

Portal – General Info

Accessing the System, General Information and Generic Functionality

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We work for and with communities, helping them come to life by walking, wheeling and cycling to create healthier places and happier lives for everyone. www.sustrans.org.uk

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0. Quick General Overview/Reference

The screenshot shows the Sustrans Project Portal interface. The top navigation bar includes the site title (1), a shrink menu button (2), help and documentation (4), and a logout button (5). A banner (6) displays grant rounds information with buttons for 'Start a New Application' and 'Scroll Down to Grant Rounds'. The main content area is divided into sections: 'Active Projects' (7) with an accordion group (8) for 'My Projects' and 'Other Projects', a table with columns for Reference, Last Active Year, Requires Attention, Title, Open/Manage, and Actions (9), and a 'What is this section?' help button (10). Below are sections for 'Incomplete/Unsubmitted Applications' and 'Submitted Applications', each with their respective accordion groups.

1. **Site Title** – Click to go to Home page.
2. **Shrink Menu button** – click to reduce side navigation menu to icons only.
3. **Side Navigation Menu** – contents vary depending on the page being displayed, and in page navigation items are only shown on the extended menu.
4. **Help & Documentation** – Click to access guidance documentation.
5. **Logout** – click to exit the site/system.
6. **Banner** – Displays important information and sometimes has links/buttons for easy access to features.
7. **Section Help button** – opens a popup containing basic information on what the section is and contains.
8. **Accordion groups** – Click to expand/collapse accordion groups and thus show/hide the content.
9. **Grid Row Button/Link** – Access pages or functionality related to the data row.
10. **Menu Button** – shown on some grids in order to provide further access to functionality.

1. Personal Data - Data Protection/GDPR

Data protection and confidentiality are important considerations within the design of the Project Portal. The system allows cross organisational working, and the viewing of one person's details by others, but this can only be done through consent.

1.1 Project Group

To allow cross organisational working, but also protect personal data, the Portal operates via an invite only methodology for external users and projects.

This also provides a level of data security in that it restricts what people can edit.

The Project Group is the list of external users that have access to and editing permissions on a project. External users cannot add themselves to the project group and must be invited by an existing member.

Note: In extreme cases (e.g. when every member of a projects Project Group has left their position within their respective organisations), it is possible for an internal Portal admin to one external user to the project group.

1.2 What Can an I See?

You can see an application or project if:

- You have been added to the project group,
- or the application/project is assigned to your organisation.

You can see other user information if:

- You are part of the same project group,
- and the other user is allowing their details to be shared/displayed to other project group members.

1.3 What Can I Edit?

If a member of the project group, then you can edit information on that application/project.

If not a member of the project group, but you can see the project (if the project is assigned against their organisation), then you will be able to carry out a small number of tasks on the project (e.g. uploading a file).

2. User and Organisation Registration

2.1 Internal Users

Sustrans colleagues do not need to register for the Project Portal. The system will prevent anyone with a Sustrans email address from registering as an external user.

2.2 External Users

2.2.1 Why is Registration Required?

The system works based on user registration, rather than open access, to provide a level of control over who uses the system.

A user is connected to an organisation at the point of registration, which connects their account through to various features within the system.

2.2.2 Fundamental Principles

- A user must be registered against an organisation.
- Organisations can be tagged with one or more 'official' domains.
- If an organisation has an 'official' domain listed, only those using an email address with that domain can register against the organisation.
- To register, the user must agree to the Portal usage terms.
- A user can be invited to register by an existing user through being added to a project group.

- A user can de-activate their account at any time.
- A user account is set to 'lapsed', and contact details hidden after six months of inactivity.
- A lapsed account can be re-activated by the user if they log in or go through the change password process.
- User data is only shared with other external users on an opt-in, project by project basis.
- User data is shared with Sustrans colleagues, who must adhere to the data protection selections made by the users.

2.2.3 How Does a Person Register?

The screenshot shows a login interface with a green header labeled 'Login'. Below the header is an 'Email: *' field with a white input box and a green 'Continue' button with a right-pointing arrow. A cookie notice states: 'This site uses cookies to store application data. None of the data stored is of a personal nature. By logging in, you are accepting the use of cookies on this site.' Below this is a brown banner that reads 'This Site Uses Multi Factor Authentication' with a link for 'More information on Multi Factor Authentication'. At the bottom, a green banner asks 'Not yet registered on the Project Portal?' and features a link 'Register for access to the Sustrans Project Portal' which is circled in orange.

Figure 1 - The login screen with the Register link highlighted.

- Users registering a new organisation, or users registering against an organisation that does not have an 'official' domain must be manually approved.
- Users registering with an email that has a domain recognised by the system will be required to enter less information and will be automatically approved.

- Users are required to verify their email address to complete registration. They are sent a unique link that allows them to complete the final part of the process.

2.2.3.1 Part 1 of the Registration Process

Note: Please be aware that the registration process asks for common personal data, and so your browser may pre-fill some of the fields. If fields have data in them when it is the first time you are viewing the page, it is the browser that populated the data. Please ensure that you check that data is correct before continuing.

To register on the Portal:

1. Go to the [Portal login page](#).
2. Look for the Not Yet Registered section (you may need to scroll down).
3. Work through Page 1 and answer the data protection questions.

Please select the options below to which you agree.

In order to complete registration and use the Project Portal, you must confirm that you understand the reason for registration and why you must submit your details. If you do not understand, please review the introduction text on this page, and if you have any further questions, please contact Sustrans Scotland on 0131 346 1384.

I understand and agree

I do not understand or I disagree

The Project Portal grants access to Projects through the assignment of individuals to each Project. A person who is assigned to a Project can request another person be added to the Project Group. Being named in the Project Group guarantees you access to the Project, allows you to access certain functionality within the Project pages, and means that your Name and Organisation Name will be visible to all others named on the Project.

Please approve requests by default

I will approve or reject requests individually myself

When you are added to a Project, your contact details can be made available to everyone else also listed on the Project, including those outside of your organisation. This can be set as the default option, or you can choose whether to show your details on a Project by Project basis. If you are assigned to a Project, no-one on the Project will be able to see your details.

I am happy for my contact details to be visible by default

I will choose at the time if I want my contact details to be visible on that Application/Project

Keep in Touch?

Please confirm below whether you would like to hear the latest news from Sustrans in the future:

Sustrans would like to keep you informed about the latest news concerning the Projects and activities in which the organisation is involved.

Yes, please keep me informed

No, please don't contact me

Sustrans would like keep you updated regarding the latest professional news about sustainable transport announcements, consultations, policy, reports and case studies from across the UK

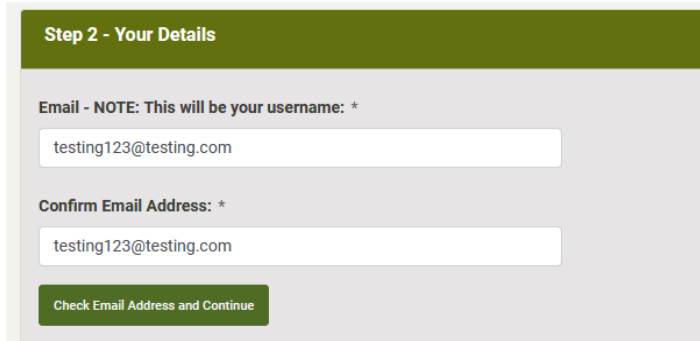
Yes, please send me the latest news and information

No, please don't send anything

Figure 2 – The data protection questions on Page 1 of the registration process.

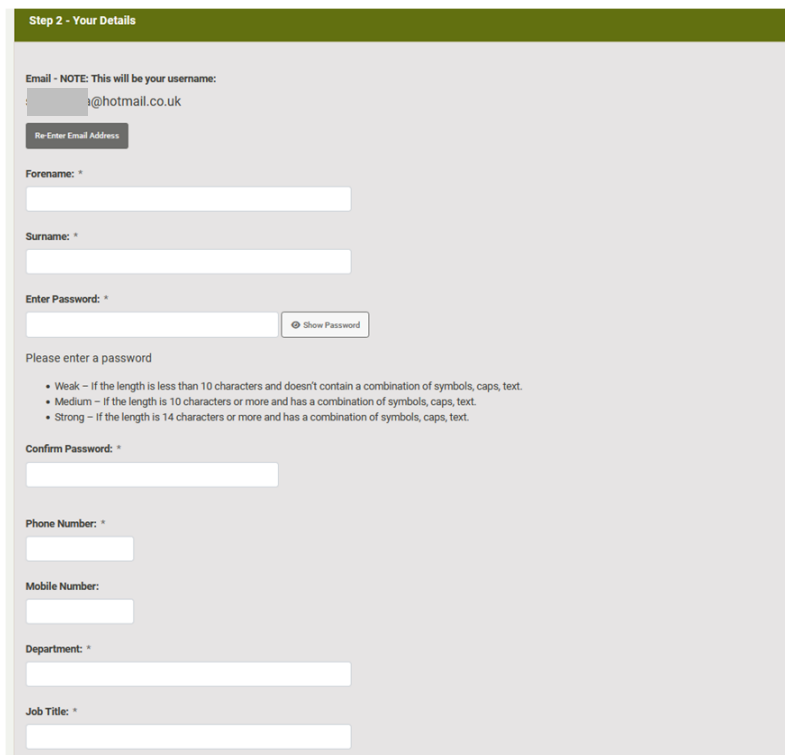
4. Click the Confirm button to move to Page 2.

5. Enter your email address into both text fields.
6. Click on Check Email button, and the system will check the email address is not already registered, and whether your email has a domain that is registered against an existing organisation.



The screenshot shows a registration form titled "Step 2 - Your Details". It features two text input fields for email addresses, both containing "testing123@testing.com". A green button labeled "Check Email Address and Continue" is positioned below the second field. A note above the first field states "Email - NOTE: This will be your username: *".

Figure 3 - Email fields on Page 2 of the registration process.



The screenshot shows the same "Step 2 - Your Details" registration form, but with more fields visible. The email field now contains "j@hotmail.co.uk" and has a "Re-Enter Email Address" button below it. Other fields include "Forename: *", "Surname: *", "Enter Password: *" (with a "Show Password" toggle), "Confirm Password: *", "Phone Number: *", "Mobile Number:", "Department: *", and "Job Title: *". A password strength indicator is present, listing three levels: Weak (less than 10 characters), Medium (10 characters or more), and Strong (14 characters or more).

Figure 4 - Personal details fields that show following email validation on Page 2 of the registration process.

7. Once the check is complete, either:

- a. The system will prevent registration, the reason for which will be shown on screen, in which case review the information to understand what to do next and ignore all further steps here.
 - b. Or additional fields will be displayed, in which case, continue with the next steps.
8. Add in all requested information into the additional fields.

Step 3 - Which Organisation are you Representing/Employed by?

Please enter the main/key part of your organisation's name: *

test or

e.g. Townname, instead of The Townname Community Trust or Townname CT.

Organisations returned from your search text. Please select one of organisations listed below. If the organisation you are employed by/represent is not listed, please try an alternative search term or select 'My Organisation is Not Listed'.

Organisations shown with (*) have a registered domain and it is not possible to register against the organisation unless you have a valid email address that utilises the domain (e.g. with an organisation domain of '@mylocalauthority.gov.uk', the email format would be something like 'username@mylocalauthority.gov.uk').

Test Valley Borough Council (awaiting approval)
test org (registration incomplete)
Test Organisation
Organisation Is Not Listed

Help - Linking to a Registered Organisation

Please enter the full organisation operating/trading name: *

Does the organisation have an official email domain that makes up the second part of the email address of all staff/members? e.g. @YourOrganisationName.co.uk

Yes, the organisation has an official email domain
No, the organisation doesn't have an official email domain.

Figure 5 - The organisation section of Page 2 of registration, showing the results of an organisation search, Organisation is Not Listed option selected, and new organisation and organisation has email domain questions/fields showing.

9. In the system organisation section:
 - a. If the system matched you to an organisation, there will be nothing you need to do.
 - b. If you were not matched to an organisation:
 - i. Enter six or more characters from your organisation name into the organisation search field and click the search button.
 - ii. If organisations matching your search are found, a list of options will be displayed, from

- which you should select your organisation or Organisation not Listed.
- iii. If no organisations are found to match your search, either try again, or enter your Organisation name into the text field that will now be showing.
 - iv. If asked whether your organisation has an official domain used in email addresses, answer yes or no accordingly.
 - v. If yes, then enter the domain into the text box that should appear.
10. Click the Confirm button.
 11. A review page should load, allowing you to check your entries/selections.
 12. If everything is correct, click on the Register button.
 13. According to the conditions laid out at the top of this document section:
 - a. The system will send an email to the admin team asking them to review your registration.
 - b. Or you will be automatically approved.

2.2.3.2 Part 2 of the Registration Process

Note: Please be aware that the registration process asks for common personal data, and so your browser may pre-fill some of the fields. If fields have data in them when it is the first time you are viewing the page, it is the browser that populated the data. Please ensure that you check that data is correct before continuing.

1. Once your registration has been approved, an email will be sent to you with a unique URL that will take you to the last part of the registration process. Click on the URL or paste it into your browser.
2. If the organisation you are registering against is new, or for some reason is missing key information, you will be asked to fill out key details regarding the organisation.
3. An address is required against your registration, and so depending on what is shown, either:

- a. Select an existing address from those already registered against your organisation.
 - b. Or enter a new address.
4. Click on the Confirm button.
5. Review the information shown, and if correct, click on the Register button.
6. The registration is complete.

2.2.4 What is the Manual Approval Process?

This only applies to new users also registering an organisation, or for those registering against an organisation that does not have an approved email domain recorded on the system.

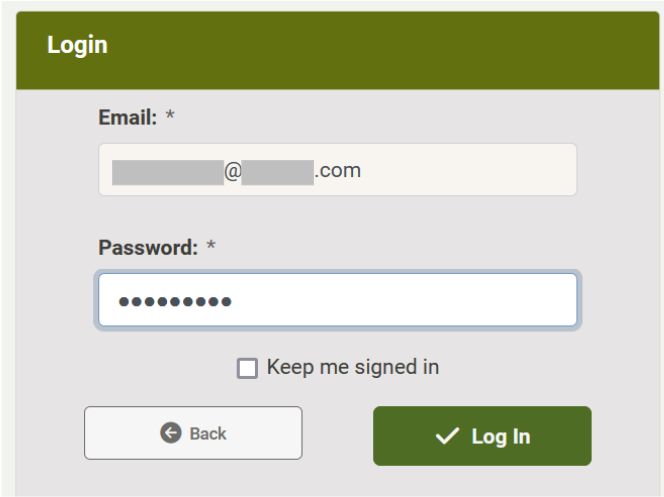
To ensure that personal data is not exposed to those that should not have access to it, certain user registrations require manual approval.

- When the user completes part 1 of registration, an email is sent to the Sustrans Admin team to alert them to the required approval..
- If an existing organisation, an existing registered user against the organisation must be contacted to verify that they know the person and that the email address provided is correct.

3. Logging into the Portal

3.1 Initial Login

1. Enter your email address and click the *Continue* button.
2. If a non-Sustrans email address is entered, the password field and Log in button will be displayed.



The screenshot shows a login form with a green header bar labeled 'Login'. Below the header, there are two input fields: 'Email: *' and 'Password: *'. The email field contains a placeholder '@.com'. Below the password field is a checkbox labeled 'Keep me signed in'. At the bottom of the form are two buttons: a white 'Back' button with a left arrow and a green 'Log In' button with a checkmark.

Figure 6 - Login section of Portal login page with Password field displayed for non-Sustrans user/email address.

3. Enter your password and click the *Log in* button.
4. You will be taken to Multi Factor Authentication.

3.2 Multi Factor Authentication (MFA)

Multi Factor Authentication is required as part of the Cyber Essentials Accreditation that Sustrans has gained. It is an

increasingly common part of the digital world and is the principle of requiring additional methods of user verification on top of simply requesting a username and password.

MFA works by requesting a code that is either sent to a device or obtained from an authentication app on a device. The device is normally a phone.

There are three methods of MFA that are currently allowed on the Portal:

- Authenticator Application
- Text (SMS)
- Email

All users must setup MFA, and therefore the system will ask a user to do so on first login. A user cannot progress beyond this without completing the MFA set-up.

The portal asks that a primary and secondary (back-up) authentication be setup, but a single method can be chosen if SMS is not possible and email is selected as the primary MFA method.

Note: It is strongly recommended that an Authenticator Application is used as the primary MFA method, and that a phone number is provided so that SMS or email can be used as a secondary method.

Note: The phone number can be completely different to the number you entered during registration, and can be a personal number, as it will not be shown to others.

3.2.1 First Login/MFA Set-up

To set-up MFA:

1. Log into the Portal.
2. You will be taken to the MFA set-up page.

Two Factor Authentication Setup Page

Two factor authentication is now required for reasons of security and privacy.

You will need to choose your default authentication method from one of the following:

- Authenticator App - requires a smart phone.
- Text message (SMS), or voice message if a landline - mobile number recommended and **do not use any shared number.**
- Email - this will be the one you use to log into your Portal account.

After two factor authentication is set-up and you have successfully logged in, you can access and change your authentication method settings in the My Account page.

Even if you do not wish to use SMS as your default MFA method, you are still asked to enter a phone number so that SMS can be provided as a secondary (back-up) method. **The number entered will not be shared or exposed to anyone else, and you can therefore use a personal (non-work) number if you do not have a suitable non-shared work phone number.**

If you do not choose SMS as your default MFA method, you will still be asked to verify the phone number you entered via a code sent in an SMS message.

If you do not have a suitable phone number for authentication, please ensure you select the appropriate options and SMS will be disabled as either a default or secondary MFA method.

Due to things beyond our control emails sent for MFA purposes can be delayed (e.g. server response, virus scanning and quarantine controls, and refresh frequency of email app inbox). It is therefore strongly recommended that you choose SMS or Authenticator App as your default MFA method.

Do you have a phone number (preferably a mobile, but not essential) that can be used for MFA?
Choosing no will prevent you from using SMS as either a default or secondary (back-up) MFA method.:

<input checked="" type="checkbox"/> Yes, I have a number that is not shared and that I can use for MFA.
<input type="checkbox"/> No, and I am happy to continue without Text Message (SMS) as Primary or Secondary MFA options.

Please select the primary authentication method you wish to use (this will be the authentication method for every subsequent login attempt you make on the Portal):

<input checked="" type="radio"/> Authentication App
<input type="radio"/> Text (SMS)
<input type="radio"/> Email (this will be the email used for the account)

[← Back to Login Page](#)

[Continue →](#)

Figure 7 - The first page in the setup process for MFA.

3. Review the information provided.
4. Select yes or no for whether you would like to enter a phone number for SMS (whether you wish to use SMS as your primary or secondary method). If yes, enter the phone number.

5. Select the MFA method you would like to use as your primary method.
6. Click the Continue button.
7. A new page will load – please continue with the applicable steps below.

If you have entered a phone number for SMS messages (even if you did not choose it as your primary method):

1. You will have been sent an SMS message, and the new page will load requesting a code from that SMS message.

This is your Sustrans Project Portal (Test Environment) security code. Do not share this code. [038488](#)

Figure 8 - Example SMS message (in this case from the Portal test environment) containing an MFA code.

The screenshot shows a web page titled "Two Factor Authentication" with a sub-heading "Text Message (SMS)". The main heading is "Authentication Code Entry". The page contains the following text: "Before setting up your chosen default MFA method, can you please verify the phone number you entered. This will allow the number to be used as a secondary (back-up) MFA method." Below this, it says: "Please open your Phone, locate the Project Portal Text Message (SMS) and enter the time limited code into the text box." There is a text input field with a red border, and above it, the text: "Please enter the number/code from the Text Message (SMS) sent to phone number [REDACTED] *". Below the input field, it says: "Haven't received the code? Use the button to request a new one." There is a button labeled "Generate New Code and Send via Text Message (SMS)". Below that, it says: "Code still not being recieved?:" followed by a checkbox and the text: "Alternatively, If there is a problem using the number provided, and you are happy to continue to your chosen default MFA method without verifying the phone number, then you can tick this box. Doing so will disable SMS as a secondary MFA method." At the bottom, there are two buttons: "Back to MFA Setup Start Page" and "Continue".

Figure 9 - The page for setting up the SMS method for MFA.

2. If you do not receive the message, please wait a minute or two as there may be a network delay, but if the message still does not arrive, double check the phone number as it is displayed on the screen, and if that is correct then you can click on the Generate New Code and Send via Text Message (SMS) button.
3. Once the SMS has been received, review the message, obtain the code, and enter it into the field on the page.
4. Click on Continue.
5. Did you choose SMS as your primary MFA method?
 - a. If yes, set-up is complete, and you will be taken to the Home page.
 - b. If no, a new page will load, and please continue with the applicable steps below.

If choosing Authentication Application as your primary method:

1. The new page will display a QR code (and a text string alternative).



Figure 10 – A portion of the Authenticator Application MFA setup page with an example QR code that would be scanned with a mobile phone.

2. Using an authenticator application on your phone, capture the QR code shown on the screen, or enter the text string.
3. Enter the code/number provided by the Authenticator App following the Portal being added as a client.
4. Click on Continue.

If choosing Email as your primary method:

1. You will have been sent an email, and the new page will load requesting a code from that email.
2. Read/listen to the message, obtain the code, and enter it into the field on the page.
3. Click on Continue.

3.2.2 Subsequent Login Attempts

You will be asked to complete MFA the first time you log in on a given day. The page related to the MFA method you chose as the primary method will load requesting the entry of a code.

Two Factor Authentication
Authentication App

Authentication Code Entry

Please open your Authenticator App, locate the Project Portal item/account and enter the time limited code into the text box.

Please enter the number/code provided by your authentication app: *

[← Back to Login Page](#) [Continue →](#)

[Can't Use That MFA Method?](#)

Figure 11 - The Authenticator App MFA page.

If you chose the Authenticator App as your primary MFA method:

1. Open the authenticator app on your phone.
2. Locate the Project Portal client item within the app.
3. Obtain the number shown and enter it into code field on the Portal MFA page.
4. Click on Continue.

If you chose SMS or Email as your primary MFA method:

1. You will have been sent an SMS message, and the new page will load requesting a code from that SMS message.
2. If you do not receive the message, please wait a minute or two as there may be a network delay, but if the message still does not arrive, double check the phone number as it is displayed on the screen, and if that is correct then you can click on the Generate New Code and Send via Text Message (SMS) button.
3. Once the SMS has been received, review the message, obtain the code, and enter it into the field on the page.
4. Click on Continue.

3.2.3 Switching to Secondary MFA Method

If for some reason you are unable to use your primary method of MFA, then you can use the links shown on the page requested the MFA code to switch to an alternative MFA method.

The alternative methods available depend on:

- Whether you entered a phone number for MFA via SMS when setting up MFA.
- The method you are using as your primary method.

Note: Switching to a secondary method does not change it to being your primary method - it is for this login attempt only.

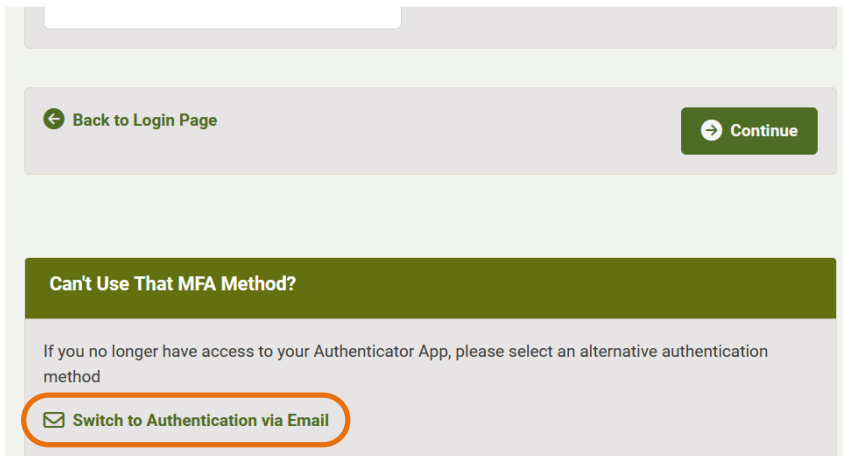


Figure 12 - An MFA screen with the link to an alternative MFA method highlighted.

3.2.4 Changing the Primary MFA Method

1. Log into the Portal and complete MFA.
2. Click My Account/Preferences item in the side navigation menu.
3. Scroll down to the Security section.
4. Click Change Primary MFA or Phone for SMS button.
5. Run through steps outlined in the section for first time MFA set-up (section 3.2.1) to change MFA settings.

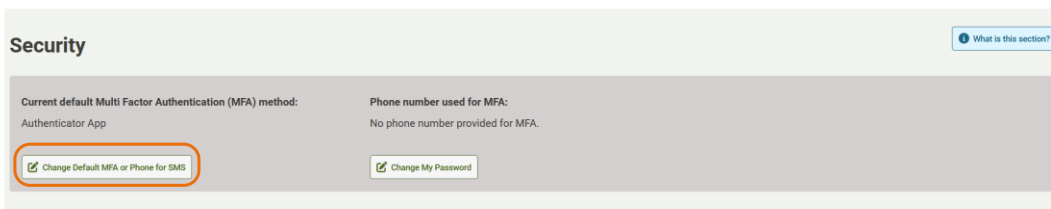


Figure 13 - The Security section of the My Account page, with the Change Primary MFA or Phone for SMS button highlighted.

3.3 Change/Reset Password

3.3.1 When Still Able to Log In

1. Log into the Portal and complete MFA.
2. Click My Account/Preferences item in the side navigation menu.

3. Scroll down to the Security section.
4. Click the Change My Password button.

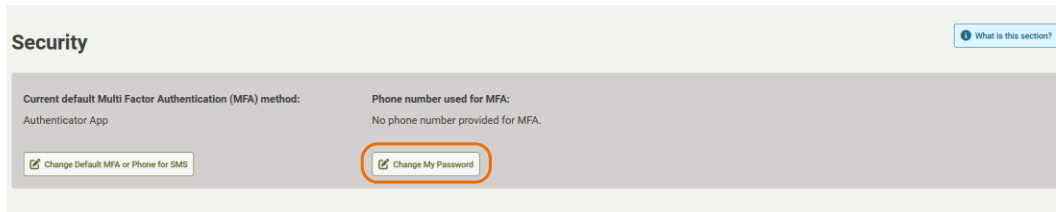


Figure 14- The security section of the My Account page with the Change My Password button highlighted.

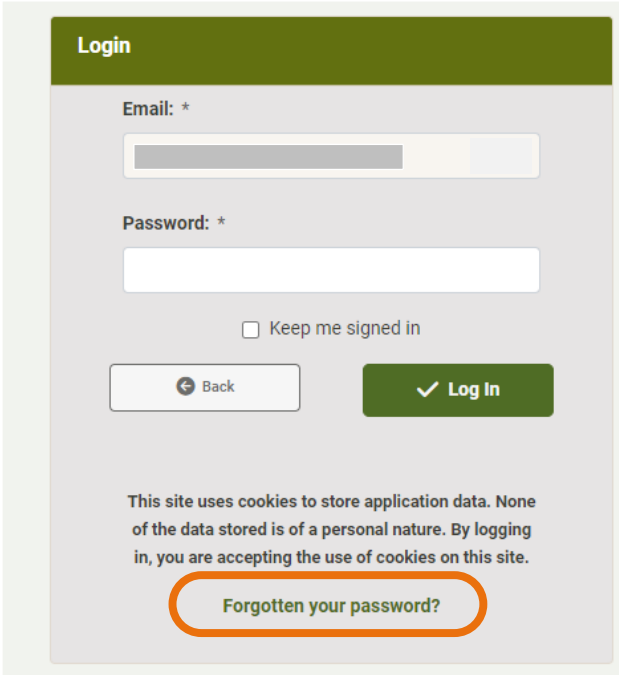
A screenshot of the 'Change My Password' popup form. The title 'Change My Password' is at the top left. The form contains three input fields: 'Enter your current password: *', 'Enter New Password: *', and 'Confirm New Password: *'. The 'Enter New Password' field has a 'Show Password' button next to it. Below the input fields, there is a section titled 'Please enter a password' with a bulleted list of password strength requirements: 'Weak - If the length is less than 10 characters and doesn't contain a combination of symbols, caps, text.', 'Medium - If the length is 10 characters or more and has a combination of symbols, caps, text.', and 'Strong - If the length is 14 characters or more and has a combination of symbols, caps, text.'. At the bottom of the form, there are two buttons: 'Cancel' and 'Confirm'.

Figure 15 - The Change My Password popup with fields for current and new passwords.

5. Type in your current password into the current password text box.
6. Type in the new password in the new password text box. You can click show password to check the new password is correct.
7. Type in the new password into the confirm text box.
8. Click the confirm button.

3.3.2 When Unable to Log In/Forgotten Your Password

1. Enter your email address into the login screen.
2. Click on Continue.
3. Click on the Forgotten Your Password link.
4. In the page that appears, re-enter your email address.
5. Click on the Confirm button.
6. You will be sent an email with a unique link allowing you to reset your password.
7. Click on the unique link in the email or copy it into your browser.
8. In the page that loads, enter your new password.
9. Re-enter the password into the confirmation box.
10. Click on the Confirm button.



The image shows a login form with a green header labeled "Login". Below the header, there are two input fields: "Email: *" and "Password: *". Below the password field is a checkbox labeled "Keep me signed in". At the bottom of the form, there are two buttons: "Back" (with a left arrow icon) and "Log In" (with a checkmark icon). Below the buttons, there is a small text block: "This site uses cookies to store application data. None of the data stored is of a personal nature. By logging in, you are accepting the use of cookies on this site." At the bottom of the form, there is a link labeled "Forgotten your password?" which is highlighted with an orange rounded rectangle.

Figure 16 - The login page with the Forgotten Your Password link highlighted.

4. System Wide Functionality

4.1 Side Bar Menu

The side bar menu is a key navigational and informational aid, allowing quick access to key pages, and giving a reference point for where the currently viewed page sits in the system hierarchy.

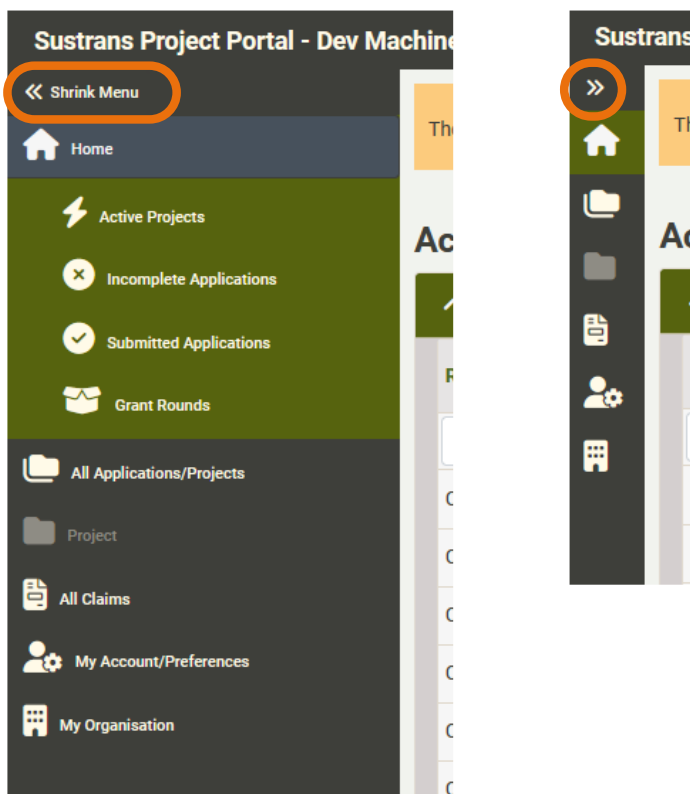


Figure 17 - Side bar menu in both expanded and shrunk display options, and with in-page navigation options shown for the Home page in the expanded menu.

The side bar menu has two sizes:

- Small size – icons only, and no in-page navigation items.
- Larger size – icons and text, and in-page navigation items are shown for current page (where they exist)

To expand or shrink the side bar menu, click on the item at the top of the menu.

On narrower screens/browser windows, the side bar menu will disappear to make room for the page content. In this scenario, a button with a 'burger menu' icon is added to the header in the top left of the page. Click that button to show the navigation menu.

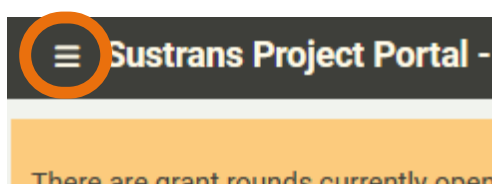


Figure 18 - Navigation menu button in page header on narrower screen/window.

4.2 Accordions

Many pages contain a substantial amount of information that if displayed by default would result in significant scrolling for the user.

The Accordion control is utilised throughout the system to manage the information available on a page, by encapsulating similar information, or sometimes just a single grid, into a collapsible area, meaning that the page content displayed can be easily reduced through the hiding of content areas.

The use of accordions also allows performance improvements, through the staggered loading of content.

Accordion controls have the following features:

- A chevron arrow next to the title and 'reactive' title (hover over and it changes style).

- Clicking the accordion group header bar will expand or collapse the accordion group, showing or hiding the content.
- The accordion group header bar is coloured when expanded (blue on internal side, green on external), and grey when collapsed.
- In many cases, the accordion content is only loaded when the accordion group is expanded.
- A 'badge' is often shown after the accordion title. This is where the accordion group contains a single grid, and the badge displays the number of items/rows within the grid.

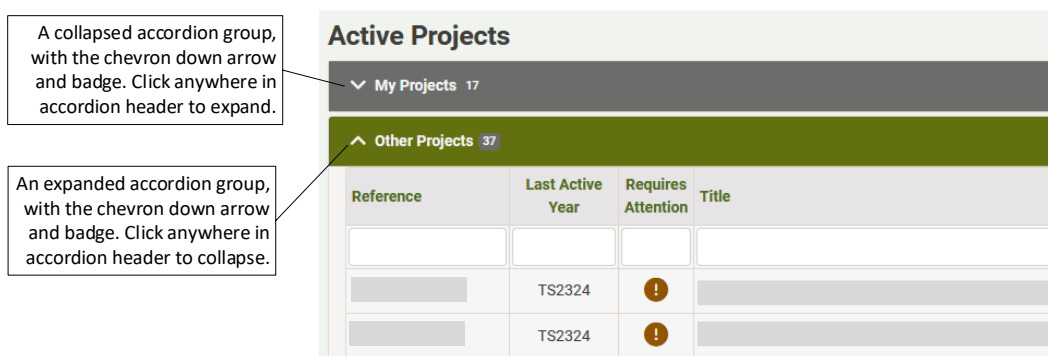


Figure 19 - Example of three accordion groups, one collapsed and one expanded.

4.4 Grid/Table Features

Where possible and appropriate, grids/tables on the system have had one or more of the following enabled:

- Adaptive Layout
- Filtering
- Sorting
- Row Menu
- Editing
- Paging

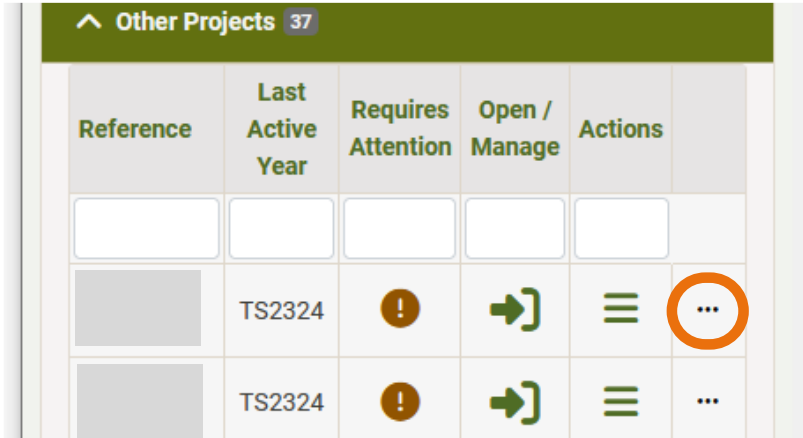
Not all features/functionality are available on all grids.

4.4.1 Adaptive Layout

The adaptive layout is to aid compatibility with a wide range of screen sizes. On smaller screens, or where content in a field is too large:

- a grid with adaptivity enabled will automatically adjust the fields shown,
- the fields that are removed are placed into a hidden panel and a new unnamed column added on the right containing 'more' ellipsis buttons.
- the unnamed column contains ellipsis buttons, which if clicked, expand the row to show the hidden panel.

This functionality is required because horizontal scrolling goes against accessibility compliance, and therefore measure must be taken to keep content within the width of the browser window.



Reference	Last Active Year	Requires Attention	Open / Manage	Actions	
	TS2324	!	➔	☰	⋮
	TS2324	!	➔	☰	⋮

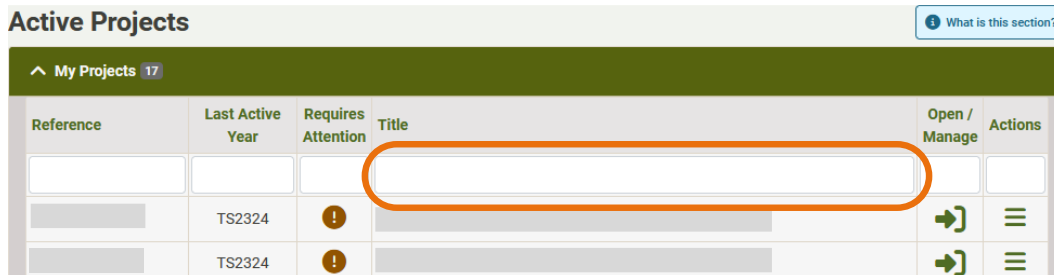
Figure 20 - A grid with adaptivity enabled where some fields have been placed into hidden panel and additional column added with a 'more' ellipsis buttons.

4.4.2 Sorting

Click on the header for the field/column by which you wish to order the results (click again to reverse the order).

4.4.3 Filtering

Filtering of data within a grid can be carried out using the filter row (if shown). Enter your filter clause into the filter row field for the relevant column.



The screenshot shows a table titled 'Active Projects' with a sub-header 'My Projects 17'. The table has five columns: Reference, Last Active Year, Requires Attention, Title, and Open / Manage. The first row is a filter row with empty input fields. The second and third rows contain data for 'TS2324' with 'Requires Attention' icons (exclamation marks) and 'Open / Manage' icons (right arrows). The filter row field for the 'Title' column is highlighted with an orange oval.

Reference	Last Active Year	Requires Attention	Title	Open / Manage	Actions
	TS2324	!		→	☰
	TS2324	!		→	☰

Figure 21 – A grid with a filter row field highlighted.

4.4.4 Row Menu

On occasion, to keep the grid manageable, some useful but less often used functionality is placed into a grid row menu. This can be identified by a 'burger menu' icon and will generally be to the right side of the grid row.



The screenshot shows the same 'Active Projects' grid as Figure 21. In this version, the 'burger menu' icon (three horizontal lines) in the 'Actions' column of the second row is highlighted with an orange circle.

Reference	Last Active Year	Requires Attention	Title	Open / Manage	Actions
	TS2324	!		→	☰
	TS2324	!		→	☰

Figure 22 - Example of grid rows with a row menu, with one of the row menu icons highlighted.

4.4.5 Editing

4.4.8.1 Existing Row

The editing of data in a grid occurs through a popup form. If the data in a grid can be edited, there will be a column dedicated to Edit buttons, with one button per row.

When edit is selected for a row (from row menu or button, depending on what is available), a popup is loaded with the data fields that can be edited.

4.4.8.3 New Row

If the ability to add new rows is enabled, a *New* button will be shown in the toolbar.

4.4.6 Paging

To improve performance and limit the amount of scrolling required on a page, grids that are likely to return many rows have paging enabled.

The default number of items per page differs depending on the result type and location of the grid, with page item number options revised accordingly.

To change the pager options:

1. Scroll to the bottom of the grid to locate the footer.
2. Then either.
 - a. from the page selection options to the left of the footer click on All
 - b. or from the drop-down menu on the far right of the footer, select the number of items you wish to display.

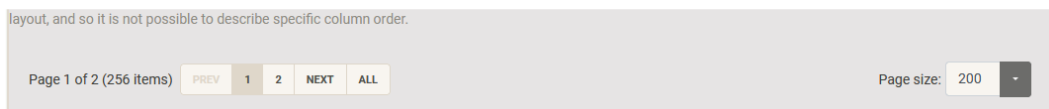


Figure 23 - Example of a grid view footer with page options.

5. Home Page

5.1 My Vs Other

- My Applications or Projects – Applications/Projects where you are a member of the Project Group.
- Other Applications or Projects – Applications/Projects where your organisation is the lead, but you are not part of the Project Group.

5.2 Active Projects

An Active Project is a project that has one or more ‘activated’ years. Activation of a project year is the internal step that turns an application into a project and enables updates and claims.

Note: An Active Project will disappear if there isn’t a recent activated project year (it can still be accessed via the All Applications/Projects page).

For more information on opening and updating Active Projects, see separate Active Project user guide.

5.3 Grant Applications

A grant application submitted, or in the process of being completed, against a given grant round.

An Application only moves up to the Active Project section once a project year has been activated.

If an application sits on the system for six months without having one or more years activated, it will disappear from the Home screen (it can still be accessed via the All Applications/Projects page).

For more information on starting a new or editing an existing application, see either the specific Grant guidance documentation, or the separate Applications and Form/Reports user guide.

5.4 Grant Rounds

The Grant Round grid shows grant rounds that are open, or those soon to be opened.

In addition, if there are grant rounds currently open, a banner will show at the top of the page with a shortcut button allowing the quick start of a new application.

For more information on Grant Rounds and starting a new application, see either the specific Grant guidance documentation, or the separate Applications and Form/Reports user guide.

6. All Applications and All Claims

These two pages are a repository for all applications/projects to which you are associated, and all grant claims connected with those projects.

If an application/project has disappeared from your home screen, then the All Applications/Projects page will still show it (assuming you are still part of the project groups and/or your organisation is the lead).

The two pages are laid out in the same way, with two accordion groups splitting the applications/projects or claim by lead organisation.

6.1 Projects Lead by My Organisation

Whether you are in the project group or not, if your organisation is the lead organisation, you will see the application/project or claim in this section.

6.2 Other Projects to which I'm Associated

If you are part of the Project Group, but your organisation is not the lead organisation, the application/project or claim will be in this section.

6.3 Opening a Project or Claim

The actions that can be performed on a project or claim will differ based on the status of the item. Links and buttons are provided on each row for editing/opening the item, and these will be enabled/disabled accordingly.

If you think you should be able to perform an action on an item but the link/button is disabled, please contact the relevant Project Officer/Grant Advisor for an update on the status of the item.

7. Managing My Account

There are two elements to your account on the Portal system:

- Your details and preferences – for you alone to manage and update.
- Your organisation’s details – updatable by anyone assigned to your organisation.

The two pages that can be used to update the information can be accessed from the side navigation menu.

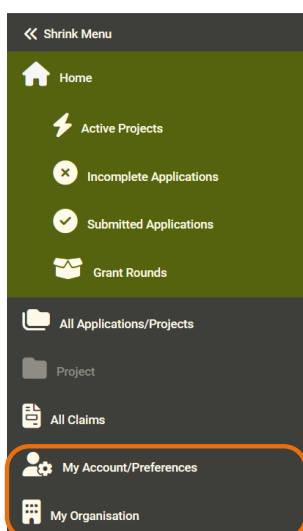


Figure 24 - The side navigation menu with the My Account/Preferences and My Organisation menu items highlighted.

7.1 My Account/Preferences

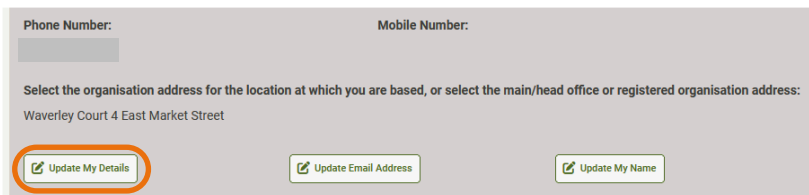
The My Account page is split into the following sections:

- My details – key information about you.
- Security – Multi Factor Authentication and Password settings.
- Data Protection, Privacy and Contact Preferences.

7.1.1 Update My Details

To update the key details held about you on the system:

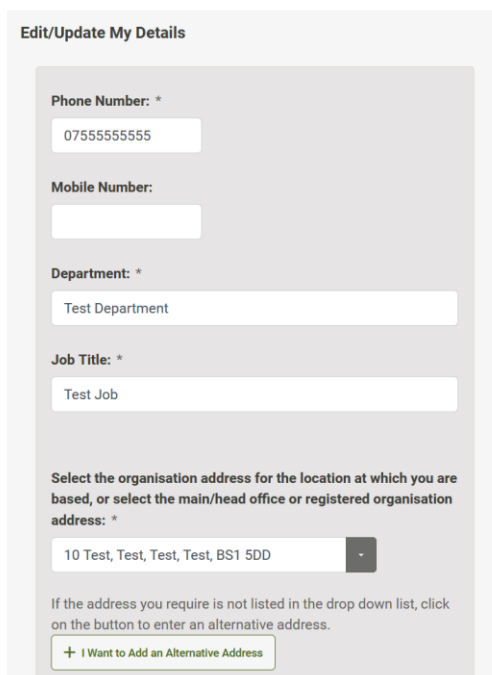
1. Navigate to the My Account/Preferences page.
2. In the My Details section, click on the Update My Details button.
3. In the popup that appears fill in/Update the relevant detail(s).
4. Click the Confirm button.



Phone Number: Mobile Number:

Select the organisation address for the location at which you are based, or select the main/head office or registered organisation address:
Waverley Court 4 East Market Street

Figure 25 - Part of the My Details section with the Update My Details button highlighted.



Edit/Update My Details

Phone Number: *

Mobile Number:

Department: *

Job Title: *

Select the organisation address for the location at which you are based, or select the main/head office or registered organisation address: *

If the address you require is not listed in the drop down list, click on the button to enter an alternative address.

Figure 26 - The Edit/Update My Details popup.

7.1.2 Update Email Address or Name

The email address and name information are key data underpinning your account, and therefore for both security and

data protection reasons, it is not possible to update your email address. If the address requires editing (e.g. you have changed your name due to marriage or other reasons), please contact the Portal support team.

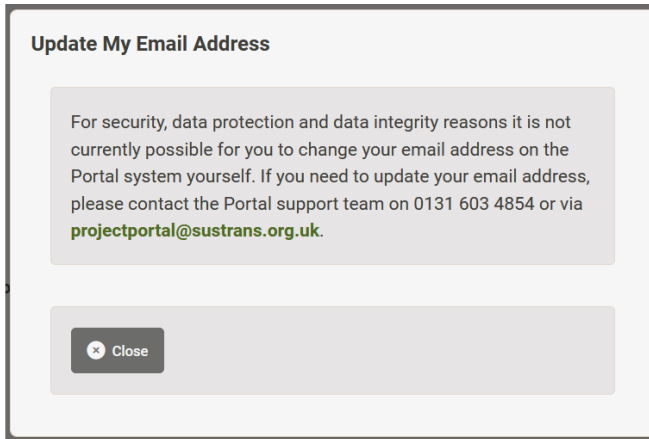


Figure 27 - The popup shown when clicking Update My Email Address button, giving instructions to contact the Portal support team.

7.2 Security

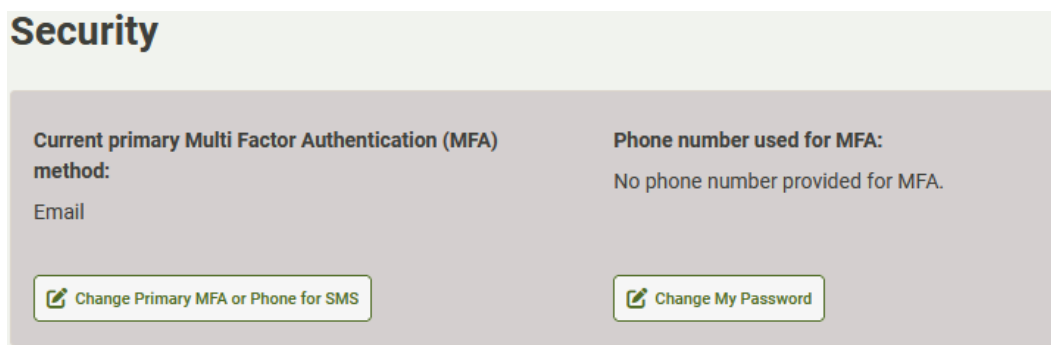


Figure 28 - The security section of the My Account page.

7.2.1 Update MFA Preferences

To update your Primary MFA preference, and mobile number to use for MFA:

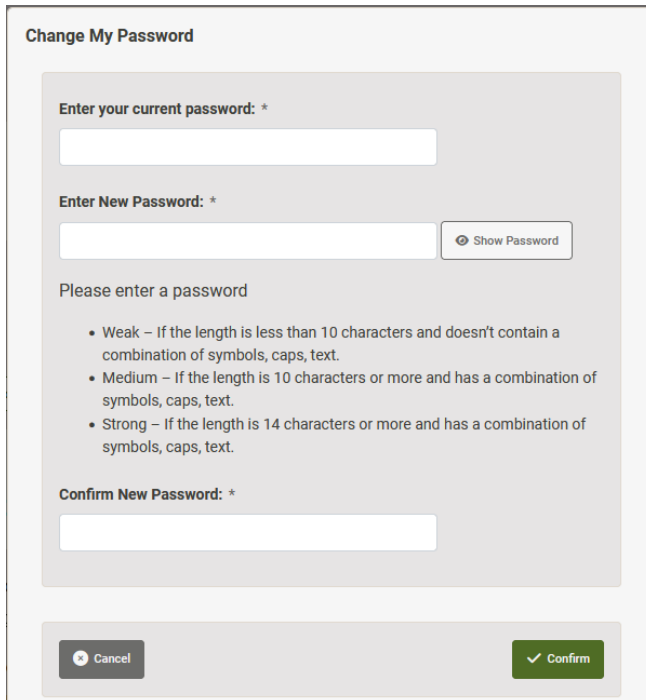
1. Navigate to the My Account/Preferences page.

2. In the Security section, click on the Change Primary MFA or Phone for SMS button.
3. Follow the steps outlined in section 3.2.1 for setting up MFA.

7.2.2 Update Password

To update your password.

1. Navigate to the My Account/Preferences page.
2. In the Security section, click on the Change Password button.
3. In the popup that appears, enter your current password, and then your choice of new password as requested.
4. Click on the Confirm button.



The screenshot shows a 'Change My Password' popup form. It contains the following elements:

- Change My Password** (Title)
- Enter your current password: *** (Text label above a text input field)
- Enter New Password: *** (Text label above a text input field, with a **Show Password** button to its right)
- Please enter a password** (Text label above a list of password strength requirements):
 - Weak – If the length is less than 10 characters and doesn't contain a combination of symbols, caps, text.
 - Medium – If the length is 10 characters or more and has a combination of symbols, caps, text.
 - Strong – If the length is 14 characters or more and has a combination of symbols, caps, text.
- Confirm New Password: *** (Text label above a text input field)
- Cancel** (Button with a circular arrow icon)
- Confirm** (Green button with a checkmark icon)

Figure 29- The popup shown after clicking the Change Password button.

7.3 Data Protection, Privacy and Contact Preferences

This section displays the choices you made at the time of registration for the system and will dictate how Sustrans is able to contact you. Regardless of the options set here, if you are

named on a project via inclusion in a Project Group, you may be contacted about that project.

To update your data preferences:

1. Navigate to the My Account/Preferences page.
2. In the Data Protection section, click on the Update Privacy/Contact Preferences button.
3. In the popup that appears, select the appropriate options.
4. Click on the Confirm button.

Update My Privacy/Contact Preferences

The information you have provided is being used to administer Grant Applications and Grant Claims, as well as enabling project management and collaboration.

Your name and organisation is shared with other Project Portal users associated with the Grant Applications/Projects on which you are named.

You may choose whether you wish the system to approve any requests for you to be added to a Project by default, or whether you would prefer to individually approve each request. The same is the case for whether your contact details are displayed to others on those Projects.

Sustrans is committed to protecting your privacy and we work in full compliance with Data Protection legislation. We will only share your personal data when you provide us with your explicit consent to do so, or when legally required. However we may share your details with carefully selected third party suppliers (data processors) working on our behalf. You have the right to access and update the data we have about you. Our [Data Protection and Privacy Policy](#) explains your rights, who has access to your data and how we safeguard your personal data.

Sustrans Project Portal Usage Agreement and Data Preferences

Please select the options below to which you agree.

The Project Portal grants access to Projects through the assignment of individuals to each Project. A person who is assigned to a Project can request another person be added to the Project Group. Being named in the Project Group guarantees you access to the Project, allows you to access certain functionality within the Project pages, and means that your Name and Organisation Name will be visible to all others named on the Project.

Please approve requests by default
I will approve or reject requests individually myself

When you are added to a Project, your contact details can be made available to everyone else also listed on the Project, including those outside of your organisation. This can be set as the default option, or you can choose whether to show your details on a Project by Project basis. If you are assigned to a Project, no-one on the Project will be able to see your details.

I am happy for my contact details to be visible by default
I will choose at the time if I want my contact details to be visible on that Application/Project

Keep in Touch?

Please confirm below whether you would like to hear the latest news from Sustrans in the future:

Sustrans would like to keep you informed about the latest news concerning the Projects and activities in which the organisation is involved.

Yes, please keep me informed
No, please don't contact me

Sustrans would like keep you updated regarding the latest professional news about sustainable transport announcements, consultations, policy, reports and case studies from across the UK

Yes, please send me the latest news and information
No, please don't send anything

Figure 30 - The popup shown after clicking the Update Privacy/Contact Preferences button, with the data protection questions and options.