

E>nable Audit

# How to Create Users and Organisations

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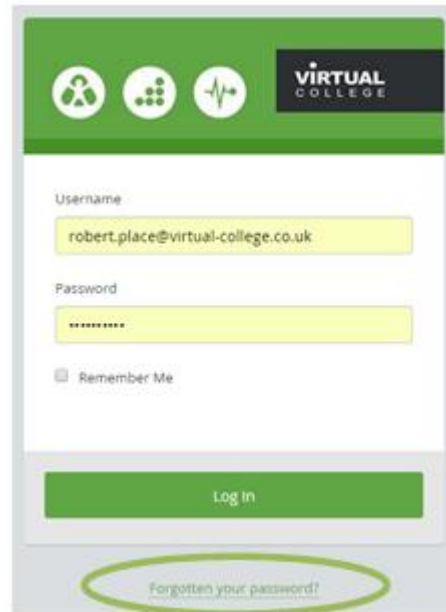
## Table of Contents

E>nable Audit .....	1
Getting Started .....	3
Viewing and Setting up your Organisation's Structure .....	5
Classifications .....	9
Viewing and Setting up Users.....	10

## Getting Started

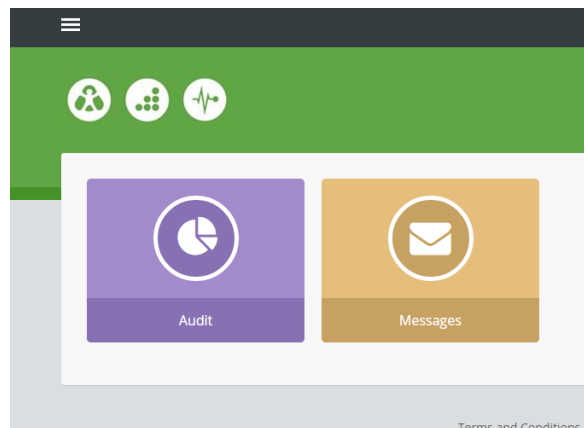
You will have already had your log in details emailed to you when you were set up on the system.

If you have forgotten your password please use the 'forgotten your password?' link at the bottom of the welcome page.



## Welcome to your Audit Dashboard

You are automatically taken to the 'dashboard' which will allow you to complete any audits you have to do.



To start reporting across audits we need to switch our view from 'User' to 'Admin' (an administrator)

This is done by selecting this symbol in the top left hand corner of the screen.

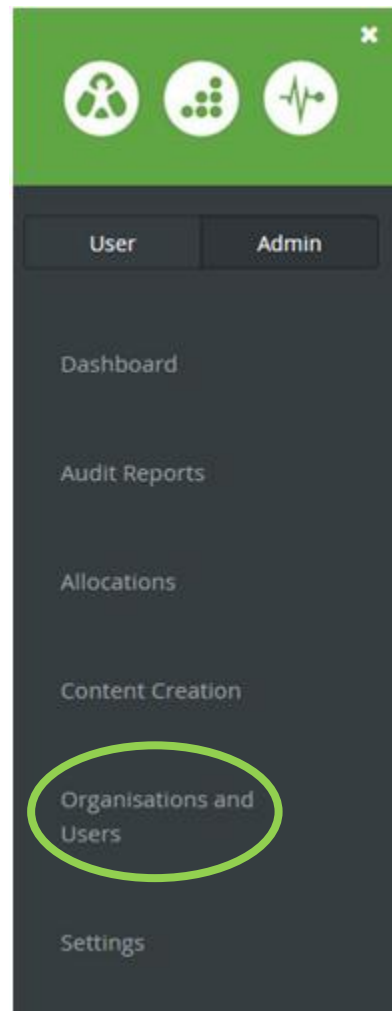


Once you have selected the menu icon you will see this side menu.

Here you can navigate yourself around the whole audit system.

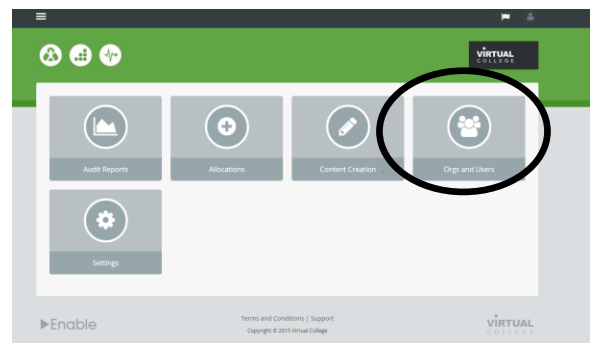
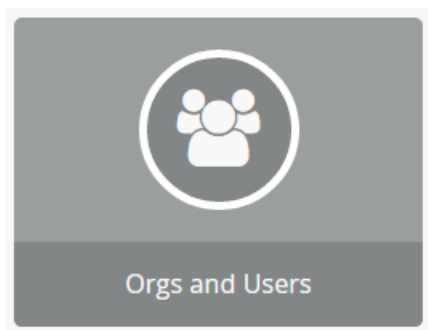
To start allocating an audit, please select the 'admin' tab.

Here you can select 'Organisations and Users'.



You also have the option of 'dashboard' which will show the various administration options laid out in a tile format:

From this view please select the 'allocations' icon, highlighted in the picture.

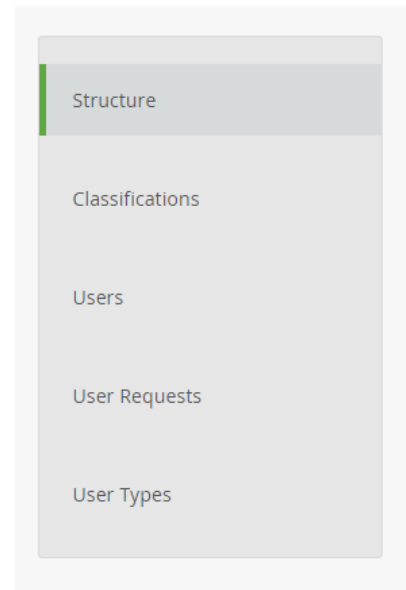


## View and Setting up your Organisation's Structure

You will see a list of options on the left of the screen.

You will automatically be shown your organisation structure, or organisation tree.

This purpose of this is to allow you to organise your audits within your organisations structure.



Here is an example using the countries of the UK.

Having this structure in place allows us to link users and audits to specific organisations within the large organisation.

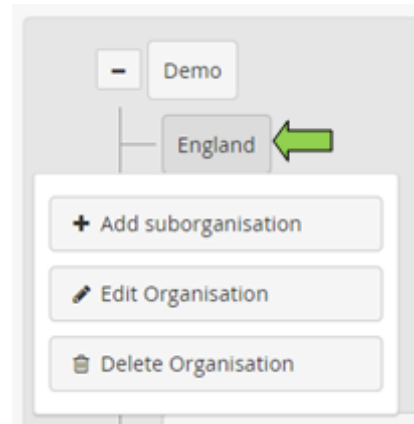
We then can run reports on organisations or users therein.

To create a new instance of your organisation structure, simply select where about's the new instance should lie, either under your main organisation name or as a sub-department therein.

**Edit** will allow you to change the details of that instance.

**Delete** will allow you to remove the instance

To make a new organisation or sub-organisation select **Add**



## Add Organisation

Details ⚠
Settings
Address
Branding

### Details

Name \*

Required Field

Classification

Add New

Here you can enter the name of the organisation.

Classifications which are seen here will be covered later in the document

Cancel
Save

You can also enter the address details of this organisation.

This is reportable should you require a list of your organisations.

### Add Organisation

Details Settings Address Branding

Address

Town

County

Postcode

Country  
United Kingdom

Cancel Save

### Add Organisation

Details Settings Address Branding

**Branding**

Branding Color

Use Custom Color

Branding Logo  
 No file chosen

Certificate Logo  
 No file chosen

Cancel Save

The logo and branding will automatically show for the main organisation but should you wish to add sub-department branding you can.

Here you can upload a logo relating to this organisation and select a colour scheme. This will be reflected when the user belonging to this organisation logs in.

## Classifications

Classifications allow you to add another layer to your organisation structure.

For instance you may have your organisation laid out in a clear order but you might wish to then filter on geographical location.

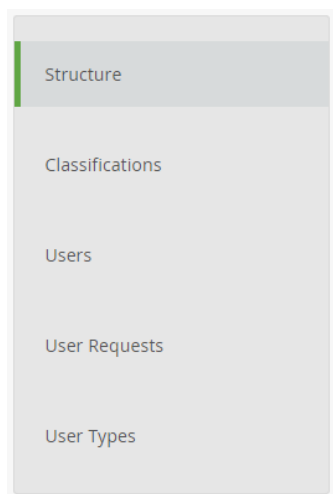
Using classifications you are able to label your organisations with extra information which you can then activity filter on.

In this example we have added colour classifications to our department structure

Now if I wanted to filter my organisations by the colour blue I could do so.

Another example could be types of schools. So I could have a classification for primary schools and a classification for secondary schools.

You can create any classification system you require.



### Viewing and Adding Classifications

On the left hand of the screen you have a tab called **classifications**.

Please select this option.



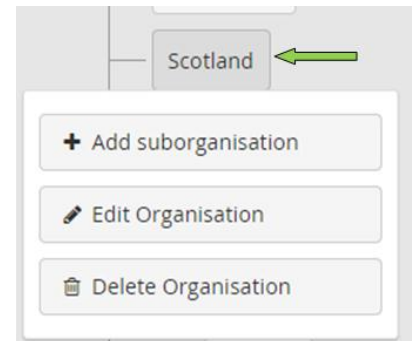
## Classifications

NAME		
<input type="text"/>	<input type="button" value="Add New"/>	
Blue	<input type="button" value="Save"/>	<input type="button" value="Delete"/>
Green	<input type="button" value="Save"/>	<input type="button" value="Delete"/>

Here you can see any classifications you have already made.

Simply type in the box and select **add new** to make new classifications

Once you have created the classifications you need then you can add them to your organisations.



## Edit Organisation

Simply select the organisation you wish to add the classification too and select edit. (You can also add classifications when creating new audits in the same way).

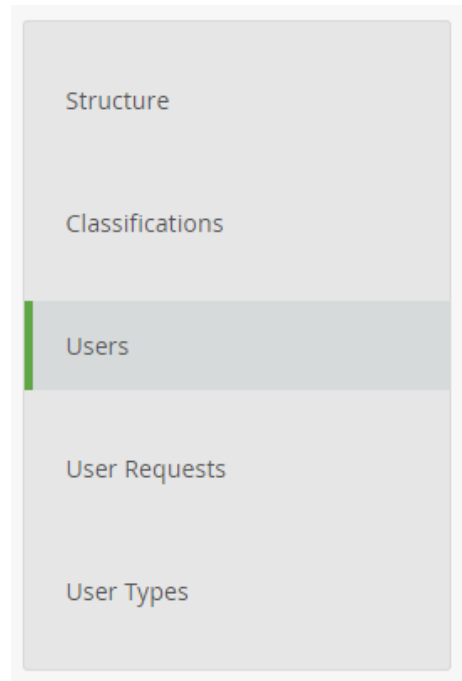
On the main page of the organisation you can see the classifications listed. Select the classification of your choice and press the **save** icon.

## Viewing and Setting up Users

You will see a list of options of the left of the screen.

You will automatically be shown your organisation structure, or organisation tree.

Please select **Users** to add/view/edit your Users



**Users** Export ▾ Add New Add Batch

Select Organisation ▾
A-Z ▾

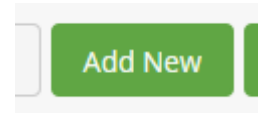
Name
  Full Email Address

NAME	EMAIL	TYPES	
Admin Demo	admin1@demo.com	Customer Admin ...	
Admin Demo	admin2@demo.com	Customer Admin ...	
Admin Demo	admin3@demo.com	Customer Admin ...	
Admin Demo	admin4@demo.com	Customer Admin ...	


Here you will be shown a list if your users. You can search or individuals using the search functionality and/or using the drop down list of organisations.

## Adding a new User

To add a new User, simply select the **Add User** option at the top right of the screen.



### Add User

Details  Organisation User Type(s)

**Details**

First Name \*

First Name

Required Field

Last Name \*

Last Name

Email Address \*

Email Address

Phone Number

Phone Number

Cancel Save

Here you can enter the information of your User.




It is important to enter the correct Email Address. This is used as their Username and is also used to send out the initial invite and future notifications.

Once you have entered their details please select their relevant organisation from the organisation tree.

(Please see the next point in this guide to make your organisation structure)

### Add User

Details  Organisation User Type(s)

- Demo

Health


Fostering

Housing

Scotland

+ Police

## Add User

Details  Organisation **User Type(s)**

### User Type(s)

Available	Allocated
<input type="text" value="Filter"/>	<div style="background-color: #00a0c0; color: white; padding: 2px;">Auditee <span style="float: right; font-size: 0.8em;">✕</span></div>
<div style="background-color: #00a0c0; color: white; padding: 2px; margin-bottom: 2px;">VC Admin <span style="float: right;">&gt;</span></div>	
<div style="background-color: #00a0c0; color: white; padding: 2px; margin-bottom: 2px;">Auditee <span style="float: right;">✓</span></div>	
<div style="background-color: #00a0c0; color: white; padding: 2px; margin-bottom: 2px;">Auditor <span style="float: right;">&gt;</span></div>	
<div style="background-color: #00a0c0; color: white; padding: 2px;">Customer Admin <span style="float: right;">&gt;</span></div>	

Now you can select their relevant role. This will be their overarching role in the system.

### Roles explained:

**Auditee:** This is the basic User role. With this role they'll be able to complete an audit they have been allocated.

**Reviewer:** This is the read-only access role. With this role they'll be able to view audits but not be able to input any data or answer any questions.

**Auditor:** This role will allow users to mark an audit. [Not yet available - coming soon]

**Audit Admin:** This is a basic administration role. You'll be able to create audit allocations. You'll also be able to manage and add Users, as well as running reports.

**Customer Admin:** This role is fully encompassing, similar to the Audit Admin role but including the ability to create audits. This role is only available to those who have bought the full toolkit.

Once you have completed **a user's details** please select the **save** button. Doing this will send an automatic email to your User which includes their username and password and information on how to log into the system.

### Editing a User



If you need to edit any User's detail simply search for the User in question and select the edit icon.



Using the delete icon here you'll be able to remove anyone's access to the system.