



How to Manage User Accounts (QRG)

This Quick Reference Guide covers the following topics:

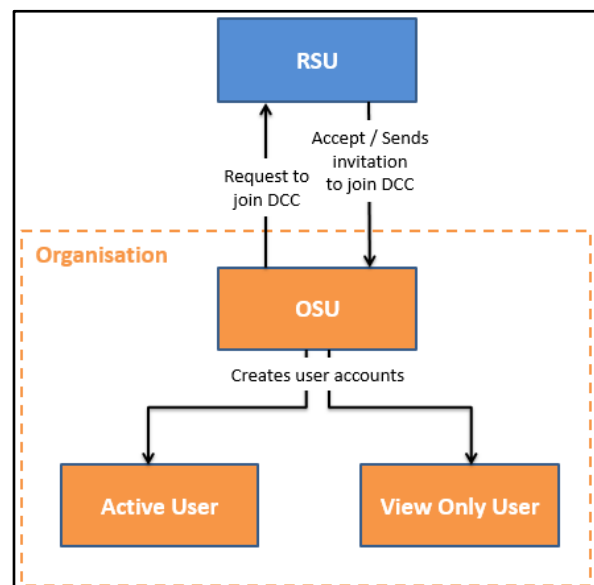
- 1 Search for a user accounts within your organisation
- 2 Create a user account
- 3 Update a user account
- 4 Delete a user account

The type of user account/user role depends on your responsibility within an organisation. The Organisation Super User (OSU) has the ability to create user accounts for members of their organisation. There are three user roles that the OSU can set up:

- **Organisation Super User (OSU)** – with full access to manage the organisation’s profile and full access to ISA functionality
- **Active User (AU)** – with full access to ISA functionality but without access to amend the organisation’s profile or create user accounts
- **View Only User (VOU)** – with access to only view ISAs, the user cannot make any changes to ISAs or the organization profile

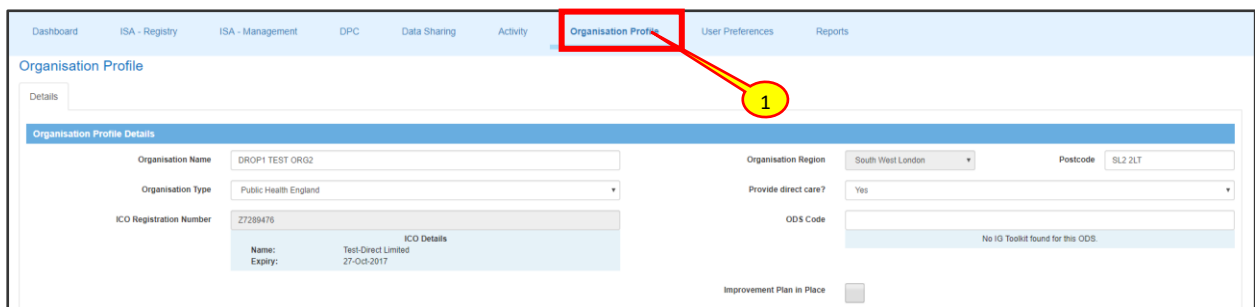
The Organisation Super User (OSU) and Active Users (AU) can initiate the request to join an Information Sharing Agreement. View Only Users (VOU) within an organisation cannot request to join or create any ISA.

Once you are logged in to the DCC portal, the user name and user role will be displayed at the top-right of your screen in the blue banner.

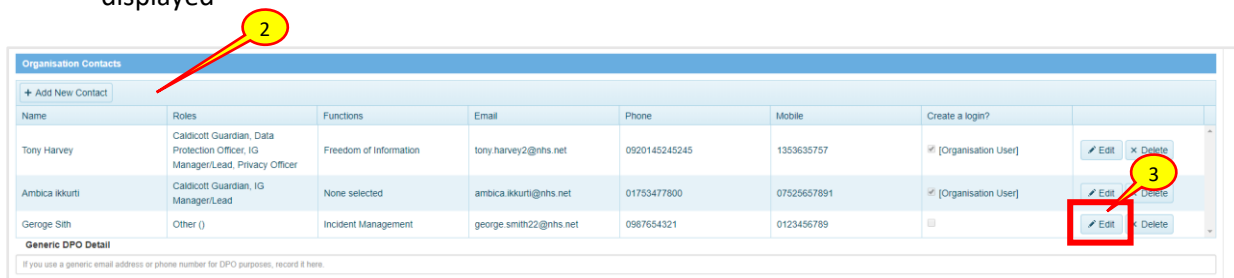




Search for and view User Accounts within your organisation

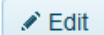


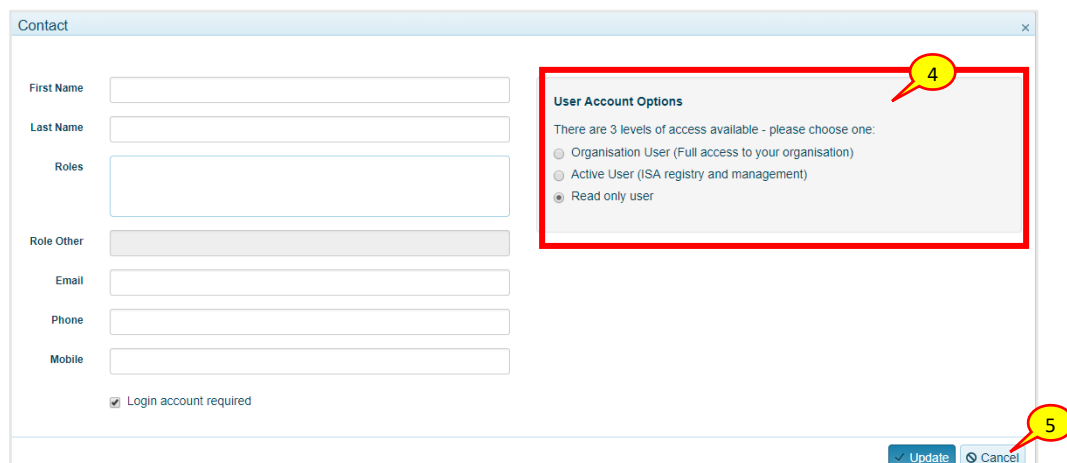
1. Click on 'Organisation Profile' tab from the navigation bar. The organisation profile screen is displayed

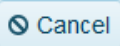


2. Scroll down to the 'Organisation Contacts' section. All the organisation's contacts are listed

Note: Contacts with user accounts have a checkbox ticked adjacent to their name in the column titled 'Create a login?'

3. To view a contact's user permissions (for a contact with the 'Create a login' checkbox ticked), click on the **Edit** () button adjacent to the contact's name



4. The 'Contact' screen is displayed, and the contact's details are displayed with the 'User Account Options' on the right of the screen
5. At the bottom-right of the screen, click **Cancel** () button to close. The screen closes and the 'Organisation Profile' screen is displayed



Create a User Account

Dashboard | ISA - Registry | ISA - Management | DPC | Data Sharing | Activity | **Organisation Profile** | User Preferences | Reports

Organisation Profile

Details

Organisation Profile Details

Organisation Name	DROPI TEST ORG2	Organisation Region	South West London	Postcode	SL2 2LT
Organisation Type	Public Health England	Provide direct care?	Yes		
ICO Registration Number	27289476	ODS Code	No IG Toolkit found for this ODS.		
ICO Details		Improvement Plan in Place <input type="checkbox"/>			
Name:	Test-Direct Limited				
Expires:	27-Oct-2017				

1. Click on 'Organisation Profile' tab from the top menu. The 'Organisation Profile' screen is displayed with your organisation details populated based on the ICO and ODS code details. The organisation details are displayed

2. Scroll down to 'Organisation Contacts' section. Organisation contact(s) details are displayed

Organisation Contacts

+ Add New Contact

Name	Roles	Functions	Email	Phone	Mobile	Create a login?	
Tony Harvey	Caldcott Guardian, Data Protection Officer, IG Manager, Lead, Privacy Officer	Freedom of Information	tony.harvey2@nhs.net	0920145245245	1353635757	<input checked="" type="checkbox"/> [Organisation User]	Edit X Delete
Ambica Ikkurti	Caldcott Guardian, IG Manager, Lead	None selected	ambica.ikkurti@nhs.net	01753477800	07525657891	<input checked="" type="checkbox"/> [Organisation User]	Edit X Delete
George Sith	Other ()	Incident Management	george.smith22@nhs.net	0987654321	0123456789	<input type="checkbox"/>	Edit X Delete

Generic DPO Detail
If you use a generic email address or phone number for DPO purposes, record it here.

3. To add a new contact, under 'Organisation Contacts' section, click on the **Add New Contact** (**+ Add New Contact**) button.

4

First Name: Tony

Last Name: Harvey

Roles: [Caldcott Guardian](#) [Data Protection Officer](#) [IG Manager, Lead](#) [Privacy Officer](#)

Role Other:

Functions:

Email: tony.harvey2@nhs.net

Phone: 0920145245245

Mobile: 1353635757

Notify for Updates:

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Update Cancel

4. A 'Contact' window is displayed. Populate the fields accordingly


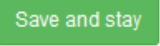
5. To enable the contact to have a user account and login to the Data Controller Console, select the checkbox labelled 'Login account required'. A 'User Account Options' pane is displayed to the right of the screen



User Account Options

There are 3 levels of access available - please choose one:

- 6
- Organisation User (Full access to your organisation)
 - Active User (ISA registry and management)
 - Read only user

6. Use the options to grant user log-in permissions accordingly for the user:
 - (a) Select 'Organisation User' to give the user full access to the organisation including the ability to create other contacts for the organisation
 - (b) Select 'Active User' to give the user partial access to the organisation. This user has the access to create an ISA and manage existing ISA's, however, they cannot create contacts or amend the organisation's profile
 - (c) Select 'Read-only' to allow the user to only view the information the organisation is associated with
7. Click the **Update** () button. The 'Contact' screen closes and the 'Organisation' screen is displayed
8. Click **Save and stay** () button at the bottom right of the page. The updated details are saved and the list of organisations are displayed
9. If the user account already exists in DCC, then the user will receive a notification email that s/he has been added as a user to the organisation

You have been added as a user to an additional organisation [Main Org 1] on the Data Controller Console. Please follow this [link](#) to login.

Regards

Data Controller Administrator

NHS (London Region)



10. If the user account doesn't exist in the DCC, the new contact will receive a notification email that a user account has been created for them. The new user will receive a username and a temporary password which they must change when they first login



A new user account has been created for you on the Data Controller Console.

Please follow this [link](#) to login.

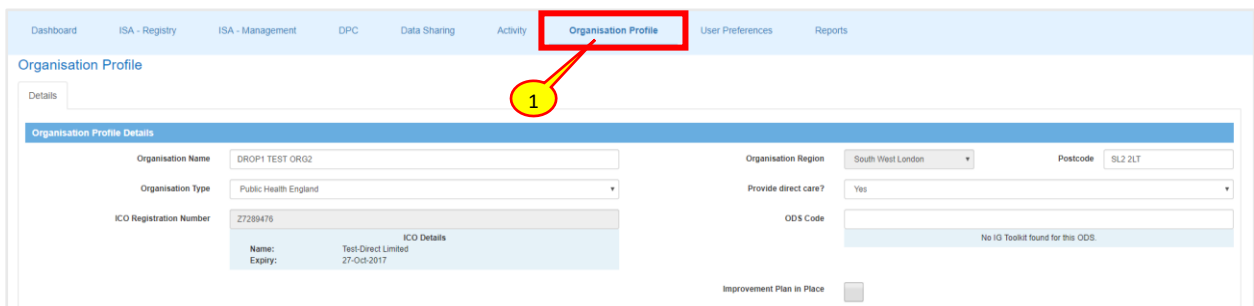
You can login using the following details:

Username: [https://hlsph.christiancare.nhs.net](#)
Password: ABCD1234

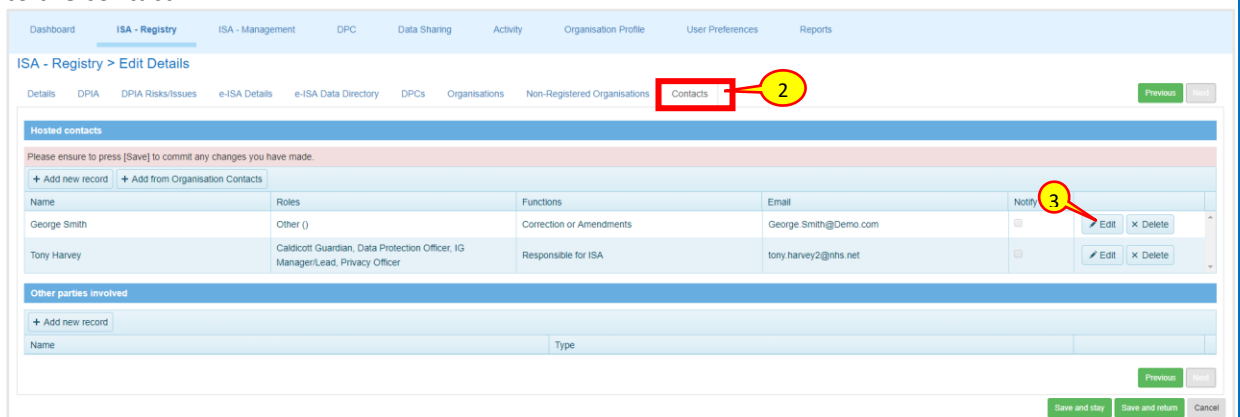
You will be asked to change this password when you first login.

Regards
Data Controller Administrator
NHS (London Region)

Update a User Account




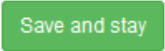
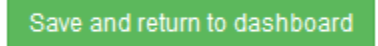
1. Click on 'Organisation Profile' tab from the navigation bar. The 'Organisation Profile' screen is displayed with the Organisation Profile Details populated based on the ICO and ODS code details
2. Scroll down to 'Organisation Contacts' section. Organisation contact(s) details are displayed
3. To edit a contact, under 'Organisation Contacts', click on the **Edit** (Edit) button adjacent to the contact.



e **Edit** (Edit) button adjacent to the contact.



The screenshot shows a 'Contact' form with the following fields: First Name (Tony), Last Name (Harvey), Roles (Caldcott Guardian, Data Protection Officer, IG Manager/Lead, Privacy Officer), Role Other, Functions (Freedom of Information), Email (tony.harvey2@nhs.net), Phone (0920145245245), Mobile (1353635757), and a checked box for 'Login account required'. On the right, the 'User Account Options' section is highlighted with a red box and contains three radio buttons: 'Organisation User (Full access to your organisation)', 'Active User (ISA registry and management)', and 'Read only user'. At the bottom right, there are 'Update' and 'Cancel' buttons.

4. A Contact window is displayed with contact details populated in the field. Amend the fields on the left as desired
5. To amend the user roles details, on the right-side of the 'Contact' screen under 'User Account Options' to grant the user permissions accordingly
 - (a) For 'Read-only' access, uncheck all the checkboxes
 - (b) For 'Active user' access, only uncheck the 'Organisation profile' checkbox and leave the other two boxes checked
 - (c) For 'Organisation Super User', check all three boxes
6. Click the **Update** () button. The 'Contact' screen closes and the 'Organisation' screen is displayed
7. Click **Save and stay** () or the **Save and return to dashboard** () button on the bottom-right of the page. The updated details are saved and the Organisation profile is displayed. The new contact will receive a notification email of the changes made

Remove a User Account

The screenshot shows the 'Organisation Profile' screen with a navigation bar at the top containing 'Dashboard', 'ISA - Registry', 'ISA - Management', 'DPC', 'Data Flow', 'Activity', 'Organisation Profile', 'User Preferences', and 'Reports'. The 'Organisation Profile' item is highlighted with a red box and callout 1. Below the navigation bar, the 'Organisation Profile Details' section contains fields for Organisation Name (Any Qualified Partner2), Organisation Type (Any Qualified Provider - Clinical and Non Clinical), ICO Registration Number (Unknown ICO Registration Number), Organisation Region (North West London), Postcode (SE1 6LH), Provide direct care? (Yes), ODS Code (EB4077), ICO Expiry Date (dd/mm/yyyy), and Improvement Plan in Place (checkbox).

1. Click on 'Organisation Profile' from the navigation bar. The 'Organisation Profile' screen is displayed with the organisation details populated based on the ICO and ODS code details.



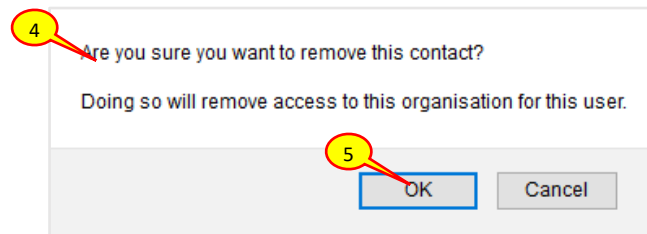
2. Scroll down to 'Organisation Contacts' section. Organisation contact(s) details are displayed

Organisation Contacts							
+ Add New Contact							
Name	Roles	Functions	Email	Phone	Mobile	Create a login?	
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Ambica Ikurti	Caldcott Guardian, IG Manager, Lead	None selected	ambica.ikurti@nhs.net	01753477800	07525657891	<input checked="" type="checkbox"/> [Organisation User]	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
George Sith	Other ()	Incident Management	george.smith22@nhs.net	0967654321	0123456789	<input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Generic DPO Detail
If you use a generic email address or phone number for DPO purposes, record it here.

3. To delete a contact, under 'Organisation Contacts', click on the **Delete** () button adjacent to the contact

4. A prompt is displayed 'Are you sure you want to remove this contact?'



5. Click **OK**. The contact is removed

6. Click **Save and stay** () or the **Save and return to dashboard** () button on the bottom-right of the page. The updated details are saved and the Organisation profile is displayed