



# ProvisionMap

## Quick start guide

Getting started with External Agency  
accounts

## External Agency accounts in Provision Map

Provision Map allows you to share your IEPs securely and consistently with users from external agencies. This quick start guide covers how to share plans with these agencies and how to manage individual access to shared plans.

Admin ▾ Plans ▾

Pupil details

Tutor groups

Import pupils

View reviews

Meetings log

Staff details

Import staff

School settings

Archived pupils

Parental comments

### How to enable agency accounts

To begin collaborating with external agencies, you need to enable the ability to set up external agency accounts in your school.

To enable agency accounts, mouse over the [Admin](#) tab at the top of the page and select [School Settings](#). In the [School details](#) section ensure that the setting [Enable external agency accounts](#) is set to [Yes](#).

Enable external agency accounts:

Yes

External agencies					
					<a href="#">Share plan with an agency</a>
	Code	Name	Status	Permissions	Expires
  	9829XZYNG7DY	Daniel	Active	Read & Write ▾	3/7/2017 00:00

Once enabled, you will see a new section at the bottom of your learning plans labelled [External Agencies](#). This section lists the agency users that the plan has been shared with. This table includes the [unique sharing code](#) for each user, the [name](#) of the agency user, the current [status](#) of their shared access, the [level](#) of access they have to this plan and the [date](#) that their access will expire.

## Sharing a plan with an external agency

Share plan with an agency

To share a plan with an external agency user, scroll to the [External Agencies](#) section of your chosen plan and click the [Share plan with an agency](#) button.

Invite external agency

External agency name

Example agency

Email address

exampleagency@edukey.co.uk

Permissions

Read only

Access expires

3/7/2017

Close

Send invite

You will then be presented with the popup form shown on the left. Here, you can enter the agency details before sending the invitation.

Once the invite has been sent, the external agency user will be sent an email that contains the [unique sharing code](#), as well as instructions on how to set up a Provision Map account.

After an agency user has set up their account, they will be able to log in using the following URL: [www.provisionmap.co.uk/agency](http://www.provisionmap.co.uk/agency)

## How to enable agency accounts

Upon the external agency user successfully registering / logging into Provision Map, the shared plan will be visible in their list of available plans. Here, they will be able to check which [plans](#) they have access to, the [level of access](#) that they have and [how long](#) they have access for.

To view a shared plan, an agency user must click on the [3 vertical dots](#) next to a plan and select [View / Edit plan](#) depending on the permission level that they have been granted.

BASIC DETAILS				
	School	Pupil	Access expires	Permissions
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		Show all
<input type="checkbox"/>	EduKey Malta test school	Sindra Aswar	7/3/2017 00:00	Read only

## Available settings to manage external agencies

Once a plan has been successfully shared with an agency user, you are able to manage the extent of access they have to the shared plan. The options that control plan access are described below.

### Communicating with an agency

You are able exchange comments with an external agency if they have access to the plan. To leave a comment for an agency user, click on the [speech bubble](#) icon next to their entry in the [External agencies](#) list.

This will open up a list of comments that have been made, along with a text area for you to leave a comment in. Agency users are also able to leave comments if they [have Read & Write permissions](#) for the plan.



Communication with Daniel

Mr Dan Harries  
(teacher)  
28/6/2017 11:32

Here is a comment left for the agency.

External agency  
28/6/2017 14:19

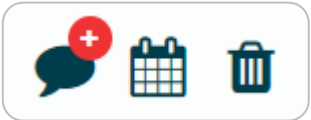
Here is a comment left by the agency

Leave a comment:

All comments will be shared with all involved parties

Add comment

If the external agency user has left a comment, the speech bubble icon will display a [red circle](#) indicating this. Click on the bubble to view the comment.



Recent communications	
External agency commented on Jimmy Abbey	
Example agency commented on	15/6/2017
Andrew Abbot	7/6/2017
Agency 3 commented on Jimmy Abbey	4/4/2017
Malta North commented on Jimmy Abbey	
Local authority commented on Jimmy	9/1/2017
Abbey	9/1/2017
Malta South commented on Sean Abbey	
	4/5/2016

### Tracking recent comments

Once they have been made, comments from external agencies can be seen on the home page of Provision Map under the [Recent Communications](#) box.

Clicking on an entry will take you to the comment.

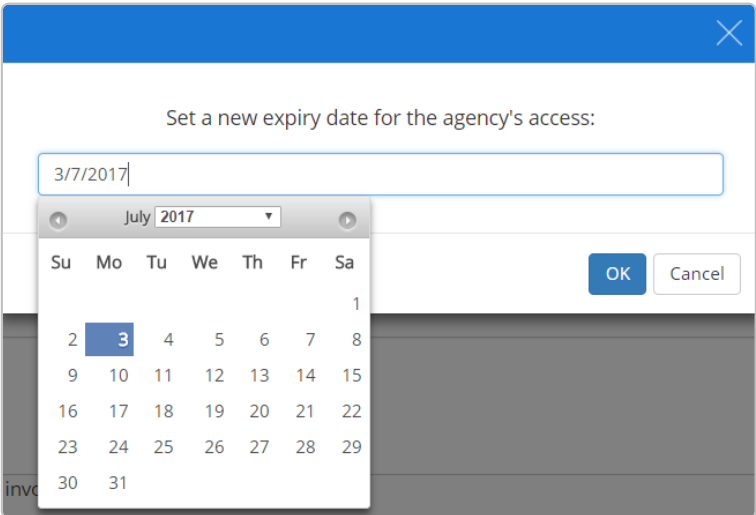
## Changing the access duration

To change the expiry date for an agency user’s access to a plan, click on the [calendar icon](#) next to their entry in the [External agencies](#) list.



Select a date from the [date selector](#) calendar to set it as the new expiry date

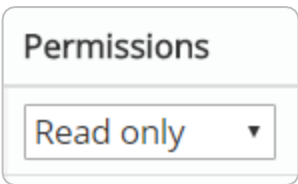
If you select a date from the past, the plan access will [expire](#) for the agency user until a current date is set.



## Revoking access for an agency

To remove an agency user’s access to a shared plan, click on the [bin icon](#) next to their entry in the [External agencies](#) list.

You will be asked to confirm your choice. Once confirmed, the agency user will no longer be able to view or edit the plan.



## Changing the permission level for an agency user

To change the permission level for an agency user, simply select a new level of access from the [Permissions](#) drop down menu for their entry in the [External agencies](#) list.

**Read only:** The agency user can view and print out the plan, but is [unable to make changes](#).  
**Read & Write:** The agency user can view, print and make changes to the plan.

## Further support

Please do not hesitate to get in touch if you need more support or training. [support@edukey.co.uk](mailto:support@edukey.co.uk)

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