# How to Manage Organisation Maintenance (How to Guide 5)

## Organisation Maintenance

Organisation Maintenance allows Operational Primary Contacts to manage access to their data for Open Exeter users and organisations.

## Glossary of Terms

### Primary Contact

An individual, authorised by an Access Control Manager (ACM), who can create and reset passwords of user accounts for other users within their organisation using Organisation Maintenance. Newly created accounts must be approved by a Data Controller before they can be used.

### Key Contact

An individual who can be contacted if there is an issue with Open Exeter affecting their organisation. A Key Contact does not have access to Organisation Maintenance and does not necessarily have to be an Open Exeter user unless they are the Primary Contact.

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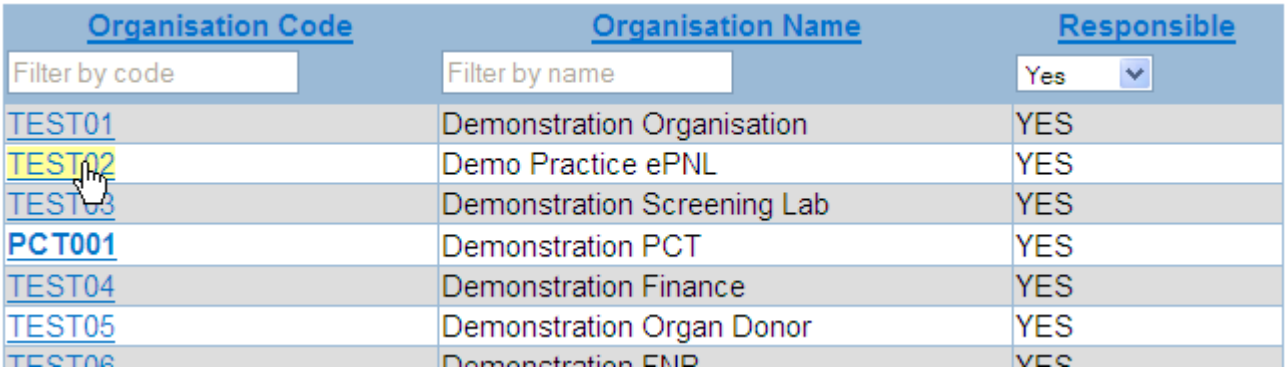
## Select an Organisation

Select an organisation(s) (multiple organisation codes may be selected from the organisation table to view and update the organisation.



| Organisation Code | Organisation Name | Responsible |
|---|---|---|
| Filter by code | Filter by name | Yes |
| TEST01 | Demonstration Organisation | YES |
| TEST02 | Demo Practice ePNL | YES |
| TEST03 | Demonstration Screening Lab | YES |
| PCT001 | Demonstration PCT | YES |
| TEST04 | Demonstration Finance | YES |
| TEST05 | Demonstration Organ Donor | YES |
| TEST06 | Demonstration ENP | YES |

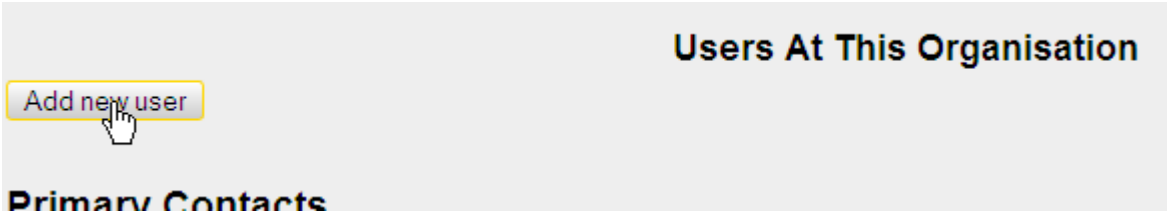
Viewing organisation TEST02

Data Controllers and Assistant Data Controllers can view any organisation which has access to their data source. Primary Contacts can view the organisations they work for.

## Create a New User

** Note that when creating a new user also refer to ‘selecting user applications’ and ‘Non-Responsible Access’ which can both only be completing whilst creating a new user.

Select an organisation code and click *Add new user*.




Creating a user.

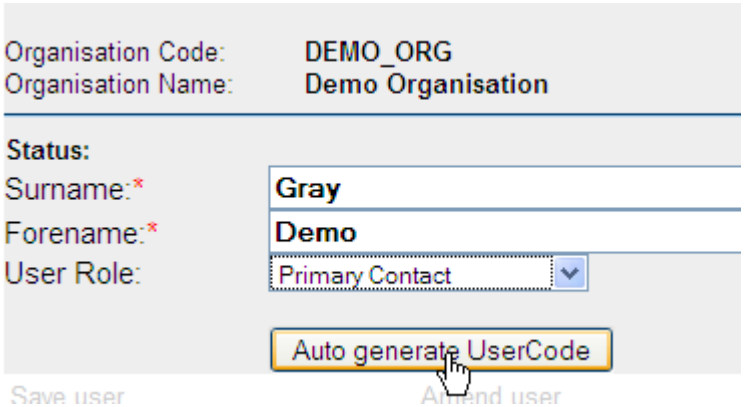
Enter the *surname* and *forename* for the new user and select a user role from the following.

**Normal User**
The user will not have any administrative responsibilities.

**Primary Contact**
The user can add other user accounts to their organisation. The new accounts must then be approved by a data controller.

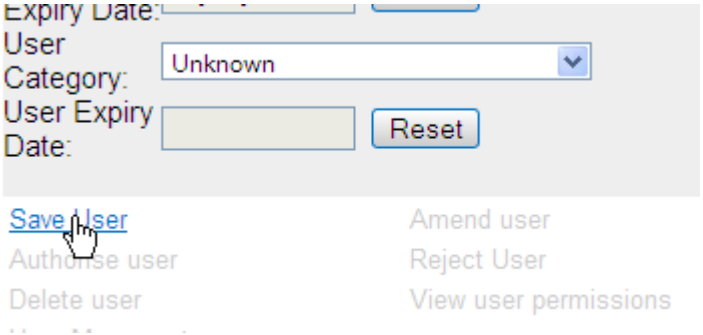
**Assistant Data Controller**
The user can add other users to any organisation in the data source. The new accounts must then be approved by a data controller.

Click *Auto generate UserCode* to create a new usercode and password for the user.



Creating a new usercode.

Fill in the other fields i.e. Title/Job Title/Telephone Number and email address (note that an nhs.net email should be used when generating passwords) and click *Save User* to create the new user.




Saving the user.

Select applications for the user, and request authorisation to data owned by other Data Controllers if necessary.

See also:

- Select an Organisation

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## Select User Applications

Primary Contacts of Open Exeter

Primary Contacts can create new user accounts within their practices by using Organisation Maintenance. All Primary Contacts have access to this application. These accounts still have to be approved by the Access Control Manager (previously the Data Control Manager).

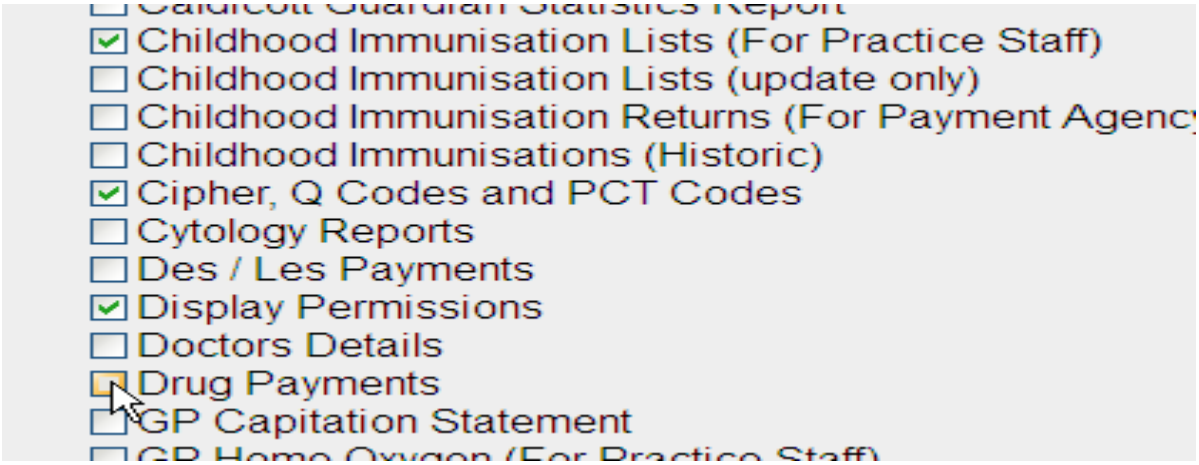
1. Log into Open Exeter in your usual way
2. Click Main Menu
3. Under Application select Organisation Maintenance then Continue
4. Click the Organisation Code
5. Click Add new user
6. Enter the surname and forename for the new user and select a user role from the following:

    - Normal User – the user will not have any administrative responsibilities
    - Primary Contact – the user can add other user accounts to their organisation and reset passwords. The new accounts must then be approved by an Access Control Manager (ACM).

7. Click Auto generate User-Code to create a new user-code and password for the user.

8. Fill in the other fields i.e. Title/ Job Title/ Telephone Number and email address (Preferably and nhs.net email address should be used).
9. Click Save User to create the new user
10. Click in the relevant box to select the applications required

    - Note Cipher, Q Codes and PCT Codes/ Display Permissions and Primary Care Performers Directory will automatically be ticked and Organisation Maintenance for Primary Contacts
    - If Breast Screening required tick Breast Screening Episodes only
    - If a User requires Practice Finance ie: Drug Payments and GP Statemen'ts then the Access Control Manager (ACM) requires authorisation from a GP before access can be granted.
    - To apply for non-responsible access, click 'Request Fringe Authorisation' for authorisation to access data held on another data source.




11. Click Continue and Close this Window
12. The request will show the status of pending until authorised by the Access Control Manager.
13. If subsequent applications are required then an email from the Primary Contact should be sent to the Access Control Manager.

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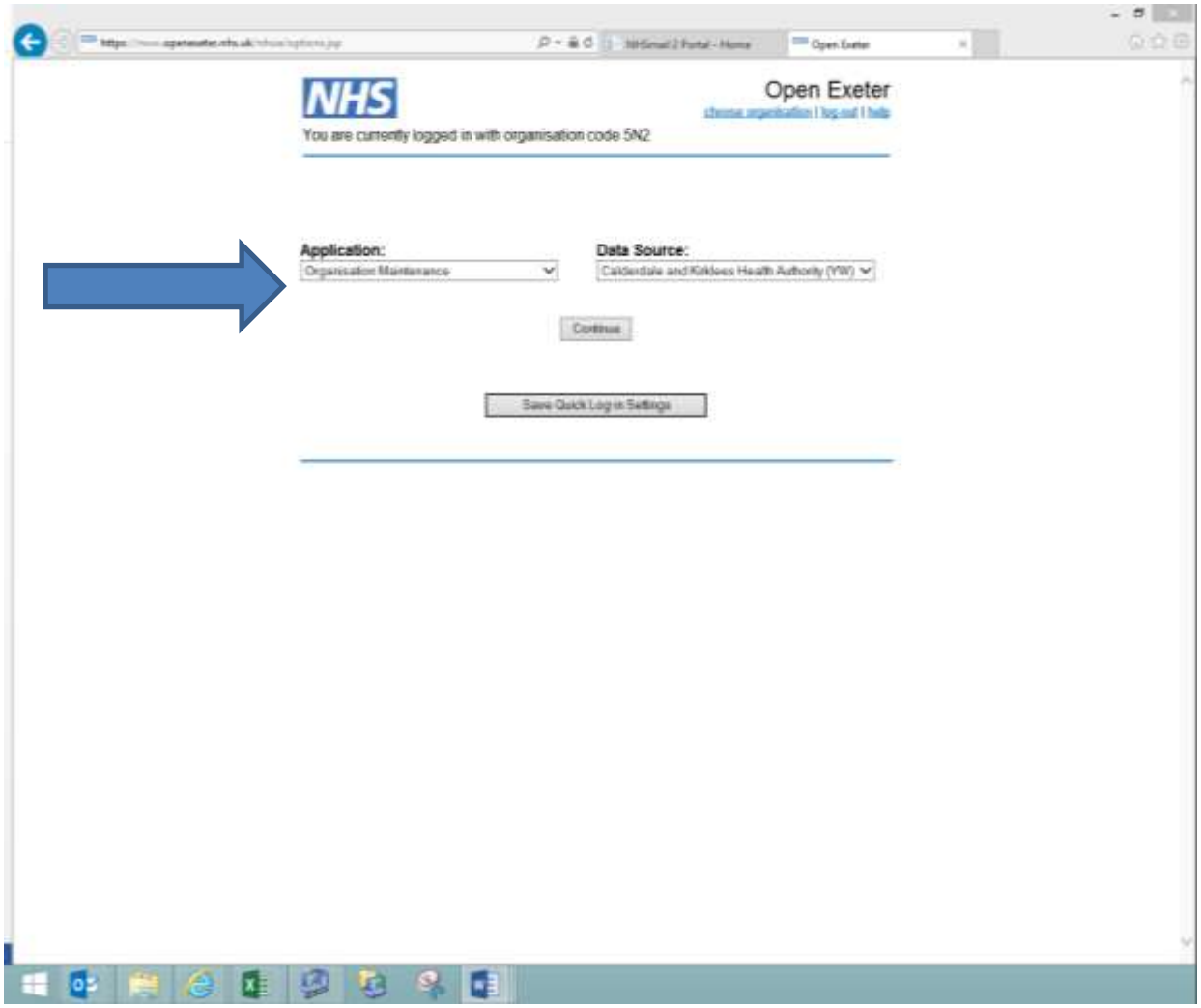
## Reset a User's Password

Your key contact can reset your password.  This is done through Organisation Maintenance option.




Click on the user's name

At the bottom of the screen select Reset Password

There is also an option to email the password to the user.  The password will expire after 7 days

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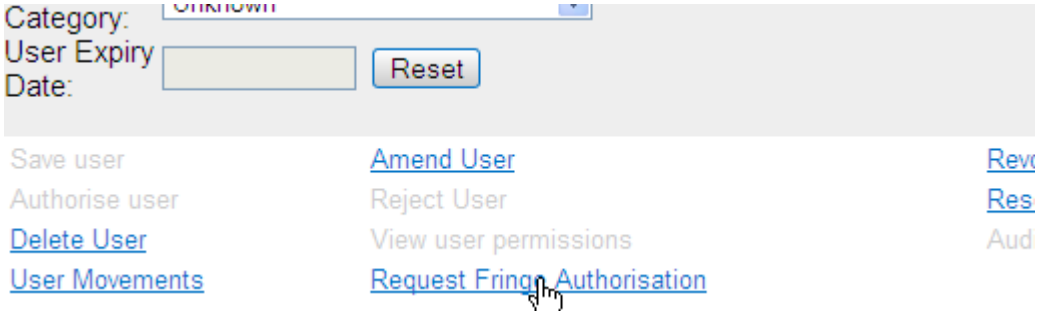
## Apply for Non-Responsible Access

Select a user and click *Request Fringe Authorisation* to apply for authorisation to access data held on another data source.




Requesting fringe access.

Tick the checkbox for any sites which you would like the user to be able to access, then click *Request Authorisation*.


Selecting fringe sites.

The responsible Access Control Manager (ACM) will be notified by email and must review and authorise access as appropriate.

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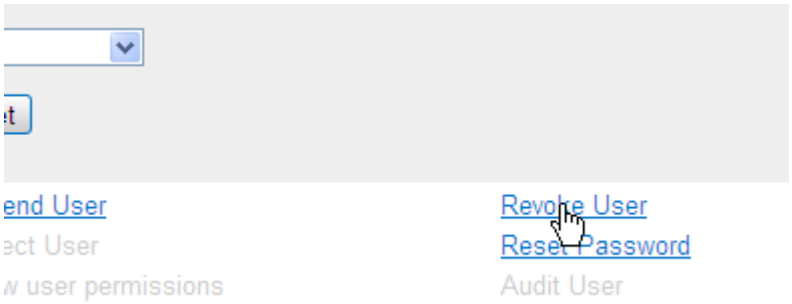
## Remove a User

Revoke or delete a user to prevent them from accessing data on your data source.

### Revoke a User

Select a user and click *Revoke User*.



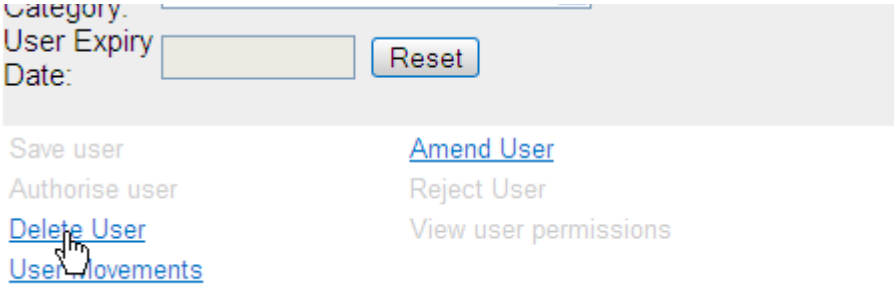

Revoking an user

The user will not be deleted, but they will be unable to access your data.

The user will be revoked for all organisations with access to your data.

**Delete a User**

Select a user and click *Delete User*.




Deleting a user

The user will be deleted from the organisation you have chosen. If the user has access to other organisations then they will still be able to log in and view data.

See also:

- Select a User

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- Should you require further assistance or for any enquiries please contact the central team and your Access Control Manager at pcse.openexeter@nhs.net