# How you can control your organisations' user accounts on GCCPlus.org

Intro

This guide covers how you can control your organisations user accounts on GCC Plus. Allowing you to own the accounts linked to your organisation. This control is only provided if you have a full finance right account:

- Creating a new user
  - Access rights for users
- Managing your current user accounts
  - Finding users
  - Editing details
  - Editing Accesses
  - Making delegate accounts live
- Pausing pre-existing user accounts

Creating a new user
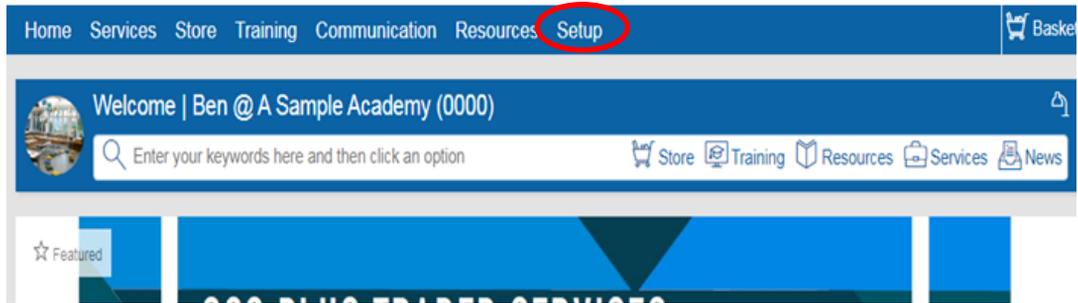
Once logged on, click on the 'Setup' section as circled.

As we are looking at setting up a new account here, you should select the 'create user' icon as circled.

You will need to first check no accounts already exist for the person, you cannot make two accounts for the same person. Please use **this section of the guide here to check if a user already exists**

If an account already exists, see the section here on **turning a delegate account into a user account**
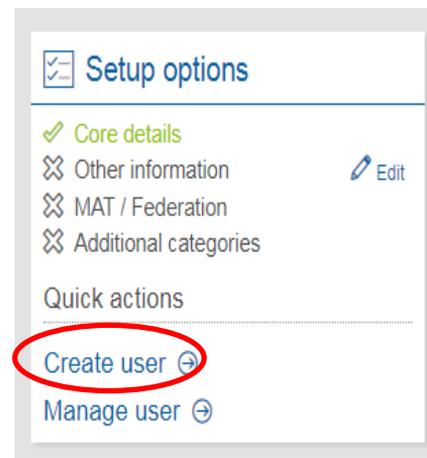
If an accounts doesn't exist, you can set them up…

General

Account type: ● User   ○ Non user

Status: ● Live   ○ Paused

Email: JohnSmith@example.co.uk *

Email confirmed: JohnSmith@example.co.uk *

To set up the account, you first have to enter the email of the person who you are setting up.

Login Details

New password: •••••• *

Password must be between 6 and 20 characters and contain numbers. It may contain these special characters: !,.@#$%'"

Confirm password: •••••• *

Required password: ● change   ○ not change   on next login

After that, you will have to input a password for the person and select the 'required password: change' so they can input their own on their first log in. As the password is going to be changed anyway, it is best to create the password using the surname of the person who's account you're setting up. So in the example, the password would be: Smith1!

Personal Details

Name: Select ⌄ John * Smith *

Job title: Teacher *

Company: Example school *

Telephone: 01452 123456 *

Mobile:

Address: Address - first line

Address - second line

Town

Postcode

County

United Kingdom ⌄

Following this, you just have to input the personal details of the person. The starred ones are the only ones that need to be filled, the others are optional.

You can then select their roles. Note that multiple roles can be selected should the person fit into multiple criteria. As 'John Smith' was a teacher, we would tick the 'Teacher/non-SLT employee' box.

The access rights can be a bit confusing, so will be continued on the following page...

Once you have selected access rights, click

Access rights for users

```
Select
Delegates
School Setting: Full finance rights
School Setting: NQT (current)
School setting: NQT (historic)
School setting: NQT Head teacher - Full Finance rights
School setting: NQT Head teacher - Shopping basket rights
School setting: NQT Induction Tutor
School setting: NQT Tutor
School setting: Personal training booker
School setting: Resource viewer
School setting: Shopping basket rights
School setting: Training booker (FULL)
School setting: Training purchaser (NEW)
```

When you click on the 'Group' section under the 'Access Rights', it will bring up this drop down. The rights we will be looking at are:

Delegates

School Setting: Full Finance Rights

School Setting: Personal training booker

School Setting: Resource viewer

School Setting: Shopping basket right

School Setting: Training booker (FULL)

School Setting: Training purchaser (NEW)

PTO for explanations of these rights…

User rights checklist

These 7 different rights and what they allow you to do are laid out below

User Group	Can view resources and buy-back reports	Can book training for self	Can book training for anyone	Can check-out training	Can place contracts and services in basket	Can check-out contracts and services
Resource viewer	✔					
Personal training booker	✔	✔				
Training booker	✔	✔	✔			
Training purchaser	✔	✔	✔	✔		
Shopping basket rights	✔	✔	✔		✔	
Full finance rights	✔	✔	✔	✔	✔	✔
Delegates	Has no access. Exists as training record only					

Managing pre-existing accounts

Finding users
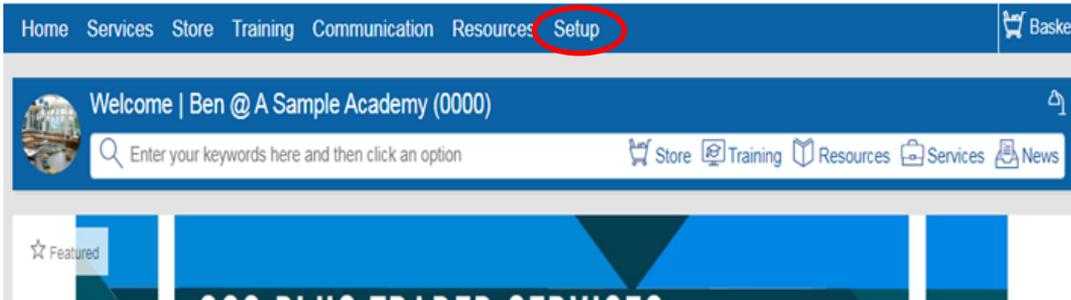
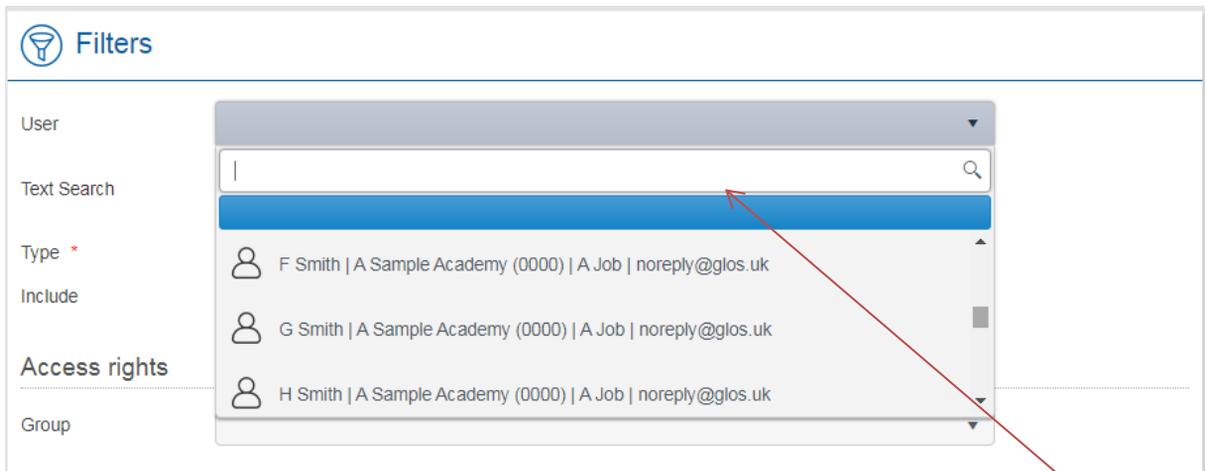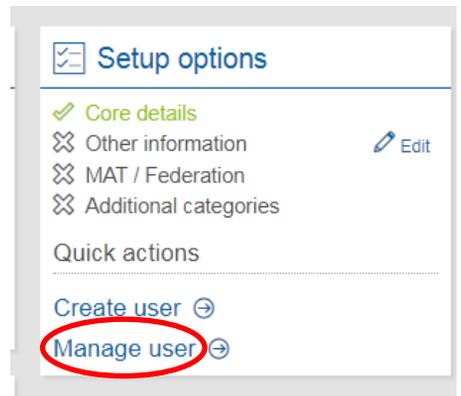If you want to look for an existing account rather than setting up a new one, you will have to click into the **set-up** tab.

Then click into **Manage user**

When searching for a user by name, click into the text box and start typing the name of who you are searching for. There will be a drop down of all the names that currently match what you are typing in

Users | Register
List of all your users

Filters

User	[▼]
Text Search	A sample academy
Type *	⦿ All ○ system users ○ delegates only / non users
Include	☑ Paused user

Access rights

Group	[▼]

🔽 **Search** Apply filters and view results

Results 　　　　　　　　　　　　　　　　　　 +

⛃ Export

⋮ T	Forename	⋮	Surname	⋮	Job title	⋮	Email	⋮	L...	⋮	Edit

There are different types of users that you can search for:

- 'System users' are all of those with access rights, where as 'delegates only/non users' don't have access rights. These are mutually exclusive, options, click 'all' to see both.

- Paused users aren't mutually exclusive and can be searched for alongside any of the 'types' of user.

If you want to specifically search for certain access rights, then you can select the 'Group' tab and then click on which access right you want to search for.

Changing a delegate to a user

User account details including username (email), password reset, and contact information, as well as Role selection and additional fields. You can also Pause a user from here.

User Rights/Groups →

Add or update user rights from this page. You can select a different Group for any number of sites and providers.

If you need to make a delegate into a user so that they can have access rights, then first of all you need to find the account in question. If you don't know how to do this, find that guide here. Then you should click the 'User Rights/Groups' as highlighted
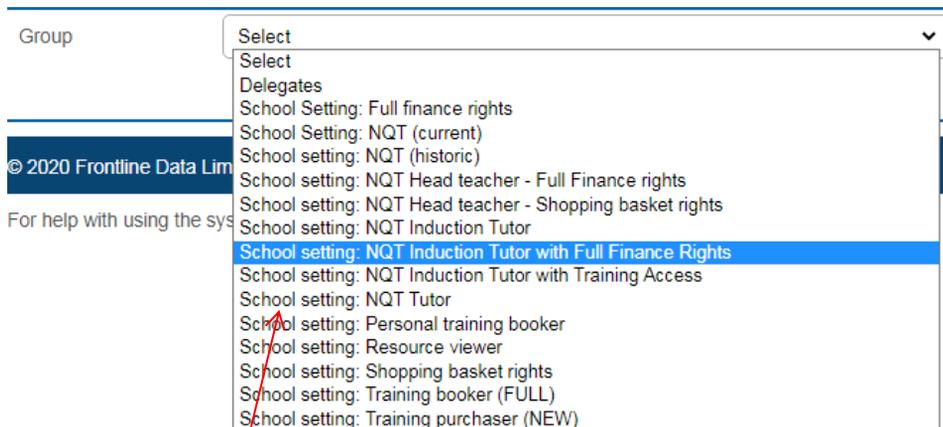
Group	Select ⌄
	Select
	Delegates
	School Setting: Full finance rights
	School Setting: NQT (current)
	School setting: NQT (historic)
	School setting: NQT Head teacher - Full Finance rights
	School setting: NQT Head teacher - Shopping basket rights
	School setting: NQT Induction Tutor
	School setting: NQT Induction Tutor with Full Finance Rights
	School setting: NQT Induction Tutor with Training Access
	School setting: NQT Tutor
	School setting: Personal training booker
	School setting: Resource viewer
	School setting: Shopping basket rights
	School setting: Training booker (FULL)
	School setting: Training purchaser (NEW)

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For help with using the sys

Then go onto the 'Group' section shown here and choose the new access rights you would like them to have.

Once complete, click   Save

Editing details

To edit the details of an account, first find the account using the previous guidance here. Then select the 'Account and Contact Details' button as shown below.

✖️ Setup

Account and Contact Details →

User account details including username (email), password reset, and contact information, as well as Role selection and additional fields. You can also Pause a user from here.

| Email: | noreply@glos.uk |
| Email confirmed: | noreply@glos.uk |

Personal Details

Name:	Select ⌄	Alan
Job title:	A job	
Company	Company	
Telephone	01452538471	*
	Mobile	

You can then amend details such as email address, phone number and job title should these need changing

Once complete, click   **Save**

Pausing pre-existing users

You should only pause an account if someone leaves your organisation. If they have not left the school than you should just change their rights to delegate or give lowered access rights.
The guidance to this is linked here.

T.	Forename		Surname		Job title		Email		Logg...		Edit
🎓	Alan		Smith		A job		noreply@glos.uk		0		Edit

To pause or amend an account, first search for the account using the methods described in the previous sections of this guide. Then click the 'Edit' button. (If unsure of how to do this, view here)

Alan Smith Non user ✉

A Sample Academy (0000)   Site Non-users

view more ⌄

After you click on the 'Edit' button it will bring up a page like this. Then click on the 'Account and Contact Details' button as highlighted.

Setup

Account and Contact Details →

User account details including username (email), password reset, and contact information, as well as Role selection and additional fields. You can also Pause a user from here.

To pause an account, press the 'Paused' icon as shown. It will then bring up a text box saying 'paused reason'. This is where you will enter why you are pausing the account for future reference,

Account type: ○ User   ● Non user

Status: ○ Live   ● Paused

Paused reason: Reason

Email: noreply@glos.uk   *

Email confirmed: noreply@glos.uk   *

Once complete, click   Save

Amending Access Rights

T.	Forename		Surname		Job title		Email		Logg...		Edit
	Alan		Smith		A job		noreply@glos.uk		0		Edit

To amend an account, first search for the account using the methods described in the previous sections of this guide. Then click the 'Edit' button. (If unsure how to do this, view here)

Setup

Account and Contact Details →

User account details including username (email), password reset, and contact information, as well as Role selection and additional fields. You can also Pause a user from here.

User Rights/Groups →

Add or update user rights from this page. You can select a different Group for any number of sites and providers.

After you click on the 'Edit' button it will bring up a page like this. Then click on the 'User Rights/Groups' button as highlighted.

uk)

Site Non-users   Default group (All No Access)   ⊗

Accessibility: A A A ▮▮ ◪ ◪

GCCPlus Support   GCCPlusSupport@gloucestershire.gov.uk

You should then be presented with a screen like the one above. To remove the previous access right so that the account has only the right they need, click the red cross (highlighted) to delete the previous rights they had.

You will need to do this first as you can't give double access to the same site

★ User Profile Rights

Alan Smith (noreply@glos.uk)

Site access:

Add new

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For help with using the system please contact   GCCPlus Support

To add a new access right, click the 'add new' button that is highlighted. Then select the rights the same way that you set up the original one.

How to deal with duplicate accounts

If you have a duplicate account (meaning two accounts exist for the same person), these accounts will need to be merged – please do not just pause one of the accounts as it may contain training attendance records etc.
Unfortunately, merging can only be done by an administrator at Gloucestershire County Council. Therefore if you would like to have accounts merged, please send the following in an email to *GCCPlusSupport@gloucestershire.gov.uk*

Account 1 – the one you wish to keep as the current log-in for the user
Name:
Email:

Account 2- the one you wish to be merged into the other account
Name: Name
Email: