# 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 your Doc Abode account as an Administrator https://controller.docabode.com/. Note that it is the same website as for controllers, the Doc Abode system will present the appropriate web pages according to the username.

   The initial webpage presented is shown below
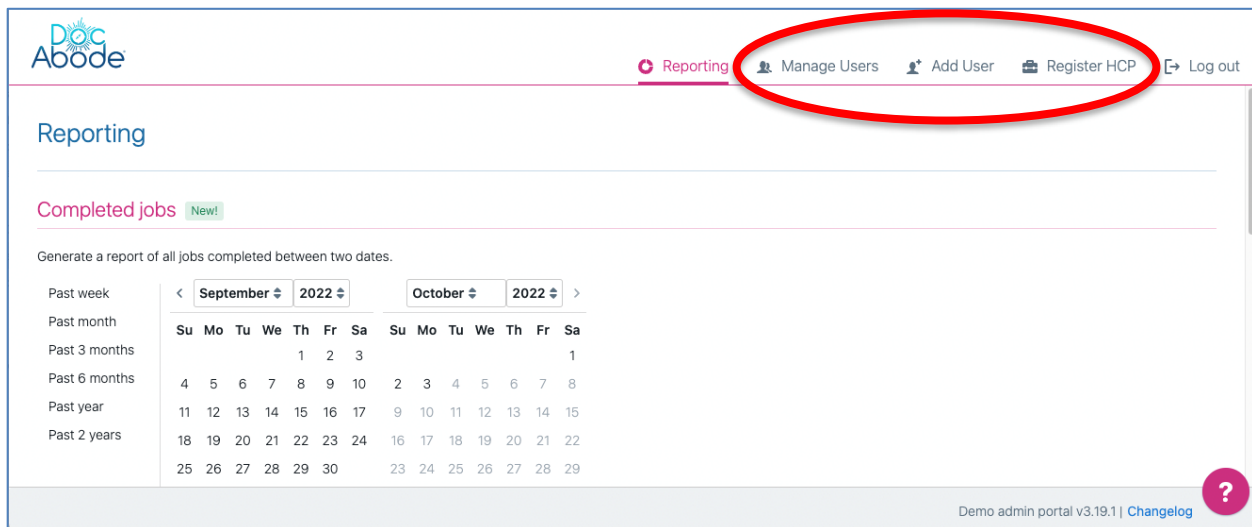
The webpage presented contains three options that are relevant for user management
- **Add User**
  - o This option enables the addition of Controllers and Administrators
- **Register HCP**
  - o This option enables the addition of HCPs, who access the mobile app
- **Manage Users**
  - o This option 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. In this case, the system will

differentiate access rights by adding ".organisation name.role" to the user name, for example the usernames could be set up as below for an organisation name of demo

Person	Username	Access type
Joe Bloggs	joe.bloggs	HCP (mobile app)
Joe Bloggs	joe.bloggs.demo.controller	Controller
Joe Bloggs	joe.bloggs.demo.admin	Administrator

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)
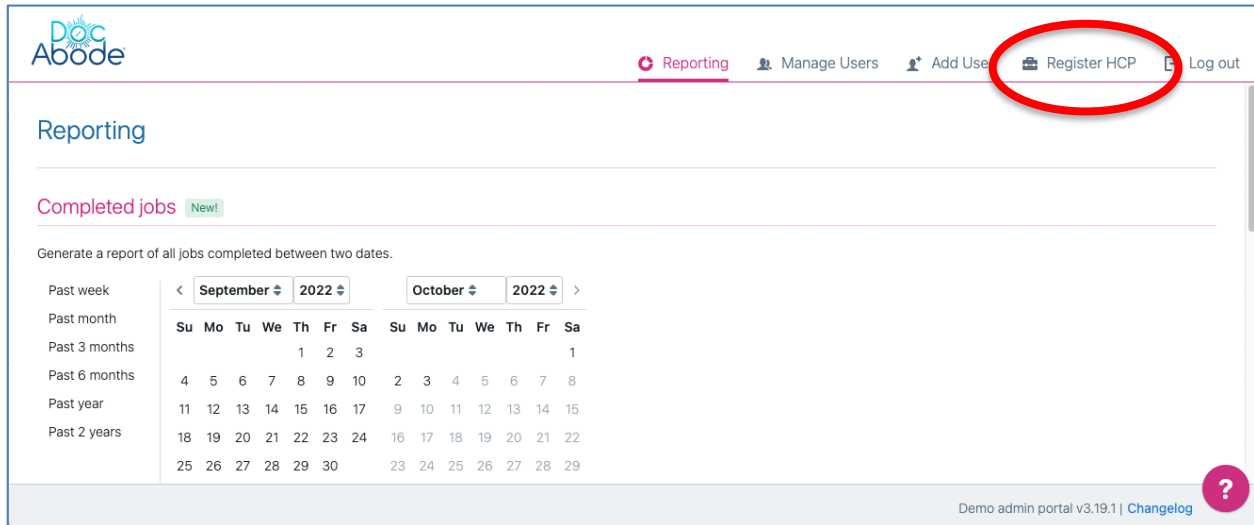
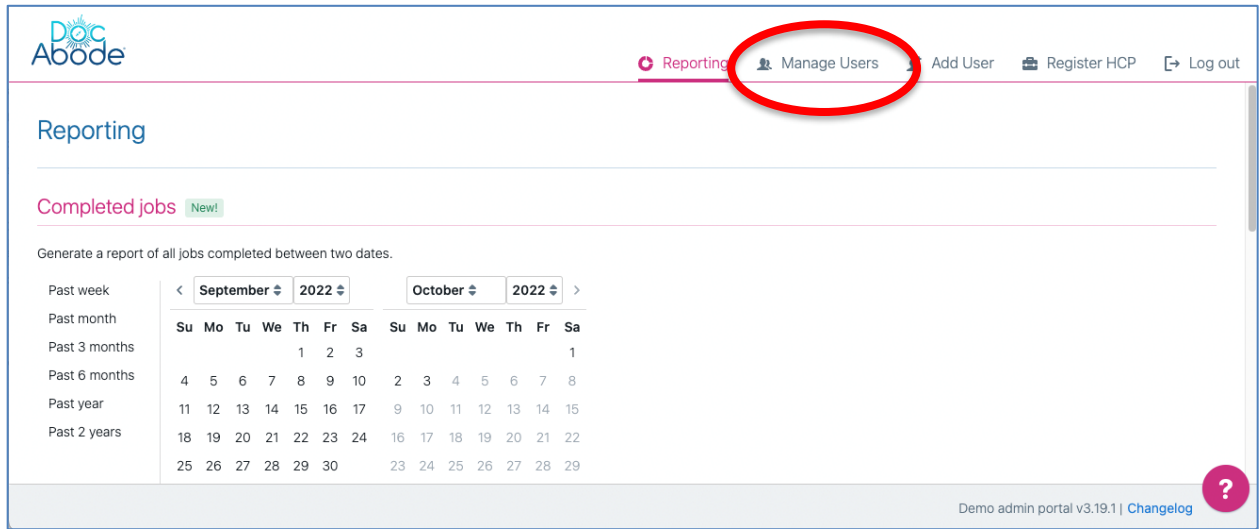Select the Register HCP option and the following page will be displayed
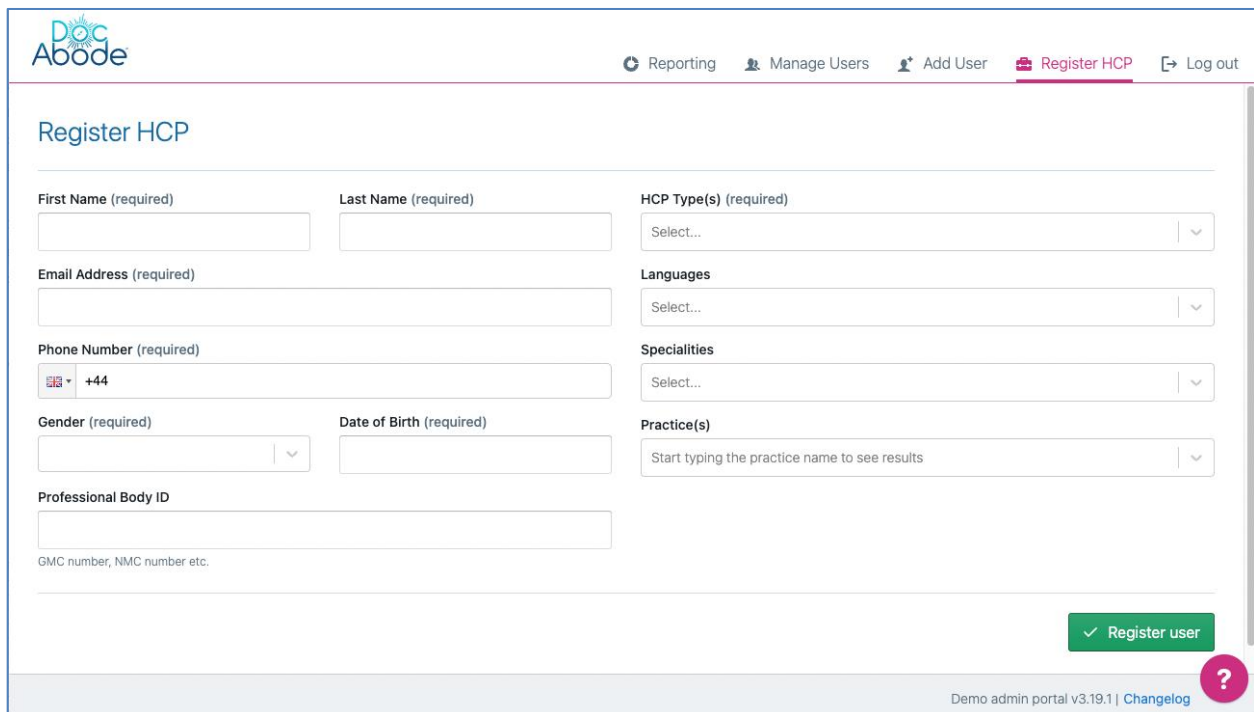
The webpage is easy and intuitive to use. Please note the following
- Mandatory fields are marked as such.

- Gender is selected from a list of options. These can be amended if needed, please raise a ticket with Doc Abode support to request this.
- There is no check against the Professional Body ID, this is for information only.
- HCP types, languages, specialties 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

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

4. Managing users (all user types).

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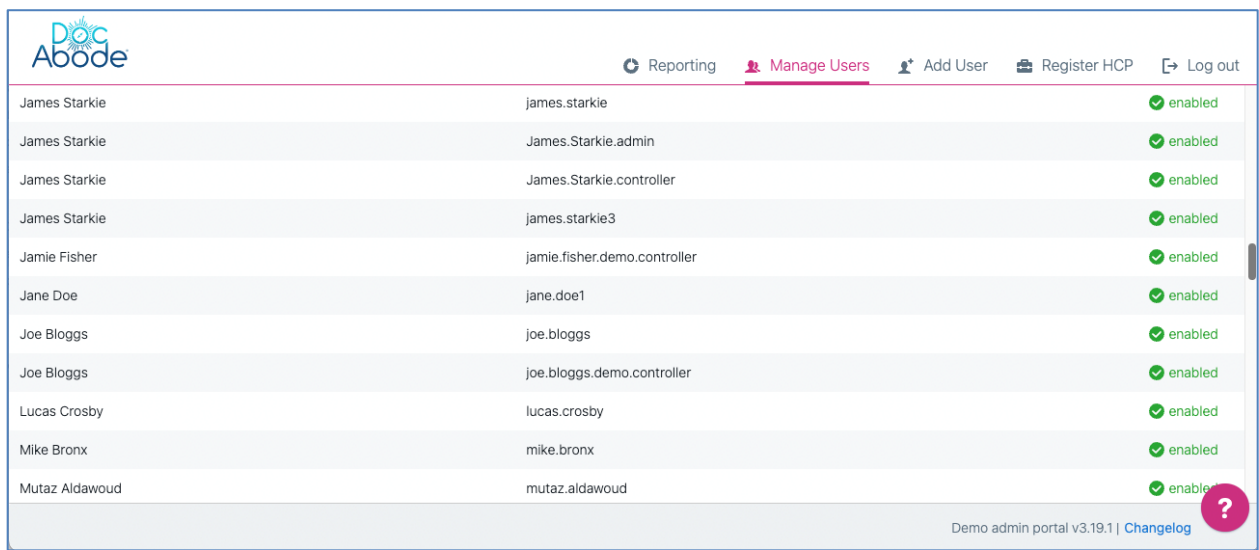

The list of users is presented alphabetically by first name. Disabled users are listed at the end.

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

The webpage presented next depends on whether the user is a controller or administrator, or whether they are an HCP

When the user is a controller or administrator, the following webpage is presented
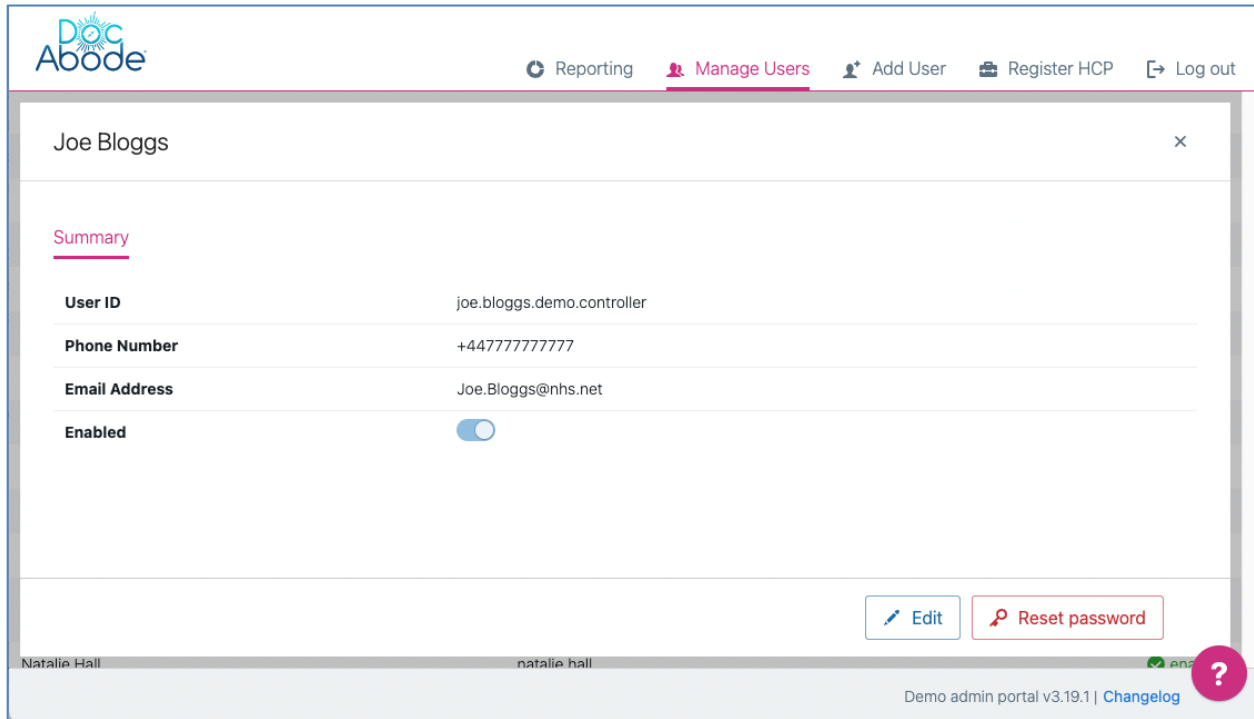
Select Edit to change details. Note that a user can be disabled by toggling the enable switch.

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.

When the user is an HCP, the following webpage is presented

The same principle applies as above, there are just more fields that can be updated. The demographics entries enable visits to be matched better to patient needs, as some patients may have gender preferences or do not speak English.