in your agency
- assign applications to agency staff

Once they have an account, we strongly encourage all agency staff to submit new applications through our Agent Portal so that they can view and check the status of these applications in the portal. Any new applications submitted through our Apply Direct system without using the Agent Portal will not immediately be visible in Agent Portal.

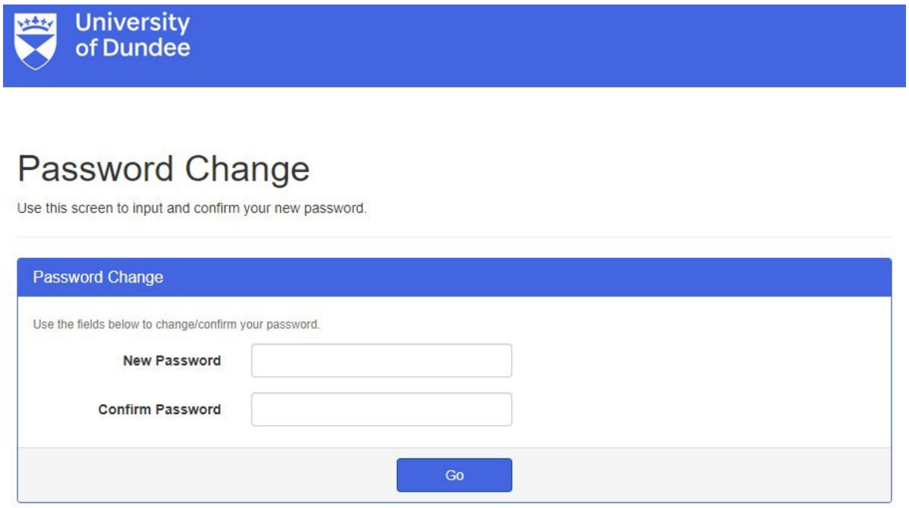
Please follow the instructions and next steps below. If you have any general questions, please contact your International Recruitment Officer (https://www.dundee.ac.uk/globalisation/people?f%5B0%5D=group%3A646) who will be able to support you.

Logging in to Agent Portal

1. You can access our Agent Portal from the link on https://www.dundee.ac.uk/guides/agent-portal.
2. The screen shown below is the portal log in screen. You may recognise this if you have ever logged into My Applications on eVision on behalf of one of your students.



3. When your account was created, you will have received an email from us which included your Agent Portal username and a temporary password. Your Agent Portal username is your personal Agent Code.
4. When you log in for the first time you will be asked to change your temporary password to something memorable and secure that only you know. Your password should be a minimum of 8 characters long and must contain: at least one upper case (A-Z), one lower case (a-z), one number (0-9), one special character (! ? * % ( ) @ # $ ^ & + - =).

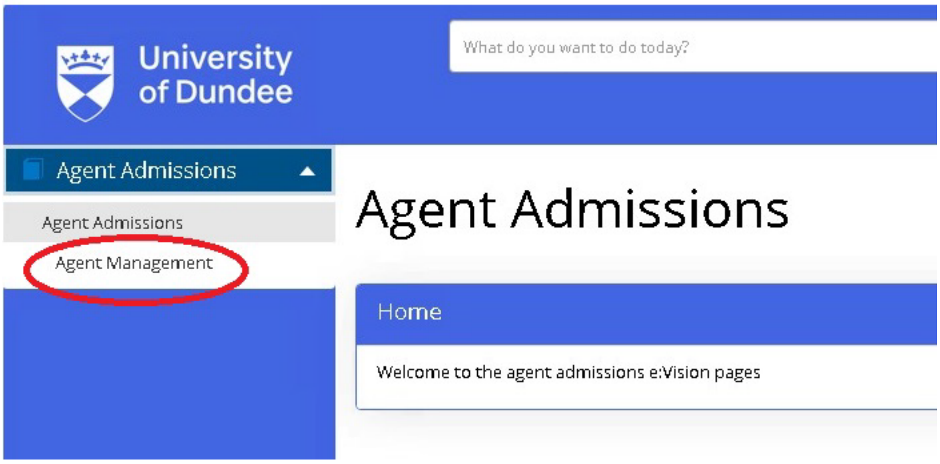


5. As a security measure, **your temporary password will expire after 60 days**, so please ensure you log in to your Agent Portal account and change your password before then. The exact date it will expire will be shown in the email you receive. If your temporary password expires before you have changed it, please contact our team at app-support@dundee.ac.uk.
6. Once you have changed your temporary password you will be taken directly to the Agent Admissions screen.

7. In the top right corner of this screen you can access the following system functions:

   a. Pin
   b. Help
   c. Notifications – click here to view any messages from us
   d. Your Profile Details – from here you can manage your profile, change your password, manage consent and log out of the system.

8. On the menu to the left of the screen, click on the arrow next to ‘Agent Admissions’ and you will see the option called ‘Agent Management’. Click this to open the **Agent Management Dashboard**.

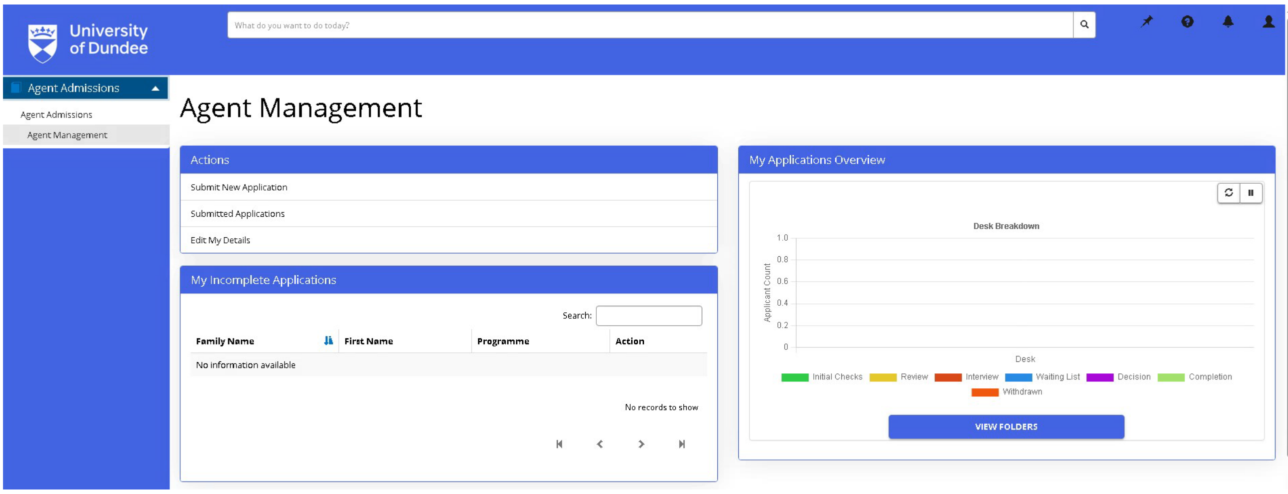


9. The **Agent Management Dashboard** is the main screen which gives you access to all parts of the system. If you used our previous Agent Portal, you will notice that this dashboard looks very different from before.

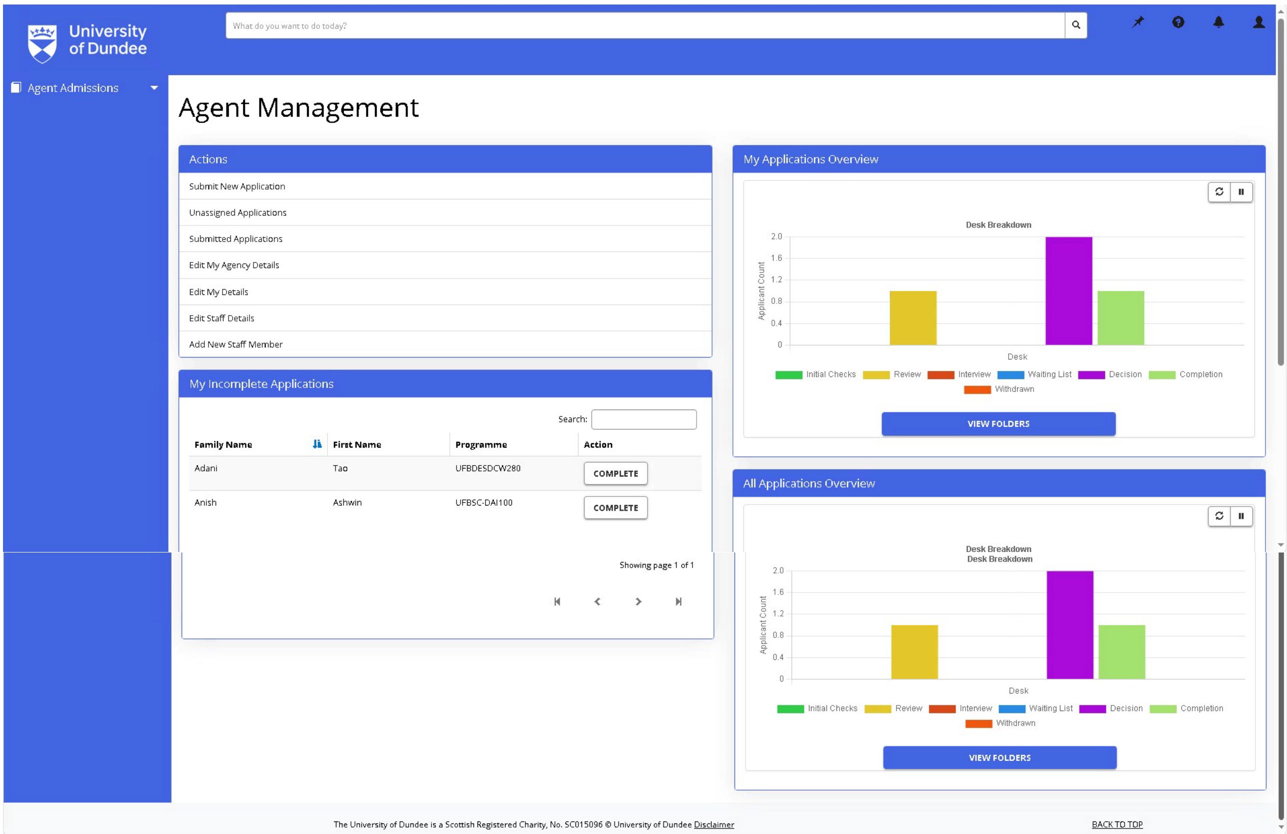
The Agent Management Dashboard

Depending on your level of access to our Agent Portal, the Agent Management Dashboard will look slightly different.

For standard users, the dashboard will look like this:



For managers, the dashboard has more options:



We're going to look at the elements on the Agent Management Dashboard which are used by all users first. Functionality which is for managers only, will be explained from page 16 onwards.

Actions

1. From this section you can click to do the following:
    a. Submit new application *(all users)*
    b. Unassigned applications *(Managers only)*
    c. Submitted applications *(all users)*
    d. Edit My Agency details *(Managers only)*
    e. Edit My details *(all users)*
    f. Edit Staff details *(Managers only)*
    g. Add new Staff Member *(Managers only)*

   For standard users, the Actions list looks like this:

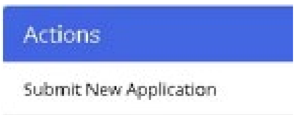
   For managers, the Actions list looks like this:

2. Clicking any of the links will take you to a different part of the Agent Portal. The functionality of each of the action links is explained in more detail in this User Guide.

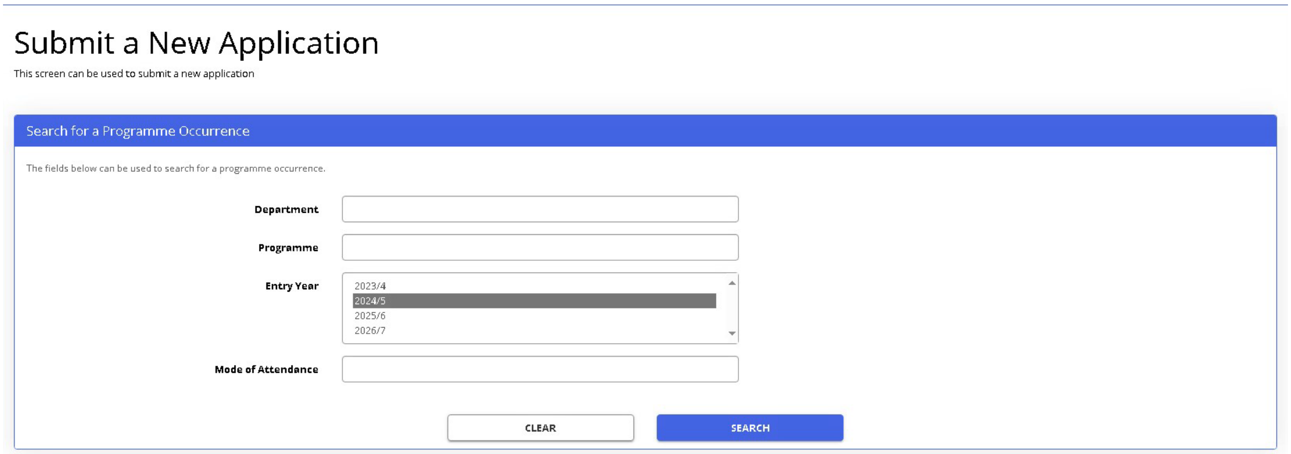
Submit a new application (all users)

Using the Agent Portal, you can create new applications on behalf of your students. You can save your progress for each application and return to complete and submit it later.

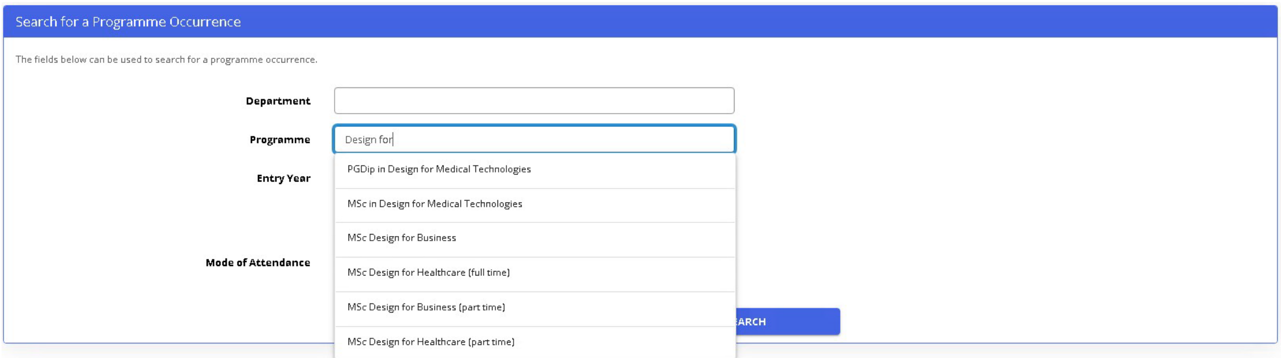
1. Click the **Submit New Application** link in the Actions section of the Agent Management dashboard.



2. This will take you to the programme selection/search screen.



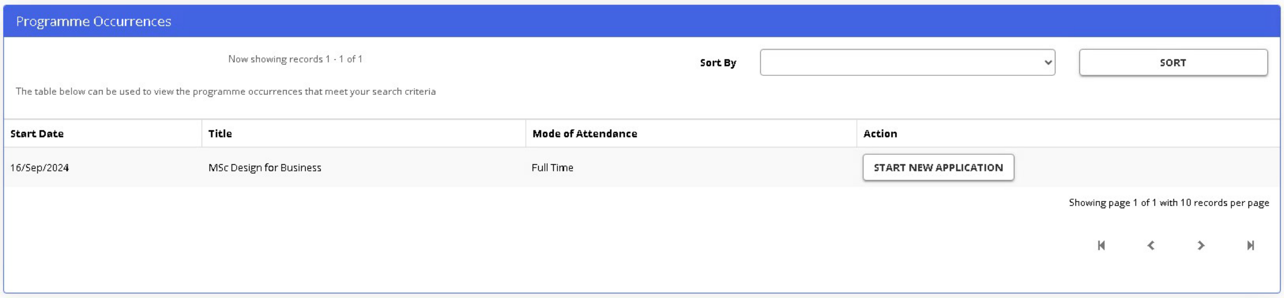
3. First select the correct **Entry Year** and then start to type the name of the programme in the **Programme** field. As you start to type, the programme names which match will appear in the drop-down list. Try to be as exact as possible to narrow down the number of options which appear. In the example shown below you can see options appearing when '2024/5' is entered as the Entry Year, and 'Design for' is typed in the Programme field.



4. If there are a few programmes which match you can scroll through the options in the drop-down list. A maximum of 30 programmes can appear in the drop-down list, so you may have to type more details to focus the search results. Please make sure you are choosing a programme name which also includes the designation, i.e. BEng (Hons), BSc (Hons), MA (Hons), MSc, MRes etc.

5. Choose the programme you are looking for from this list. The programme name will show in the **Programme** field. Now click **Search**.

6. The next screen shows you all the intake options currently available for this programme.

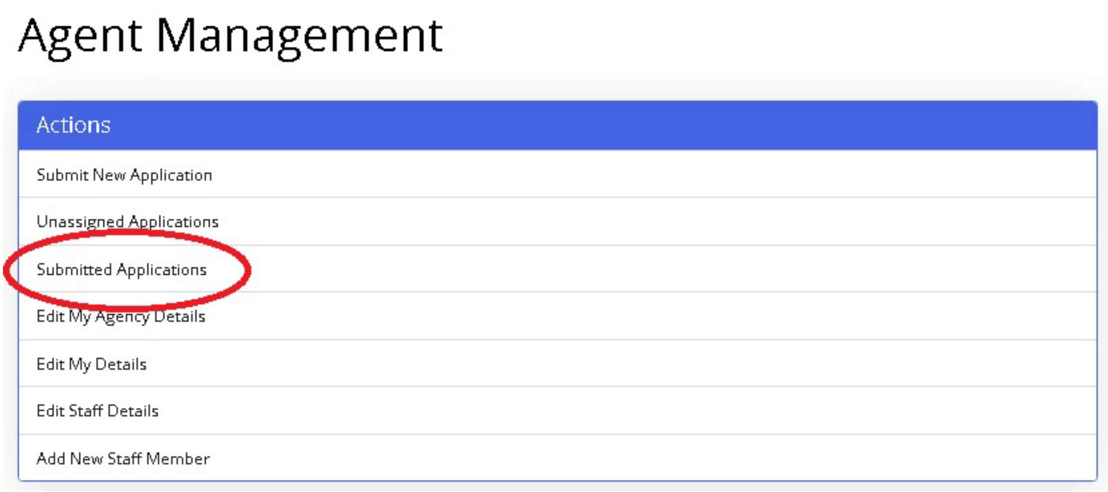


7. If you don't type anything in the **Programme** field and then click **Search** you will see all available programmes. You can then use the page buttons in the bottom right of the screen to navigate through longer course lists or use the **Sort by** box in the top right. Since we have hundreds of undergraduate, taught postgraduate and research programmes it is not advisable to do this.
8. The programme list is sorted A to Z by title by default. You can choose to sort the list by another column by clicking the column name and the sort icon  . If you click the sort icon once it will sort the list in A to Z order, and if you click is again it will sort in Z to A order.
9. For some programmes, and at different times of year, it may be possible to choose from more than one academic year and/or intake. Please ensure you have chosen the course with the correct academic year and intake, then click **Start New Application**.
10. After you click **Start New Application** a new browser tab will open and you will be taken into our new Apply Direct system.
11. **From here on you must complete the applicant's details**, create a temporary password for the Apply Direct system for the applicant (and remember to share this with them) and then submit the application once it's complete.
12. You will be able to save an incomplete application and then return to complete it from the **My incomplete applications** section in the Agent Management Dashboard.
13. If you haven't used our Apply Direct system before there are some instructions for completing the application on our website at www.dundee.ac.uk/agents.
14. When you reach the part of the application which asks for details of the agent, your agency details will be automatically populated.
15. You can return to the main Agent Management Dashboard by clicking the previous tab and choosing **Agent Management** from the menu on the left.

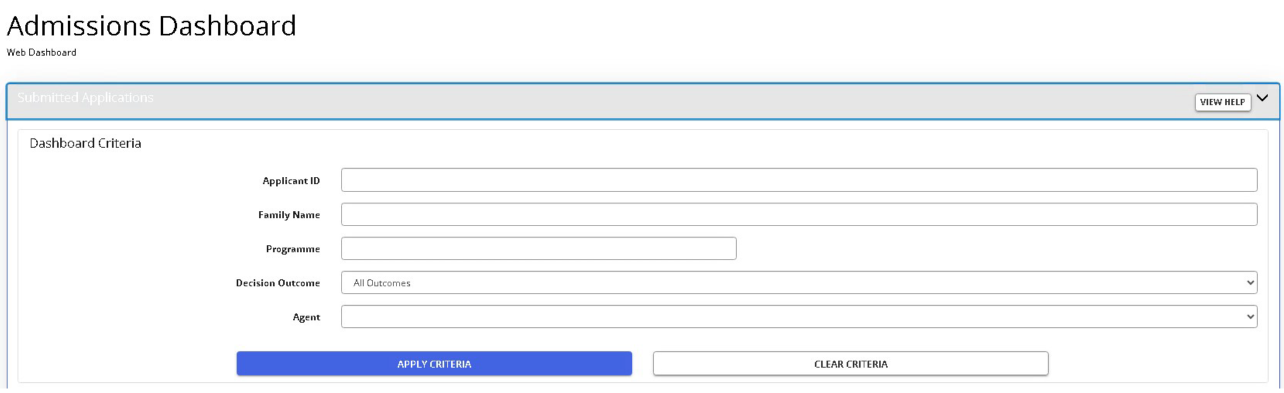
View submitted applications (all users)

You can view the status of all the applications you have completed and submitted to us at any time.

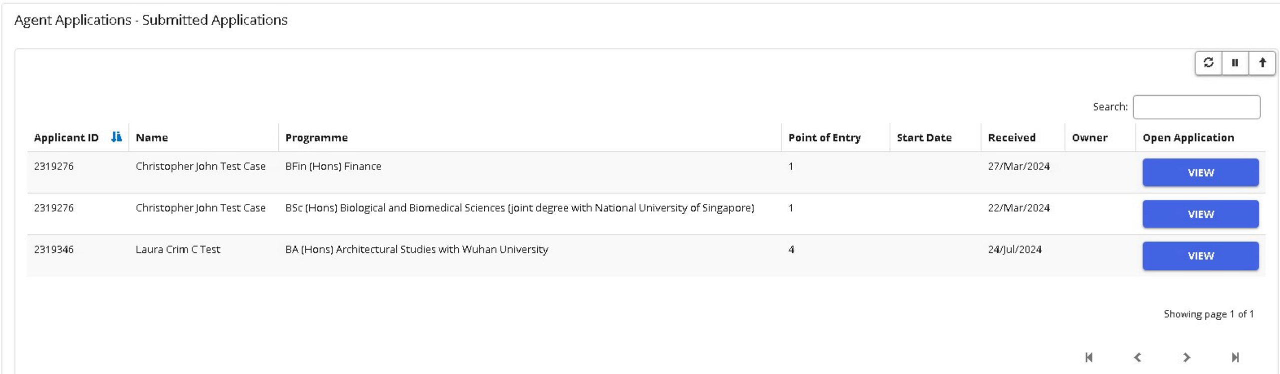
1. Click the **Submitted applications** link in the Actions section of the Agent Management Dashboard.



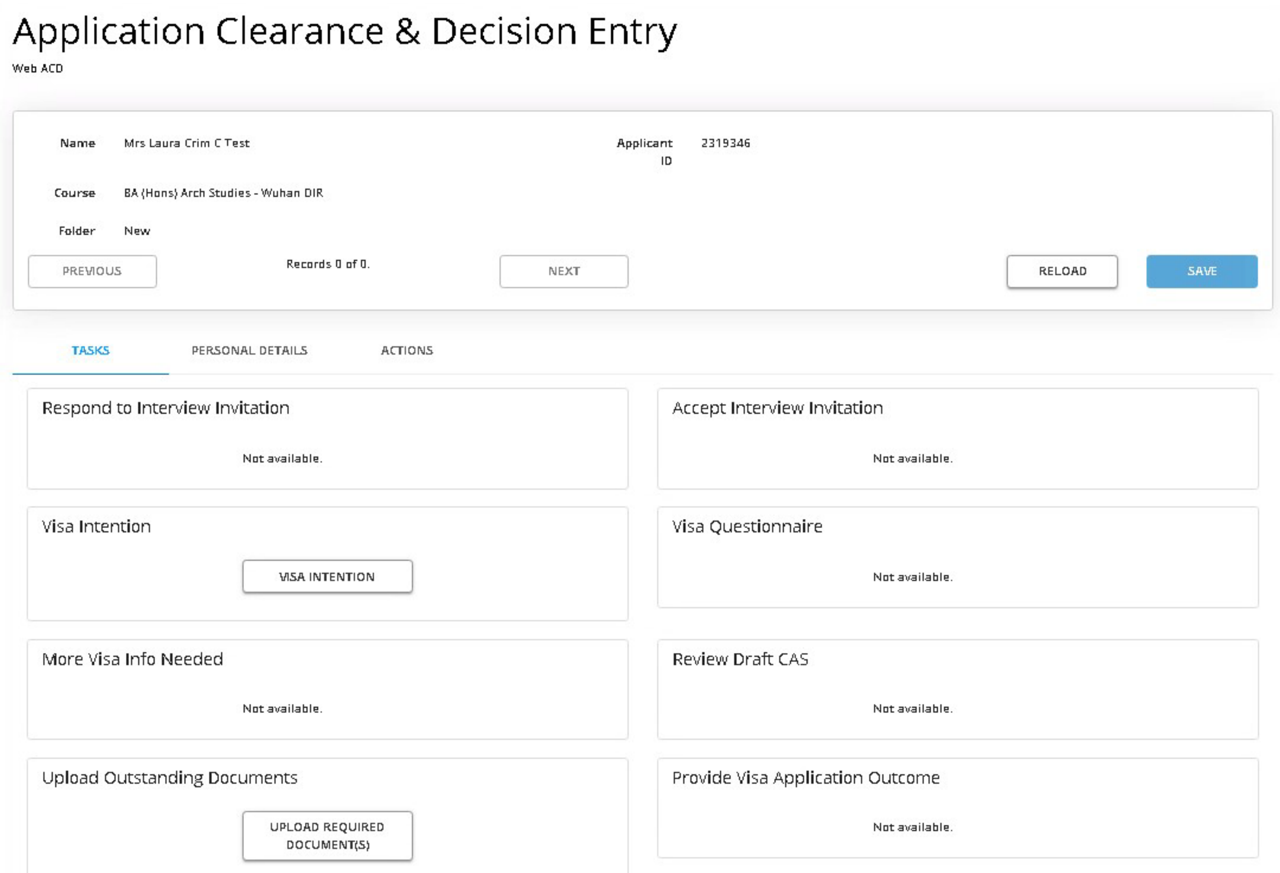
2. On the next screen click the blue **Submitted** Applications bar to open the Submitted Applications Dashboard.
3. From this screen you can either retrieve all applications you have submitted to us, or you can search for one application.



4. You can choose to either retrieve all applications you have submitted by leaving all fields blank, or you can search using the student's University of Dundee Student ID, their name, or programme. You can also search for programmes by their decision outcome, e.g. to see all applications with a decision still pending. Managers will be able to view applications submitted by all agents in their agency office.
5. When searching you can use the * (asterisk) to substitute for missing information, e.g. if you enter W*ng in the surname field, this might produce results for students with the name of Wang, Weng, Wing, Wong, Wung etc. Click **Apply Criteria**.
6. If you have standard user access, you will see a list of all applications you have submitted which matches the criteria you used to search. If you have Manager access, you will see a list of all applications submitted by your agency office which matches the criteria you used to search. The list is shown in alphabetical order of the students' surnames, but you can change this to any other column by clicking the column heading.
7. You can see an example (with test applications) of what the list of submitted applications looks like on the next page.



8. If you click **View** next to any of the applications shown in the list, a new browser tab will open and take you into the application. From here you can see if there are any outstanding Tasks to complete, e.g. upload any requested documents, confirm visa intentions etc, and you can action them on behalf of the applicant.

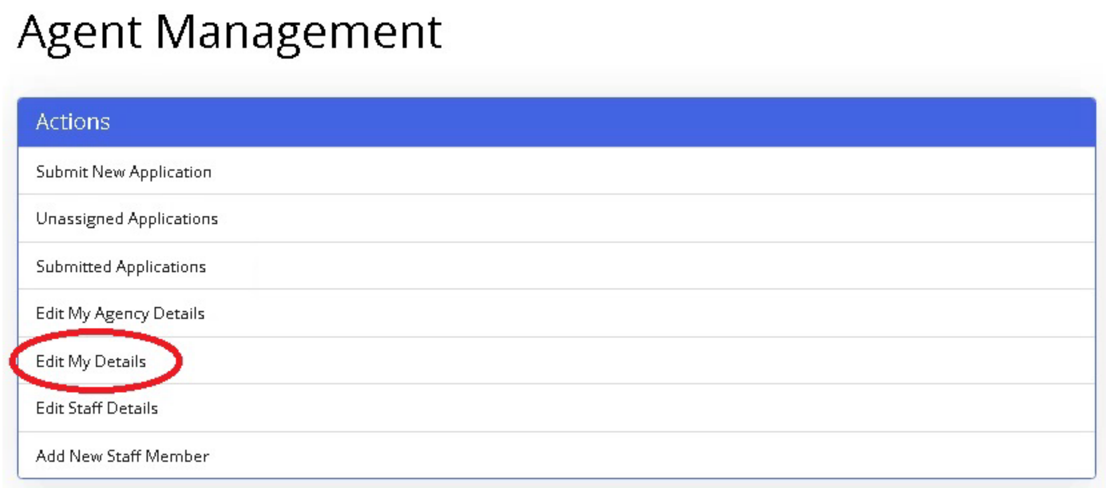


9. To return to the **Agent Management Dashboard**, return to the previous browser tab.

Edit My Details (all users)

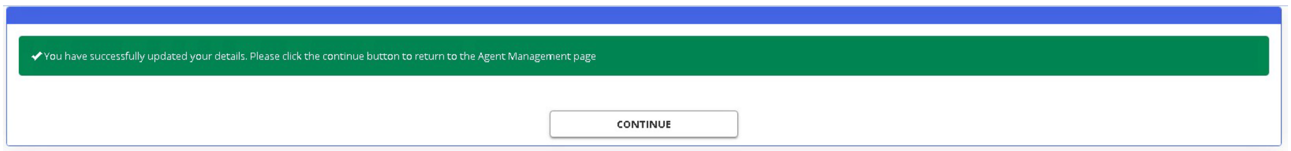
If required, you can edit your First Name, Family Name, Email address or Job Title that we hold for you.

1. Click the **Edit My Details** link in the Actions section on the Agent Management Dashboard.



2. The **Edit My Details** screen opens and you can edit any of the four fields.

3. Click **Save** and you will see confirmation that the changes you have made have been successfully updated.

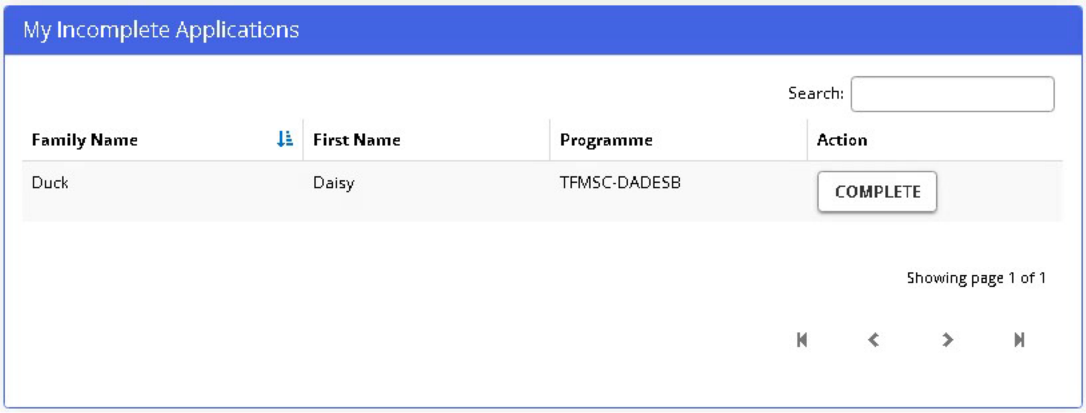


4. Click **Continue** to return to the **Agent Management Dashboard**.

My incomplete applications (all users)

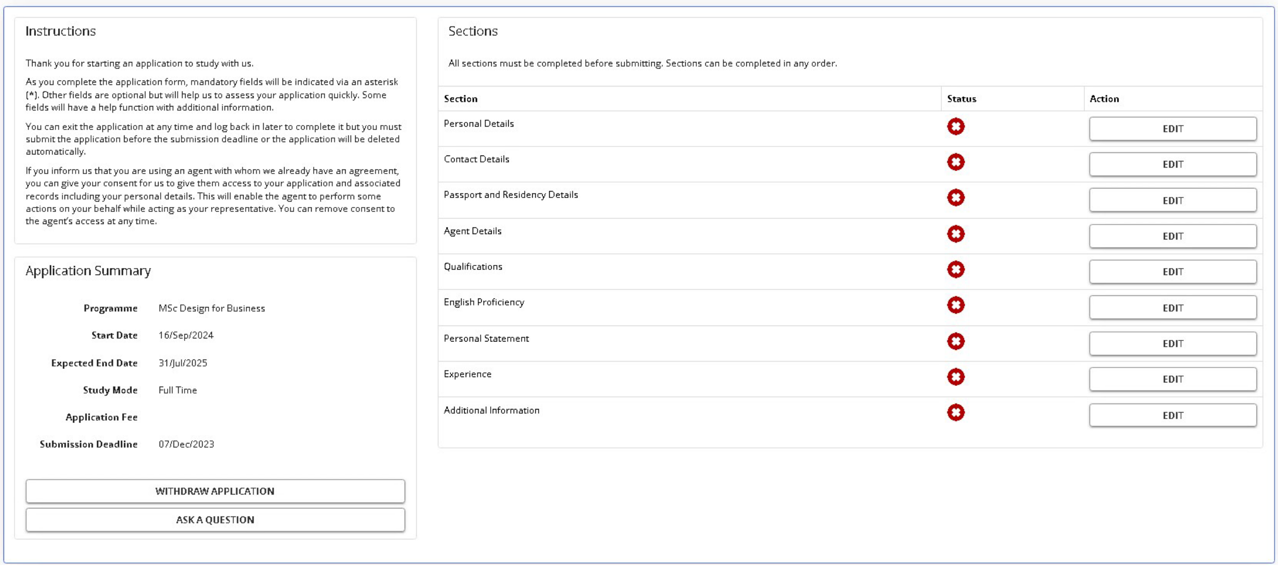
If you are unable to complete an application in the same session your progress will be saved and you can return to it at any time.

1. On the **Agent Management Dashboard** you will see a section which shows all your incomplete applications. If you have many incomplete applications, you can search for the one you want by using the Search box or scrolling through the pages using the arrows in the bottom right of the section.



2. In this example there is only one unsubmitted application, but if you have more than one you will see them all on this screen. You can sort the applications shown in the table by clicking the arrow in the column heading.
3. Once you have clicked **Complete** against the correct student's record the application form will open in a new browser tab and you will be able to see easily which sections have still to be completed**.**

My Application Form

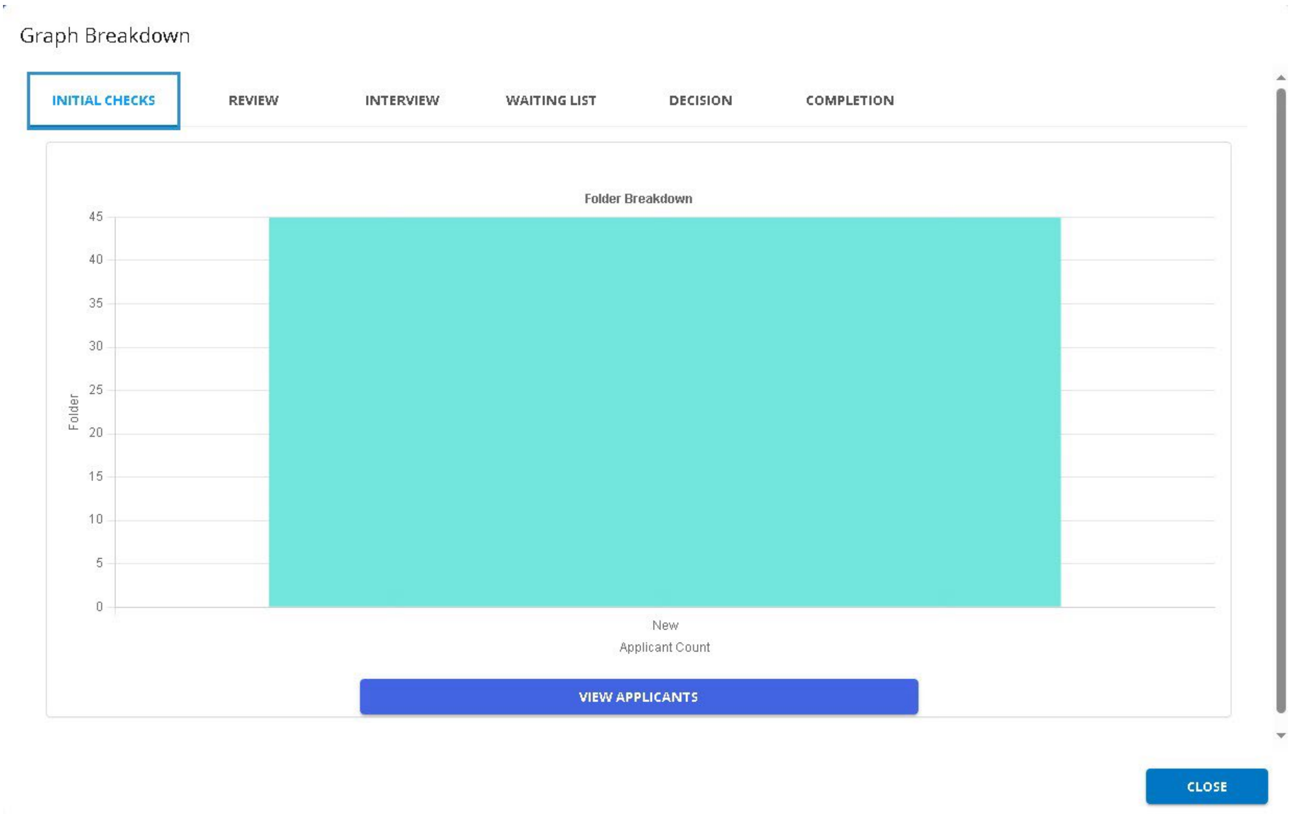


4. Complete the outstanding sections by clicking **Edit** next to the relevant section(s). When each section is complete you will see a green tick in the **Status** column.
5. To return to the **Agent Management Dashboard**, return to the previous browser tab.

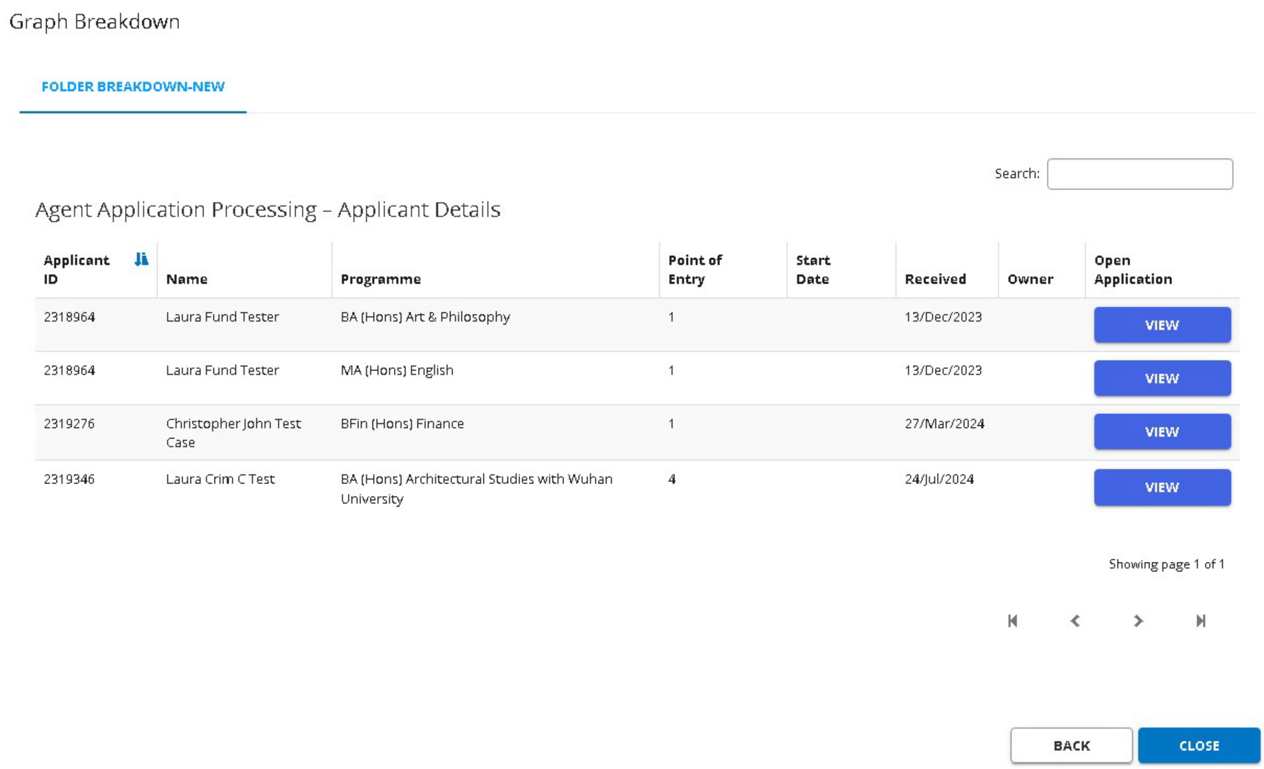
My Applications Overview (all users)

From the **Agent Management Dashboard** you can view a graphical representation of all the applications you have submitted.

1. This is a dynamic chart, which means that you can click on each bar to see more details.
2. This view refreshes automatically but you can also force a refresh or pause the refresh by clicking either of the two buttons in the top right corner.
3. The chart shows how many applicants you have sitting at each stage:
    a. Initial checks
    b. Review
    c. Interview
    d. Waiting list
    e. Decision
    f. Completion
    g. Withdrawn
4. If you hover your cursor over each bar, you can see how many applicants are in that stage.
5. Click **View Folders** below the chart and a new dialogue box opens. This has a tab for each stage along the top, with a button to **View Applicants** in each stage below the chart.



6. If you click **View Applicants** you will see a list of our applicants with applications currently in that stage. Thew view below shows some test applicant details.



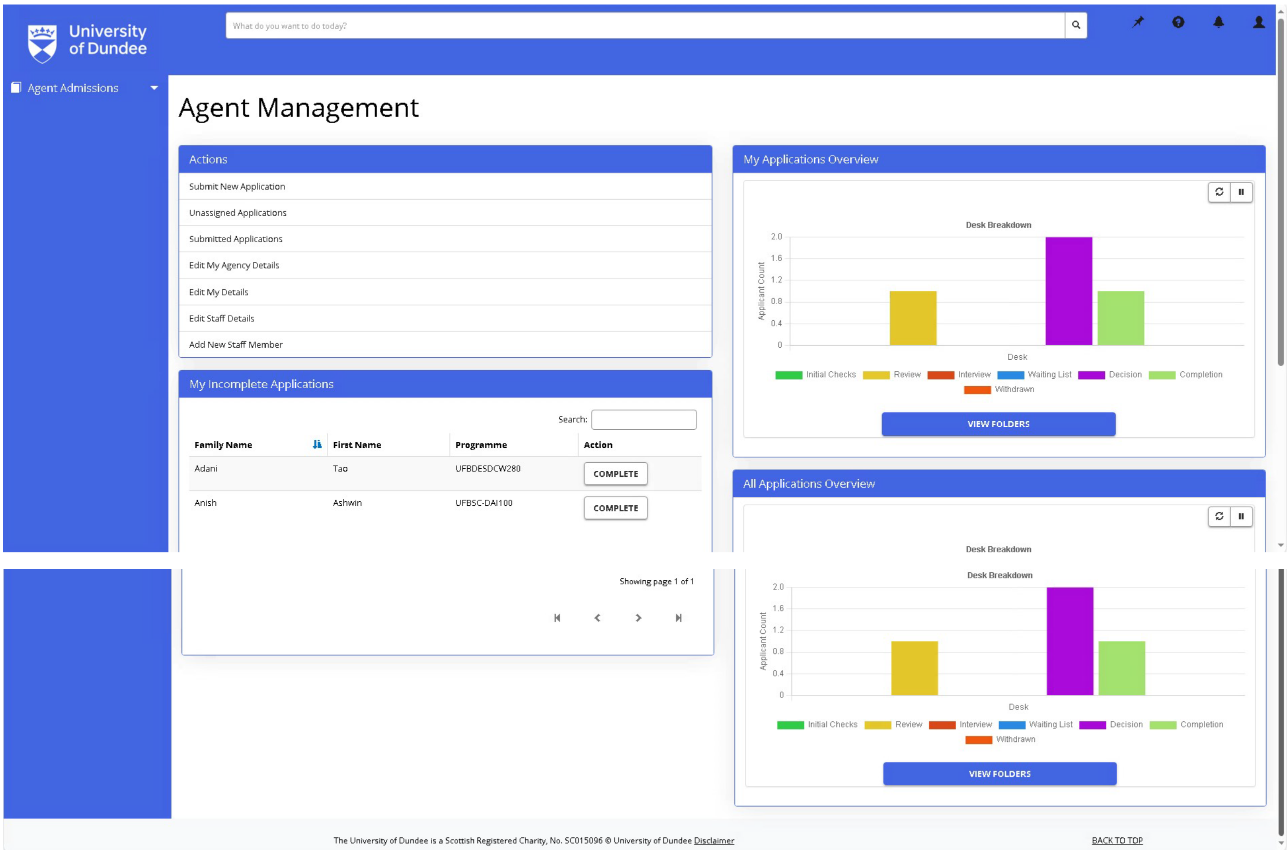
Applicant ID	Name	Programme	Point of Entry	Start Date	Received	Owner	Open Application
2318964	Laura Fund Tester	BA (Hons) Art & Philosophy	1		13/Dec/2023		VIEW
2318964	Laura Fund Tester	MA (Hons) English	1		13/Dec/2023		VIEW
2319276	Christopher John Test Case	BFin (Hons) Finance	1		27/Mar/2024		VIEW
2319346	Laura Crim C Test	BA (Hons) Architectural Studies with Wuhan University	4		24/Jul/2024		VIEW

7. From this screen you can click **View** and see each application in more detail.
8. Click **Back** to return to the previous view. From there you can choose another tab to view applications at different stages.
9. Click **Close** to return to the Agent Management Dashboard.

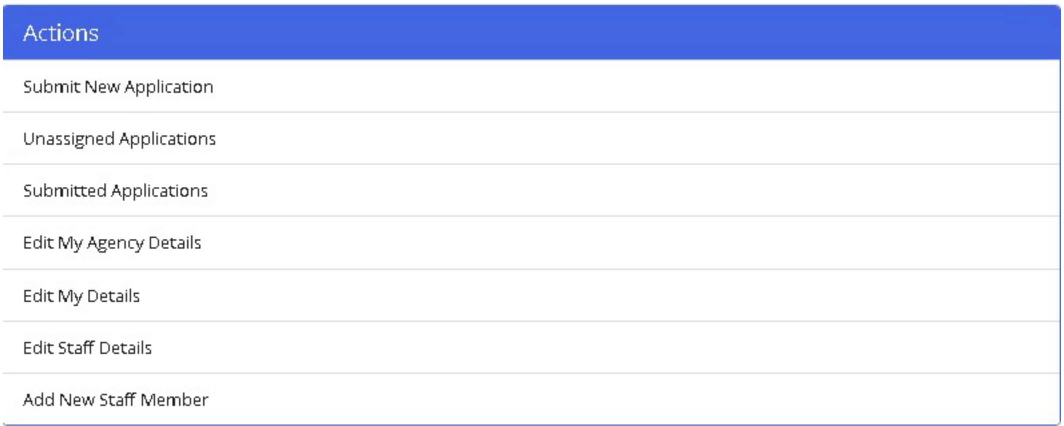
Functionality for managers only

Anyone with **Manager Level** access in Agent Portal will have access to more options than standard users.

For managers, the Agent Management Dashboard looks like this:



The **Actions** list for managers is also more extensive:

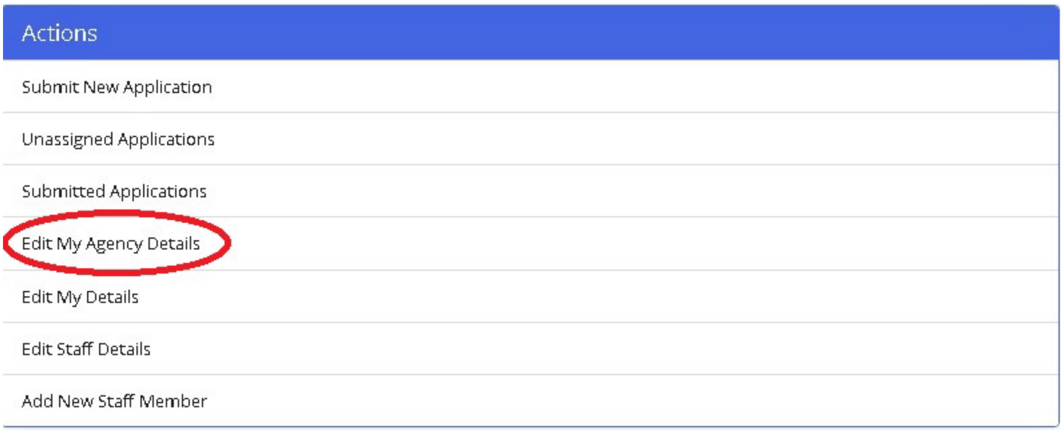


The following pages explain some of the option which only managers will be able to access.

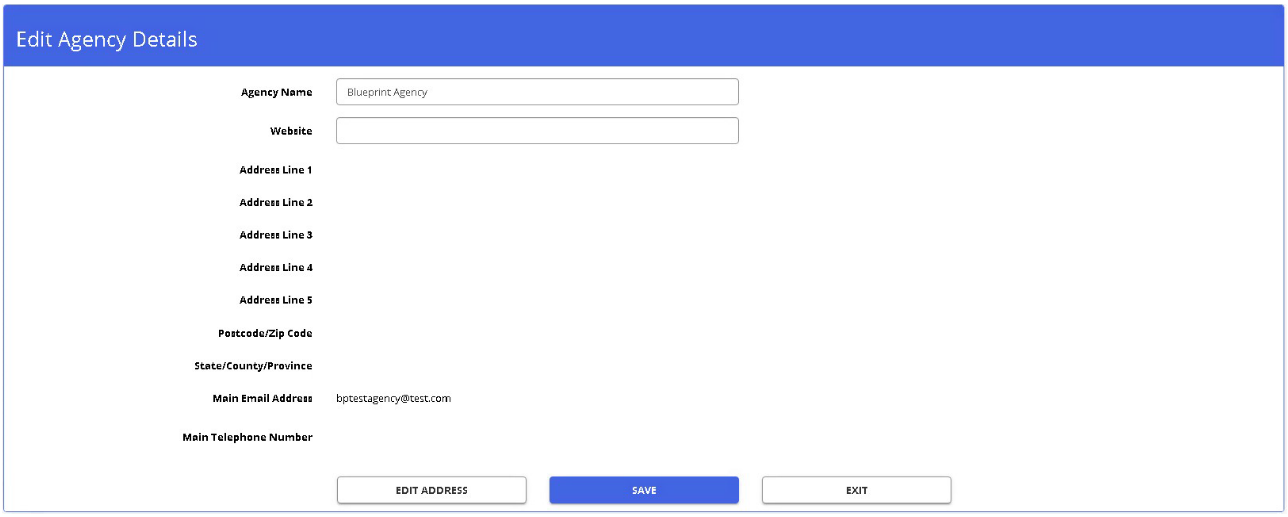
Edit My Agency Details (Managers only)

Anyone with **Manager Level** access can view and edit the details we hold for your agency.

1. Click the **Edit My Agency Details** link in the Actions list on the Agent Management Dashboard.



2. This opens the **Edit Agency Details** screen. You can see the details we currently hold for your agency, and if anything needs to be updated, you can do this here

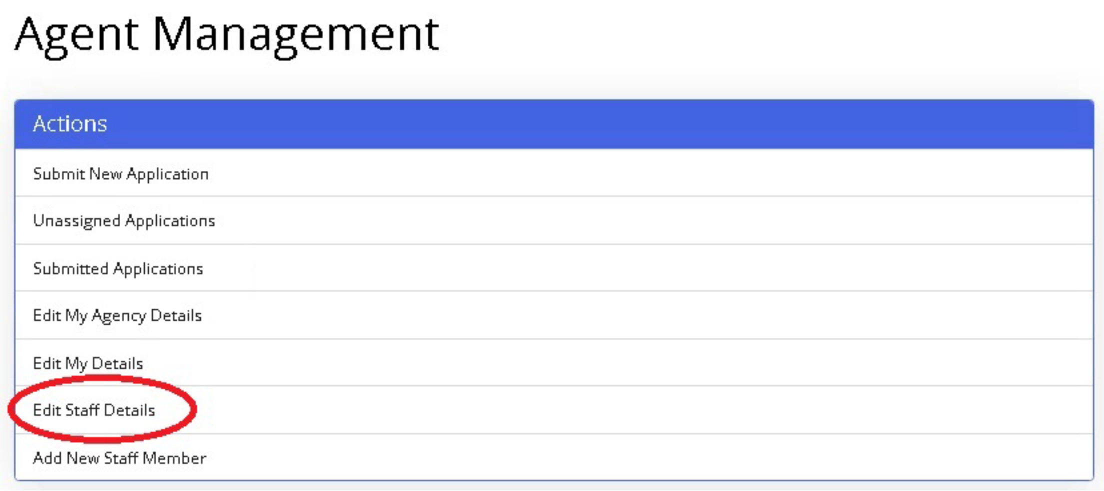


3. To edit any of the address fields, click **Edit Address** and complete the fields as required. Click **Next** and then click **Save**.
4. Click **Exit** to return to the **Agent Management Dashboard**.

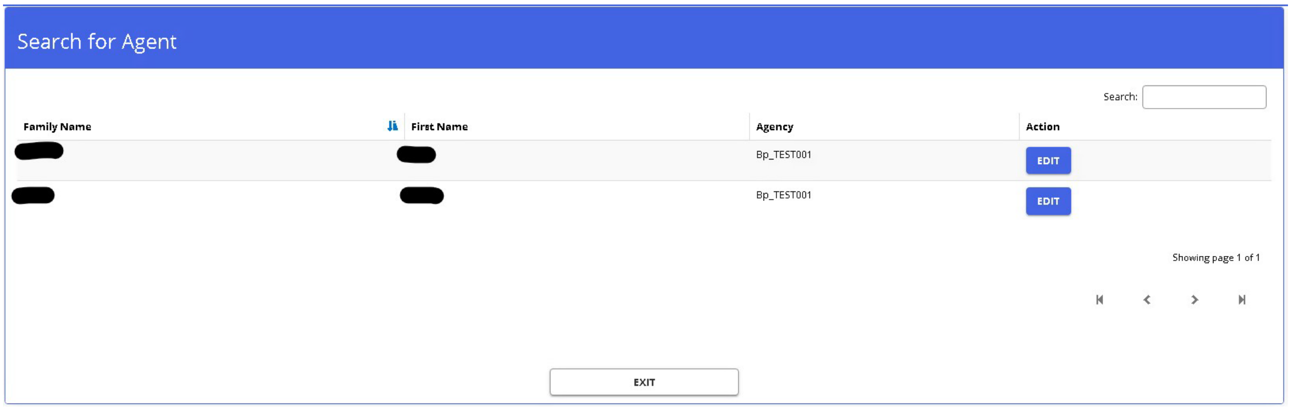
Edit Staff Details (Managers only)

Anyone with **Manager Level** access can view the details of all staff in your agency who have access to Agent Portal. You can update details for any staff member and deactivate/reactivate a staff member's account.

1. Click the **Edit Staff Details** link in the Actions list on the Agent Management Dashboard.



2. The screen will open to show the members of staff in your agency who have access to Agent Portal, ordered by Family Name. If there are more than 10 staff in your agency with access, you can click through each of the pages from the links in the bottom right corner. You can also search using the box in the top right corner.

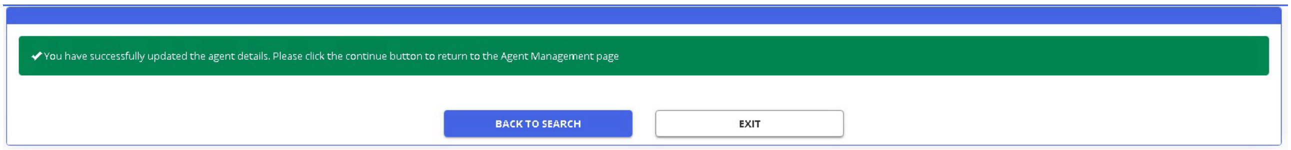


3. Click **Edit** next to the member of staff whose details you want to update.
4. On the next screen you can edit any of the fields shown, including Family name and Email address.

5. You can edit the details of an agency staff member on this screen and then click **Save**. This will update the details we hold in our system for that staff member.
6. There are two types of user access levels – 'User' and 'Manager'. The table below summarises the actions each user can carry out:

Actions	Agency User	Agency Manager
Submit new applications	Y	Y
Carry out tasks on applicants' behalf	Y	Y
Edit my own contact details	Y	Y
Edit agency and agency staff contact details		Y
Assign applications to agents		Y
View applications I have submitted	Y	Y
View applications agency staff members have submitted		Y

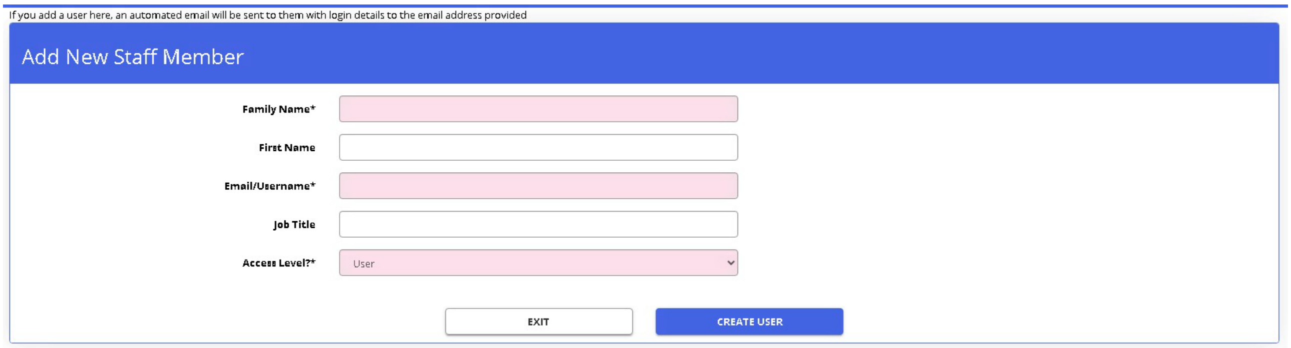
7. If a staff member no longer works for you or no longer needs access to the Agent Portal, please change the **Account Active** box to 'No' to deactivate their account. Since we do not keep track of all the staff changes in your agency, it is very important that someone in your agency takes responsibility for deactivating the accounts of staff who leave, otherwise they will still be able to access the applications they have submitted.
8. On the next screen you will see confirmation that you have edited and stored the new information. Click **Exit** to return to the Agent Management Dashboard or click **Back to Search** if you need to edit another agent's details.



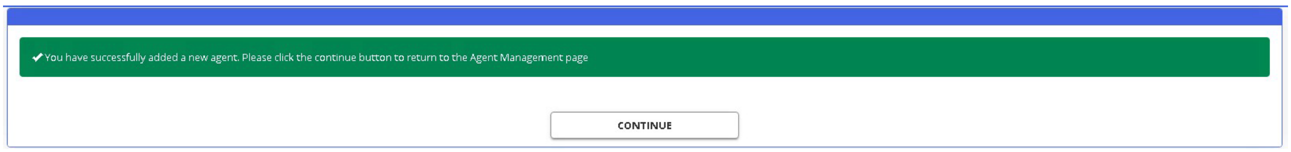
Add New Staff Member (Managers only)

Managers can give new staff members access to the Agent Portal. It is important to note that we are unable to keep track of staff in your agencies, which is why responsibility for adding and removing access to Agent portal for staff lies with those with Manager level access in each agency office.

1. Click the **Add New Staff Member** link in the Actions section on the Agent Management Dashboard to create an account for any new staff.
2. The fields shown in pink and with a * are mandatory and must be completed before you can save a new staff account.



3. When adding a new staff member it is important to choose the correct level of access in the **Access level** field. Only give 'Manager' level access to staff who require it, ideally at least two staff in each agency office. See the table on page 20 to understand the differences between the two access levels.
4. **<u>When adding a new member of staff it is important to use the individual email address of the staff member and not a generic email address</u>**, as it will be used to create an Agent Portal account and for any correspondence with staff about the Agent Portal only. **<u>The email given here must not be used for student applications.</u>**
5. Click **Create User** to save the new record.
6. On the next screen you will see confirmation that you have edited and stored the new information. Click **Continue** to return to the Agent Management Dashboard.



7. Once the new account is created the staff member will automatically receive an email from our system which confirms their username and password and explains how to log in to the Agent Portal.

More information on staff accounts

The University understands that agency organisations are set up differently, often with Head offices and Sub-offices taking on different roles in the recruitment and processing of applicants.

Within our systems each Head office and Sub-office is set up as a separate entity and has its own agency code (e.g. AGC_ 00000059). Staff are then associated with each separate office, and through the Agent Portal can only view applications entered by themselves (User access) or by all staff in the same agency office (Manager access).

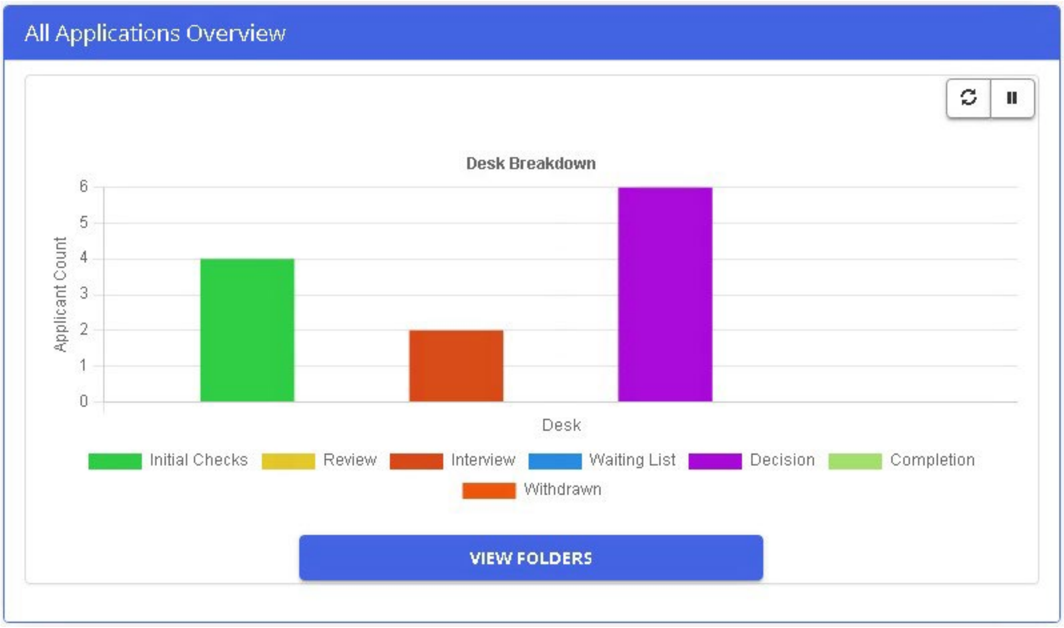
If each agency office in your organisation processes its own applications, then all staff within the individual office will be able to complete, submit, view, and track the applications via the Agent Portal, once you have given them access.

If staff at a single head (or other) office enter all applications on behalf of their sub-offices, and there is no requirement for sub-offices to view/track the applications, then most staff accounts should be created at the single head/other office.

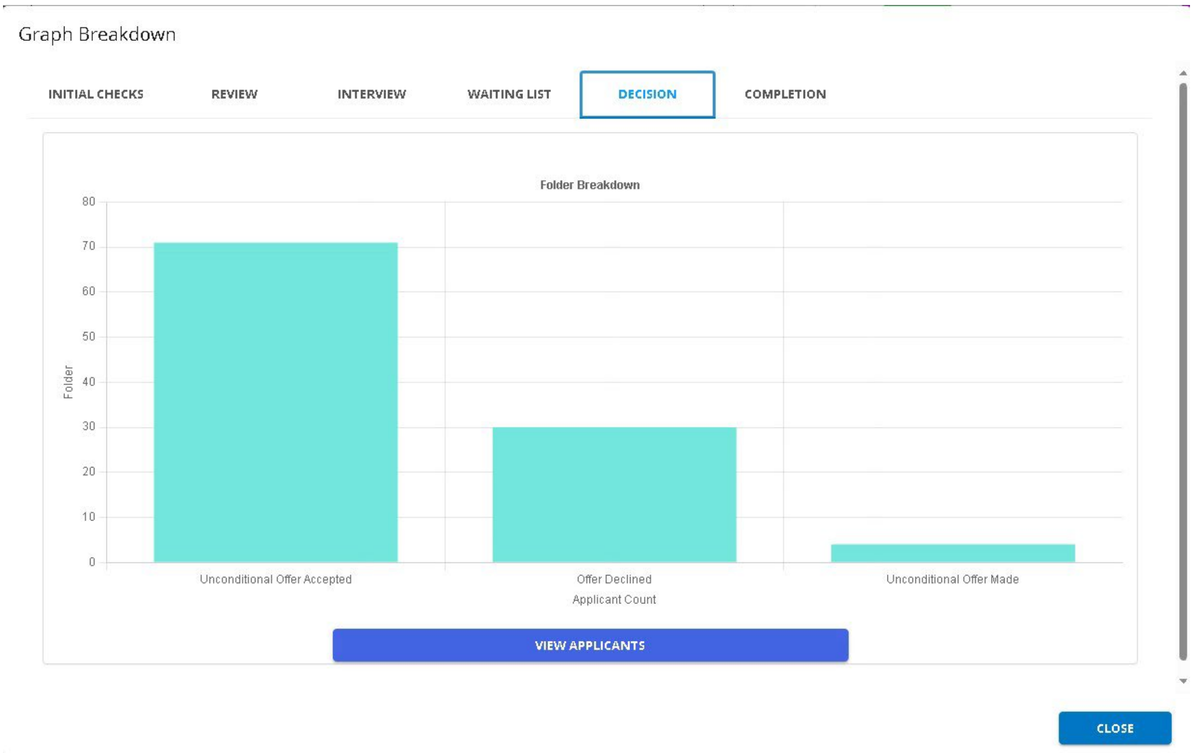
If staff at a single head (or other) office enter all applications on behalf of their sub-offices, but staff in sub-offices also need to view/track applications, then please contact us to discuss how we can set this up in our system.

All Applications Overview (Managers only)

From the Agent Management Dashboard you can view a graphical representation of all the applications which have been submitted by your agency office. This chart works in the same way as the **My Applications Overview** shown on page 14.



1. This is a dynamic chart, which means that you can click on each bar to see more details.
2. This view refreshes automatically but you can also force a refresh or pause the refresh by clicking either of the two buttons in the top right corner.
3. The chart shows how many applicants your agency office has sitting at each stage:
    a. Initial checks
    b. Review
    c. Interview
    d. Waiting list
    e. Decision
    f. Completion
    g. Withdrawn
4. If you hover your cursor over each bar, you can see how many applicants are in that stage.
5. Click **View Folders** below the chart and a new dialogue box opens. This has a tab for each stage along the top, with a button to **View Applicants** in each stage below the chart.



6. If you click **View Applicants** you will see a list of our applicants with applications currently in that stage. Thew view below shows some test applicant details. When the **Decision** tab is chosen, you will see further tabs – one for each decision/reply. If you click on each one you will see the applicants with the same decision/reply.

Graph Breakdown

FOLDER BREAKDOWN-UNCONDITIONAL OFFER ACCE... | FOLDER BREAKDOWN-OFFER DECLINED | FOLDER BREAKDOWN-UNCONDITIONAL OFFER MADE

Search:

Agent Application Processing – Applicant Details

Applicant ID	Name	Programme	Point of Entry	Start Date	Received	Owner	Open Application
2318964	Laura Fund Tester	MFA Fine Art	1		25/Jan/2024		VIEW
2319110	Albus Fund Tester	BSc (Hons) Psychology	1		28/Jan/2024		VIEW
2319110	Albus Fund Tester	MFA Fine Art	1		25/Jan/2024		VIEW
2319110	Albus Fund Tester	PhD Life Sciences (4 years)	1		21/Feb/2024		VIEW

Showing page 1 of 1

BACK CLOSE

7. From this screen you can click **View** and see each application in more detail.
8. Click **Back** to return to the previous view. From there you can choose another tab to view applications at different stages.
9. Click **Close** to return to the Agent Management Dashboard.

University of Dundee

University of Dundee
Nethergate
Dundee
DD1 4HN

t: +44 (0)1382 383838
e: contactus@dundee.ac.uk