

CQRS Local – Commissioning Administrator

Account Administration

Version 1.1
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- 1. Pending Actions – Managing Registrations..... 1
- 2. Managing your System Users 2
- 3. Inviting New and Existing Users to New Roles 2
- 4. Revoking a User Account 3
- 5. Re-enabling a User Account 3
- 6. Disabling a User Account 3
- 7. What the Buttons Mean 4
- 8. Help and Support..... 4

If you haven't already got a CQRS Local Commissioning Administrator account, please click on the below link and register. The CQRS Service Desk will then approve your account. Please regularly check your emails and click on the link within the email to complete the account registration.

<https://auth-local.cqrs.nhs.uk/Account/Login>

1. Pending Actions – Managing Registrations

When a GP practice user registers for a CQRS Local account, their request will be within this section.

1. Log into CQRS Local.
2. From your home page, click on the **Pending Actions** menu tile.



3. Click on the **Review User** button.

| Here you can approve registration role requests, resend registration emails & delete registrations | | | | | | | | |
|---|---|------------|-----------|---------------------------|---------------|---------------------|-------------|--------|
| Created | Role Reason | First Name | Last Name | Organisation | Role | Email | Is Approved | Action |
| 02 Aug 2023 | New account and role by self registration | John | Martin | STRANDHILL MEDICAL CENTRE | Provider User | john.martin@nhs.net | x | |

You can sort each column by date or by approval etc. by clicking on the header arrows.

- To Approve this account, select the **Approve** option and then click the **Confirm** button. The user will then receive notification via email that their account has been approved. They should then click on the link to complete the registration set up. Once confirmed you will see them in the **Users** section.

Details for John Martin

Role Request

Date: 13 Sep 2022 Role: Provider User Reason for Role: New account and role by self registration

Approve Reject **Confirm**

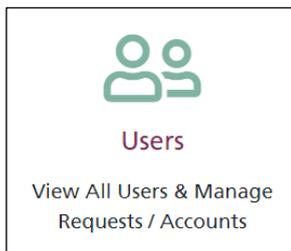
Note: If you need to Reject the registration, you will need to give a reason and then click on the **Confirm** button. The user will then receive notification via email that their account has been rejected. **Please note that you will need to reject any requests where a generic email address has been used and the name doesn't identify an individual.** Such examples are shown below.

| First Name | Last Name | Email |
|------------|-----------|-------------------------------|
| Reception | Staff | reception.team-L81065@nhs.net |

2. Managing your System Users

You will also need to check any requests that are within the **Users** section. These are, for example, Practice Managers who have had an account previously approved and have requested access to an additional GP practice.

- From your home page, click on the **Users** menu tile.



- Click on the **Review** button and follow the same steps as above.

Home > Users

10 Search Firstname, Lastname, Email, ODS Code or Organisation

| First Name ↴ | Last Name ↴ | Email ↴ | Pending Role Review | Action |
|--------------|-------------|-----------------------|---------------------|---------------|
| Stanley | Laurel | stanleylaurel@nhs.net | Yes | Review |

3. Inviting New and Existing Users to New Roles

As an Administrator you have the ability to invite a user rather than them registering for an account.

- Click on the **Invite** button.



2. Enter the users email address and click on the **blue arrow** button.
3. Enter the first and last name of the new user and click on the **Next** button.
4. Select the organisation you want to invite the new user to and click **Next**.
5. Next is to select the role you wish for the user to be set up with and click **Next**.
6. An email invite will generate. Check that everything is correct and then click **Send**.

4. Revoking a User Account

Revoking an account is when you remove all access to an account associated to that organisation. The user will still be able to login using their credentials and will still be able to get to the **My Profile** page and then can request access to another organisation.

1. From the CQRS Local homepage, click on the **Users** menu tile.
2. Find the user whose account you wish to disable and click on the **View** button.
3. Scroll down to the bottom of the screen and click on the red **Revoke** button.
4. Click the **Confirm** button.

5. Re-enabling a User Account

Re-enabling a CQRS Local account will give the user back their access.

1. From the CQRS Local homepage, click on the **Users** menu tile.
2. Find the user whose account you wish to disable and click on the **View** button.
3. Scroll down to the bottom of the screen and click on the blue **Enable Account** button.
4. Click the **Confirm** button.

6. Disabling a User Account

Disabling an account - this is in effect an account deletion (their data is retained for audit reasons) so if they try to login into the application, they will be notified that their account has been disabled and therefore will be unable to access CQRS Local for all organisations they are registered at.

There are two ways in which this could be done. Firstly, the user themselves could disable their own account, if for example they no longer required access. Secondly, this can be done by the Administrator. The below instructions will be for the Administrator to disable the users account.

1. From the CQRS Local homepage, click on the **Users** menu tile.
2. Find the user whose account you wish to disable and click on the **View** button.
3. Scroll down to the bottom of the screen and click on the **Disable Account** button.
4. Select a reason why you are disabling the account. There is an 'Other' option, which if selected will prompt you to enter some information. Please enter as much detail as possible up to a maximum of 250 characters.
5. Click the **Confirm** button.

7. What the Buttons Mean

| | |
|---|---------------------------|
|  | Review User |
|  | Resend Registration Email |
|  | Delete Registration |

8. Help and Support

The CQRS Local Service Desk are here to support you. If you have any queries, please contact us:

Telephone: 0330 124 4039

Email: support@cqrs.co.uk