

# Document Store Admin Portal – Managing People

## Overview

From this portal you can manage staff in your department giving them the appropriate access for Document Creation. It can also be used to add Internal People if they do not appear in the Recipients list.

**Clinician:** If a clinician does not appear in the drop down list as the Lead or Attending clinician, add their name to your department and give them the role of Clinician

**Manager:** If you would like other staff to be able to manage staff and AutoText give them the role of Manager.

**Secretary:** This role will give secretaries access to the documents they create in Document Store Printing.

**Internal Person:** If a person does not appear in the recipients list in the Internal Person search they can be added via the Admin Portal. If you don't have access to their department you will need to contact IT Services Help Desk and ask for them to be added.

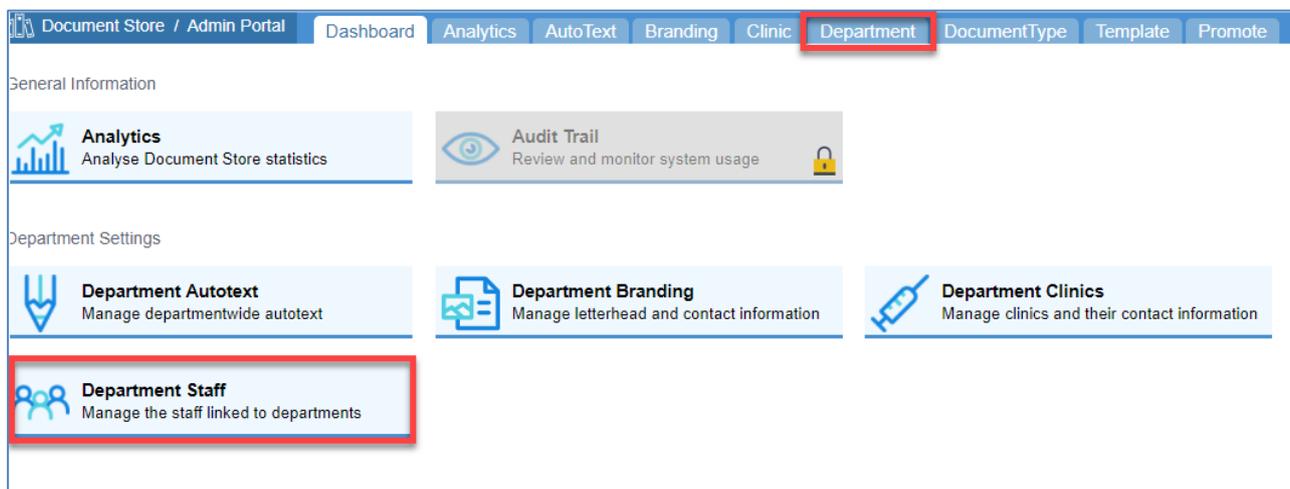
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## Open Document Store Admin Portal

To access the portal type the following text into your web browser and press the enter key.

**documentstoreadminportal.app**



Select the **Department Staff** or the **Department** tab

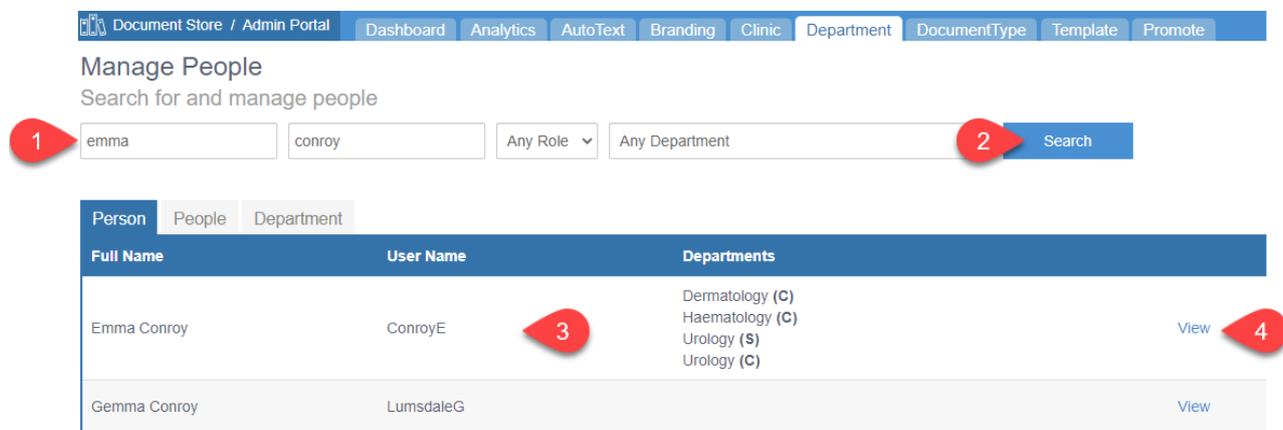


If an error message is displayed informing you that you do not have access, contact the IT Service desk on ext 21000 and ask for your name to be added as Manager in your department.

## Add Person to Department

With the **Person** tab selected

1. Enter the users **first name** and **last name**
2. Click **Search**
3. Check you have the correct person.
4. Click **View** to see their current roles



- Select the persons role from the drop down list (Manager, Clinician or Secretary)

**IMPORTANT NOTE** - In most cases people will only have one role. The exception to this is in PICU where a clinician will also need to have the role of Secretary (to be able to view documents in their department)

- Select a **Department** from the drop down list
- Click **Add Role**

The role and department will now appear in the list for this person.

| Role      | Department             |                        |
|-----------|------------------------|------------------------|
| Manager   | Haematology            | <a href="#">Remove</a> |
| Clinician | Accident and Emergency | <a href="#">Remove</a> |

Click the white cross in the top right hand corner to close this screen.



Staff can operate in more than one department so only remove someone from a department if you are absolutely sure.

## Adding Multiple People to Department

You can add multiple people into the same department at the same time if they all have the same role.

With the **People** tab selected

1. Select the relevant **Department** from the drop down list (if there is more than one)
2. Tick the appropriate **check boxes** for the role of the user (Clinician, Secretary or Manager). You can select more than one.
3. Enter the users **email address** – each person on a new line
4. Click **Save**

The screenshot shows the 'Manage People' interface. At the top, there is a search bar and a dropdown menu for 'Cancer Services' (callout 1). Below this are three tabs: 'Person', 'People' (selected), and 'Department'. Under the 'People' tab, there are three checkboxes for roles: 'Clinician' (checked, callout 2), 'Secretary' (unchecked), and 'Manager' (unchecked). Below the checkboxes is a text area with the instruction: 'Please add the Active Directory or Email Address of the people to add to the department. Each person should be on a new line.' The text area contains two email addresses: 'carol.millar5@nhs.net' and 'emma.conroy@nhs.net' (callout 3). At the bottom right, there are two buttons: 'Save' (callout 4) and 'Reset'.

## Managing the Department

You can quickly review all the people in the department and Remove or amend their role

With the **Department** tab selected

1. Select the relevant **Department** from the drop down list (if there is more than one)

2. Click **Search**

Add or remove ticks from check boxes or select Remove All to remove all access.

3. Amend as required and click **Save**

The screenshot shows the 'Manage People' interface. At the top, there is a search bar with 'Urology' selected in a dropdown menu (marked with a red '1') and a 'Search' button (marked with a red '2'). Below the search bar are three tabs: 'Person', 'People', and 'Department', with 'Department' selected. The main area is a table with columns: 'Full Name', 'User Name', 'Clinician', 'Secretary', 'Manager', and 'Remove All'. The table contains several rows of data, each with a 'Remove All' link. At the bottom right, there is a green 'Save' button (marked with a red '3') and a grey 'Reset' button.

| Full Name | User Name | Clinician                           | Secretary                           | Manager                  | Remove All |
|-----------|-----------|-------------------------------------|-------------------------------------|--------------------------|------------|
| [blurred] | [blurred] | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | Remove All |
| [blurred] | [blurred] | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | Remove All |
| [blurred] | [blurred] | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | Remove All |
| [blurred] | [blurred] | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | Remove All |
| [blurred] | [blurred] | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | Remove All |
| [blurred] | [blurred] | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Remove All |
| [blurred] | [blurred] | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | Remove All |
| [blurred] | [blurred] | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Remove All |
| [blurred] | [blurred] | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | Remove All |
| [blurred] | [blurred] | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Remove All |
| [blurred] | [blurred] | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Remove All |