How to Manage User Accounts (QRG)

This Quick Reference Guide covers the following topics:
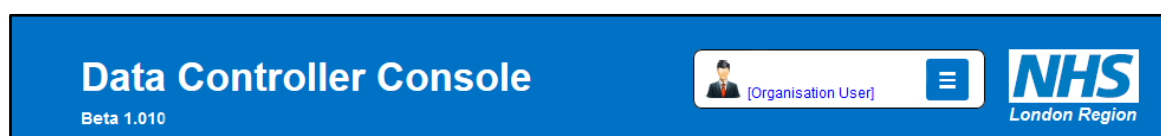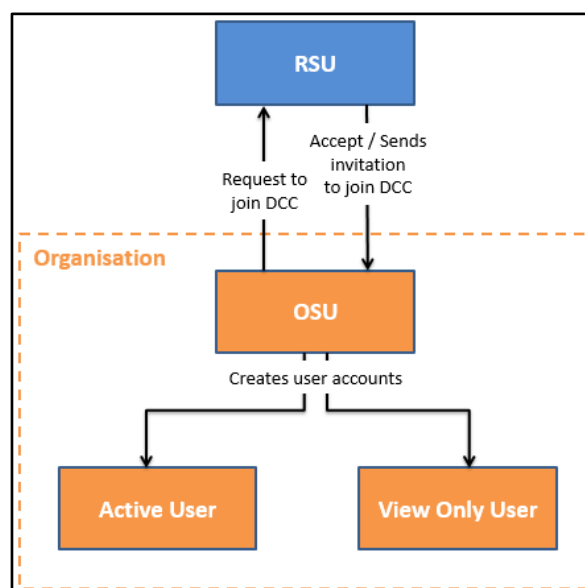
1. Search for a user accounts within your organisation
2. Create a user account
3. Update a user account
4. Delete a user account

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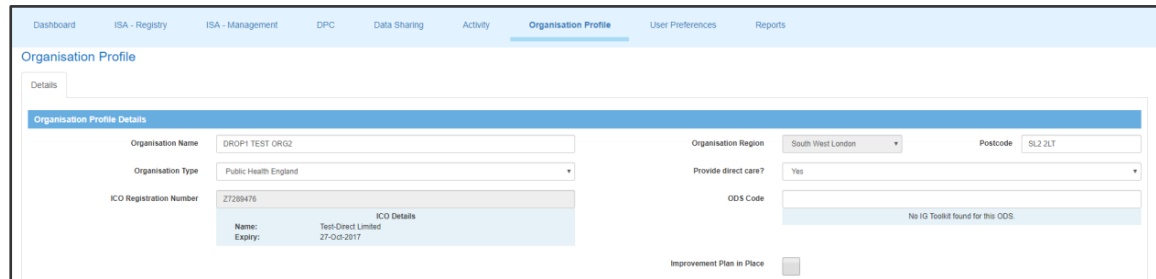
Once you are logged in to the DCC portal, the user name and user role will be displayed at the top-right of your screen in the blue banner.

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** (✏ Edit) button adjacent to the contact's name
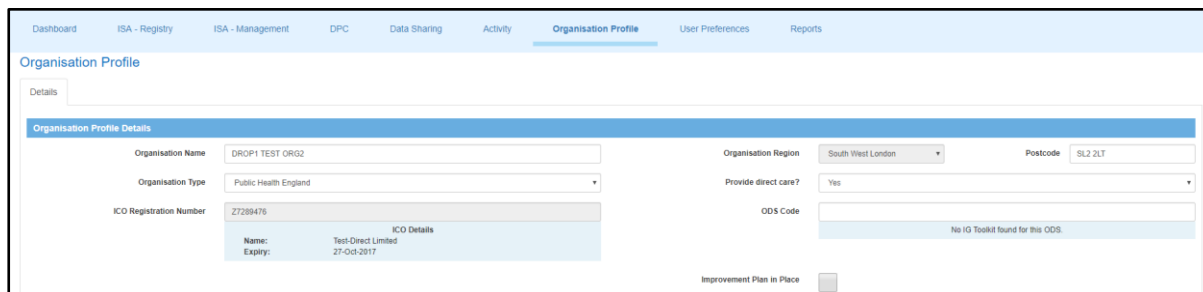

4. The 'Contact' screen is displayed, and the contact's details are displayed with the 'User Account Options' on the right of the screen

5. At the bottom-right of the screen, click **Cancel** (⊘ Cancel) button to close. The screen closes and the 'Organisation Profile' screen is displayed
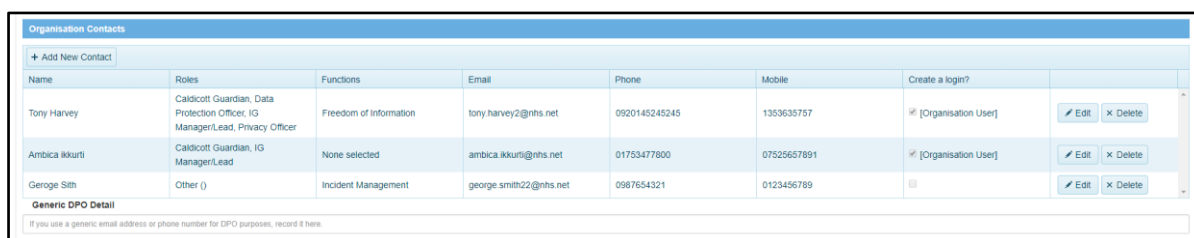
Create a User Account

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

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

3. To add a new contact, under 'Organisation Contacts' section, click on the **Add New Contact** (+ Add New Contact) button.
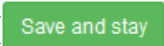
4. A 'Contact' window is displayed. Populate the fields accordingly

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

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

8. Click **Save and stay** (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)

   NHS

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: ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓
    Password: ABCD1234

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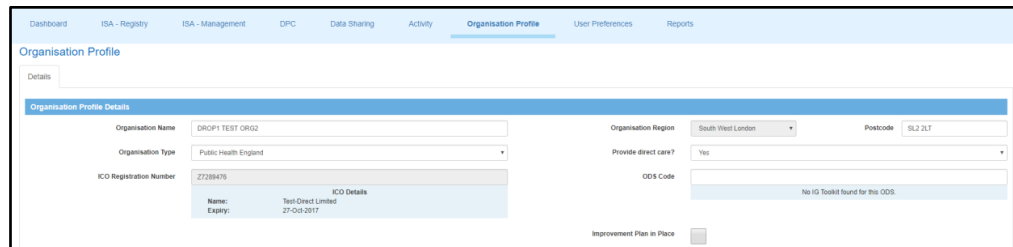
    Regards

    Data Controller Administrator

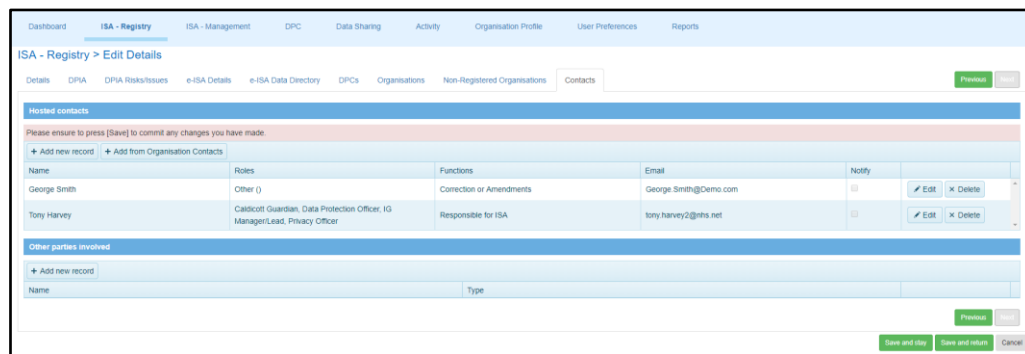   NHS (London Region)

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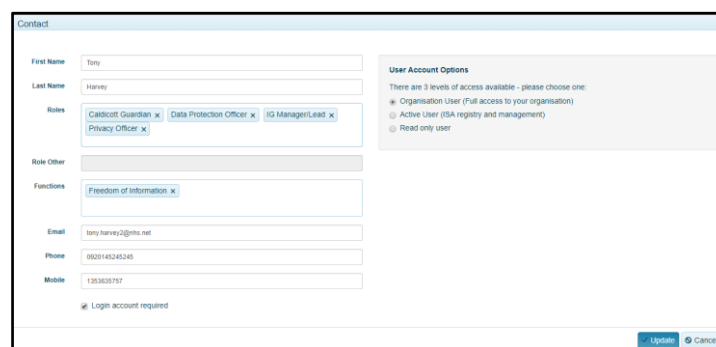
Update a User Account

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
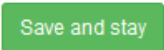

3. To edit a contact, under 'Organisation Contacts', click on the **Edit** (✏ Edit) button adjacent to the contact.

4. A Contact window is displayed with contact details populated in the field. Amend the fields on the left as desired
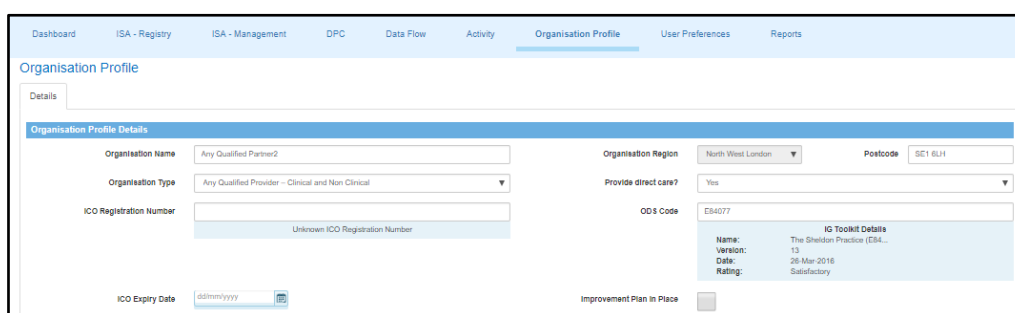

5. To amend the user roles details, on the right-side of the 'Contact' screen under 'User Account Options' to grant the user permissions accordingly

(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

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

7. Click **Save and stay** (Save and stay) or the **Save and return to dashboard** (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
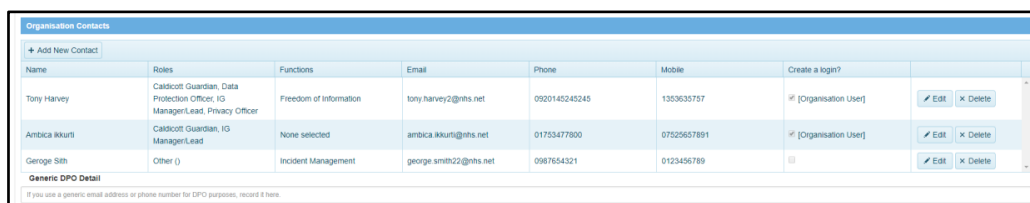
Remove a User Account

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

3. To delete a contact, under 'Organisation Contacts', click on the **Delete** (× 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** (Save and stay) or the **Save and return to dashboard** (Save and return to dashboard) button on the bottom-right of the page. The updated details are saved, and the Organisation profile is displayed