

**WITHDRAWN**

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## **Regulatory Information Technology System (RITS)**

### Administration

- Login and password
- General navigation and searching
- User maintenance
- Organisation maintenance
- Contact maintenance
- Document maintenance



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# 1 Introduction

## 1.1 Document purpose

This document provides a guide to all organisation users on the use of the Regulatory Information Technology System (RITS). This guide describes the user and organisation maintenance features in detail.

For further information and queries about RITS, please contact [rits.technical@ofqual.gov.uk](mailto:rits.technical@ofqual.gov.uk).

## 2 Login process

### 2.1 Introduction

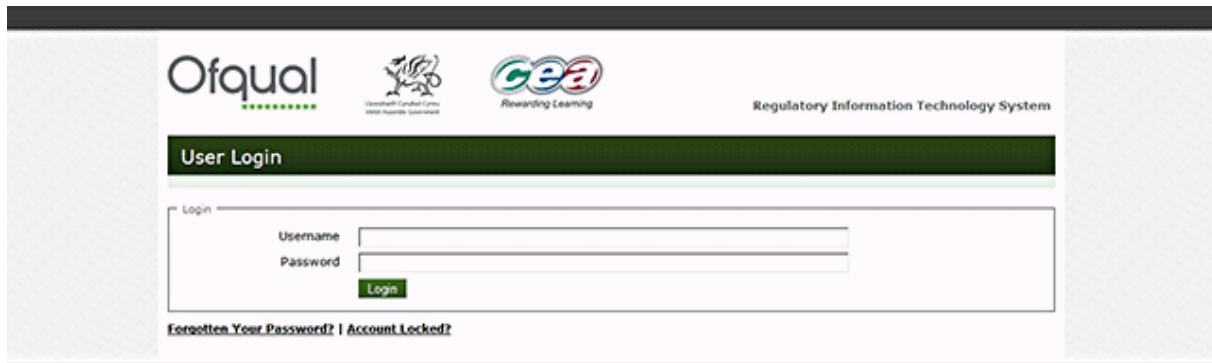
This section describes the security procedures on RITS for an organisation admin user. It consists of the following areas of functionality:

- login
- logout
- reset password.

Note: Ofqual sets up each organisation and the first administrator on RITS. The organisation administrator's login details are communicated via two separate emails from RITS automatically; one communicating the username, and the other communicating the password as with all new and changed login details. The awarding organisation administrator then maintains all details about the organisation and allocates permissions for RITS users. It is advisable to add at least one more administrator as one individual cannot update their own role or user permissions when required but all users can change their own personal details.

### 2.2 Login

1. You can access RITS via the Ofqual website [www.ofqual.gov.uk](http://www.ofqual.gov.uk) or type <https://rits.ofqual.gov.uk/Users/Session/Login> into the address part of your web browser – the screen shown below appears. (Save this to your favourites.)



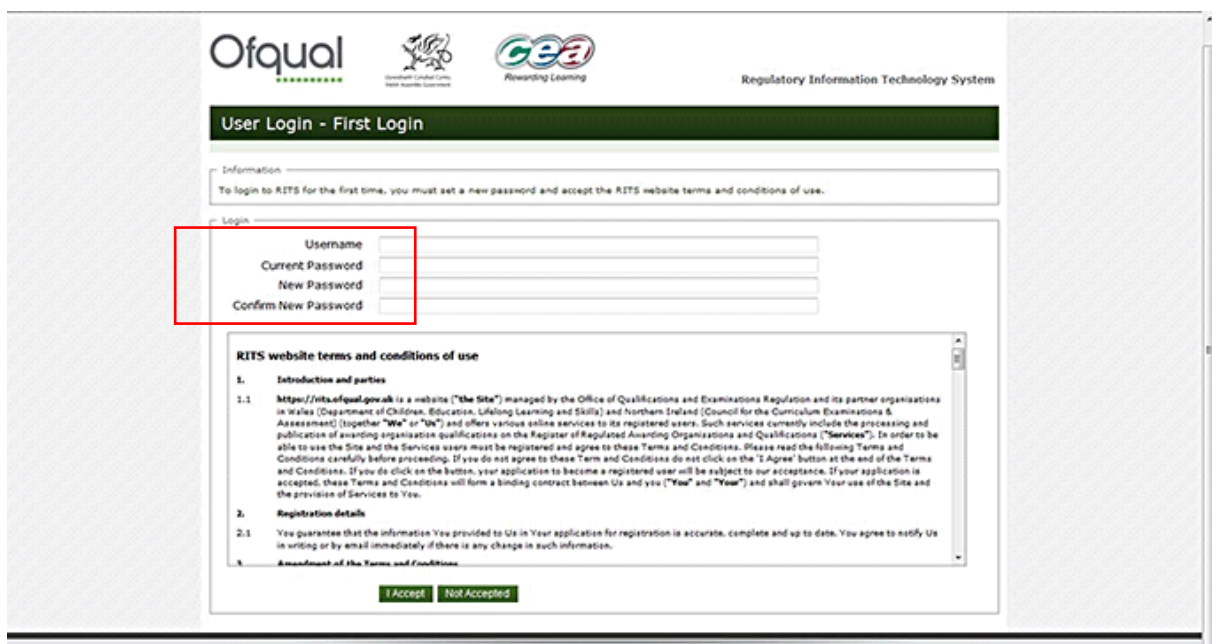
2. Enter the following details:

- **Username:** It can be in any format you like – JSmith; SmithJ; Smithj; smith; JohnS; John.Smith; Smithy; Smudge etc. It is not case sensitive but cannot be duplicated anywhere in RITS, not just in your own organisation. Note: If you have a common/popular name you may have to come up with something different from usual.
- **Password:** It is case sensitive and you will be asked to change this on a regular basis. It cannot be reused until 12 changes have been made.

3. Click the Login button.

## 2.3 Initial login – change password

When you first log in to RITS you are asked to set a new password, and to accept the RITS website terms and conditions, as shown below.



Note: the constitution of the password must conform to the following:

- Password must be at least eight characters.
- Password must contain three of these features:
  - lowercase character
  - uppercase character
  - digit
  - symbol.
- Password must not contain your username.

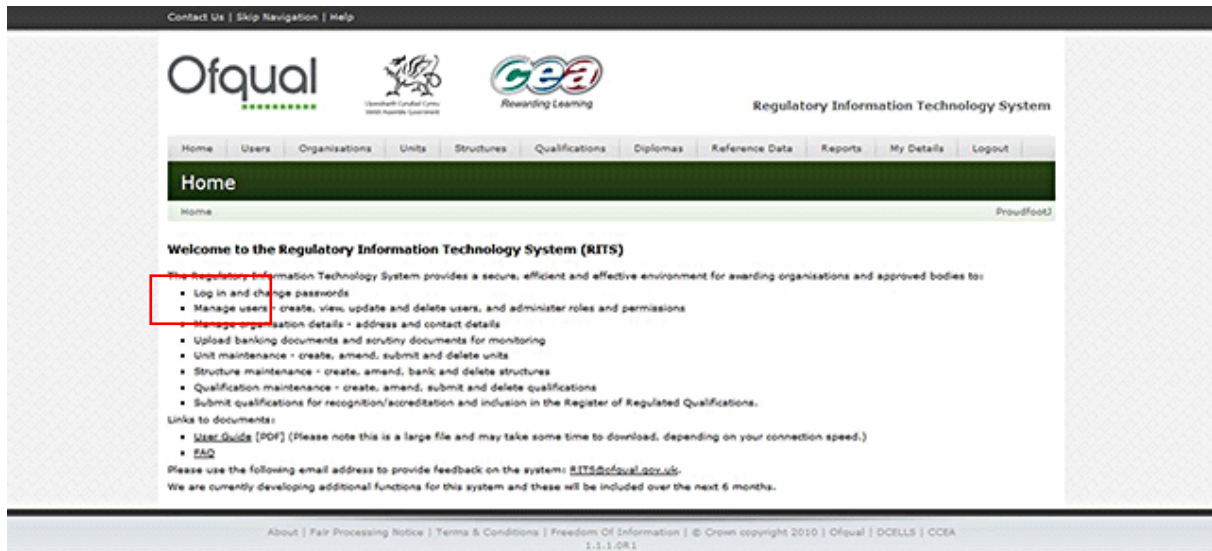
Once completed, please indicate acceptance of the website terms and conditions by clicking the I Accept button.

If you click the Not Accepted button, you are returned to the Login page, and the password is *not* changed.

## 2.4 Main screen

Once you are logged in, the RITS homepage is displayed, as shown below. The following menu items are the full set. The view each user sees will vary dependent upon the permissions your organisation has been allocated and your role within your organisation:

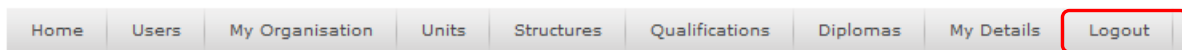
- Users
- My Organisation
- Units
- Structures
- Qualifications
- Diplomas
- Data Submission
- Reports
- My Details
- Logout.



At the foot of the page there are links to the User Guide and the Frequently Asked Questions document.

## 2.5 Logout

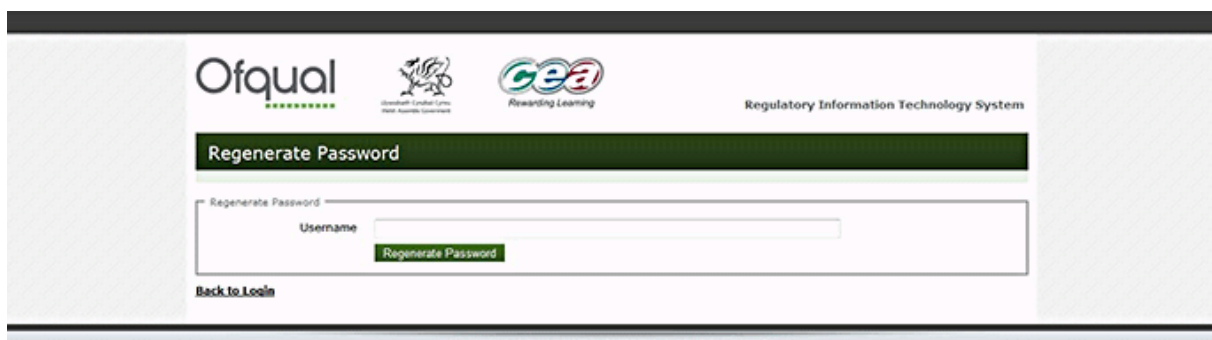
To log out of RITS, select the Logout link from the menu.



## 2.6 Forgotten your password/account locked?

If you forget your login password then follow these steps:

1. Click the Forgotten Your Password/Account Locked? link on the Login page. The Regenerate Password page appears, as below.



2. Provide the username.
3. Click the Regenerate Password button. A new password is emailed to the user account associated with the username entered.

4. Go to the Login page. Type the username and the new password and click the Login button. If you are copying the password from your email be careful not to copy in blank spaces.
5. A page with a 'You must set a new password' warning is displayed, as shown below.

Ofqual  
CCEA  
DCELLS  
Regulatory Information Technology System

**User Login - Change Password**

Information  
For security reasons you must set a new password. A new password is required when your current password expires, when your password is regenerated or when it is reset.

Login Change Password

Username  
Current Password  
New Password  
Confirm New Password

Login Change Password

Legal Notices | © Crown copyright 2010 | Ofqual | DCELLS | CCEA | 1-0-9-081

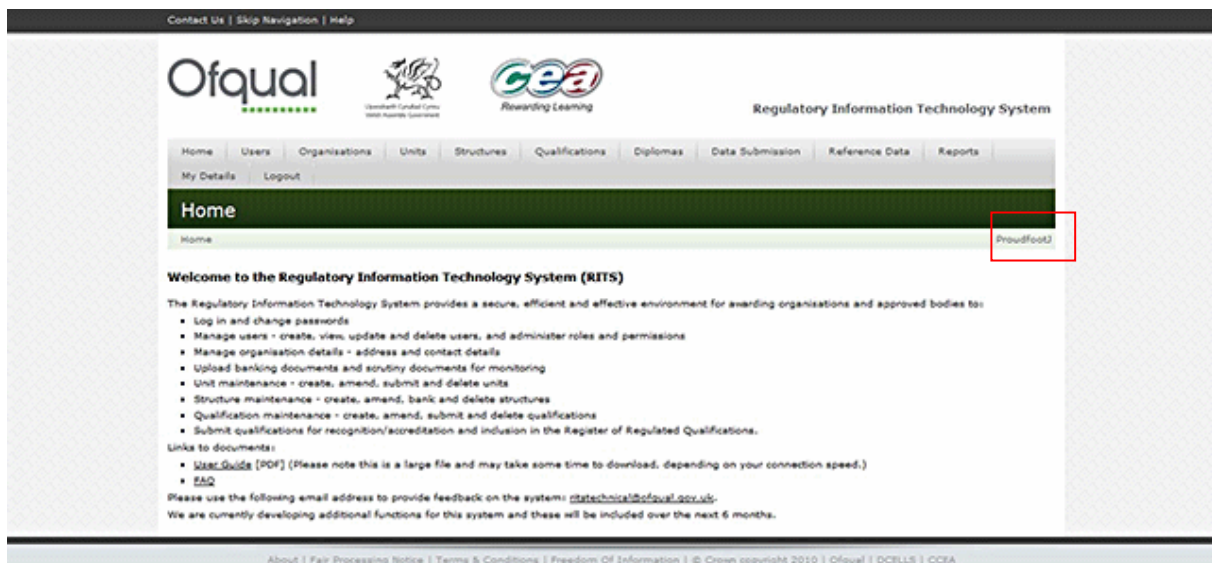
6. Provide the following information:
  - username
  - current password
  - new password
  - confirm new password.
7. Click the Login Change Password button.

## 3 General navigation and system features

### 3.1 Menu buttons

Towards the top of the page are the menu buttons, as depicted below. The buttons that are displayed are dependent on the user's access privileges. The screenshot below depicts the menu buttons displayed to someone who is logged in as an admin user.





### 3.2 User name displayed

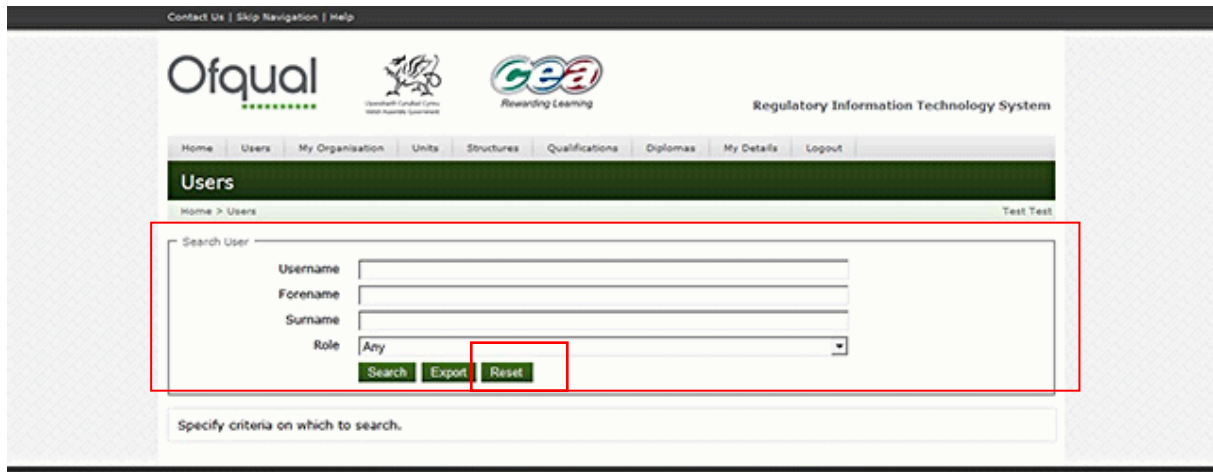
The user name is displayed on the right-hand side of the screen, as shown above.

### 3.3 Search facility

You can use the search area of a screen to search the various areas of the database. The results appear at the foot of the page. For example, the Search Users facility is a specific option you see when you hover the mouse over the Users menu button.

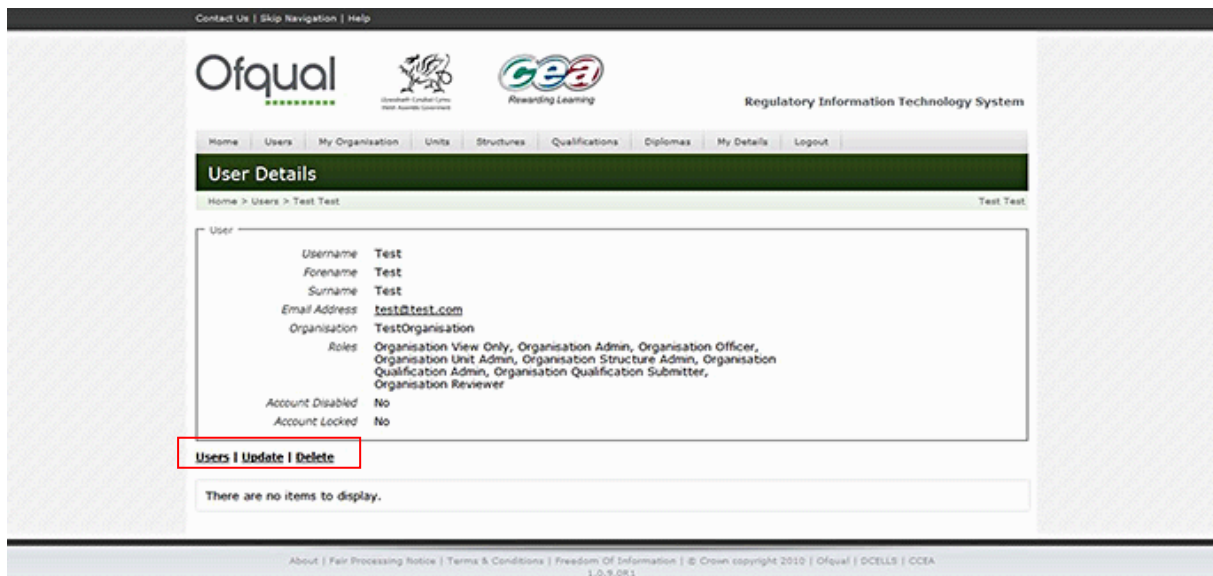
If you leave all the fields blank and click the Search button, the system returns a list of all RITS users in your organisation.

Alternatively, you can create a more specific search by selecting a role and/or entering values and then clicking Search. Text searches are not case sensitive and a 'contains' match is performed. This search is stored until you log out. If you wish to make a new search press the Reset button and this will clear the last search in order for you to enter a new search.



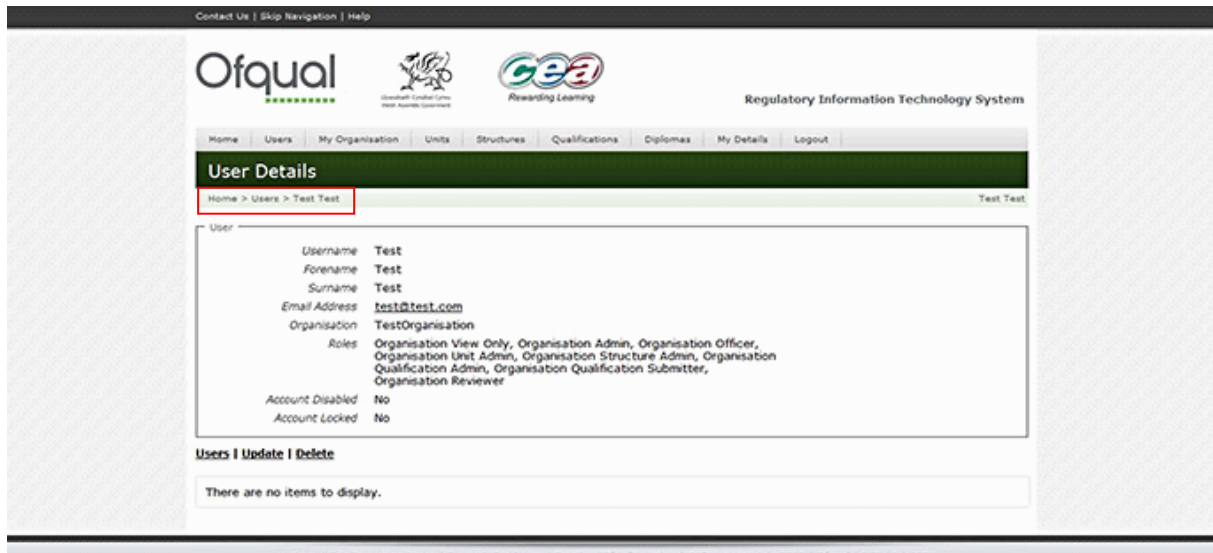
### 3.4 Action links

Action links are hyperlinks on the screen that take you to additional functions within the feature or return you to a menu, as shown below.



### 3.5 Breadcrumbs

Breadcrumbs are used on screen to keep track of where you are in the application. They appear horizontally under the screen title and provide a link to the previous pages that you accessed to get to the current screen. You should use these breadcrumbs to navigate back to previous pages. (Breadcrumbs should always be used in preference to using the browser Back button.)



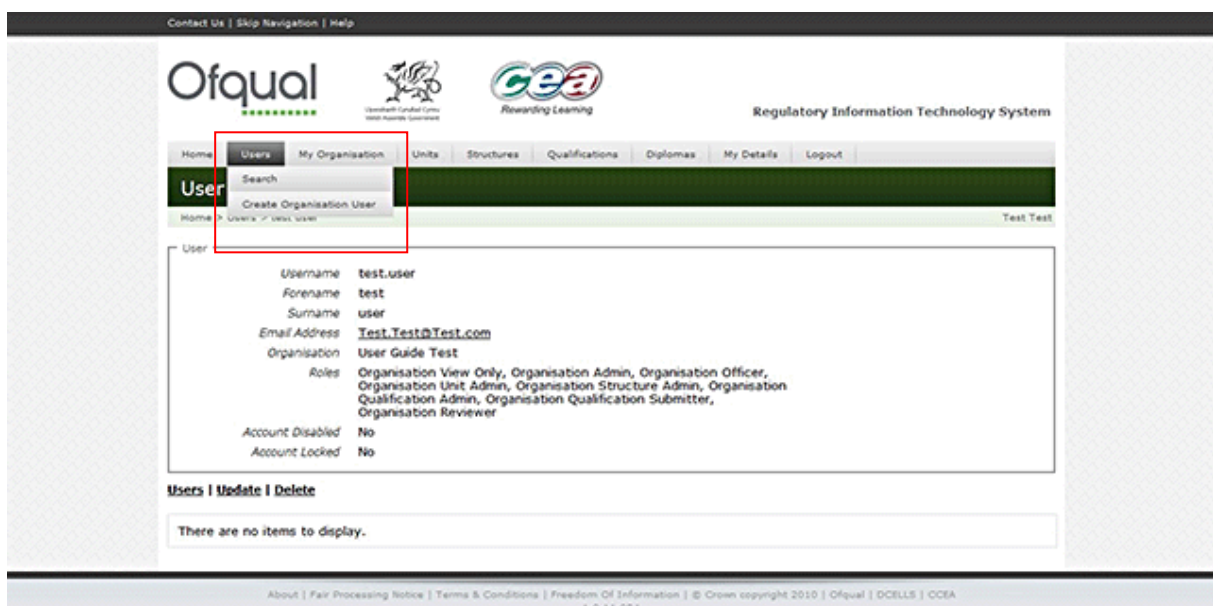
## 4 User maintenance

### 4.1 Introduction

User maintenance involves creating, updating, deleting and viewing the users. These permissions depend upon the user role. The organisation administrator has the permissions to set up and maintain users, create and maintain the organisation office and contact details, and upload and maintain documents for that organisation.

When you hover over the Users menu button, you are presented with the option to:

- search for a user
- create an organisation user.



## 4.2 Search users

To view the list of users, perform the following steps:

1. Hover the mouse over the Users menu button at the top of the page and select Search. You are presented with the screen as shown below.

Username	Forename	Surname	Organisation	Role
Test	Test	Test	TestOrganisation	Organisation View Only Organisation Admin Organisation Officer Organisation Unit Admin Organisation Structure Admin Organisation Qualification Admin Organisation Qualification Submitter Organisation Reviewer
Test1	Test	Test	TestOrganisation	Organisation View Only Organisation Admin Organisation Officer
test2	test	no	TestOrganisation	Organisation Officer
TestUser	Gregor	Dow	TestOrganisation	Organisation Admin

2. Make an entry in any field, and then click the Search button. For example, typing the letter 'T' in the Username field and clicking the Search button returns a list of all users set up in your organisation containing a 'T' in the username. The search is not case sensitive.

Note: If you leave all fields blank and click the Search button, the system displays a list of all users that have been set up in your organisation.

The user names are listed alongside their organisation name and the roles they are assigned in the system.

## 4.3 Export users to a CSV file

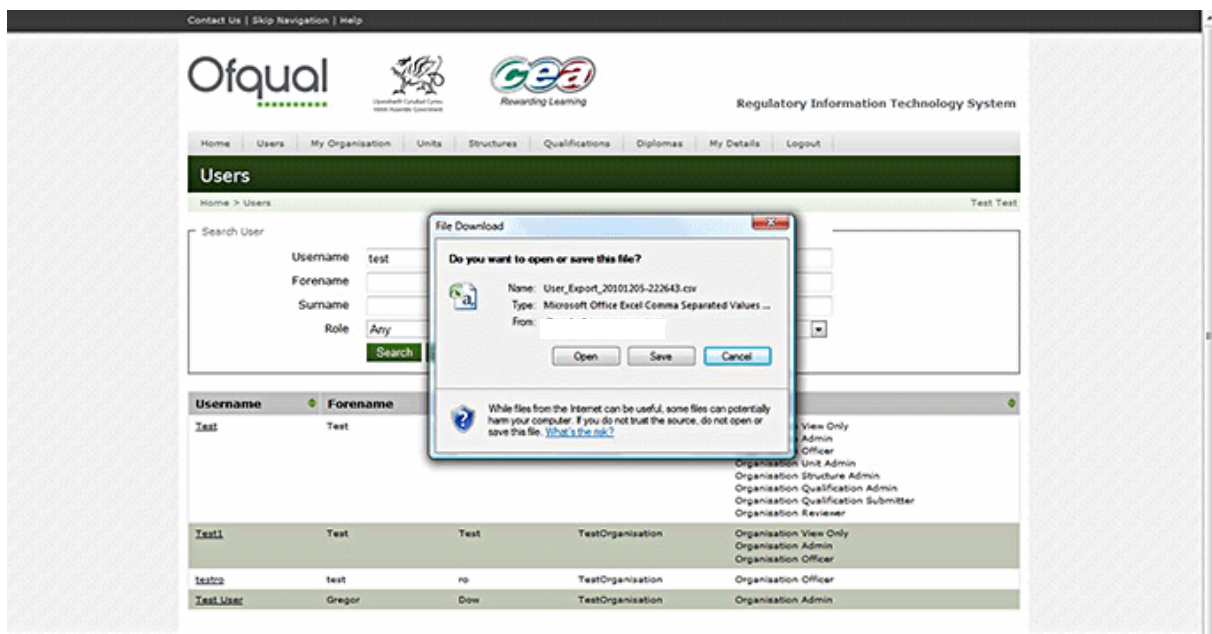
The Export button (shown in the previous screenshot) allows you to export a list of users to a CSV file, for example Microsoft Excel, which allows you to filter and manipulate data as required.

Leaving the fields blank and clicking the Export button exports the full list of users.

Alternatively, you can export a subset of the full list by making appropriate entries in the fields, for example those users containing a letter 'T' in their username, as per the steps described in section 4.2, and clicking the Export button.

RITS provides the option to open or save the following information for all organisation users to a CSV/Excel file, as shown below:

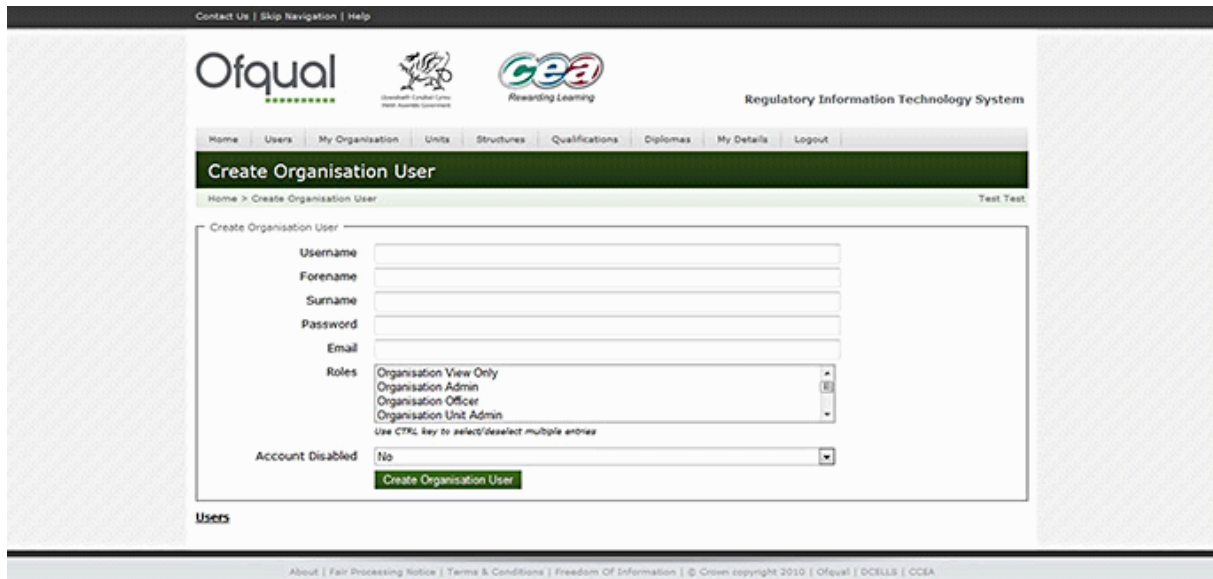
- username
- first name
- surname
- email address
- organisation
- user roles
- account disabled
- account locked.



#### 4.4 Create a user

To create a user, perform the following steps:

1. Hover the mouse over the Users menu button at the top of the page and select Create Organisation User, which takes you to the screen below.



2. Provide the following information:

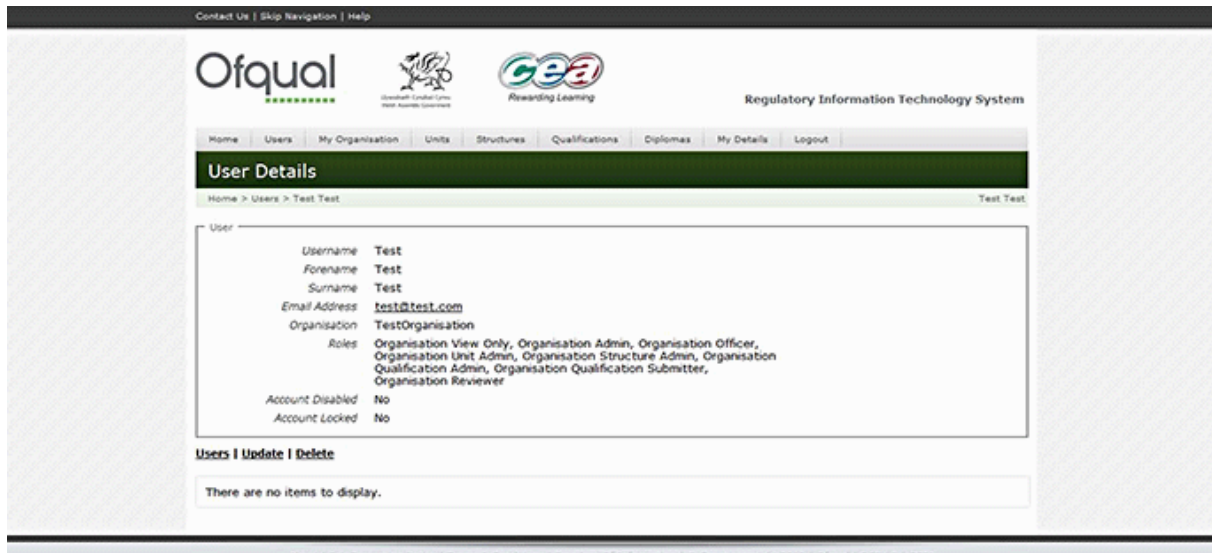
Field	Validations/recommendations or tips for input	Mandatory
Username	Must be unique (spaces allowed) Maximum length of 20 characters	Yes
Forename	Maximum length of 50 characters	Yes
Surname	Maximum length of 50 characters	Yes
Password	Maximum length of 20 characters The following password constraints are applied: <ul style="list-style-type: none"> <li>■ length must be greater than or equal to eight characters long</li> <li>■ must contain at least three of the following: <ul style="list-style-type: none"> <li>□ lower case letter</li> <li>□ number</li> <li>□ symbol</li> <li>□ upper case letter</li> </ul> </li> <li>■ does not contain the username</li> <li>■ has not been used in the last 12 password</li> </ul>	Yes

Field	Validations/recommendations or tips for input	Mandatory
	changes	
Email	Must be a valid format; for example username@companyname.com  Maximum length of 150 characters	Yes
Roles	All users must have at least Organisation View Only role type from the eight available	Yes
Account Disabled	It is No by default (Note: If a disabled status for a user is set to Yes, then that user is not able to log in)  (Note: This 'disabling' feature allows users to be set up on the system in advance of when they are permitted to use it. In effect this suppresses the communication of their login details.)	No

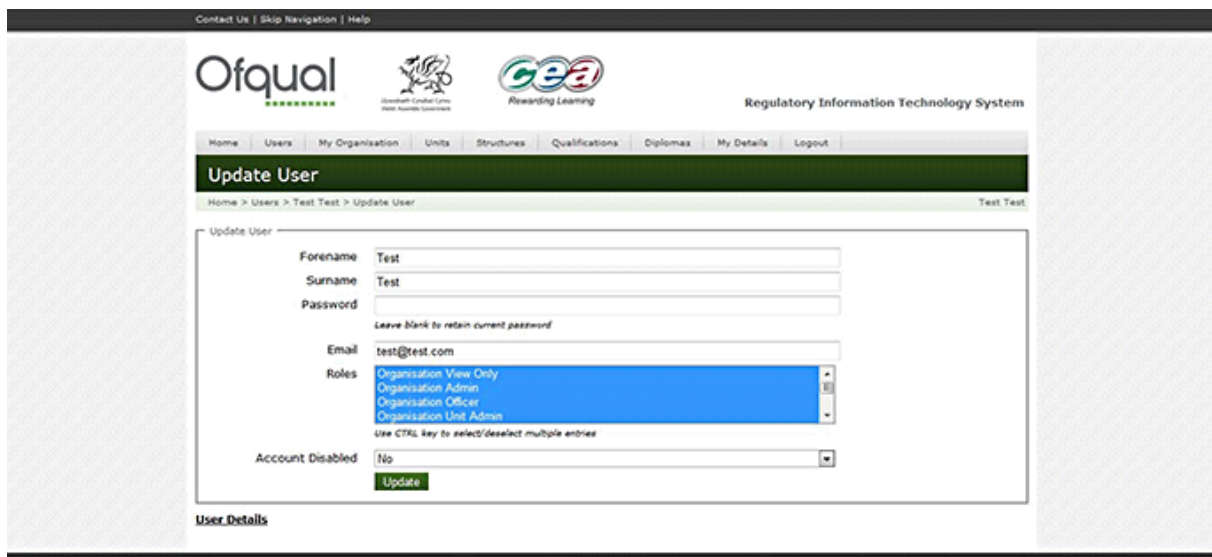
3. Roles are selected (and unselected) by clicking on the required role. If more than one role is required (or not required) hold down the control or shift key and click. Allocated roles are shown as highlighted.
4. Click the Create Organisation User button in order to create and save a new user.

#### 4.5 Update organisation user details

1. Hover the mouse over the Users menu button at the top of the page and select Search.
2. If you know the username of the user whose details you wish to update, type it (or the first few letters) in the Username field, and click the Search button. This returns a list of users satisfying the search criteria specified. Alternatively, you can leave the fields blank and click the Search button, which returns a list of all users set up in your organisation.
3. Select the organisation user to be updated from the list at the foot of the page. The screen shown below is displayed.



- To update the selected organisation user's information, click the Update link, which displays the Update User screen, as shown below.



- Perform the changes by providing the valid data and save the changes by clicking the Update button.

To cancel the update do not click the Update button; simply navigate away by selecting the User Details link, or use the breadcrumbs or the menu buttons at the top of the page.

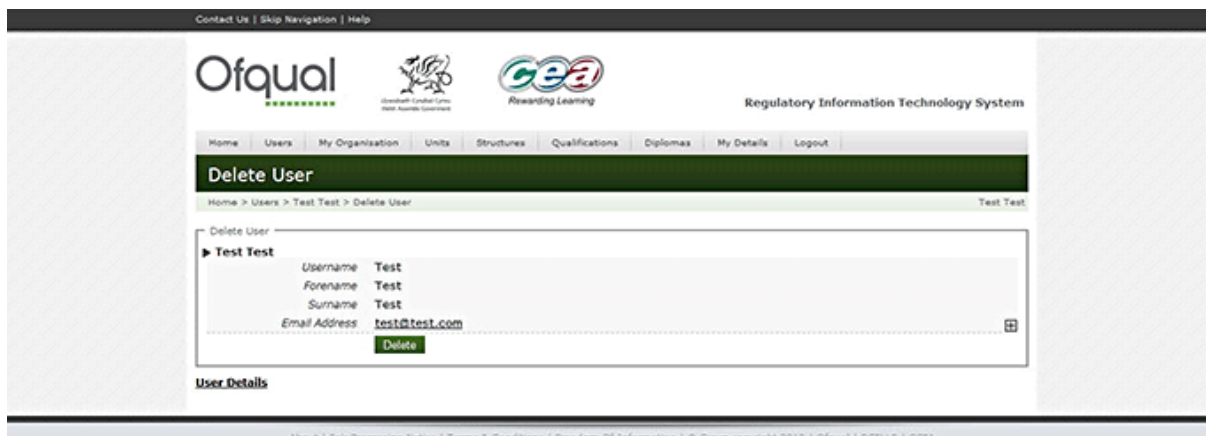
#### 4.6 Delete organisation user

- Hover the mouse over the Users menu button at the top of the page and select Search.
- If you know the username of the user whose details you wish to delete, type it (or the first few letters) in the Username field, and click the Search button. This



returns a list of users satisfying the search criteria specified. Alternatively, you can leave the fields blank and click the Search button, which returns a list of all users set up in your organisation.

3. Select the organisation user to be deleted from the list at the foot of the page.
4. Select the Delete link and the Delete User screen appears, as shown below.

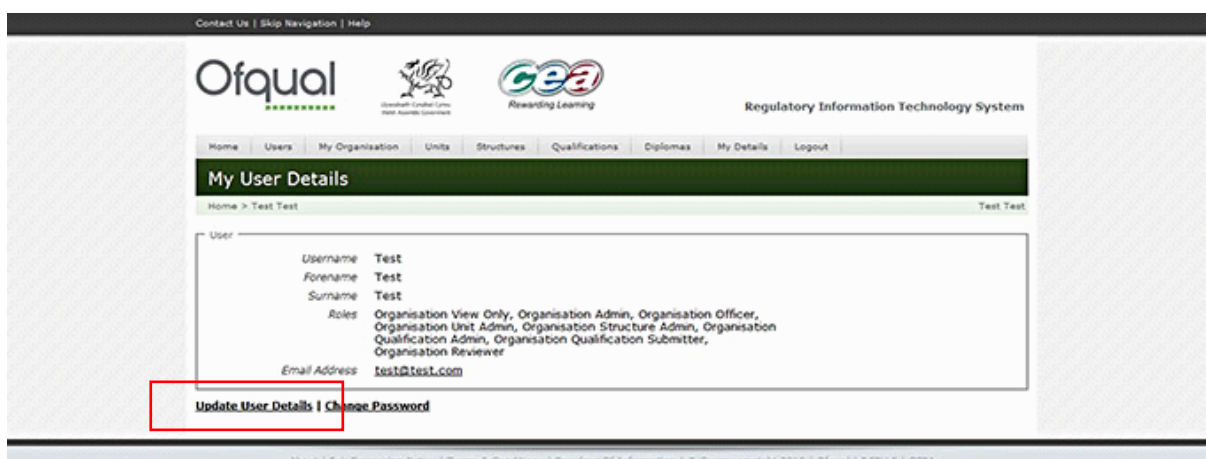


5. To confirm the deletion of the organisation user, click the Delete button.

To cancel the deletion of the organisation user do not click the Delete button; simply navigate away by selecting the User Details link, or use the breadcrumbs or the menu buttons at the top of the page.

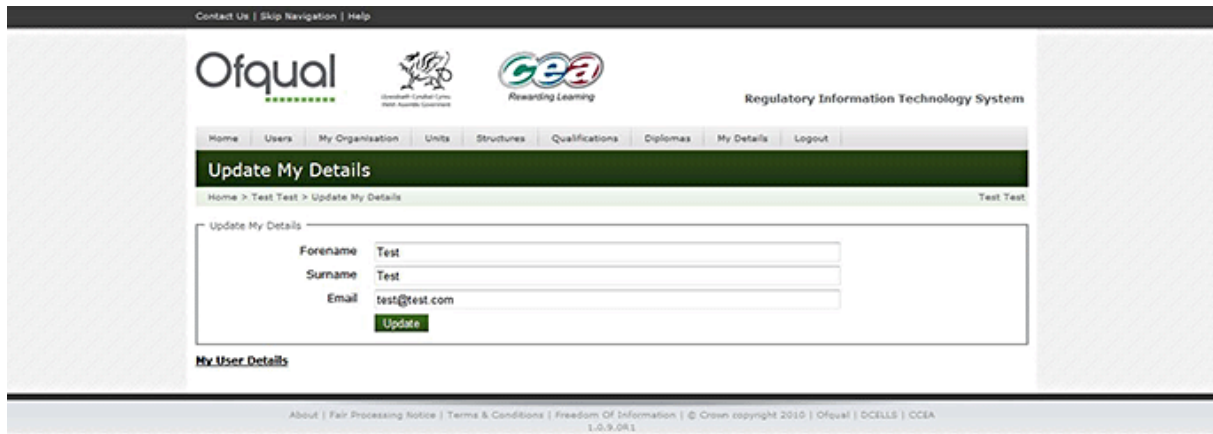
## 4.7 View and change user details

To view details of the user currently logged in, click the My Details menu button from the top of the page. The screen shown below appears.



To update the organisation admin user details:

1. Click the Update User Details link as shown above. You then go to the Update My Details screen shown below.



2. Perform changes by providing valid data and save the changes by clicking the Update button.

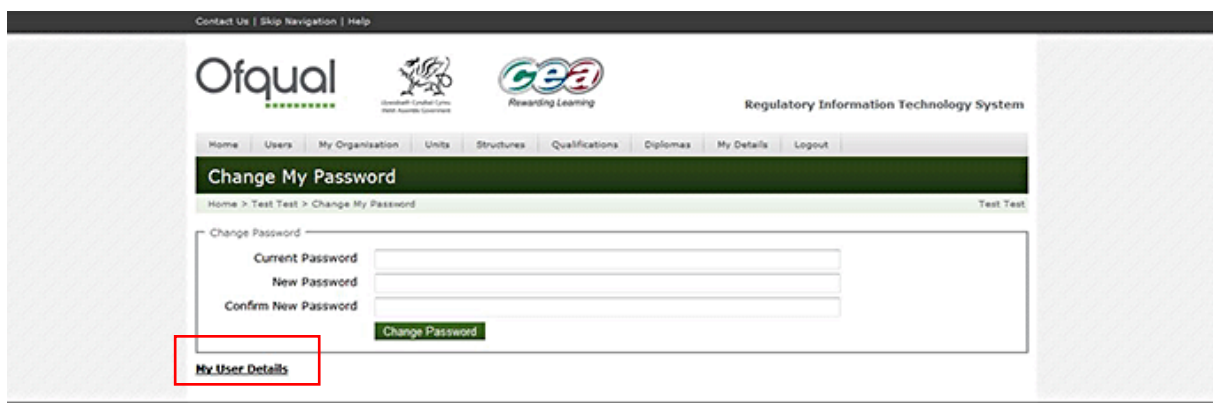
To cancel the update, select the My User Details link.

## 4.8 Change your password

To change your password, perform the following:

1. Click the My Details menu button at the top of the page. The first screen shown in section 4.7 appears.
2. Select the Change Password link and provide the following details:
  - current password
  - new password
  - confirm password.
3. Click the Change Password button to save the new password, as shown below.

To cancel the password change, select the My User Details link.



## 5 Organisation maintenance



### 5.1 Introduction

This section allows the organisation admin user to maintain their own organisation's details, including addresses and contacts, and to upload and maintain documents.

### 5.2 View organisation details

To view your organisation details, click the My Organisation menu button at the top of the page. The screen shown below is displayed.

Contact Us | Skip Navigation | Help

Ofqual   Regulatory Information Technology System

Home | Users | My Organisation | Units | Structures | Qualifications | Diplomas | My Details | Logout

**My Organisation Details**

Home > TestOrganisation Test Test

Organisation

Organisation Name	TestOrganisation
Legal Name	TestOrganisation Ltd
Number	12121
Type	Company
Email Address	test@test.com
Website	http://www.test.com/
Status	Recognised

[Update Organisation Details](#)

Related Items



[Addresses](#) | [Contacts](#) | [Documents](#) | [Operational Plan](#)

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### 5.3 Update organisation details

1. Click the My Organisation menu button at the top of the page. The screen shown above is displayed.
2. Select the Update Organisation Details link (see the screenshot above) and the screen shown below is displayed.

Contact Us | Skip Navigation | Help

Ofqual   Regulatory Information Technology System

Home | Users | My Organisation | Units | Structures | Qualifications | Diplomas | My Details | Logout

**Update My Organisation's Details**

Home > TestOrganisation > Update My Organisation's Details Test Test

Update My Organisation's Details

Legal Name	TestOrganisation Ltd
Email	test@test.com
Website	www.test.com
Number	12121
Type	Company

[My Organisation Details](#)

3. Perform changes by providing valid data and save the changes by clicking the Update button. (Note: the Number field should be populated with the organisation's company number or charity number.)

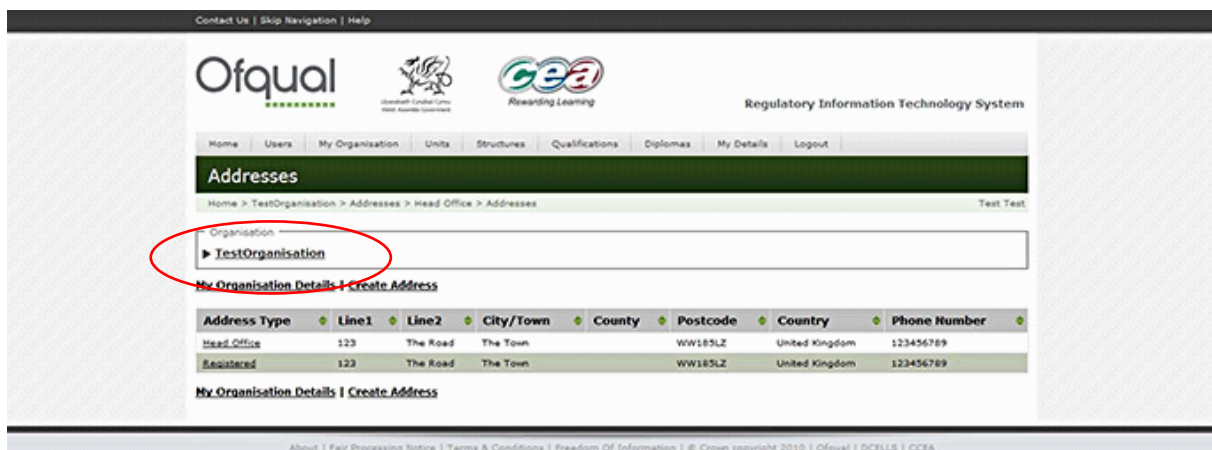
To cancel the update, select the My Organisation Details link, or navigate away from the screen using the breadcrumbs or menu buttons.

## 5.4 Maintain organisation addresses

### 5.4.1 View organisation addresses

To view your organisation address, perform the following:

1. Click the My Organisation menu button at the top of the page. The screen shown in section 5.2 is displayed.
2. Select the Addresses link.
3. A page containing the organisation information and list of the addresses is displayed, as shown below.



The screenshot shows the 'Addresses' page in the RITS Administration system. The page header includes the Ofqual logo, the Government of Wales logo, and the CEI logo. The main navigation menu is visible, with 'My Organisation' selected. The 'Addresses' page title is displayed in a green bar. Below the title, there is a breadcrumb trail: 'Home > TestOrganisation > Addresses > Head Office > Addresses'. The 'Organisation' dropdown menu is expanded, showing 'TestOrganisation' selected and circled in red. Below the dropdown, there is a table of addresses with columns for Address Type, Line1, Line2, City/Town, County, Postcode, Country, and Phone Number. The table contains two rows of data: 'Head Office' and 'Registered'.

Address Type	Line1	Line2	City/Town	County	Postcode	Country	Phone Number
Head Office	123	The Road	The Town		WW185LZ	United Kingdom	123456789
Registered	123	The Road	The Town		WW185LZ	United Kingdom	123456789

4. You expand the organisation (circled above) to show more detail by clicking on it, as shown below.

The screenshot shows the RITS Administration interface. At the top, there are logos for Ofqual, GCE, and the Regulatory Information Technology System. A navigation menu includes Home, Users, My Organisation, Units, Structures, Qualifications, Diplomas, My Details, and Logout. The main content area is titled 'Addresses' and shows a breadcrumb trail: Home > TestOrganisation > Addresses > Head Office > Addresses. Below this, there is a section for 'TestOrganisation' with various details. At the bottom, there is a table of addresses.

Address Type	Line1	Line2	City/Town	County	Postcode	Country	Phone Number
Head Office	123	The Road	The Town		WW185LZ	United Kingdom	123456789
Registered	123	The Road	The Town		WW185LZ	United Kingdom	123456789

#### 5.4.2 Create organisation addresses

1. Click the My Organisation menu button at the top of the page. The screen shown in section 5.2 is displayed.
2. Select the Addresses link.
3. A page containing the organisation information, list of offices (address type) and corresponding addresses at the foot of the page is displayed, as shown in sections 5.4.1 to 5.4.4.
4. Select the Create Address link and provide the following information:

Field	Validations/recommendations or tips for input	Mandatory
Type	Select address type from drop-down list	Yes
Line1	Maximum length of 50 characters	Yes
Line2	Maximum length of 50 characters	No
City/Town	Maximum length of 50 characters	No
County	Maximum length of 50 characters	No
Postcode	Maximum length of 10 characters	Yes

Country	Select from list of countries	No
Phone Number	Numerical only	No

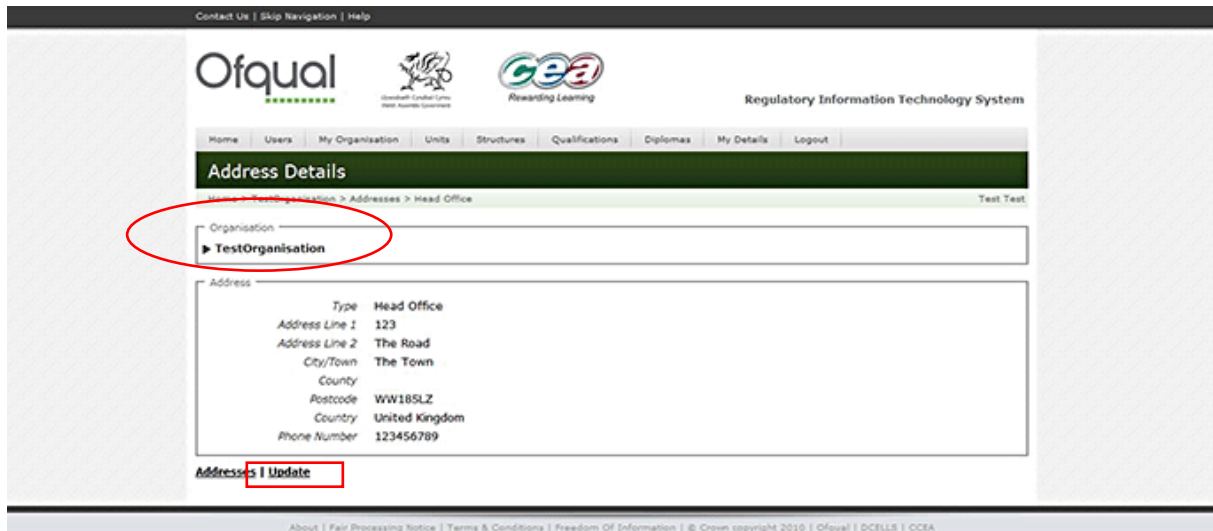
- After providing the valid information, click the Create Address button to create and save the address, as shown below.

The screenshot shows the 'Create Address' page in the RITS system. At the top, there are navigation links: Contact Us | Skip Navigation | Help. Below that are logos for Ofqual, the Department for Business, Innovation and Skills, and the Quality Standard for Regulators. The main navigation bar includes: Home, Users, My Organisation, Units, Structures, Qualifications, Diplomas, My Details, Logout. The breadcrumb trail is: Home > TestOrganisation > Addresses > Head Office > Addresses > Create Address. The form itself has a dropdown for 'Organisation' set to 'TestOrganisation'. The 'Create Address' section contains: 'Type' dropdown set to 'Head Office', 'Line1', 'Line2', 'City/Town', 'County', 'Postcode', 'Country' dropdown set to 'United Kingdom', and 'Phone Number'. A green 'Create Address' button is highlighted with a red rectangle. At the bottom of the page, there is a footer with links: About | Fair Processing Notice | Terms & Conditions | Freedom Of Information | © Crown copyright 2010 | Ofqual | DCELLS | CCEA | 1.0.9.081.

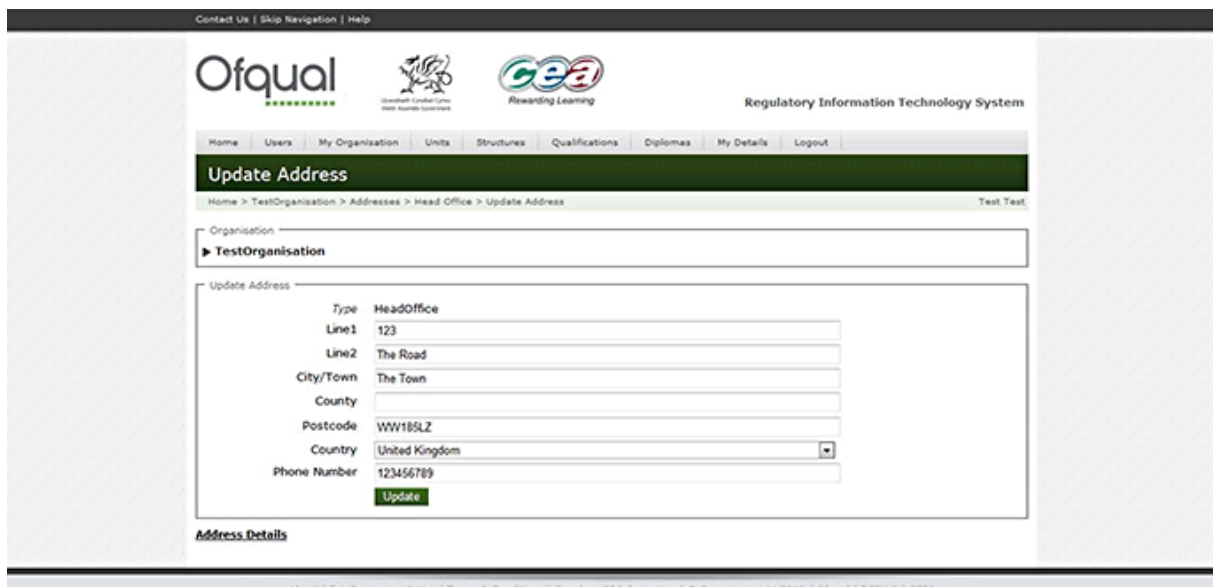
### 5.4.3 Update organisation addresses

To update an organisation address, perform the following:

- Click the My Organisation menu button at the top of the page. The screen shown in section 5.2 is displayed.
- Select the Addresses link.
- A page containing the organisation information (if expanded), list of offices (address type) and corresponding addresses at the foot of the page is displayed, as shown in section 5.4.1.
- Select an organisation address to be updated from the list and the screen shown below is displayed.



5. Click the Update link and perform changes by providing the valid data, as shown below.



6. Save the changes by clicking the Update button.

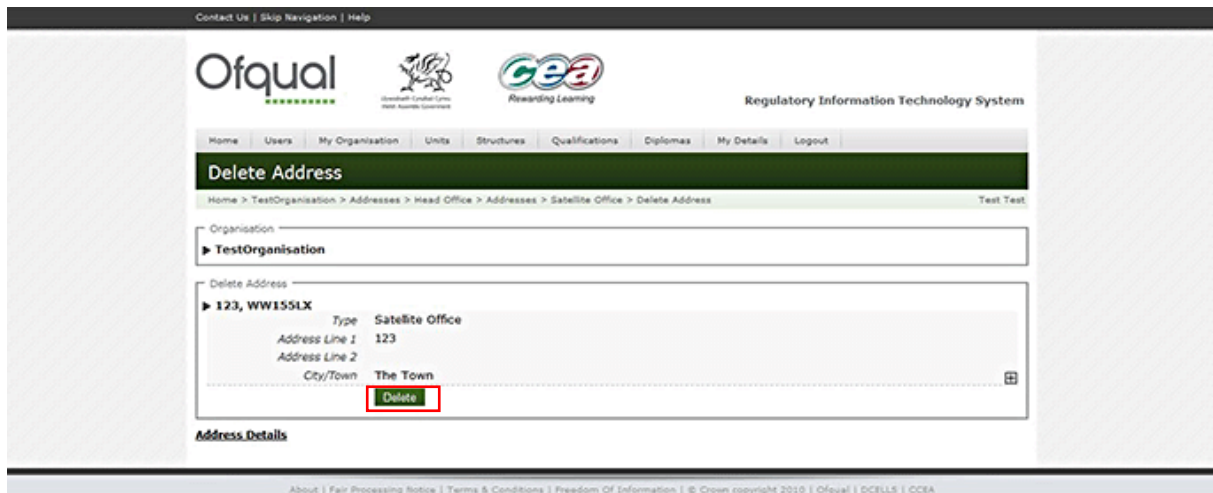
To cancel the update, click the Address Details link, or navigate away from the screen using the breadcrumbs or menu buttons.

#### 5.4.4 Delete organisation addresses

Note: only satellite office addresses can be deleted.

1. Click the My Organisation menu button at the top of the page. The screen shown in section 5.2 is displayed.
2. Select the Addresses link.

3. A page containing the organisation information (if expanded), list of offices (address type) and corresponding addresses at the foot of the page is displayed, as shown in section 5.4.1.
4. Select an office to be deleted from the list and the screen shown below is displayed.

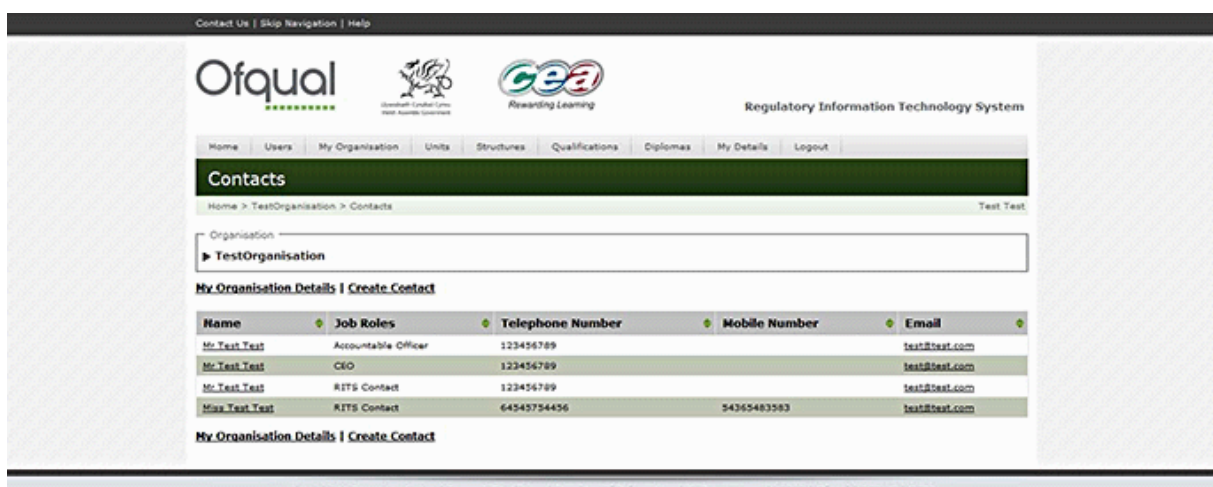


5. Click the Delete button to delete the address.

## 5.5 Maintain organisation contacts

### 5.5.1 View organisation contacts

1. Click the My Organisation menu button at the top of the page. The screen shown in section 5.2 is displayed.
2. Select the Contacts link.
3. A page containing the organisation information and the list of contacts is displayed, as shown below.





### 5.5.2 Create organisation contacts

1. Click the My Organisation menu button at the top of the page. The screen shown in section 5.2 is displayed.
2. Select the Contacts link. A page containing the organisation information and the list of contacts is displayed, as shown above.
3. Select the Create Contact link and the screen shown below is displayed.

4. Provide the following information:

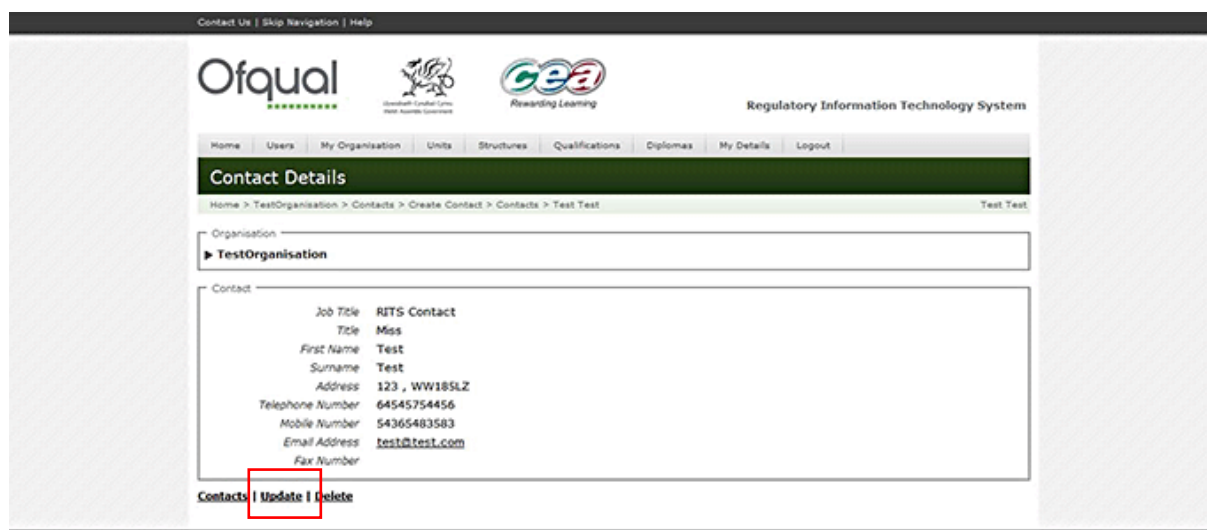
Field	Validations/recommendations or tips for input	Mandatory
Title	Select from list containing title	Yes
First Name	Maximum length of 50 characters	Yes
Surname	Maximum length of 50 characters	Yes
Job Title	Select from list containing job titles	Yes
Address	Select from list containing addresses	Yes
Telephone Number	Maximum length of 20 characters	Yes

Mobile Number	Maximum length of 20 characters	No
Email	Must be a valid format Maximum length of 150 characters	Yes
Fax	Maximum length of 20 characters	No

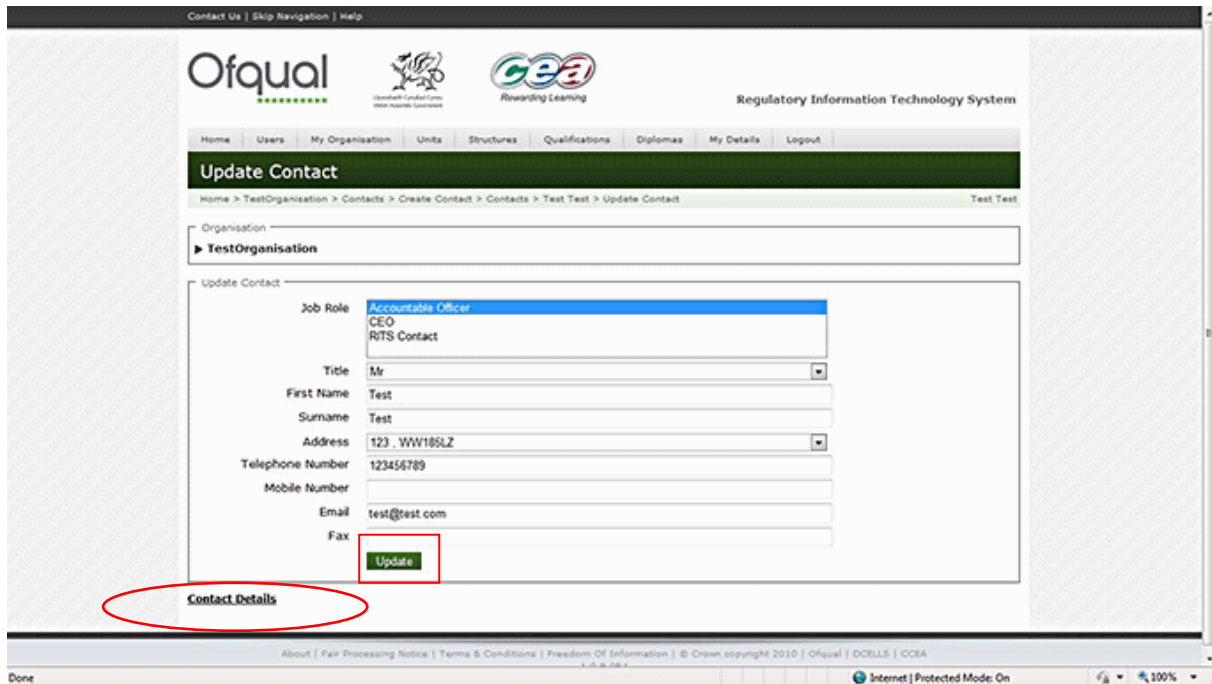
5. After providing the required information, click the Create Contact button to create and save the contacts.

### 5.5.3 Update organisation contacts

1. Click the My Organisation menu button at the top of the page. The screen shown in section 5.2 is displayed.
2. Select the Contacts link.
3. A page containing the organisation information (if expanded) and the list of contacts is displayed.
4. Select the contact to be updated from the list at the foot of the page, and the screen shown below is displayed.



5. Click the Update link and perform changes by providing valid data.
6. Save the changes by clicking the Update button as shown below.

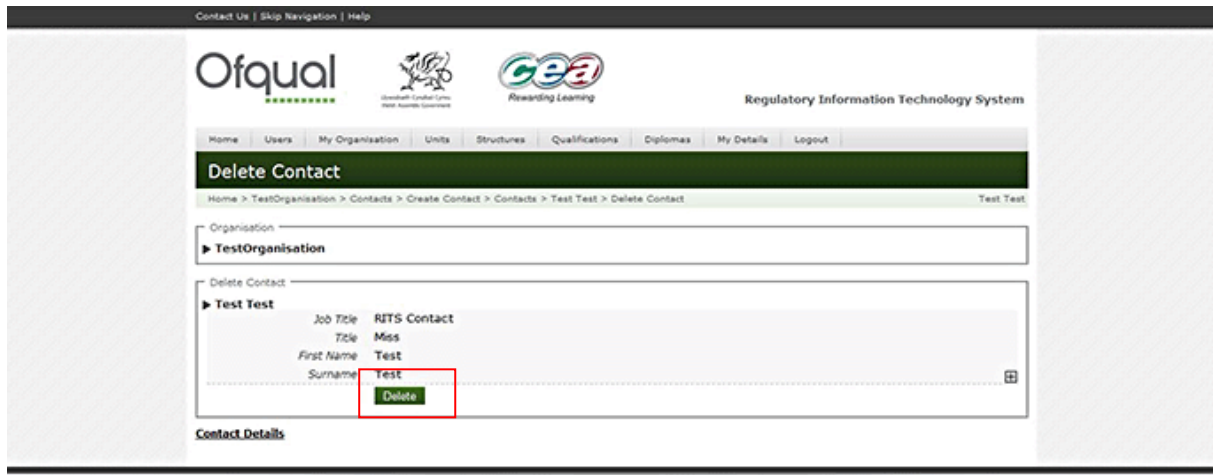


To cancel the update, click the Contact Details link as shown above.

#### 5.5.4 Delete organisation contacts

Note: only RITS contacts can be deleted. All organisations must have a responsible officer. More than one contact role can be assigned to one person. An organisation is not limited to one RITS contact.

1. Click the My Organisation menu button at the top of the page. The screen shown in section 5.2 is displayed.
2. Select the Contacts link.
3. A page displaying the organisation information and list of the contacts is displayed.
4. Select the contact to be deleted.
5. Click the Delete link, which takes you to the Delete Contact screen, as shown below.



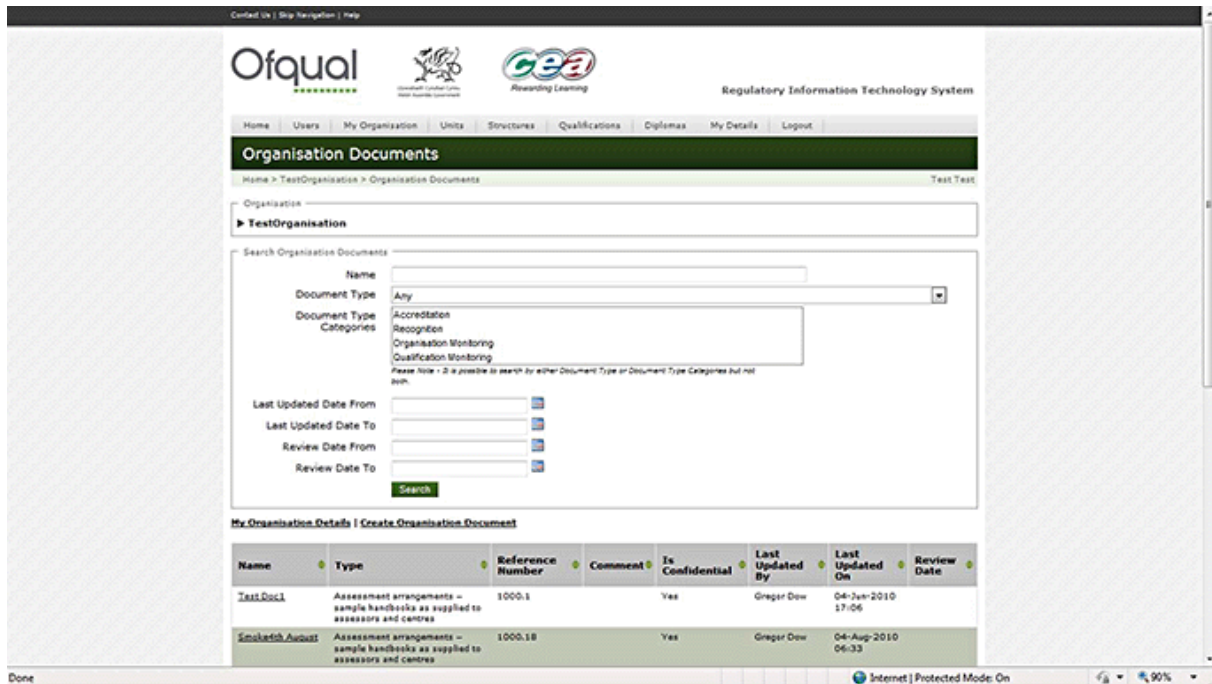
6. Click the Delete button in order to delete the contact.

## 5.6 Upload and maintain documents

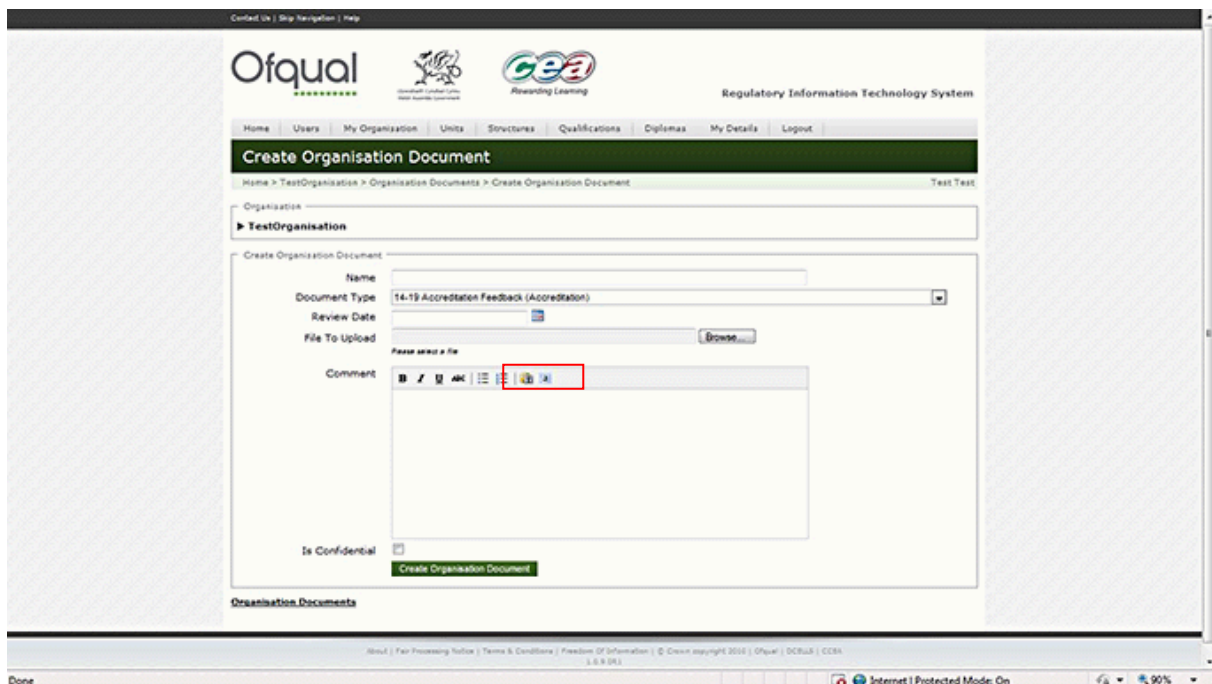
This section describes how the organisation can upload and maintain documents to evidence compliance with the recognition criteria, and scrutiny documents for the regulatory monitoring teams. Note: once a document has been uploaded, it cannot then be deleted. This is for regulatory audit purposes. Upload only documents in Word or PDF formats.

### 5.6.1 Upload a document

1. Click the My Organisation menu button at the top of the page. The screen shown in section 5.2 is displayed.
2. Select the Documents link. A page displaying the organisation documents is displayed. There is a Search Organisation Document facility in the middle of the page, and the list of documents already uploaded is displayed at the foot of the page, as shown below.



3. Select the Create Organisation Document link. The Create Organisation Document screen appears, as shown below.



4. Enter the name of the document.
5. Select the document type from the drop-down menu.
6. Enter the review date. You can either enter the date manually in the format dd-mm-yyyy, or choose the date from the calendar. The review date indicates the

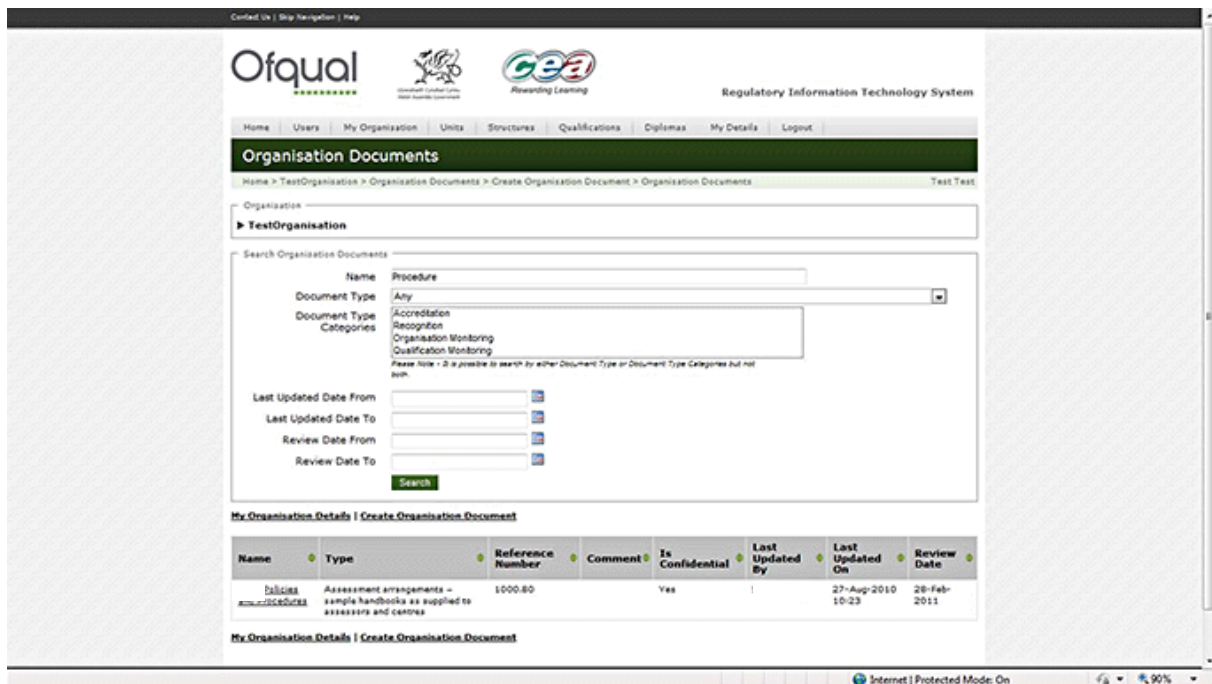
date that the document should be reviewed. This should be aligned with the qualification review date with which the document is associated.

7. Use the Browse button to select a file for uploading. The file can be located anywhere on your local PC or your network.
8. Once you have selected the correct document to be uploaded, click the Open button on the dialogue box. The 'File to upload' field is completed with the path to the document. Note: you cannot delete a document on RITS once it has been uploaded, so please double-check that this is the correct file.
9. Enter any comments relating to the uploaded document. You can format the comments that you enter using the format buttons at the top of the Comments box. Always use the 'Paste As Text' function and then apply any necessary formatting within the textbox. This will maximise the number of characters you can enter in these textboxes. The 'Select All' button (far right) selects all the contents of the textbox. This function will select all visible and hidden content, making it useful should the user want to completely clear the textbox and start again.
10. If the document is confidential tick the confidential box. (The confidential flag should be used for any documents you may deem to be commercially sensitive.)
11. Once you have completed all data fields, click the Create Organisation Document button.

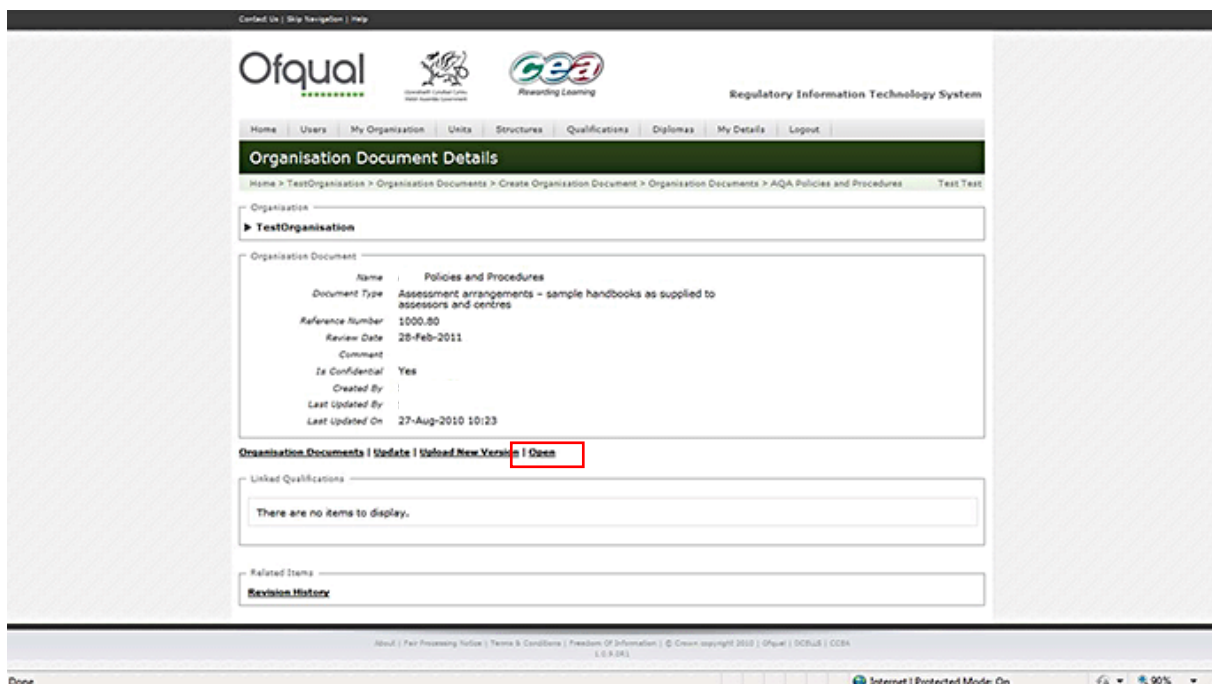
The newly added document is presented in the list at the foot of the page.

### **5.6.2 Search for documents**

1. Enter a character or word (for example 'Procedures' in the example shown below) in one of the fields and click the Search button.



2. The documents satisfying the search criteria are returned at the bottom of the screen.
3. Select a document from the list to view the details as shown below.

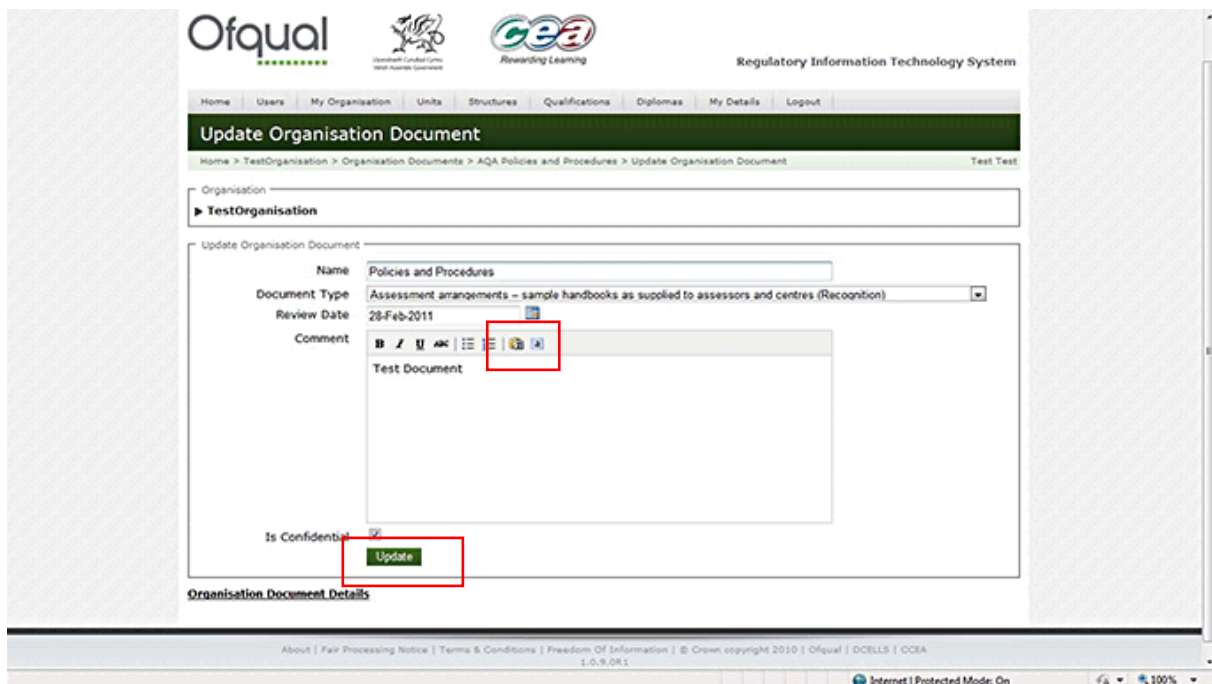


4. Click the Open button to view the document.

### 5.6.3 Update a document

To update the document details (properties), perform the following:

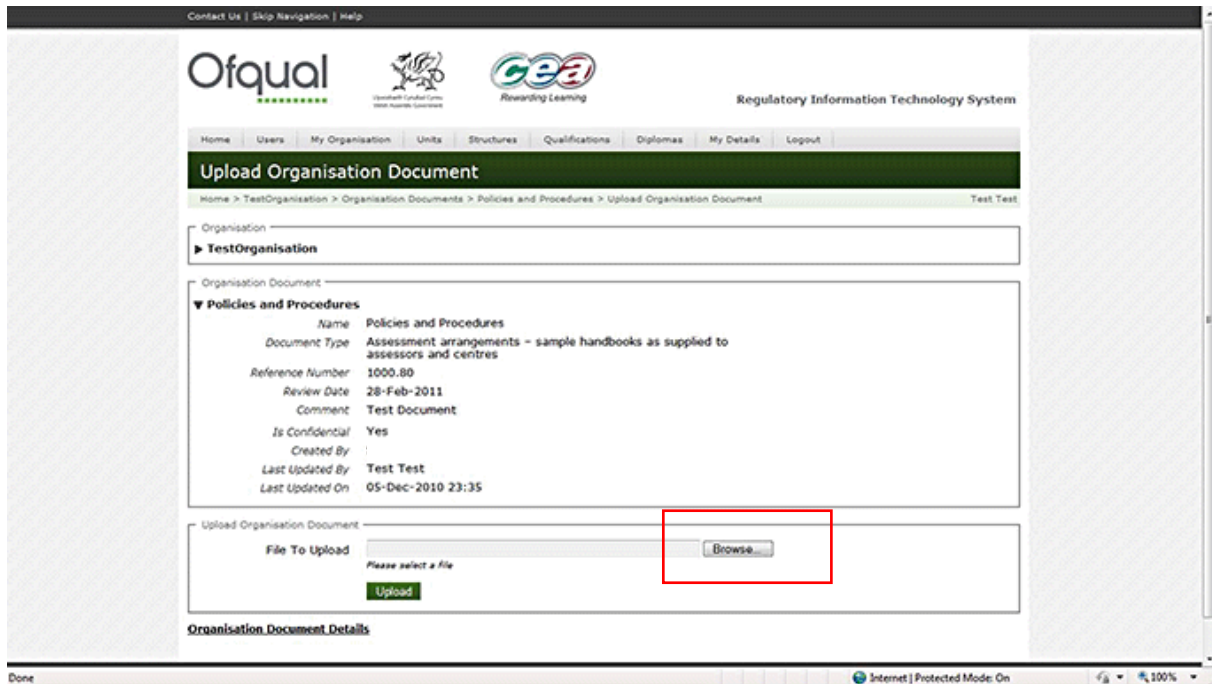
1. Select the organisation document from the list at the foot of the page. This allows you to change:
  - document name, for example to append or change a document version number
  - type ID
  - review date
  - comment attached to the document. Always use the 'Paste As Text' function and then apply any necessary formatting within the textbox. This will maximise the number of characters you can enter in these textboxes. The 'Select All' button (far right) selects all the contents of the textbox. This function will select all visible and hidden content, making it useful should the user want to completely clear the textbox and start again. (Highlighted below.)
2. Once you have completed the update, click the Update button, as shown below.



#### 5.6.4 Upload a new version of a document

1. Select the document for which you wish to upload a new version from the Organisation Document screen.
2. Select the Upload New Version link.
3. Click on the Browse button, as shown below, and select the new version to be uploaded. Note: the new version should always be in the same format as the original, e.g. if the original was PDF the update also needs to be PDF.

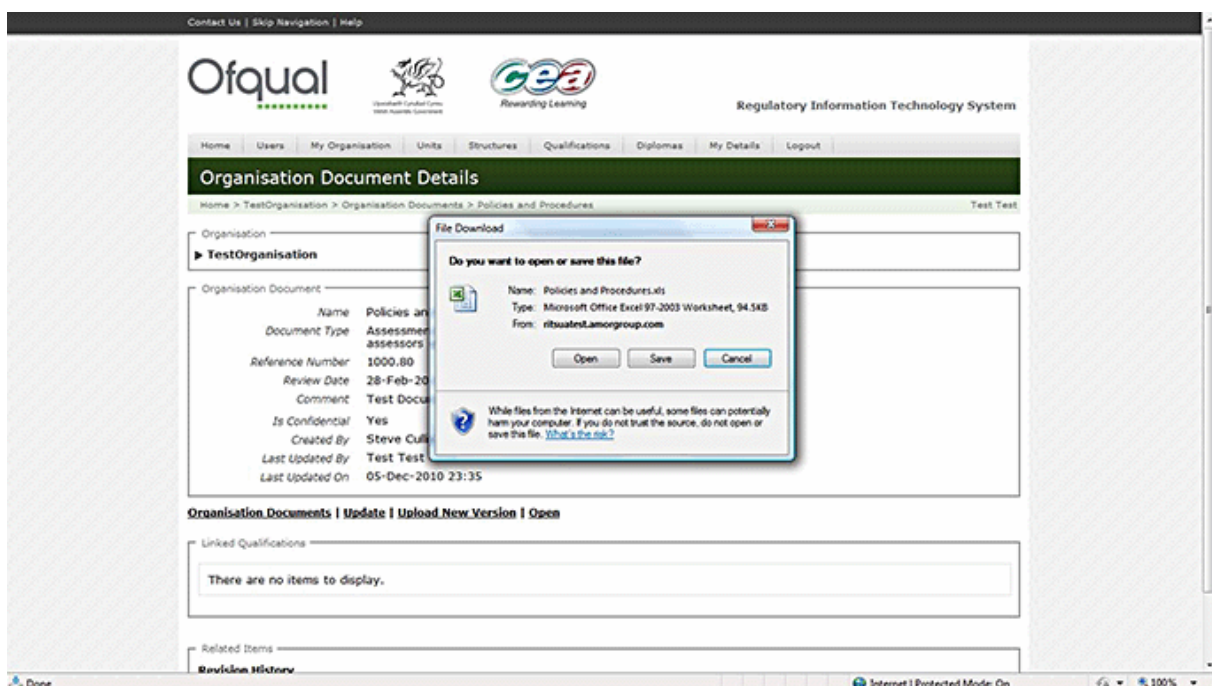




4. Click on the Upload button.

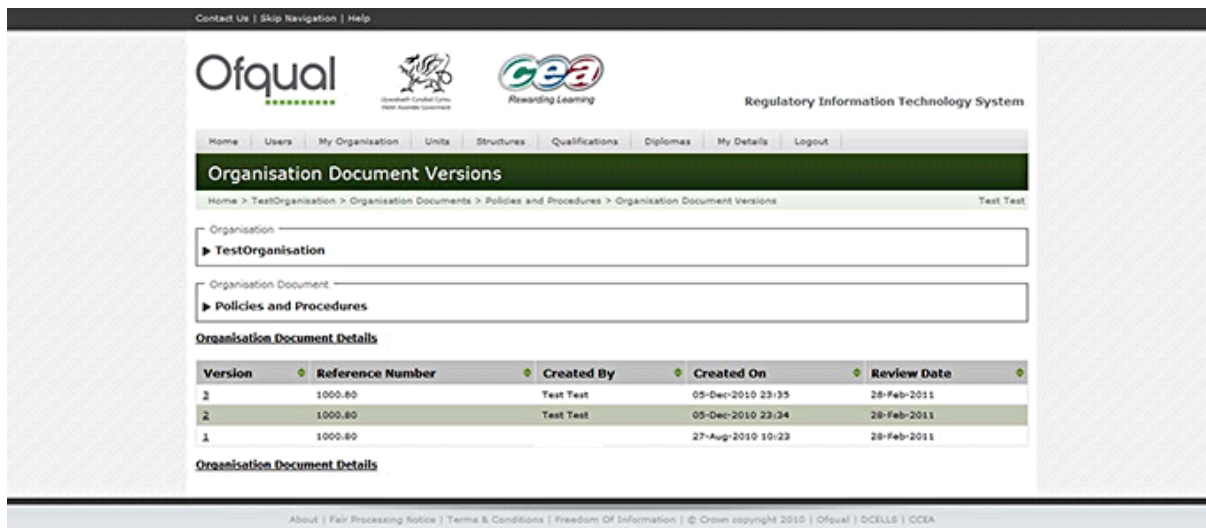
### 5.6.5 Open a document

1. From the Organisation Documents list, select the document to be opened from the list at the foot of the page. This displays the Organisation Document Details screen.
2. Click the Open link, and then click the Open button on the dialogue box that appears, as shown below. This opens the document in the application it was created in and allows you to view the contents of the document on the system.



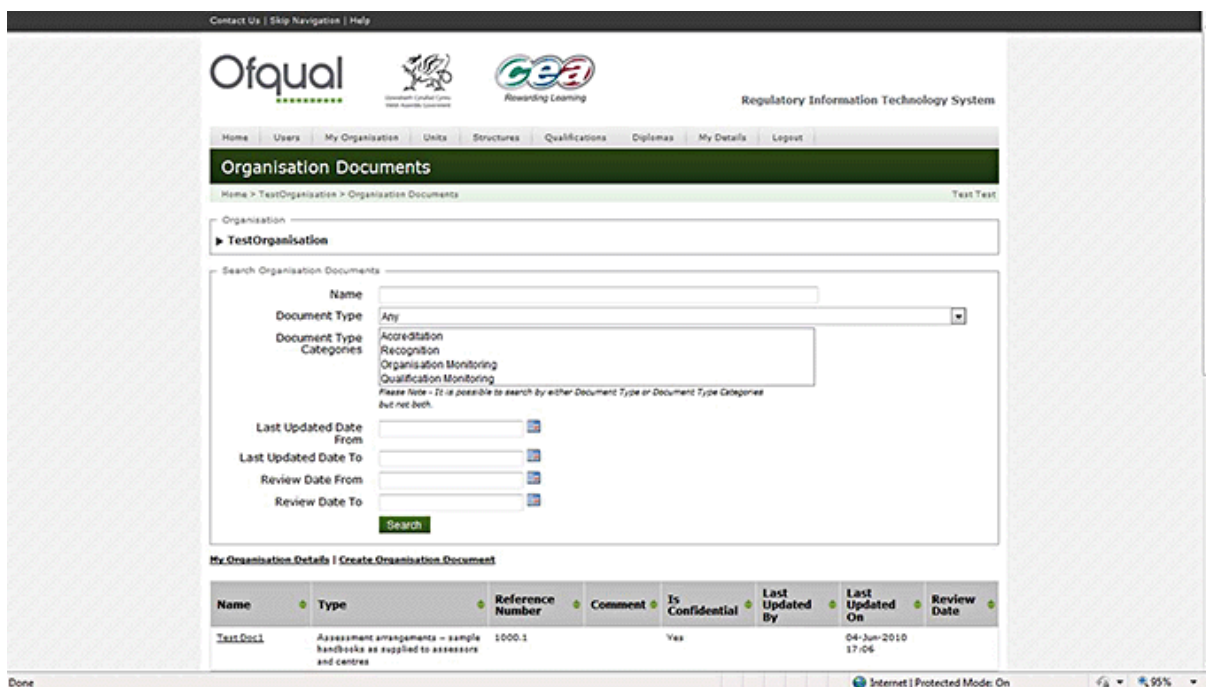
### 5.6.6 Revision history

To access the revision history, select a document from the list at the foot of the Organisation Documents screen, and click the Revision History button at the bottom of the page. An example is shown below.



### 5.6.7 View the Organisation Documents list

To view your organisation's documents list, click the My Organisation menu button at the top of the page, and then click the Documents button. The list of documents uploaded by the organisation appears at the foot of the page, as shown below.



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