

How to Manage User Accounts (QRG)

This Quick Reference Guide covers the following topics:

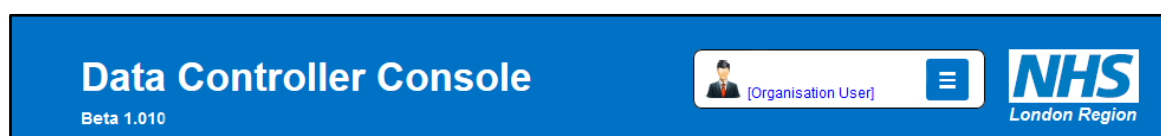
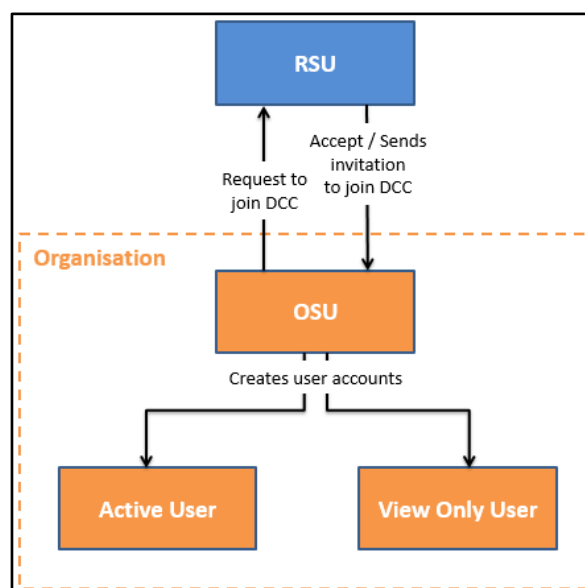
- 1 Search for a user accounts within your organisation
- 2 Create a user account
- 3 Update a user account
- 4 Delete a user account

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.

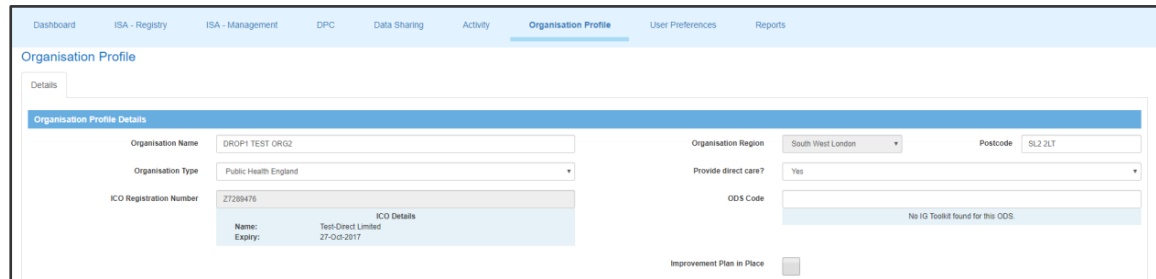
Once you are logged in to the DCC portal, the user name and user role will be displayed at the top-right of your screen in the blue banner.



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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



The screenshot shows the 'Organisation Profile' tab selected in the navigation bar. The main content area displays the 'Organisation Profile Details' section. It includes fields for Organisation Name (DROP1 TEST ORG2), Organisation Type (Public Health England), Organisation Region (South West London), Postcode (SL2 2LT), Provide direct care? (Yes), ICO Registration Number (Z7289476), and ICO Details (Name: Test Direct Limited, Expiry: 27-Oct-2017). There is also a field for ODS Code with a message 'No IG Toolkit found for this ODS' and an 'Improvement Plan in Place' checkbox.


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

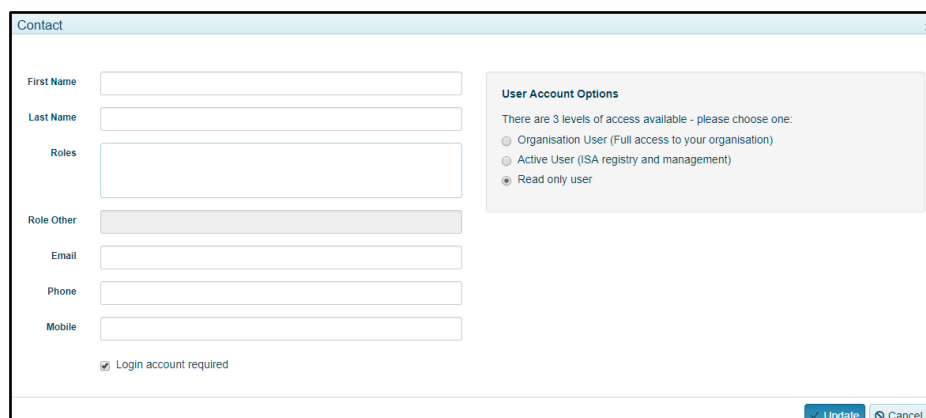


The screenshot shows the 'Organisation Contacts' section with a table listing contacts. The table has columns for Name, Roles, Functions, Email, Phone, Mobile, Create a login?, and actions (Edit, Delete). Three contacts are listed: Tony Harvey, Ambica Ikkurli, and George Smith. The 'Create a login?' checkbox is checked for Tony Harvey and Ambica Ikkurli, and unchecked for George Smith.


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 Delete
Ambica Ikkurli	Caldcott Guardian, IG Manager/Lead	None selected	ambica.ikkurli@nhs.net	01753477800	07525657891	<input checked="" type="checkbox"/> [Organisation User]	Edit Delete
George Smith	Other ()	Incident Management	george.smith22@nhs.net	0967654321	0123456789	<input type="checkbox"/>	Edit Delete

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

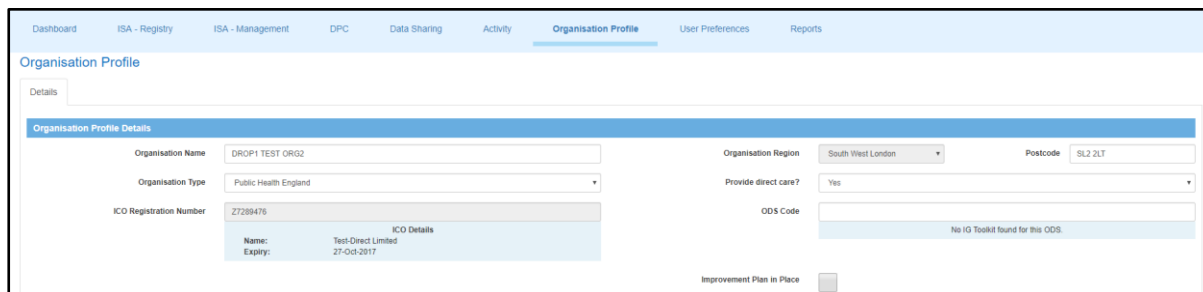


The screenshot shows the 'Contact' screen with fields for First Name, Last Name, Roles, Role Other, Email, Phone, and Mobile. There is a checkbox for 'Login account required' which is checked. On the right side, there is a 'User Account Options' section with three radio buttons: 'Organisation User (Full access to your organisation)', 'Active User (ISA registry and management)', and 'Read only user'. The 'Organisation User' option is selected. At the bottom right, there are 'Update' and 'Cancel' buttons.

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

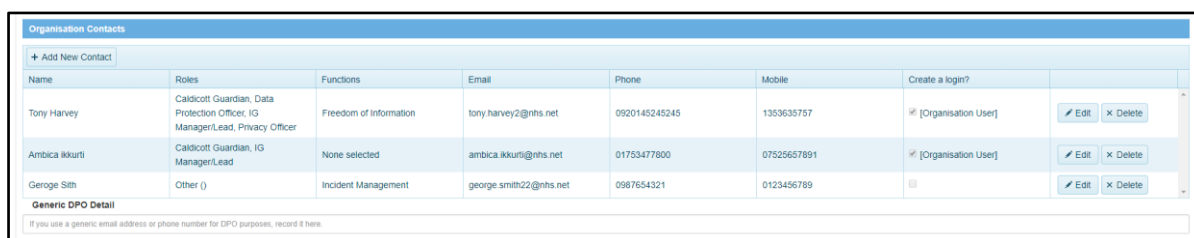
Create a User Account

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



The screenshot shows the 'Organisation Profile' tab selected in the top navigation bar. The main content area is titled 'Organisation Profile' and contains a 'Details' section. This section includes fields for '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' (Z7289476), and 'ODS Code' (No IG Toolkit found for this ODS). There is also a section for 'ICO Details' showing 'Name: Test-Direct Limited' and 'Expiry: 27-Oct-2017'. An 'Improvement Plan in Place' checkbox is at the bottom right.

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

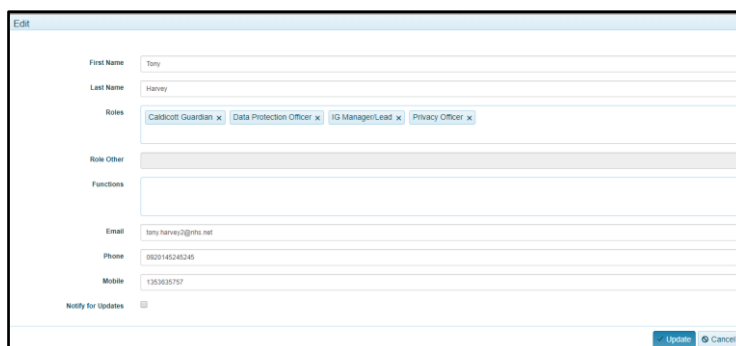


The screenshot shows the 'Organisation Contacts' section with a table of contacts. The table has columns for Name, Roles, Functions, Email, Phone, Mobile, Create a login?, and actions (Edit, Delete). There are three contacts listed: Tony Harvey, Ambica Ikkurti, and George Smith. Each contact has a 'Create a login?' checkbox and 'Edit' and 'Delete' buttons.

Name	Roles	Functions	Email	Phone	Mobile	Create a login?	
Tony Harvey	Caldcott Guardian, Data Protection Officer, IG ManagerLead, 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 ManagerLead	None selected	ambica.ikkurti@nhs.net	01753477800	07525657891	<input checked="" type="checkbox"/> [Organisation User]	Edit X Delete
George Smith	Other ()	Incident Management	george.smith22@nhs.net	0987654321	0123456789	<input type="checkbox"/>	Edit X Delete

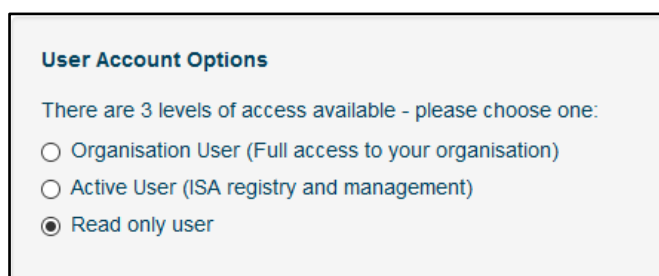
Generic DPO Detail
If you use a generic email address or phone number for DPO purposes, record it here.

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




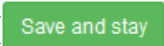
The screenshot shows the 'Edit' form for a contact. It includes fields for 'First Name' (Tony), 'Last Name' (Harvey), 'Roles' (Caldcott Guardian x, Data Protection Officer x, IG ManagerLead x, Privacy Officer x), 'Functions' (empty), 'Email' (tony.harvey2@nhs.net), 'Phone' (0920145245245), and 'Mobile' (1353635757). There is a 'Notify for updates' checkbox and 'Update' and 'Cancel' buttons at the bottom right.

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



The screenshot shows the 'User Account Options' pane. It has a title 'User Account Options' and a message 'There are 3 levels of access available - please choose one:'. Below this are three radio button options: 'Organisation User (Full access to your organisation)', 'Active User (ISA registry and management)', and 'Read only user' (which is selected).

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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: [username@nhs.uk](#)

Password: ABCD1234

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

Regards

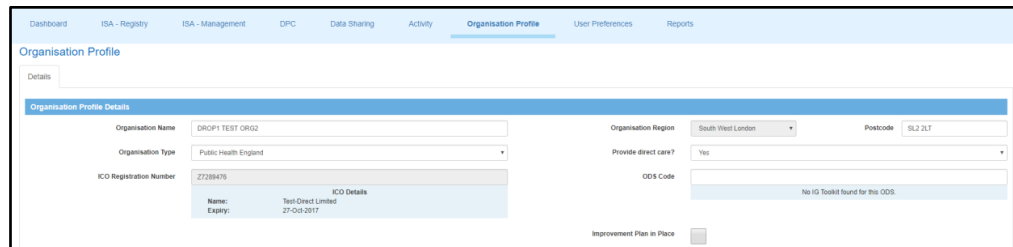
Data Controller Administrator

NHS (London Region)

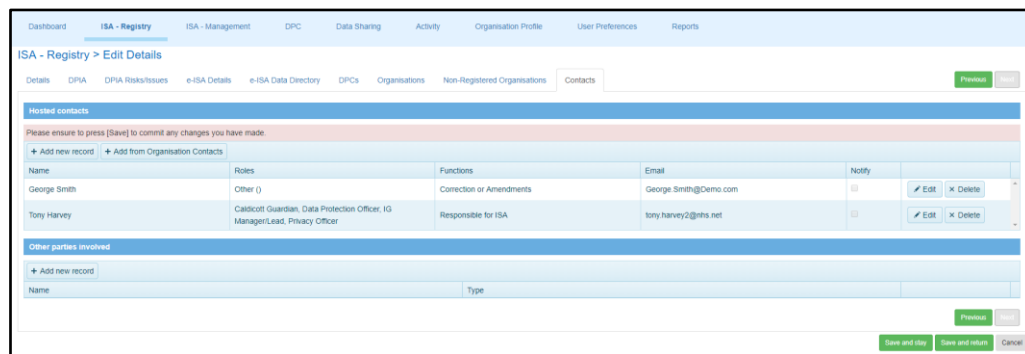



Update a User Account

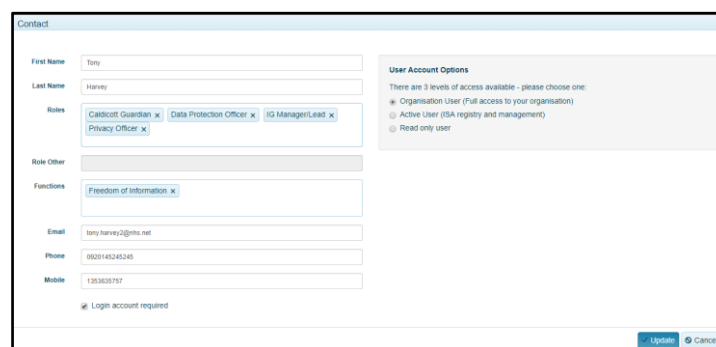
1. Click on 'Organisation Profile' tab from the navigation bar. The 'Organisation Profile' screen is displayed with the Organisation Profile Details populated based on the ICO and ODS code details



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


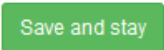



3. To edit a contact, under 'Organisation Contacts', click on the **Edit** ( Edit) button adjacent to the contact.
4. A Contact window is displayed with contact details populated in the field. Amend the fields on the left as desired



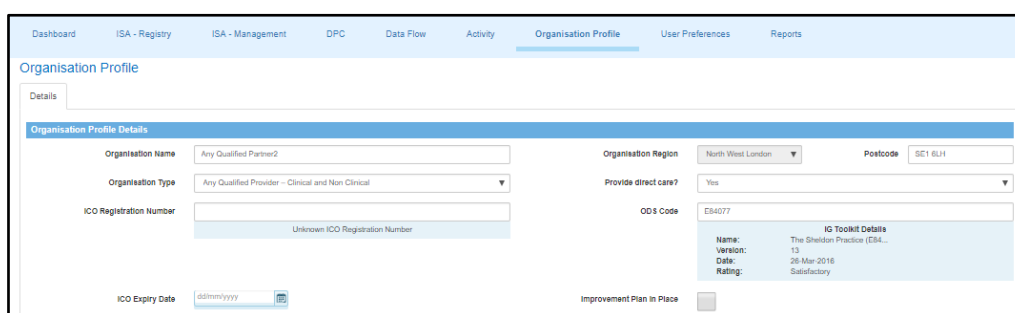
5. To amend the user roles details, on the right-side of the 'Contact' screen under 'User Account Options' to grant the user permissions accordingly
 - (a) For 'Read-only' access, uncheck all the checkboxes
 - (b) For 'Active user' access, only uncheck the 'Organisation profile' checkbox and leave the other two boxes checked
 - (c) For 'Organisation Super User', check all three boxes

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- Click the **Update** () button. The 'Contact' screen closes and the 'Organisation' screen is displayed
- 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

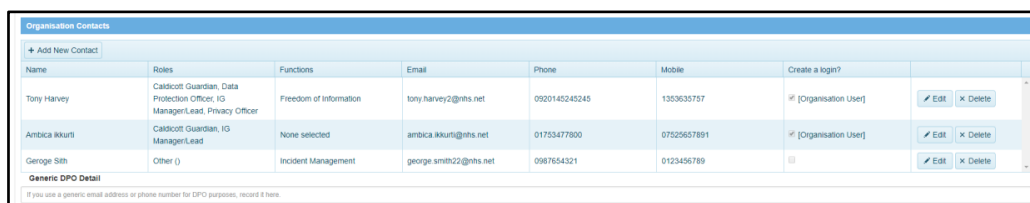
- Click on 'Organisation Profile' from the navigation bar. The 'Organisation Profile' screen is displayed with the organisation details populated based on the ICO and ODS code details.









The screenshot shows the 'Organisation Profile' screen with the following details:


- Organisation Name:** Any Qualified Partner2
- Organisation Type:** Any Qualified Provider - Clinical and Non Clinical
- ICO Registration Number:** Unknown ICO Registration Number
- ICO Expiry Date:** dd/mm/yyyy
- Organisation Region:** North West London
- Postcode:** SE1 6LH
- Provide direct care?:** Yes
- ODS Code:** E84077
- IG Toolkit Details:**
 - Name: The Sheldon Practice (E84...
 - Version: 13
 - Date: 28 Mar 2016
 - Rating: Satisfactory
- Improvement Plan In Place:** ☐

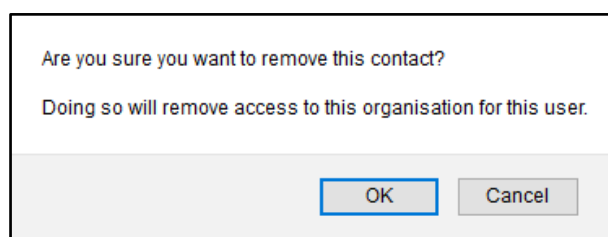
- Scroll down to 'Organisation Contacts' section. Organisation contact(s) details are displayed



Name	Roles	Functions	Email	Phone	Mobile	Create a login?	
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Amirica Akuru	Caldicot Guardian, IG Manager/Lead	None selected	amirica.akuru@nhs.net	01753477800	07525657891	<input checked="" type="checkbox"/> [Organisation User]	 
George Sibi	Other ()	Incident Management	george.smb22@nhs.net	0987654321	0123456789	<input type="checkbox"/>	 

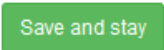

Generic DPO Detail
If you use a generic email address or phone number for DPO purposes, record it here.

- To delete a contact, under 'Organisation Contacts', click on the **Delete** () button adjacent to the contact
- A prompt is displayed 'Are you sure you want to remove this contact?'



Are you sure you want to remove this contact?

Doing so will remove access to this organisation for this user.

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