![GDPRiS logo]

GDPRiS Platform v2 Guidance for Users

DP Staff

User Management

Contents

User Management

The GDPRiS portal currently has two user types, General Staff and School DP Staff. The **General Staff** user role is used by most of your school staff.

The **School DP Staff** role is an Admin user who will create new users, manage suppliers, set up Internal Audits as well as perform DPO tasks within the portal.

Bulk Import Users

Note: Bulk Imports must be completed using an .xlsx file

Please find below a link to our template, which is at the bottom of the page, to enable you to create your accounts:
User Import Template

Navigate to the **User Management** area via the **Administration** area on the Navigation Pane.

Click **Import**

Either use **Choose** and navigate to your saved template and select the **Template** and click **Open**.

Or drag the file into the **Drag and Drop** area

Click **Upload** to start the import of your staff from your spreadsheet.

Note: All staff will be imported as General Staff users unless you put an **'x'** in the **dpstaff** column on the template.

All new staff accounts will be marked as **Activated**. Therefore the toggle will be green. This is so areas of the platform can be set up before sending registration emails. Users can not access GDPRiS until the Registration email has been sent.

Sending the registration email

When you are ready for your staff to access their GDPRiS accounts you will need to send them a registration email. **This email is only valid for 7 days.**

Tick any users that you wish to send the registration email to.

Note: Users that have logged on can not be ticked and will be 'greyed' out

Click **Send Registration Email**

Once this has been sent you will see confirmation in the Registration Sent column next to the users.

First Time Log In

In the registration email, click on the link to take you to the log in page.
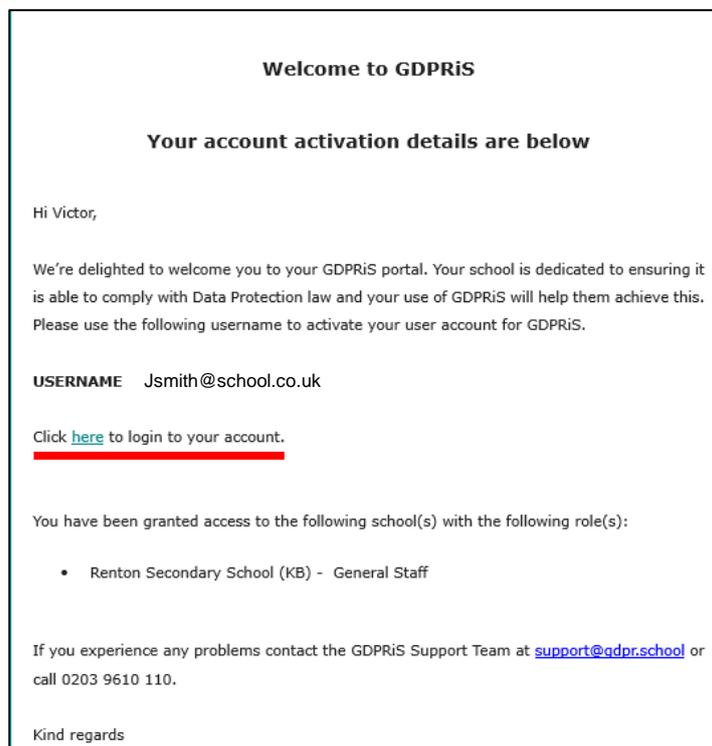
Password Requirements

You will be asked to set a password.

Passwords must have:

- Between 12-30 characters
- At least one uppercase letter
- At least one lowercase letter
- At least one symbol
- At lease one number

Disabling Accounts

If you wish to disable a user account move the toggle to the left. It will appear grey. This will mean that the user no longer has access to the site.

Add a New User Manually

In **User Management**, click **'Add**.

Fill in the relevant details and select which role you want your new user to have.

SAVE.

An Update User window will appear.

If you are happy at this point for your user to have access to GDPRiS then click the **Send Registration Email** button. **This email is valid for 7 days.**

You can do this later from the User Management page

Click **SAVE** after any amendments.

Updating and Removing Staff

You can **Update User** by using this icon.

You can **Delete** staff by using this icon.

Categorise Staff

How to categorise users in User Management.

If you wish to enrol your staff onto training course you will need to categorise them.

Navigate to the **User Management** area via **Administration** on the **Navigation Pane.**
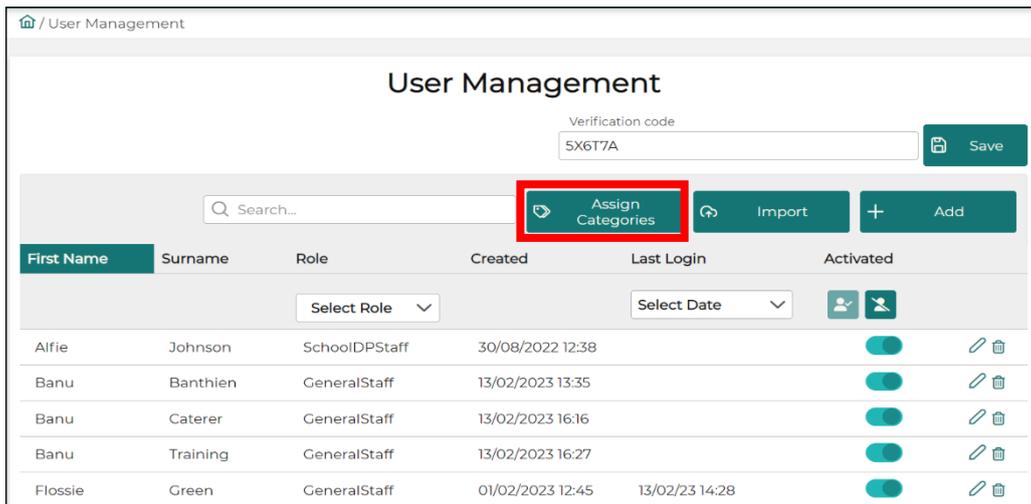
You will see a list of your staff that have accounts on the GDPRiS portal.

Select **Add Categories**

Select the users you wish to add a category to.

Select the category/categories you wish to assign to the selected staff.

Please check the **confirmation message** and click **SAVE** again
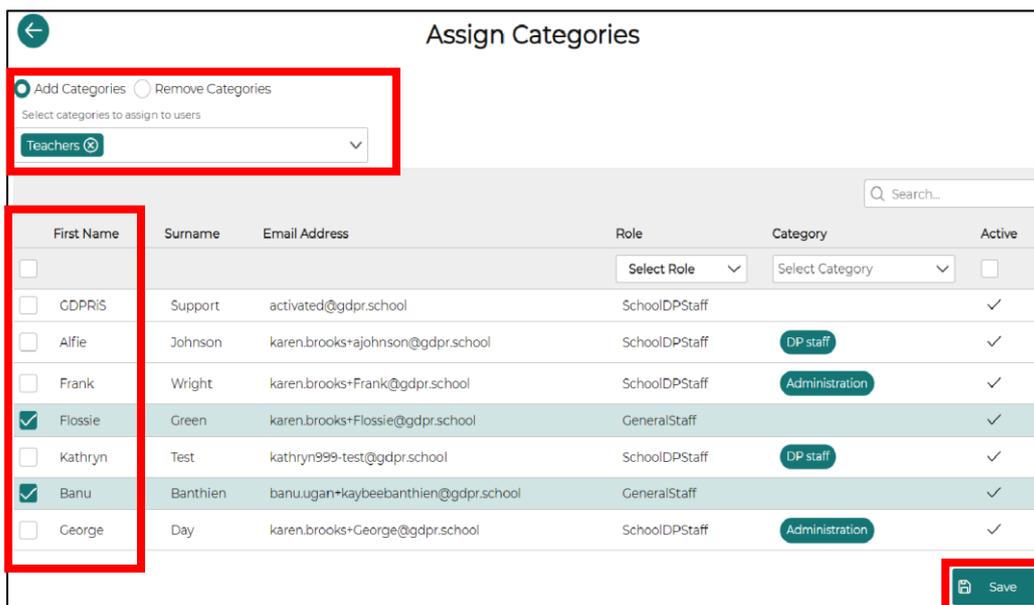
Filter Categories

You can filter by categories to check your selections.

If you choose **No Category** it will reduce your list and you will see any staff that you may have missed.

Remove Categories

* This process does not unenroll staff from courses

Select **Remove Categories**

Select the users you wish to remove the category/categories from

Select the category/categories you wish to remove from the selected staff.

Please check the **confirmation message** and click **SAVE** again

Forgotten Password

If a user has forgotten their password they must use the **Forgot your password** link on the login page.
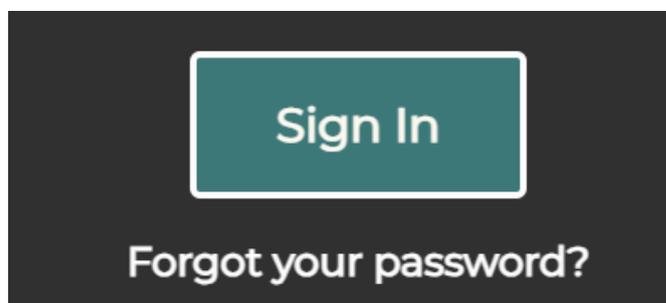
Link to Reset Password

You may need to check your junk mail as well as your inbox.

Xporter on Demand (XoD)

The GDPRiS portal can be linked up to your schools MIS which uses Groupcall's Xporter on Demand (XoD) process. This will look to import your staff directly from your MIS. This saves you time on duplicating the same information which is in your MIS into the GDPRiS portal.

There is an annual charge of £65.00 per school for this service

If you would like to link your MIS with your GDPRiS portal, please send an email to support@gdpr.school and we will begin the process.

How does it work?

GDPR in Schools will add a domain to your school which will be taken from an example user from your User Management portal. We will then run through a process via Groupcall's XoD portal which will send you an email requesting you to authorise the link between your schools MIS and the GDPRiS portal. XoD in this case acts as the middle man which we use to pass the information from your school to our portal.

Once we have processed your schools request, you will receive an email which will take you through the process via Groupcall's XoD portal. Information on this can be found via this URL: https://www.youtube.com/watch?v=IJMoBMg-xYM&feature=youtu.be

Once you have completed the process of authorising the link between your schools MIS and GDPRiS, you can log in to your GDPRiS portal, go to the User Management section and use the **MIS Sync Now** button which now appears.

Once you have clicked the MIS Sync Now button, your portal should then go through the process of importing your users from your MIS. You will need to click **OK** for your page to refresh to see all your imported users.

MIS Sync Completed

This has now been processed. Click OK to refresh the page.

OK
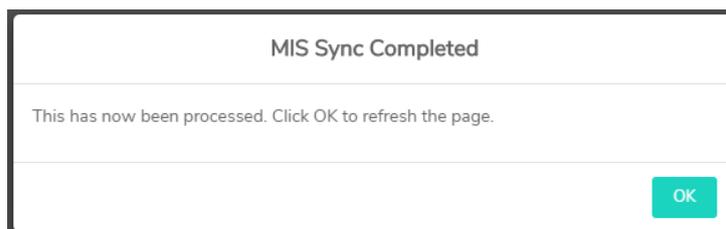
At the bottom of your **User Management** section is a table which shows information on the last performed Synchronise.

MIS Sync	School Email Domain	Last Sync Status	Last Sync Message
30/04/2021 10:30	@Homeschool.co.uk	30/05/2019 10:39 Imported 38/49 staff	

From this table, you will be able to see when the sync occurred, which email domain was used, how many users were successfully imported and a message.

Note: Users with the provided email domain will be imported. Any users in your MIS which do not match the provided domain will not be imported.

By default, all users will be imported as General Staff users. If you wish for any of your staff to have higher permissions than the rest of your staff, please edit those users and change their role to School DP Staff.

Contact the Customer Success Team

Office hours

Mon-Thurs: 09:00 - 16:30 GMT

Fri: 09:00 – 15:30 GMT

If you require assistance regarding any section of this help guide, please do not hesitate to contact us via one of the following methods:

Tel: 02039 610 110

Mail: support@gdpris.co.uk