

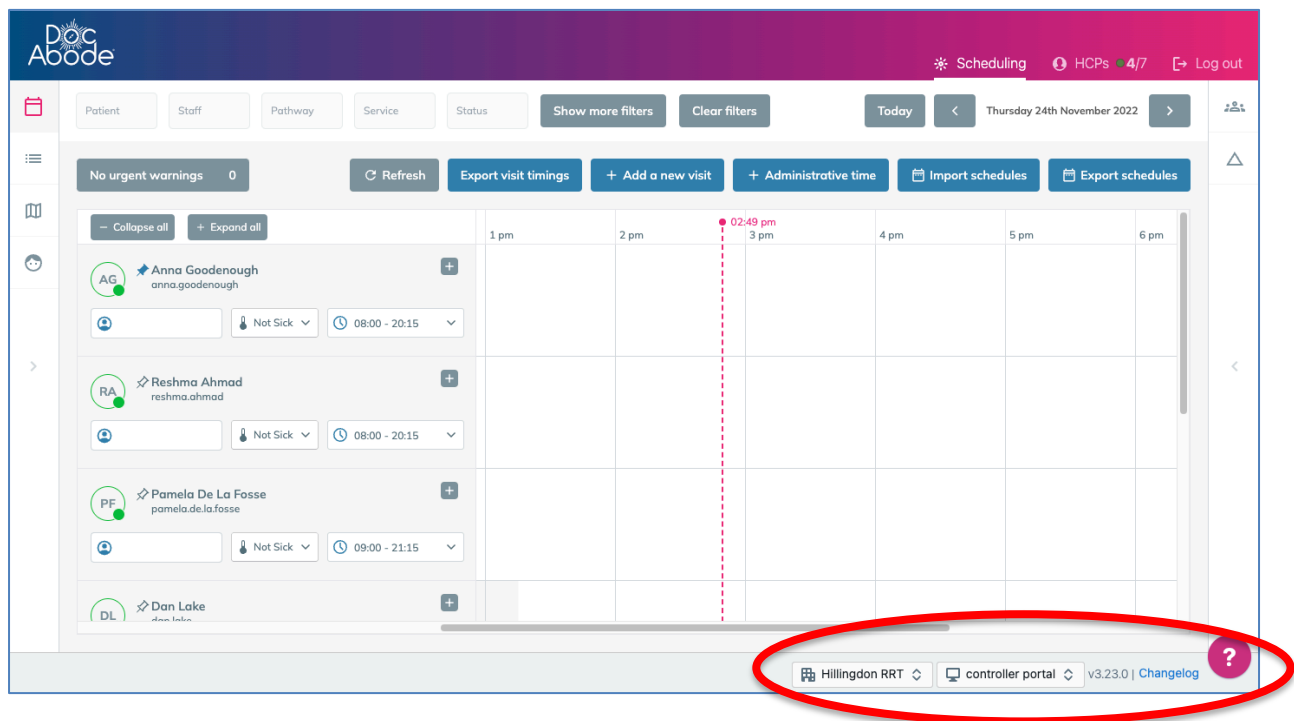
Scheduling System – Admin Functions

User Set Up

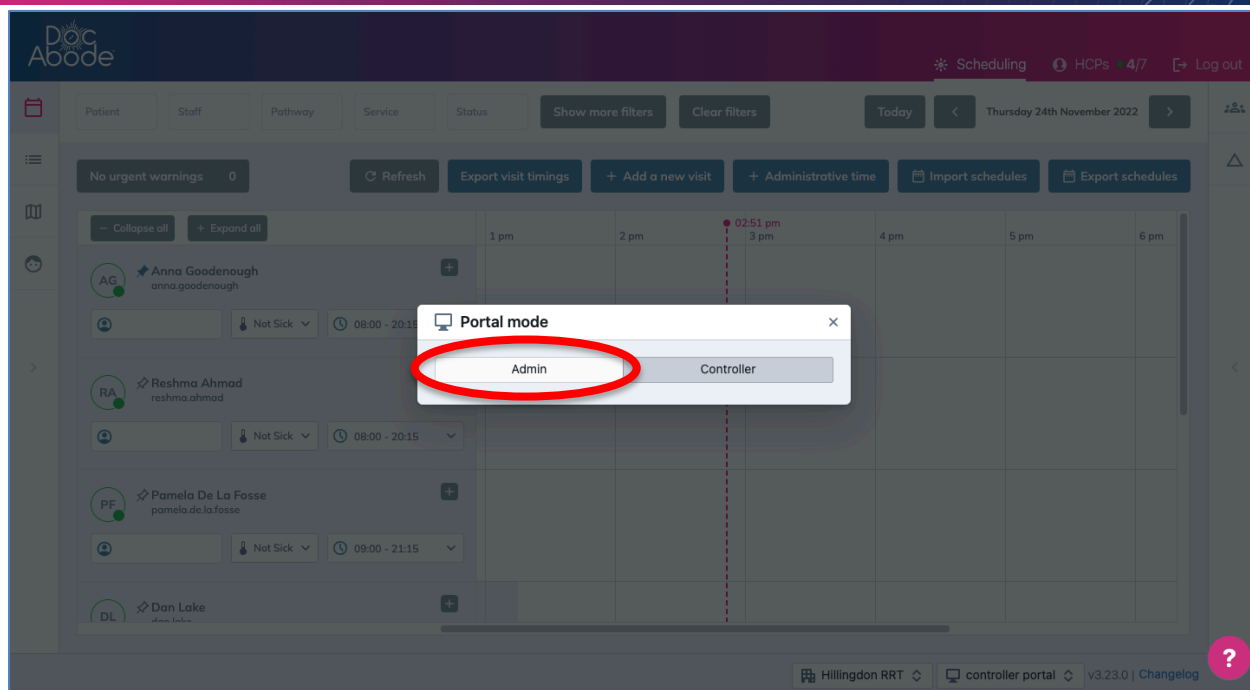
This feature enables administrators to add, update and disable users on the Doc Abode system, and applies to all three role types: Administrators, Controllers and HCPs. This means that each Doc Abode customer is self-sufficient and not dependent on the Doc Abode support desk for user administration.

1. Log in to Doc Abode on <https://controller.docabode.com/>. Note that it is the same website as for controllers, as we have a single (“unified”) login that is independent of role (administrator, controller and HCP).

The initial webpage presented is shown below



If the user has both controller and administrator permissions, the controller web page will be presented as the default. Select the admin portal by pressing the button between the database name and system version number on the bottom right of the web page



The current portal is in grey, press on the desired portal which is shown in white here and the screen display will change to present administrator functions. These are

- Manage users
- Add user (for controllers and administrators)
- Register HCP (to access the phone app)

Reporting Manage Users Add User Register HCP Log out		
Name	User ID	Status
Anna Goodenough	anna.goodenough	enabled
Dan Lake	dan.lake	enabled
Fred Nxumalo	fred.nxumalo	enabled
Imran Younis	imran.younis	enabled
Pamela De La Fosse	pamela.de.la.fosse	enabled
Reshma Ahmad	reshma.ahmad	enabled
Swapna Yariagadda	swapna.yariagadda	enabled

The webpage presented contains three options that are relevant for user management

- **Add User**
 - This option enables the addition of Controllers and Administrators
- **Register HCP**
 - This option enables the addition of HCPs, who access the mobile app
- **Manage Users**
 - This option enables updating of contact phone number and email address, password reset and disabling of the account. This capability applies to all types of user account

Note it is possible to set up the same person with multiple accounts: in practice it is convenient to set people up to have both HCP and Controller access, and in a few cases to have all three types of access (administrator, controller and HCP).

Important note:

In December 2022 we will be updating all our users to have a unified login, which means having a single account rather than three separate accounts (one for each of administrator, controller and HCP).

Whilst all accounts are now being set up in this way, the web pages for customers to be able to perform their own administration have not yet been updated. For this interim period, please request all new users to be set up via a support ticket with Doc Abode.

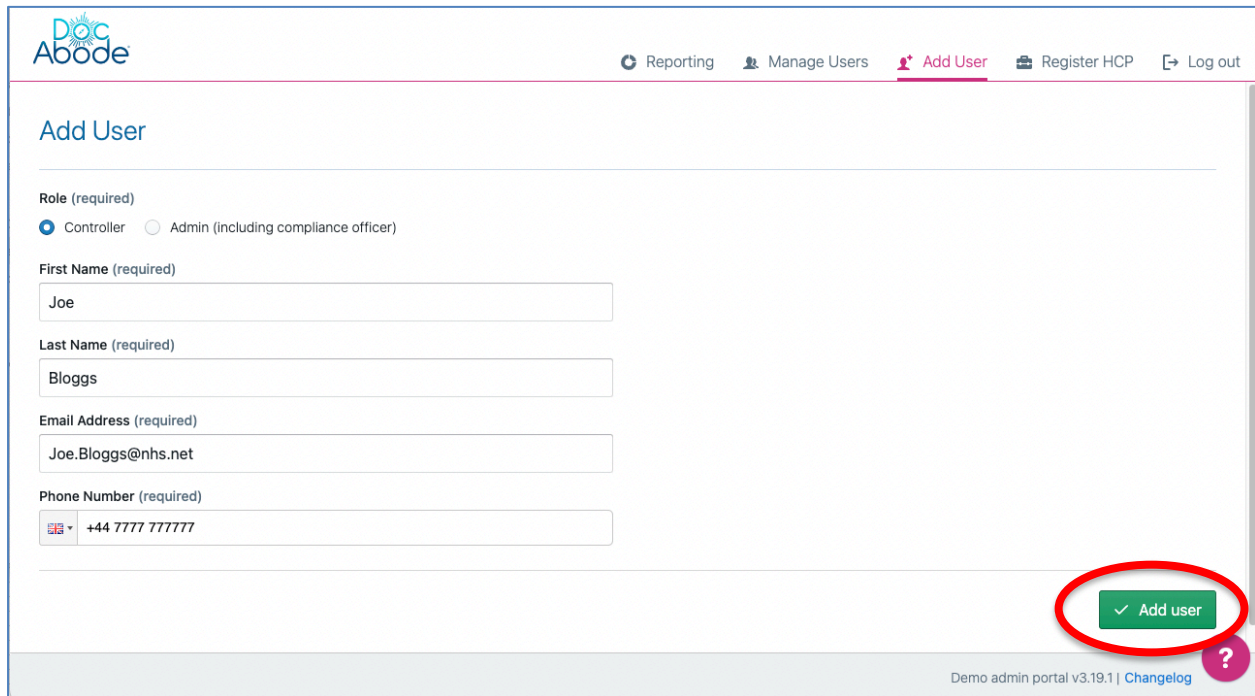
User details (phone number, email address, gender and languages) can be maintained and passwords can be reset. All other changes can be made by raising a support ticket so that Doc Abode can make these changes on users' behalf.

We sincerely apologise for any inconvenience in this interim period.

The following pages apply to users that have **not** been set up as unified accounts.

2. Adding a user (controller or administrator)

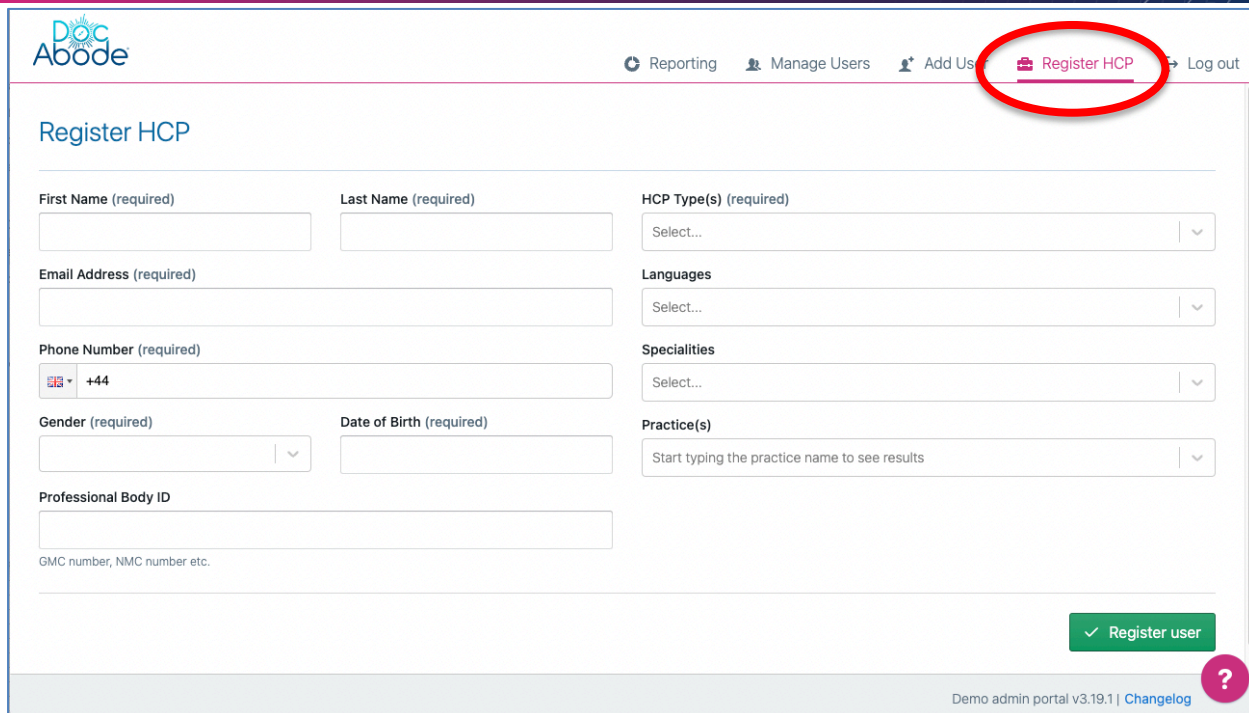
Select the Add User option and the following page will be displayed



Enter the details about the user and then press the Add user button on the bottom right of the web page. A message on a bright green background will be briefly be displayed on the top right of the webpage to confirm that the user was added successfully.

3. Registering an HCP (mobile app)

Select the Register HCP option and the following page will be displayed



Doc Abode

Reporting Manage Users Add Users **Register HCP** Log out

Register HCP

First Name (required) Last Name (required) HCP Type(s) (required)

Email Address (required) Languages

Phone Number (required) Specialities

Gender (required) Date of Birth (required) Practice(s)

Professional Body ID

GMC number, NMC number etc.

Register user

Demo admin portal v3.19.1 | Changelog ?

The webpage is easy and intuitive to use. Please note the following

- Mandatory fields are marked as such.
- Gender is selected from a list of options.
- There is no check against the Professional Body ID, this is for information only.
- HCP types, languages, specialities and practices are also selected from a list of options, and multiple options can be selected.
- To select Practices, start typing any part of the practice name and a list containing that text will be presented

The list of genders, HCP types, languages and specialities can be tailored for each organisation using the Doc Abode system. Please raise a ticket with Doc Abode support to request this.

Once the appropriate information is entered press the Register user button on the bottom right of the webpage to add the user

Reporting Manage Users Add User Register HCP Log out

Register HCP

First Name (required)

Last Name (required)

HCP Type(s) (required)

Email Address (required)

Languages

Phone Number (required)

Specialities

Gender (required)

Date of Birth (required)

Practice(s)

Professional Body ID

GMC number, NMC number etc.

This email address is already set on another user account and you may create a duplicate account.
This phone number is already set on another user account and you may create a duplicate account.

Register user

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Demo admin portal v3.19.1 | [Changelog](#)

4. Managing users (all user types).

Reporting Manage Users Add User Register HCP Log out

Reporting

Completed jobs New!

Generate a report of all jobs completed between two dates.

Past week
Past month
Past 3 months
Past 6 months
Past year
Past 2 years

September 2022


October 2022

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3							1
4	5	6	7	8	9	10	2	3	4	5	6	7	8
11	12	13	14	15	16	17	9	10	11	12	13	14	15
18	19	20	21	22	23	24	16	17	18	19	20	21	22
25	26	27	28	29	30		23	24	25	26	27	28	29

?

Demo admin portal v3.19.1 | [Changelog](#)

Select the Manage Users option and the following page will be displayed

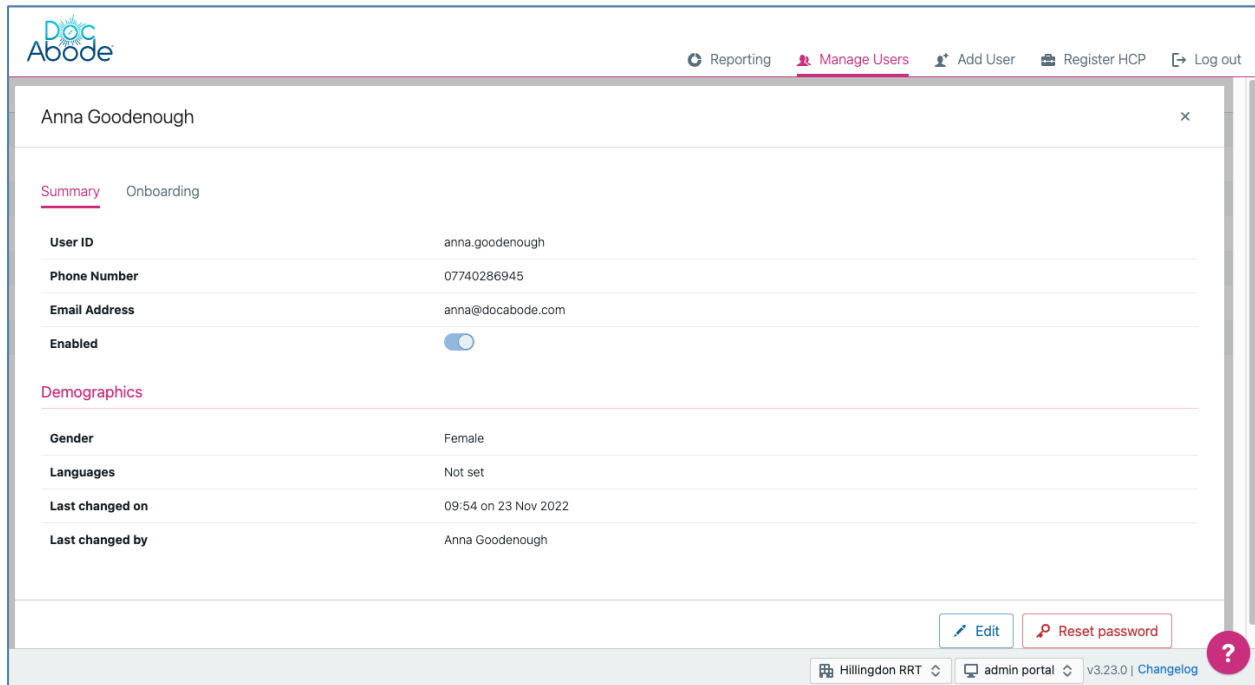
 Reporting Manage Users Add User Register HCP Log out		
James Starkie	james.starkie	enabled
James Starkie	James.Starkie.admin	enabled
James Starkie	James.Starkie.controller	enabled
James Starkie	james.starkie3	enabled
Jamie Fisher	jamie.fisher.demo.controller	enabled
Jane Doe	jane.doe1	enabled
Joe Bloggs	joe.bloggs	enabled
Joe Bloggs	joe.bloggs.demo.controller	enabled
Lucas Crosby	lucas.crosby	enabled
Mike Bronx	mike.bronx	enabled
Mutaz Aldawoud	mutaz.aldawoud	enabled

Demo admin portal v3.19.1 | [Changelog](#)

The list of users is presented alphabetically by first name. Disabled users are listed at the end.

Select a row by moving the mouse there, and the cursor will change from the usual graphic (usually an arrow) to a hand.

The following webpage is presented.



The screenshot shows the 'Manage Users' interface for a user named Anna Goodenough. The page has a top navigation bar with links for Reporting, Manage Users (active), Add User, Register HCP, and Log out. Below the navigation bar, the user's name 'Anna Goodenough' is displayed with a close button (X). The main content area is divided into two sections: 'Summary' and 'Onboarding'. The 'Summary' section contains a table with the following details:

User ID	anna.goodenough
Phone Number	07740286945
Email Address	anna@docabode.com
Enabled	<input checked="" type="checkbox"/>

Below the 'Summary' section is the 'Demographics' section, which contains a table with the following details:

Gender	Female
Languages	Not set
Last changed on	09:54 on 23 Nov 2022
Last changed by	Anna Goodenough

At the bottom right of the main content area, there are two buttons: 'Edit' and 'Reset password'. The footer of the page displays 'Hillingdon RRT', 'admin portal', 'v3.23.0 | Changelog', and a help icon (question mark).

Select *Edit* to change details. Note that a user can be disabled by toggling the enable switch.

The demographics entries (gender and languages) enable visits to be matched better to patient needs, as some patients may have gender preferences or do not speak English. Ignore these fields if they do not apply to the user.

The *Reset password* option is used to create a new temporary password, which the user can then update to something more memorable for them.

When the changes have been entered, two buttons will be presented: cancel or save changes. It is also possible to cancel by clicking on the x in the top right of the webpage, just below the Log out button.