USER, USER PERMISSIONS AND CCS PERSONNEL

This tip sheet will walk you through how to:

- **Create Users**
- **Assign a Role**
- **Create CCS Personnel:**
  → **Management and Control** and **Operation/Contact Roles**
- **Remove Users**
- **Troubleshooting**

Summary

Create new user:

1. Click on the settings cog
2. Select users/personnel
3. Click create new contact
4. Enter the user's first and surname and click Continue
5. Enter the user's details
6. Tick Grant System Access
7. Tick Active
8. Enter a unique username
9. Click Save
10. Click Send Password Reset Email

Assign a Role:

1. While in the user record click sites tab
2. Click edit on the Site Name
3. Select the required role/s
4. Click Save

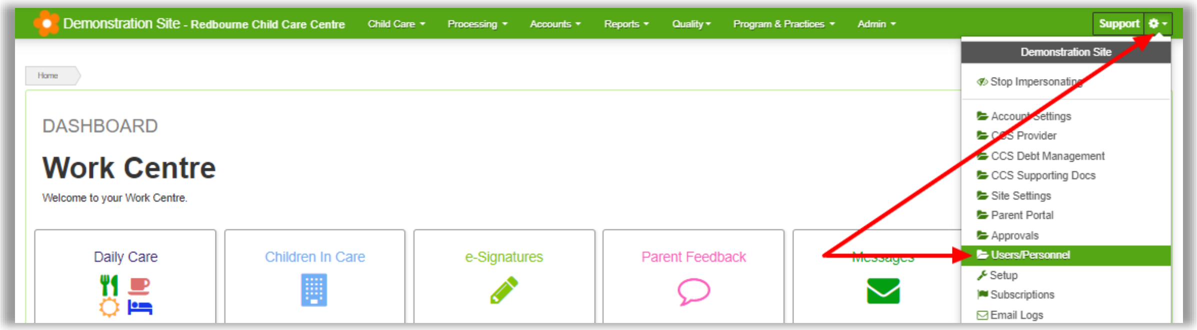
Generate e-Signature PIN for user:

1. Click on the e-Signature tab
2. Tick Enable e-Signature Access
3. Select the user's start date and click Generate
4. Click Save

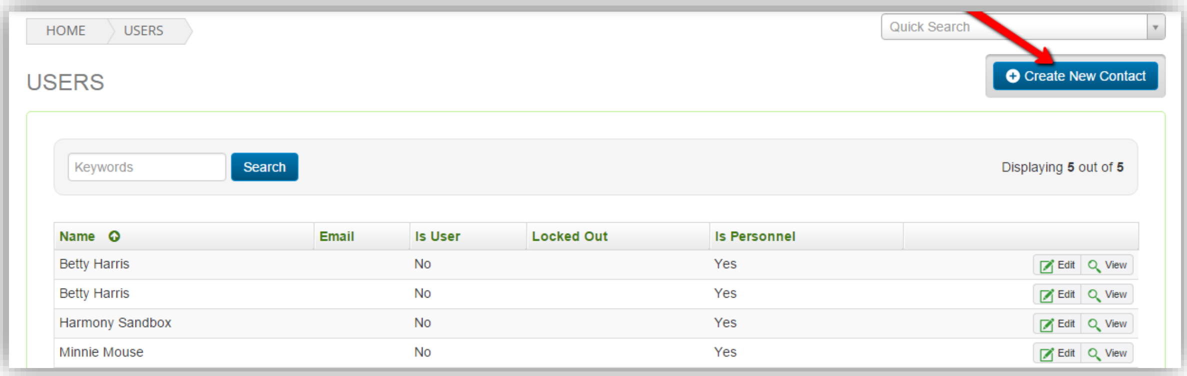
CREATING A USER

Detailed

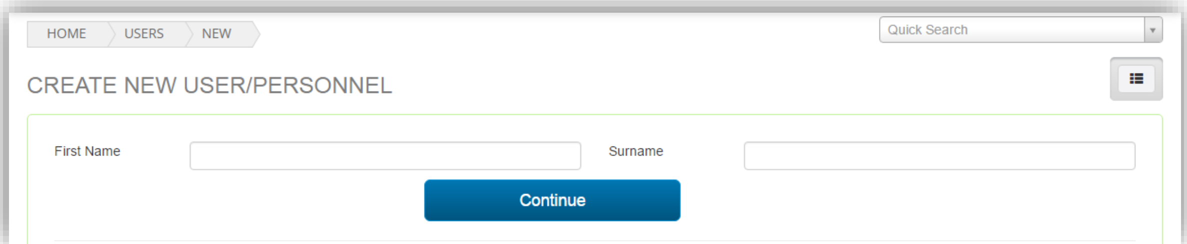
Click on the **settings cog** and click **Users/Personnel**



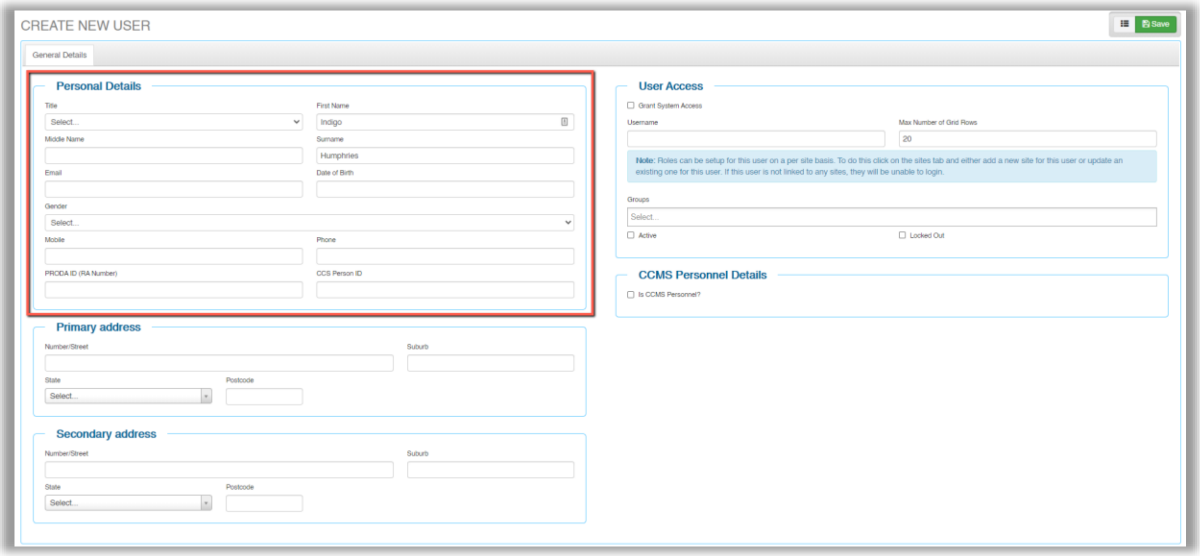
Click **Create New Contact**



Enter the users **first** and **surname** then click **continue**:



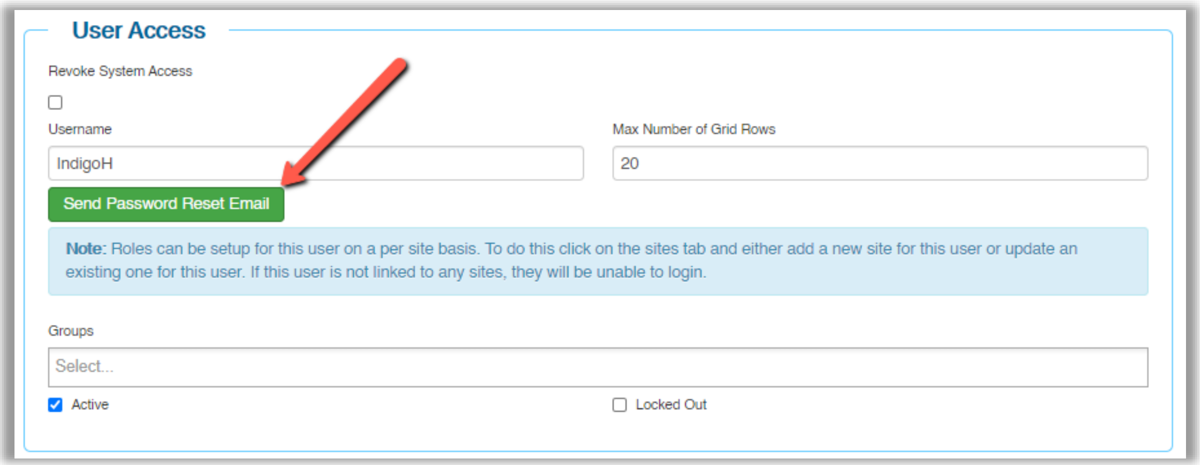
Enter the user's details:



Tick **Grant System Access.**

Tick **Active** and click **Save.**

Click **Generate Password Reset Email**. The user will receive an email from which they may set their own password.



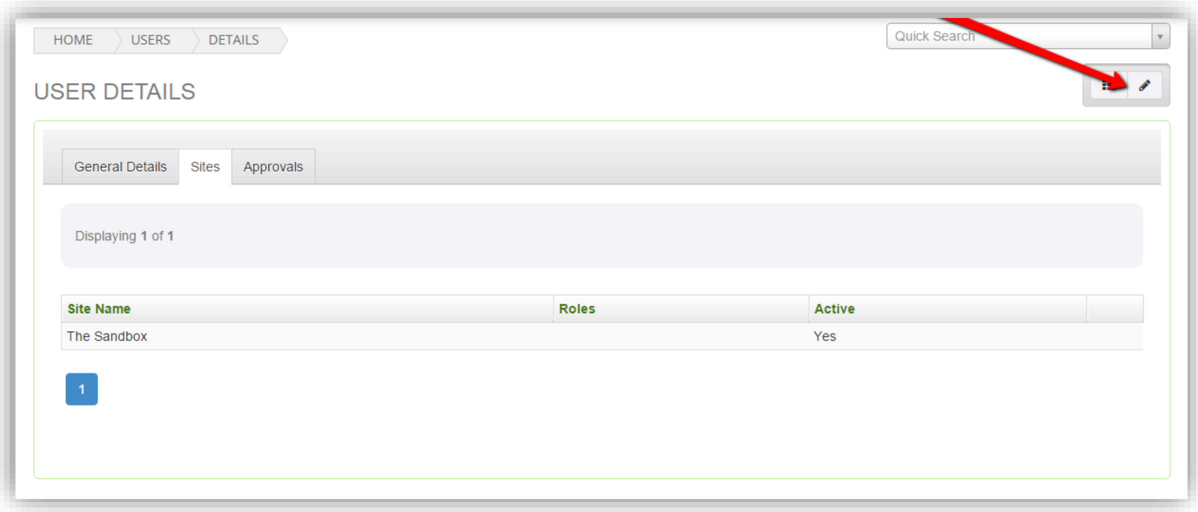
Once you have saved the record, you will have access to additional tabs.

NOTE: Following this first process you have given the user access to log into the system only. In order for them to be able to see data within your system you will need to assign them a role. Please continue through to 'assign a role' on how to do this.

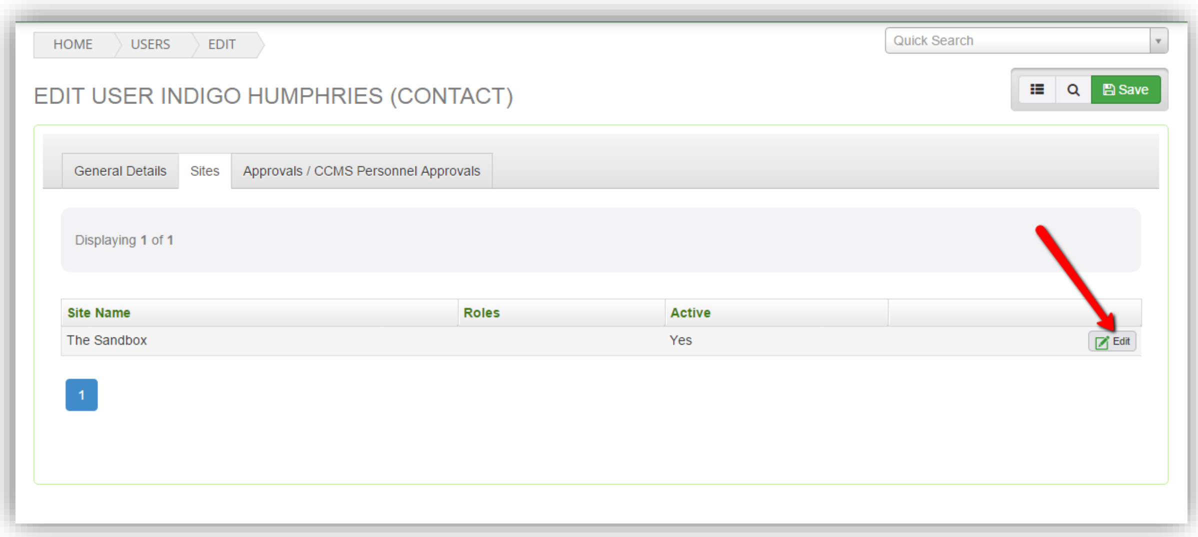
Assign a Role

You will assign a role in the software to let the system know what permissions/data they are able to access. You can create new roles and customise permissions if you are wanting to limit information the user is able to see and do. To do this please see our tip sheet called **Service Set Up** and view the **roles** section.

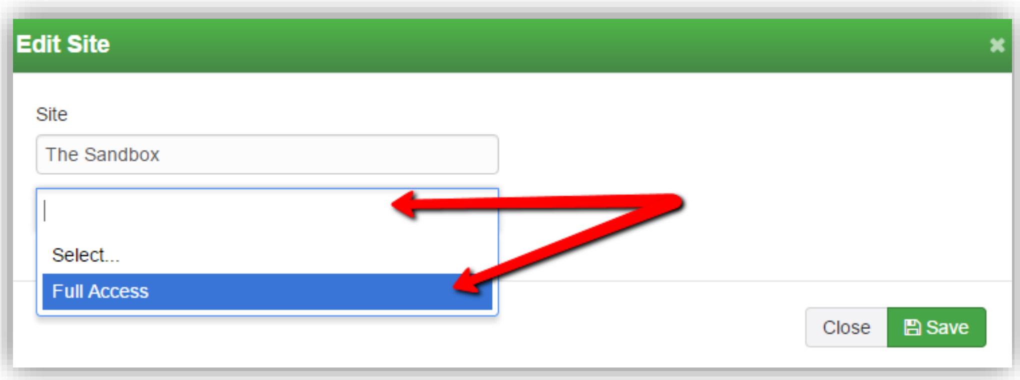
Click the **Sites** tab and click the **Edit** pencil.



Click **Edit**

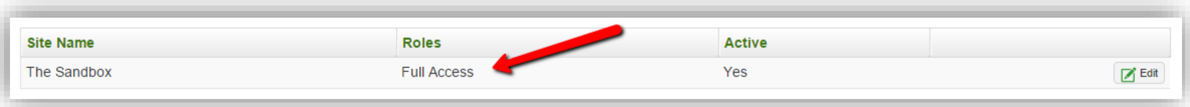


Click the blank box and select a role from the dropdown menu.



Click **Save**

The role will now display in the table.

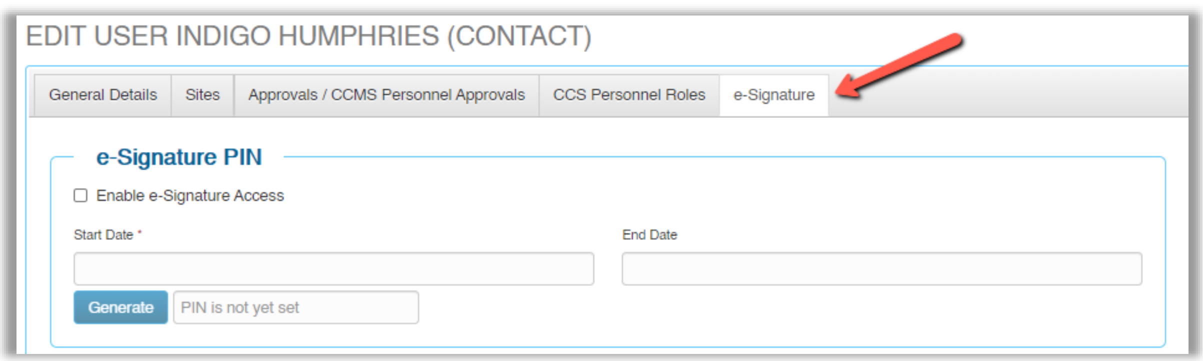


NOTE: You will not be able to assign the "Account Admin Access" role, this can only be assigned by the System Administrator, please make contact with our Support Desk.

Generate a PIN

If your service is utilising our e-Signature module you will also be able to generate a pin for your user in here.

While in the user record click on the e-Signature tab.



Tick **Enable e-Signature Access**

Enter a **Start date** and tick **Generate.** A pin number will now be emailed to the user.

Click **Save**

CREATING A CCS PERSONNEL ROLE

Summary

Management and Control Role:

1. Click on the settings cog
2. Select CCS provider
3. Select Personnel Tab
4. Click the create button and fill in the details required:
    a. Select Position
    b. Select start Date
    c. Select Authorised by
    d. Answer previous history questions
    e. Answer Declaration questions and upload all documents.
5. Click Submit

NOTE: You will not be able to submit the role until you have all relevant documents.

Operational / Contact Roles:

1. Click on the settings cog
2. Select user/personnel
3. Select CCS Personnel Roles Tab
4. Click the add role button and fill in the details required:
    f. Select Role (Operational or Contact)
    g. Select start Date
    h. Select Authorised by
    i. Answer Declaration questions and upload all documents.
5. Click Submit

CREATING A CCS PERSONNEL ROLE

Detailed

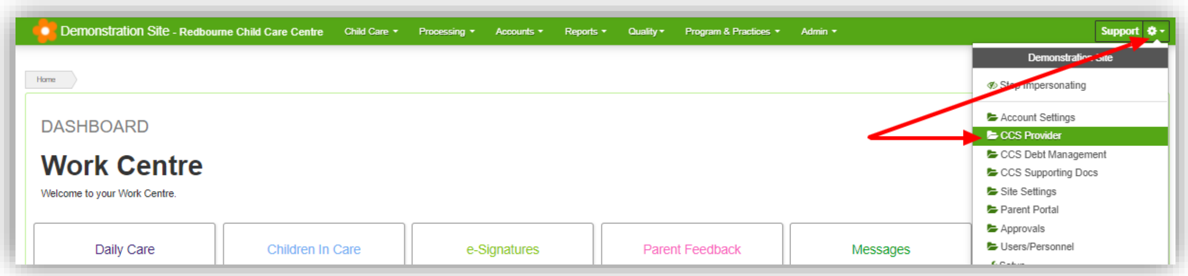
There are 3 different CCS roles:

1- Management and Control
2- Operational
3- Service Contact

If you are unsure of what CCS Role to assign a user please contact CCS for further information.

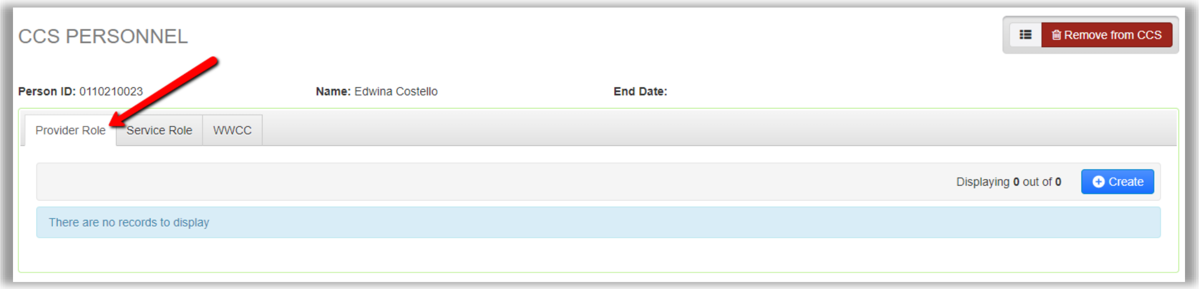
Management and Control role

This user can only be created within your CCS provider Profile.
Select Cog button
Select **CCS Provider**

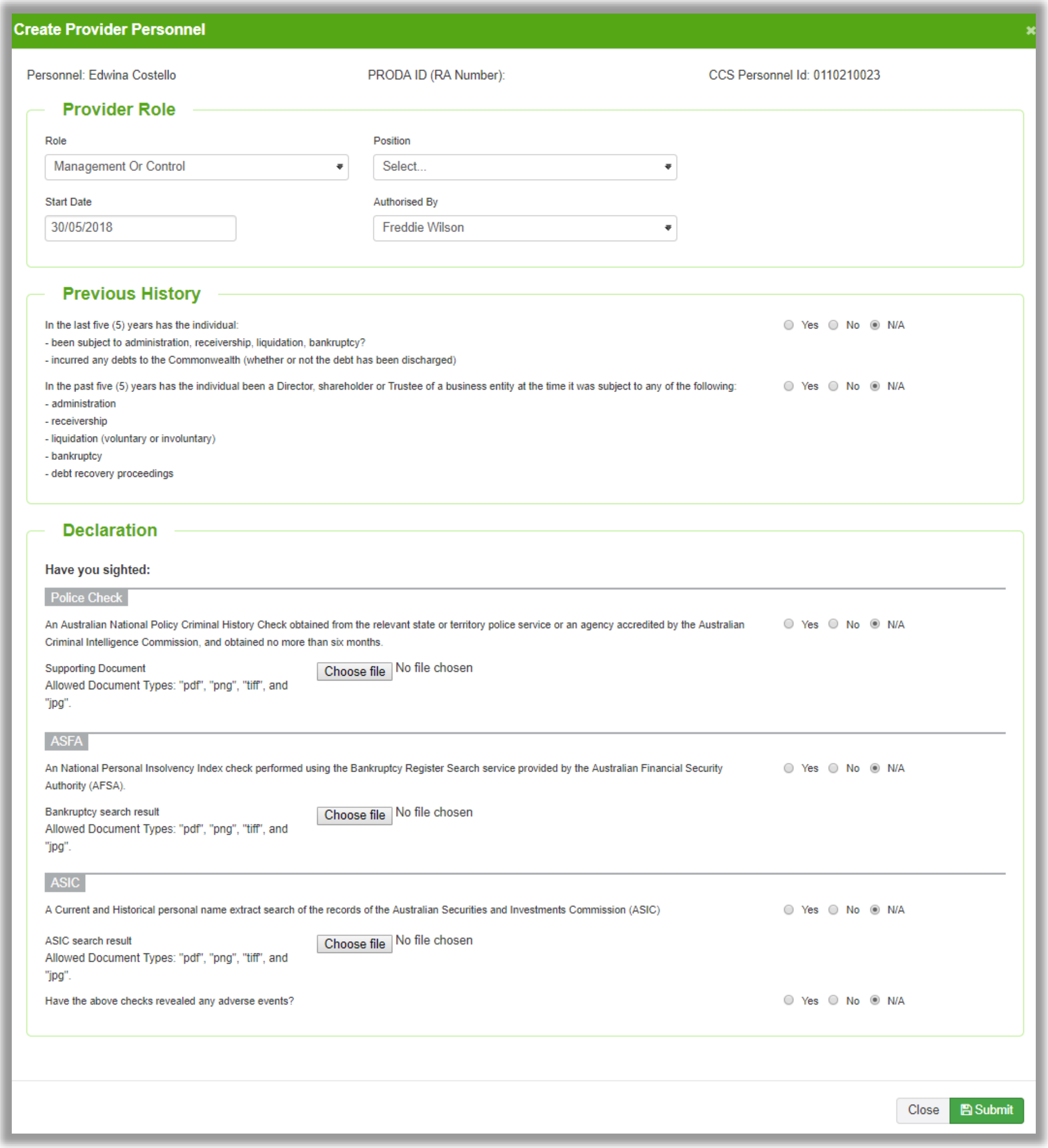


Select **Personnel** tab
Select Edit **Edit** button for the required person:

Select **Provider Role** tab:



Select **+Create** button and the following window will open:



Select the user's Position, enter their start date and select the person authorising the transaction.

You will next need to answer questions relating to the user's previous history.

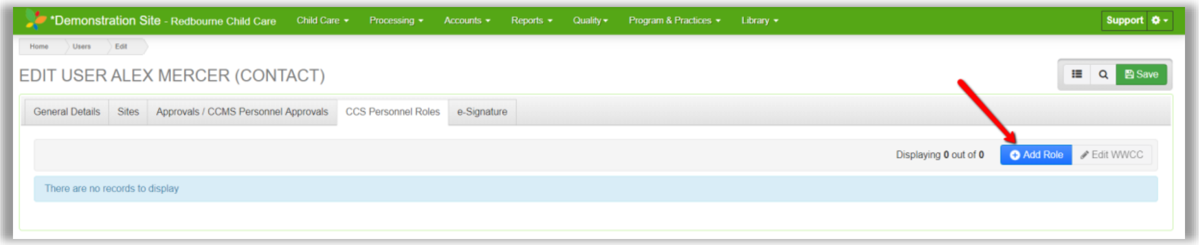
All fields within the **Declaration** are mandatory.

You will need to complete each of these fields, upload supporting documents and click on the **Submit** button.

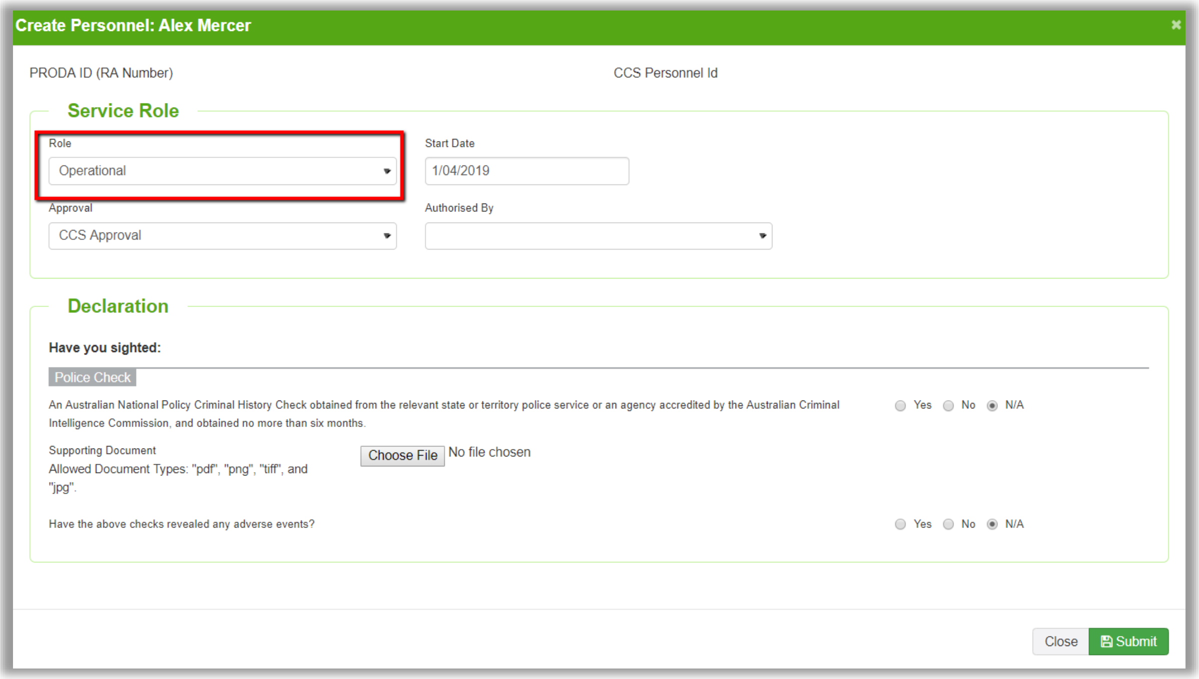
It is important to note that this must be submitted by a user with a 'Management or Control' role.

Operational Role

This role is created through the user record. While in the user record click on the CCS **Personnel Roles** tab and click on **Add Role**



The following window will then appear:



Make sure the **Operational Role** is selected

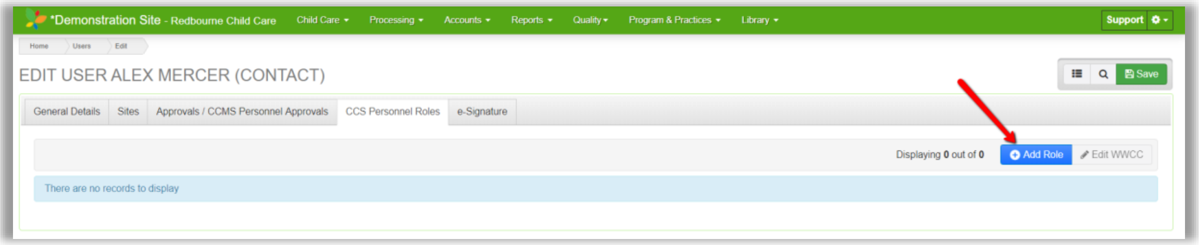
Change **start date** if needed

Select **Authorised Person**

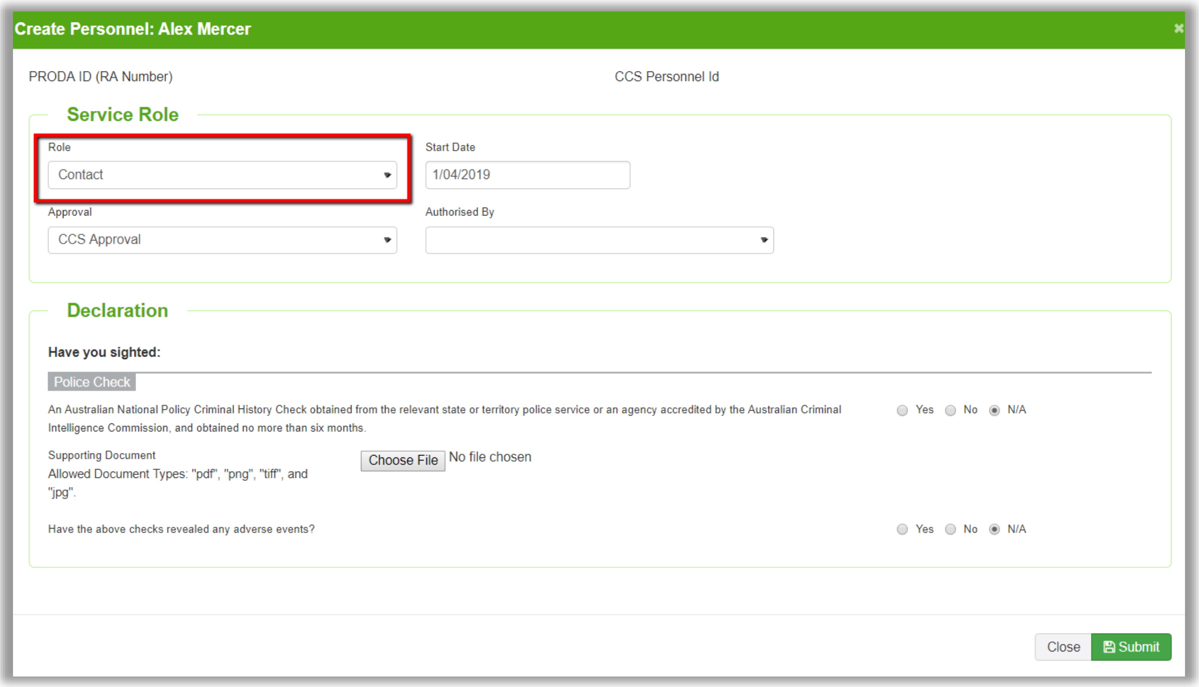
Fill in the **Declaration**, you will need to complete each of these fields, upload supporting documents and click on the **Submit** button.

Service Contact Role

This role is created through the user record. While in the user record click on the CCS **Personnel Roles** tab and click on **Add Role**



The following window will then appear:



Make sure the **Contact Role** is selected

Change **start date** if needed

Select **Authorised Person**

Fill in the **Declaration**, you will need to complete each of these fields, upload supporting documents and click on the 'Submit' button.

REMOVING USERS

Summary

Revoke System Access

1. Click on the settings cog
2. Click Users/Personnel
3. Find the user and click edit
4. Tick Revoke System Access
5. Untick Active
6. Click Save

End CCS Personnel Role – Management and Control

1. Click on the settings cog
2. Select CCS provider
3. Select Personnel Tab
4. Find the User and click edit
    a. Select an authorised person
    b. Select end date
5. Click submit

End CCS Personnel Role – Operational/Contact

1. Click on the settings cog
2. Select user/personnel
3. Find the User and click edit
4. Click on the CCS personnel roles tab
5. Click edit on the role
    c. Select an authorised person
    d. Select end date
6. Click submit

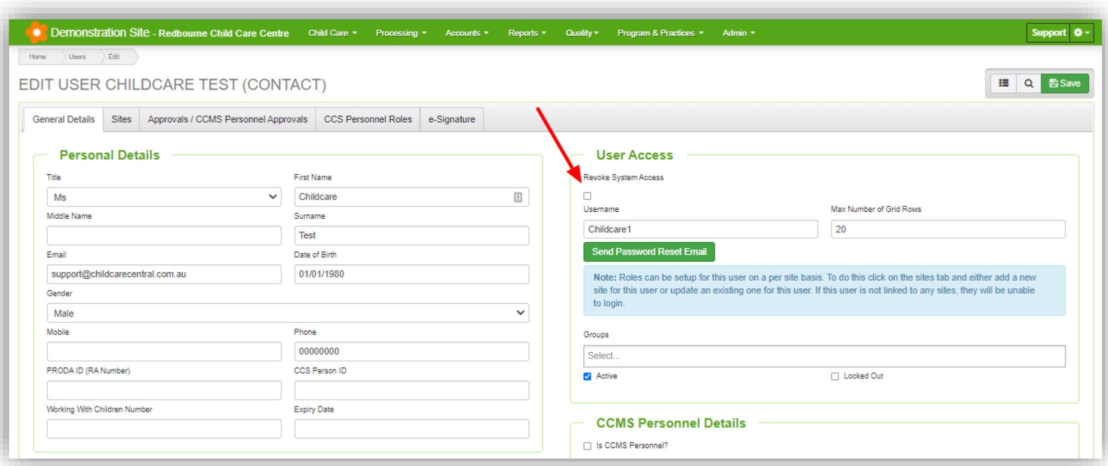
REMOVING USERS

Detailed

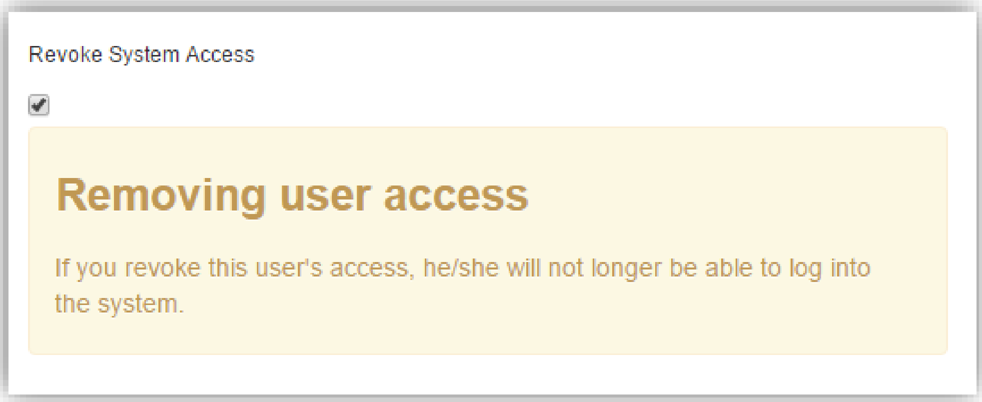
There are 2 processes to follow when a user is no longer with your service.

1 - Revoke system access

While in the user record Click Revoke System Access



The following message will appear:



Click Save

The user will no longer have access to the software.

2 – End dating the CCS Role

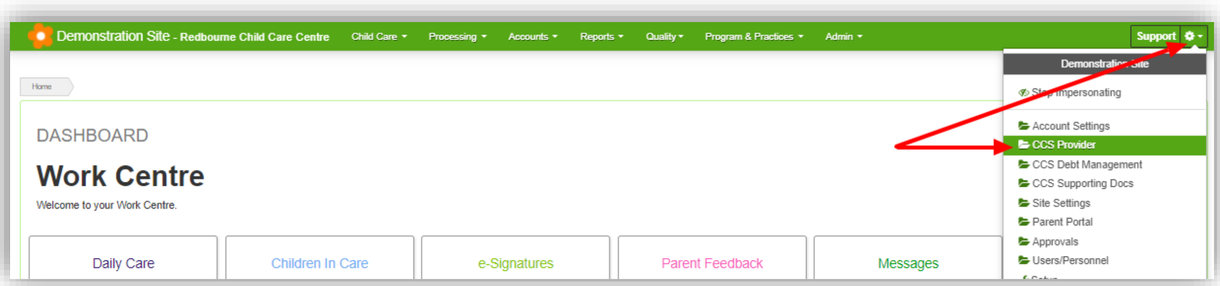
Management or Control Role

NOTE: If you want to remove a management and control DO NOT do this until a new management and control person has been created and queried successfully in your software. If you are unsure of the process, please contact the Support Desk.

This role can only be ended within your CCS provider Profile.

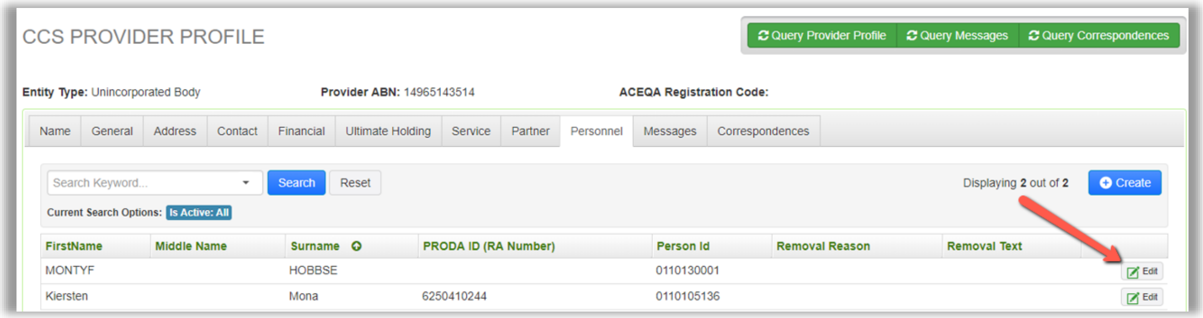
Click on the **Settings Cog** button

Select **CCS Provider**

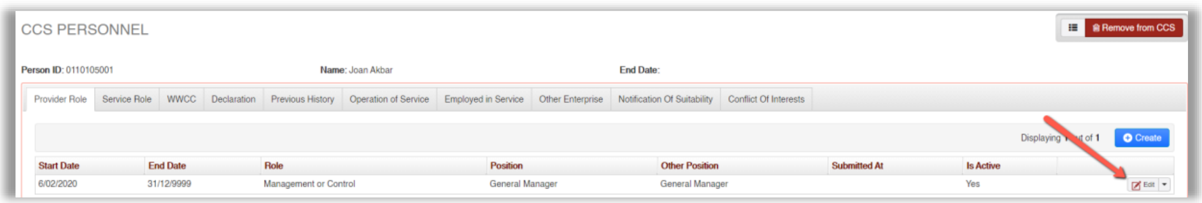


Select **Personnel** tab

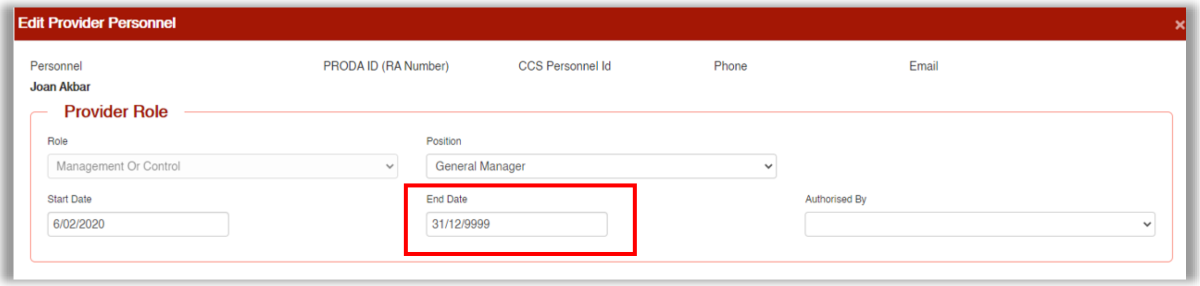
Find the user/role and select **Edit** button for the required person:



Again, the role will display so click **edit** again:



Now, enter the end date:

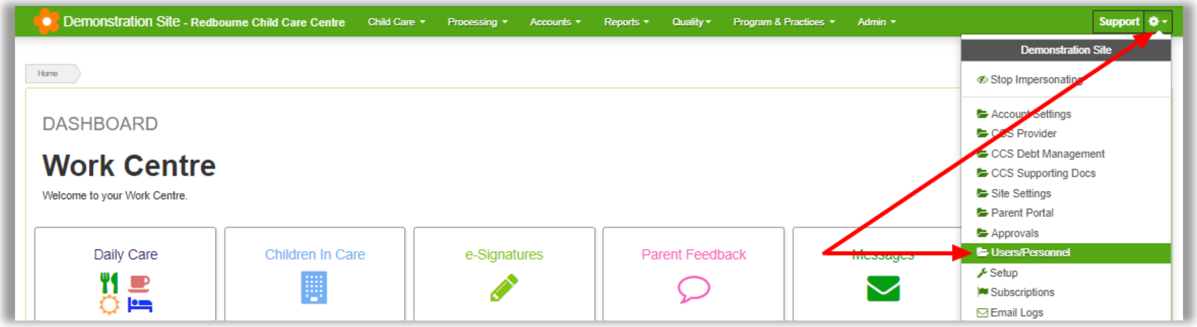


Click on **Submit.**

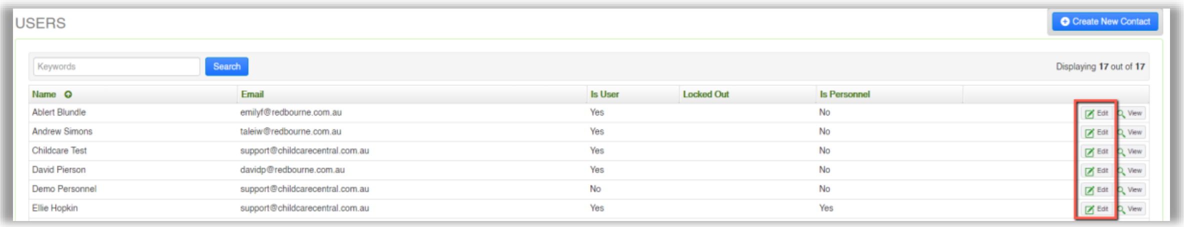
Operational and Service Contact Roles

The role for a operational and service contact user is ended via their user record.

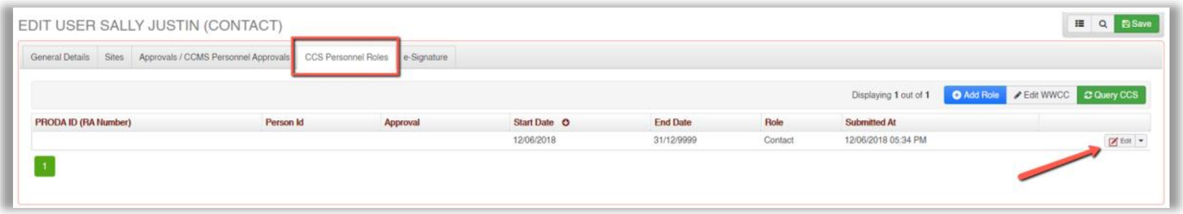
Click the **settings cog** and select **Users/Personnel:**



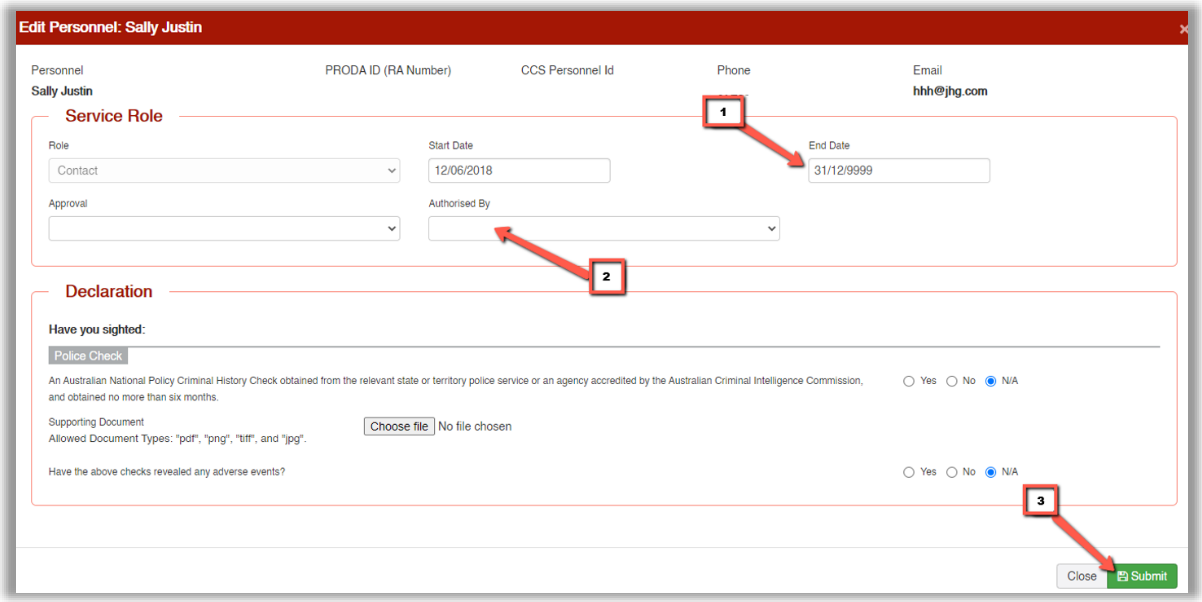
Find the user and click **Edit**:



Click on the **CCS Personnel Roles** tab then click **Edit** on the role displaying.



Select an **end date**, **authorised person** and click on **submit**.



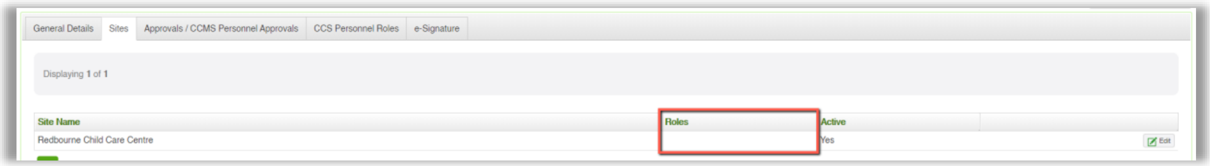
When the system queries overnight the role will be removed from the CCS Personnel Tab.

USER, USER PERMISSIONS AND CCS PERSONNEL

Troubleshooting

Issue: The user can log in but they cannot see anything.

Why? This is due to the user not being assigned to a Role. The role contains permissions on what the user can see and do within the system.



Resolution: While in the user record click sites tab, click edit on the site name, select the required role/s, click save.

Now advise the user to log out and log back in.

Issue: I don't want the user to have full access.

Resolution: You can create new roles and therefore change the permissions. To do this process we would recommend viewing the tip sheet called **Service Set Up** under the section called ***Roles***.

Issue: If you get an error saying 'Last Name does not match PRODA'

Resolution: There are four reasons for when we get the Last Name Does Not Match are the following:

- Last Name Does Not Match PRODA's records
- Documents have not been all verified
- Account has become inactive
- When entering the PRODA Id in the user record, you have entered incorrect details or entered the RA in front of the number.

If you have checked all this, we suggest contacting PRODA for further assistance.

Issue: I am end dating a CCS role and I'm getting an error saying the role doesn't exist.

Resolution: This means that the role has already been ended elsewhere.

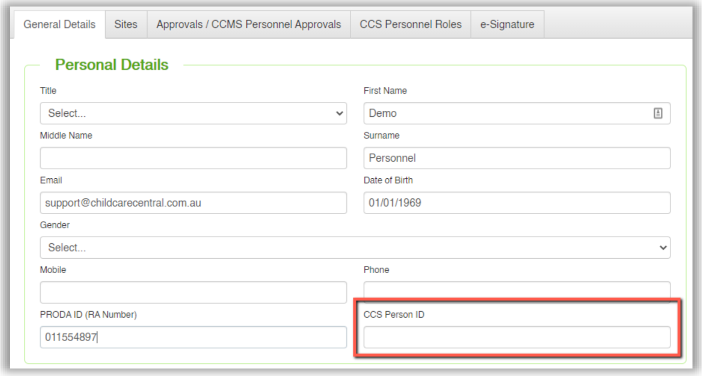
Click on the Query CCS button and the role will be removed.

Issue: I have already created the personnel role in PEP, do I need to create it again?

Resolution: No if you try and create it again you will get an error. In this case, we can just pull through the role.

Management or Control Role

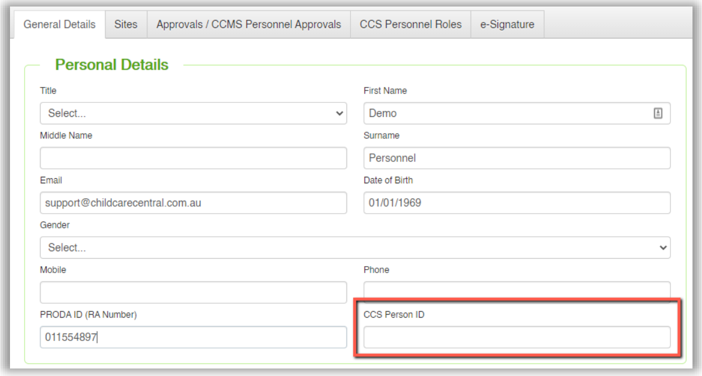
1. Navigate to the General Details tab and enter their CCS personal I.D in the space provided then Save.



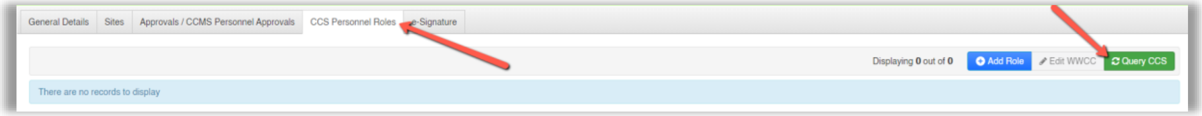
2. Click on the settings cog and select CCS Provider
3. Click on Query Provider Profile
4. Select Authorised person and click query.
5. The role will then display within the Personnel tab.

Operational/Contact Role

1. Navigate to the General Details tab and enter their CCS personal I.D in the space provided then Save.



2. Once Saved, click on the CCS Personnel Roles tab
3. Click on Query CCS



4. Select Authorised person and click query.
5. The role will then display accordingly.

Issue: I cannot see the CCS Provider option within the cog settings.

Why? Only users with Management or Control roles with CCS will be able to access this option within the cog settings. If you have a Management or Control role and do not have access to this area, please contact the support team and we will be able to assign the correct Role to your user account.