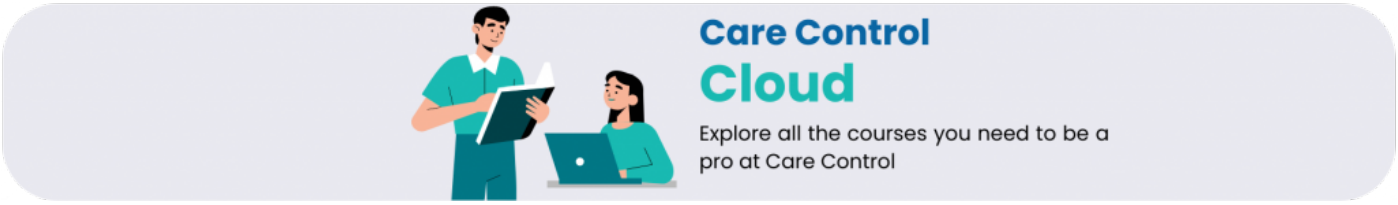
OM – Manage Access Roles

Windows Org Man Archive · https://cclearninghub.co.uk/docs/om-manage-access-roles/

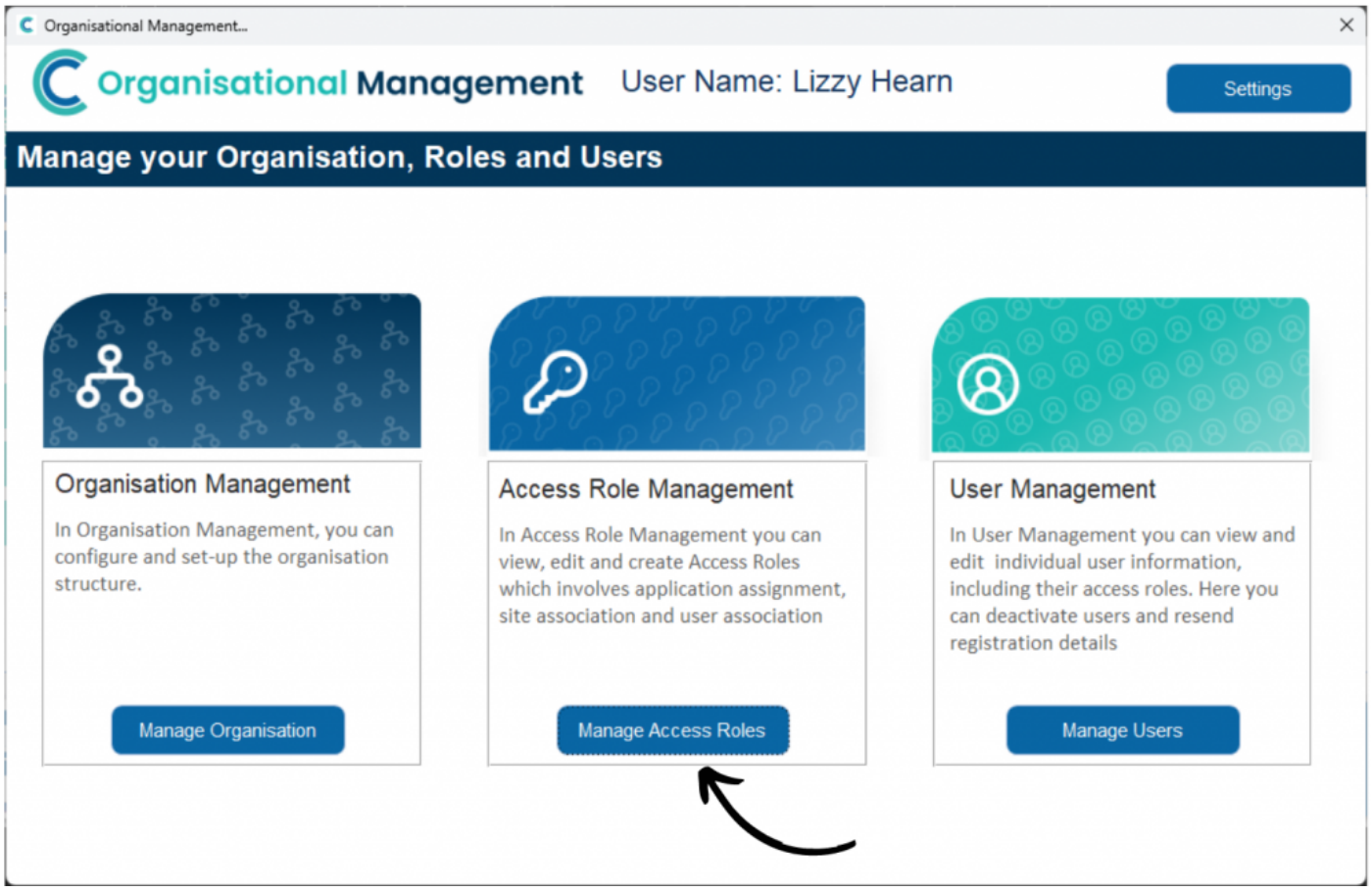


Manage Access Roles

This guide will cover how to set up the new Access Roles within the Organisational Management tool in CC Windows.

Access Roles define where, who and what staff members can access across multiple sites and applications in the new Care Control Cloud.

Embedded media:
https://player.vimeo.com/video/848366656?color&autopause=0&loop=0&muted=0&title=0&portrait=0&byline=0&h=59cf



1

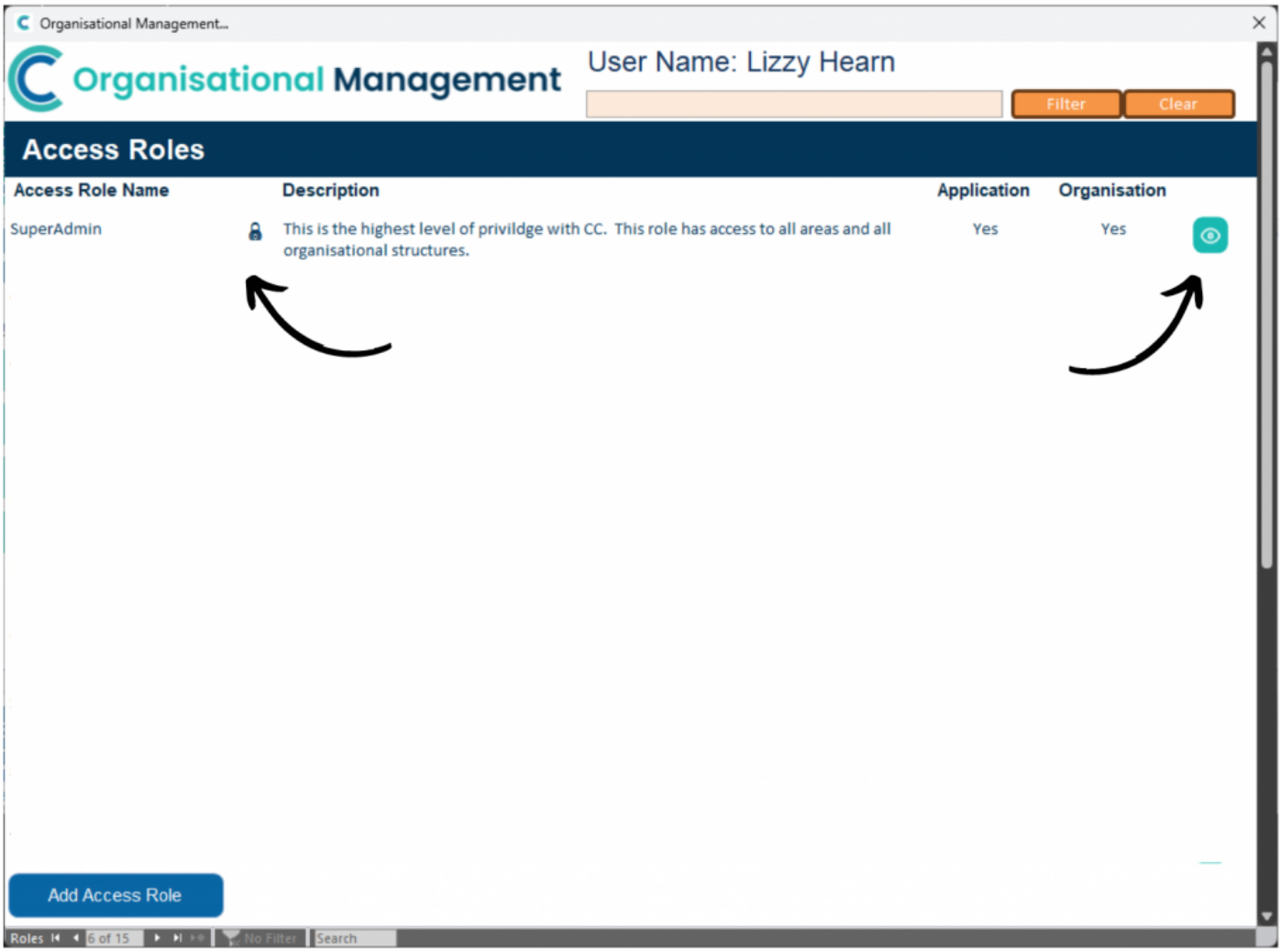
Within the Organisational Management tool, select **Manage Access Roles** to begin.

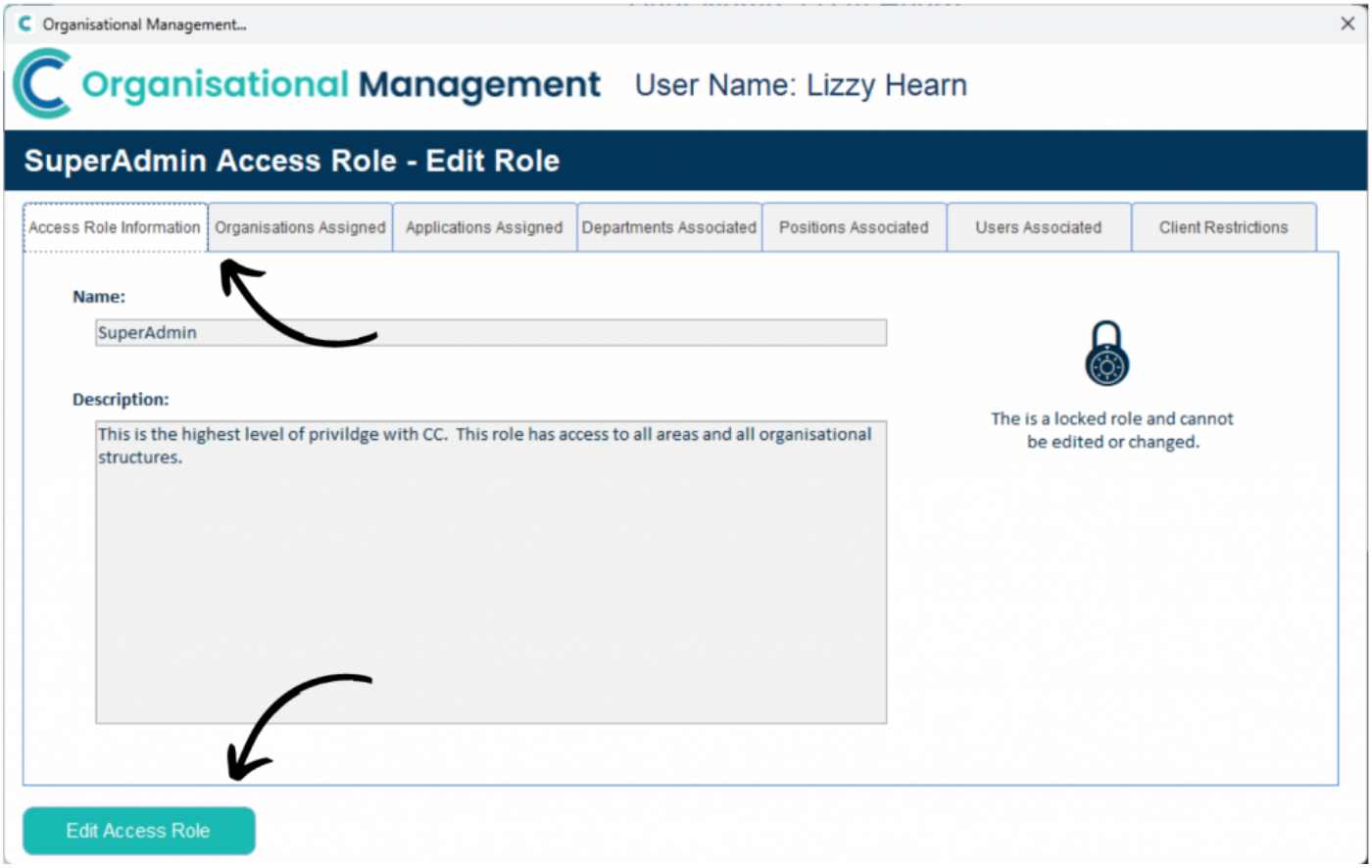
2

Here, a list of your existing Access Roles will be displayed.

The **SuperAdmin** role may be the only role on the list and this is reserved for staff members who require access to everything; for example, business owners or management staff.

Note – this role is locked and cannot be edited or changed. Press the **eye icon** to view more information about it.





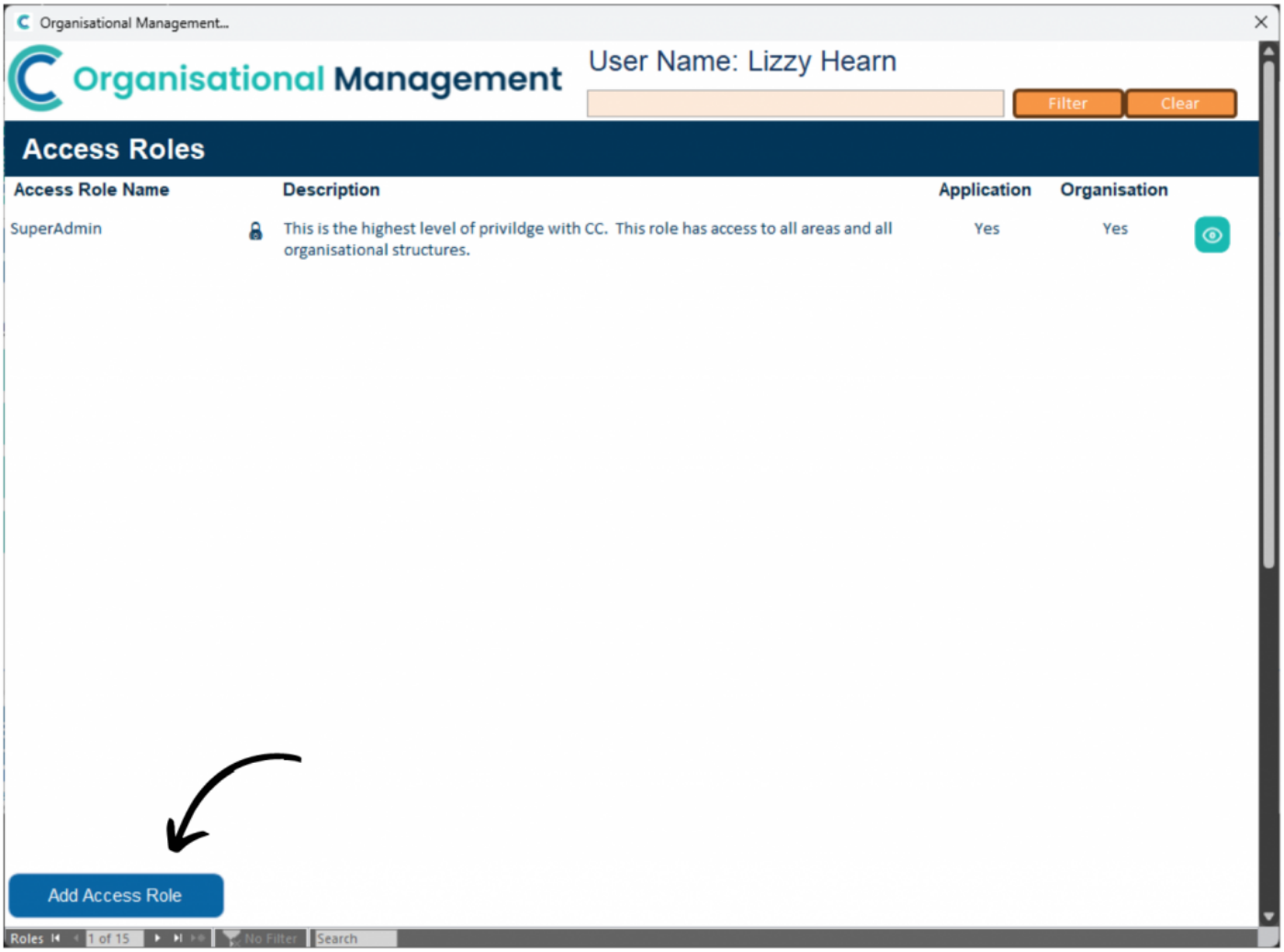
3

A new window will open. Here, a series of tabs containing different access settings is displayed.

These will be explained in the following steps.

4

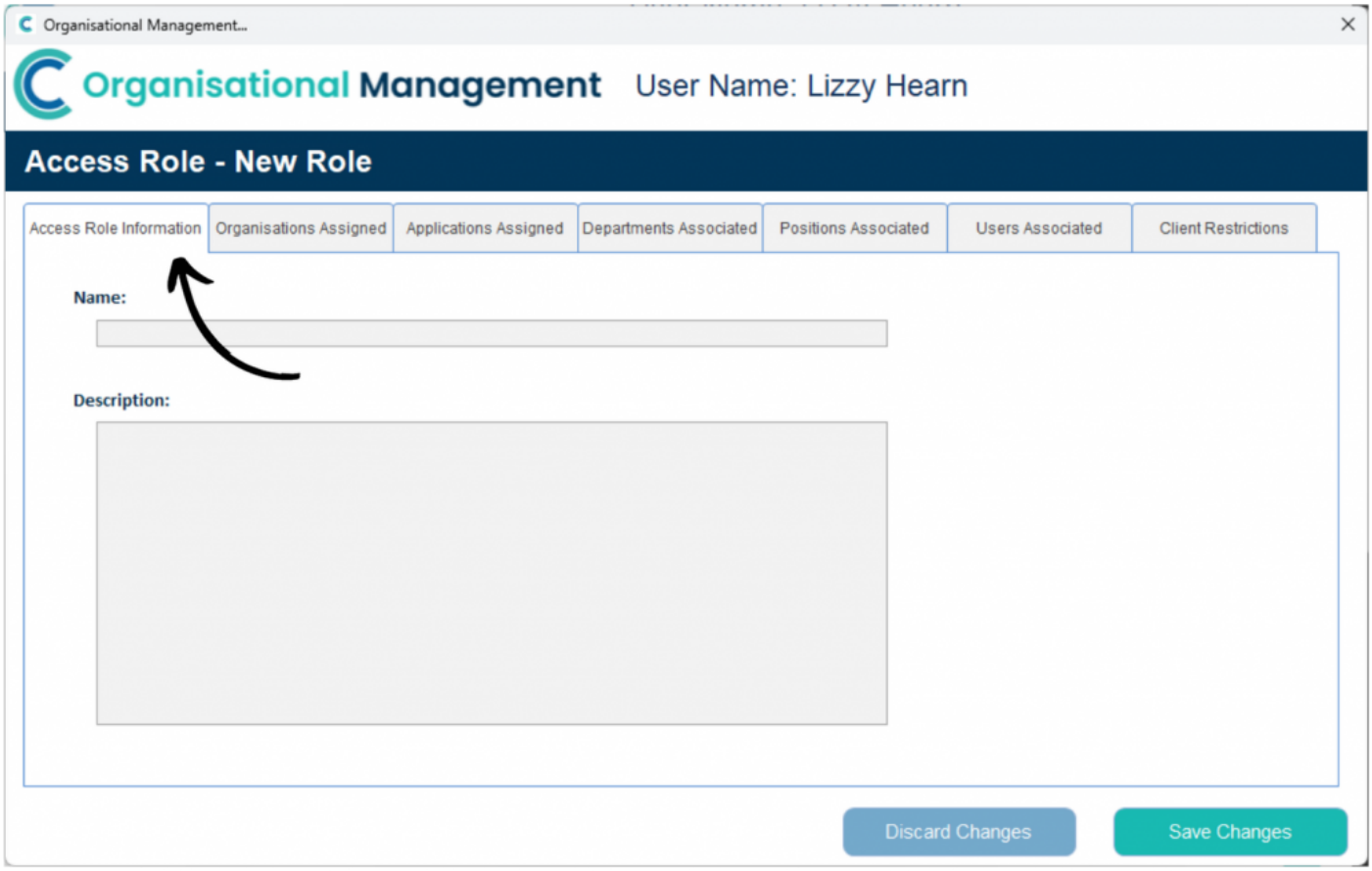
Within the Manage Access Roles tool, press **Add Access Role** to begin.

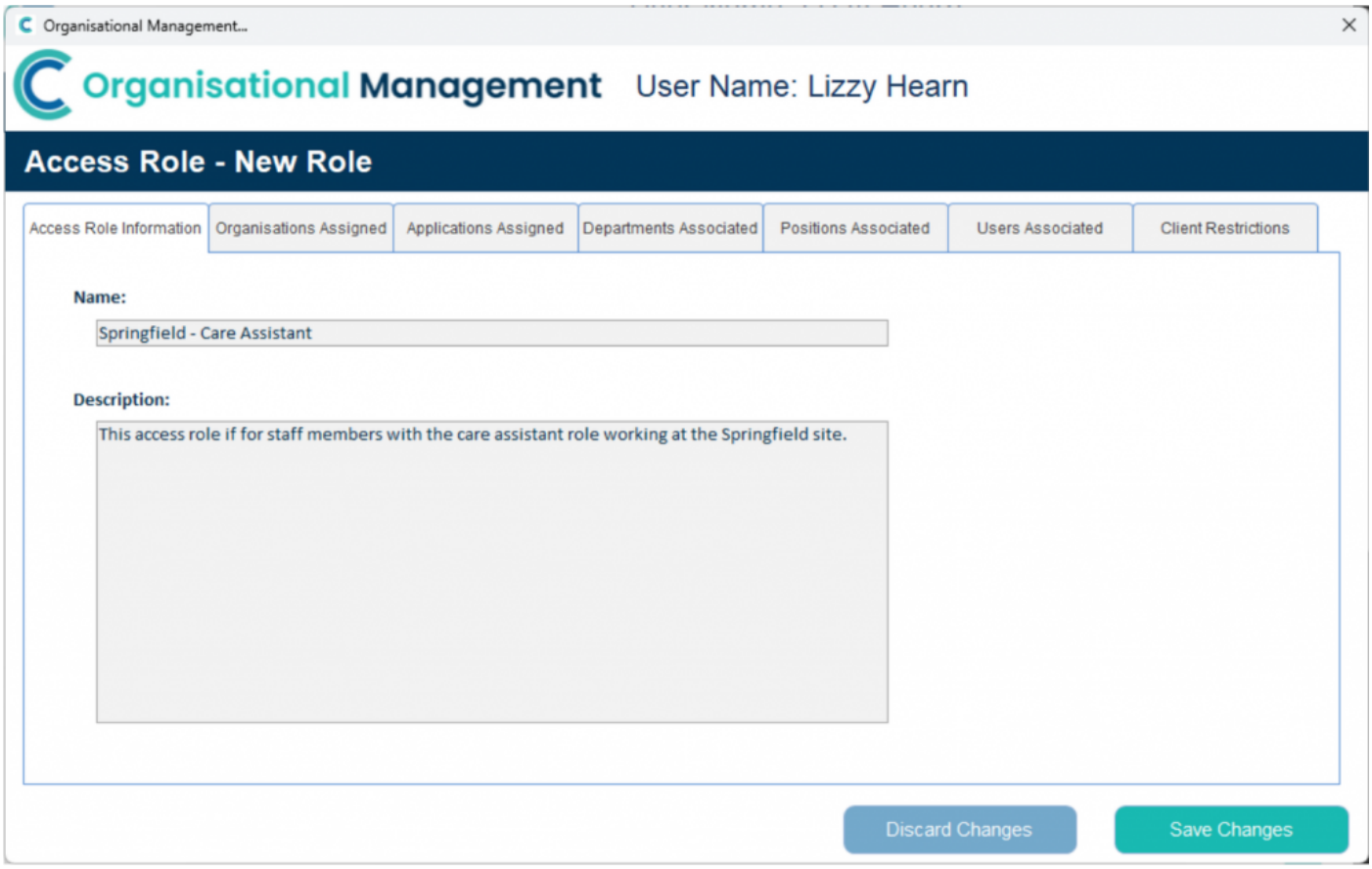


5

A blank form will open. The first tab contains some basic information about the role – its **name** and **description**.

The next steps in this guide will be accompanied by a screenshot of the blank form and a screenshot containing a filled out form as an example – a care assistant role working at a singular site.


Organisational Management...
Organisational Management
User Name: Lizzy Hearn
Access Role - New Role
Access Role Information
Organisations Assigned
Applications Assigned
Departments Associated
Positions Associated
Users Associated
Client Restrictions
Name:
Description:
Discard Changes
Save Changes

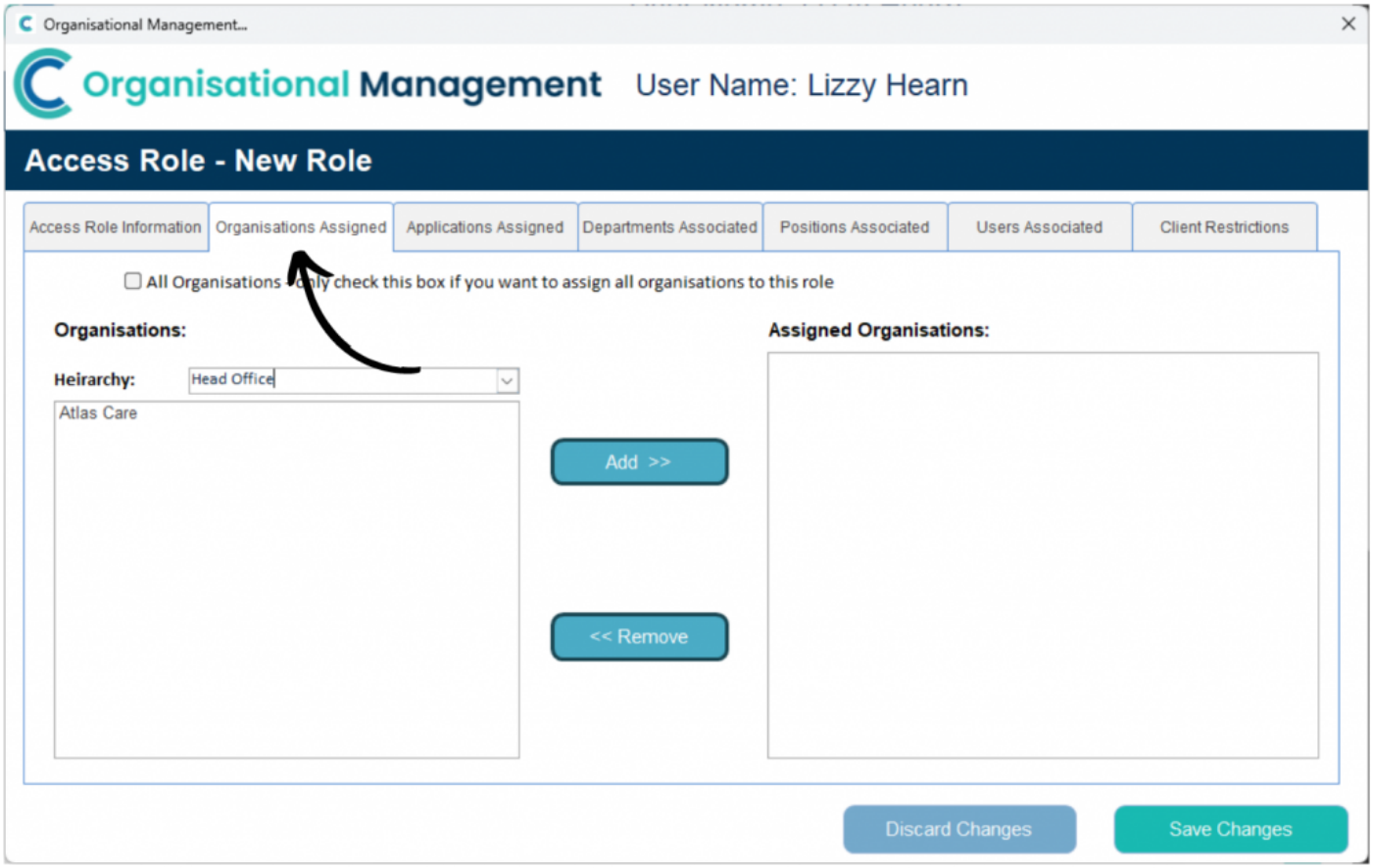


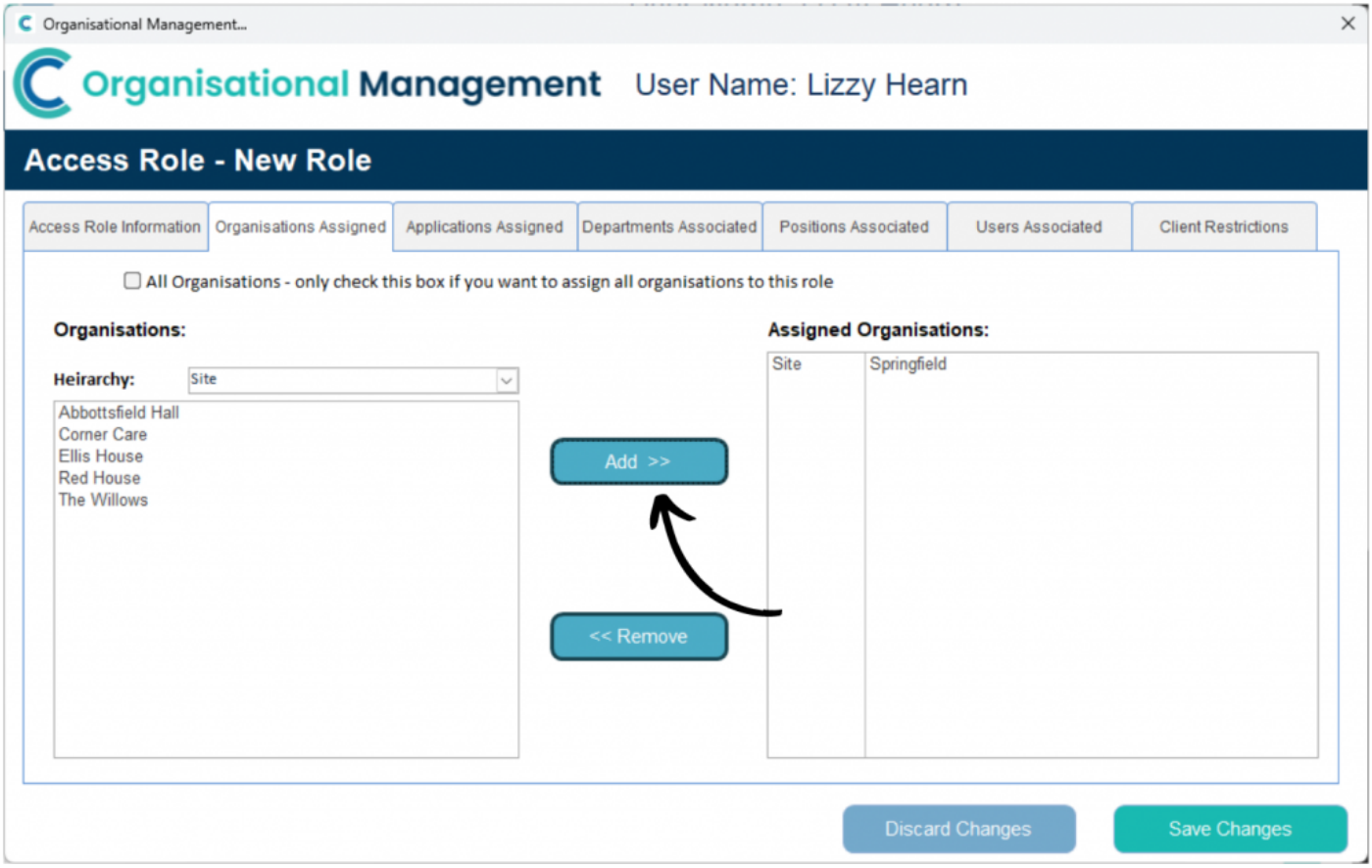
6

The next tab, **Organisations Assigned**, contains options for which organisational units can be accessed by this new role. You can choose to allow access to all via the checkbox at the top, or manually select using the drop down list on the left hand side.

Simply select the unit to highlight it, then press **Add** to move it to the right hand side.

In this example, we are creating an access role designed for **one site** – we filtered the units by ‘site’ and moved the Springfield site to the right hand side. This role will therefore only have access to the Springfield site.

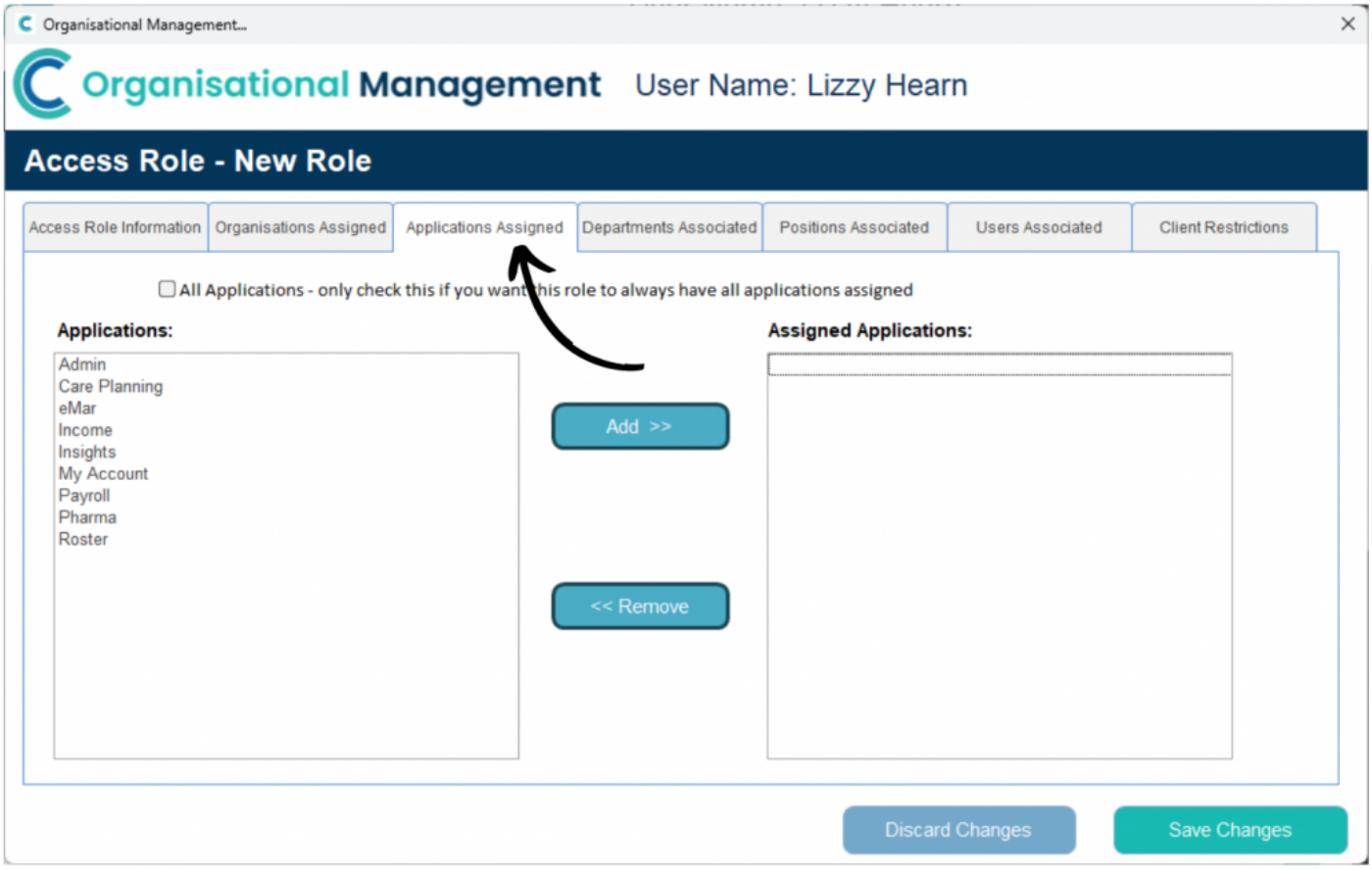

Organisational Management...
Organisational Management
User Name: Lizzy Hearn
Access Role - New Role
Access Role Information
Organisations Assigned
Applications Assigned
Departments Associated
Positions Associated
Users Associated
Client Restrictions
All Organisations - only check this box if you want to assign all organisations to this role
Organisations:
Assigned Organisations:
Heirarchy:
Head Office
Atlas Care
Add >>
<< Remove
Discard Changes
Save Changes

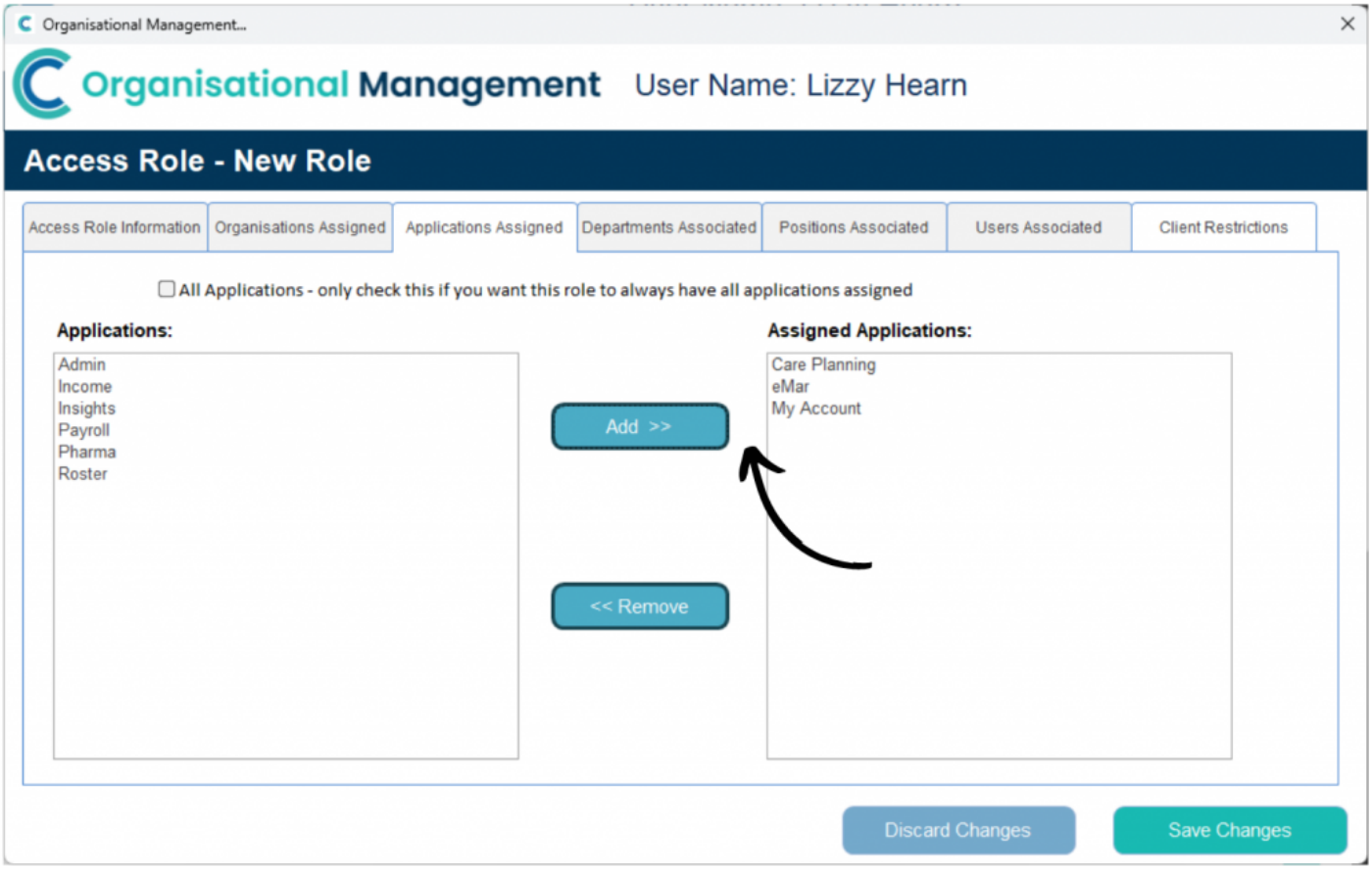


7

The third tab, **Applications Assigned**, controls which apps this role will be able to use within Care Control Cloud. Once again, you can choose to enable access to all apps via the checkbox, or, you can select individual apps and **Add** them to the right hand list.

In this example, our care assistant role needs access to **My Account**, **eMAR** and **Care Planning**.

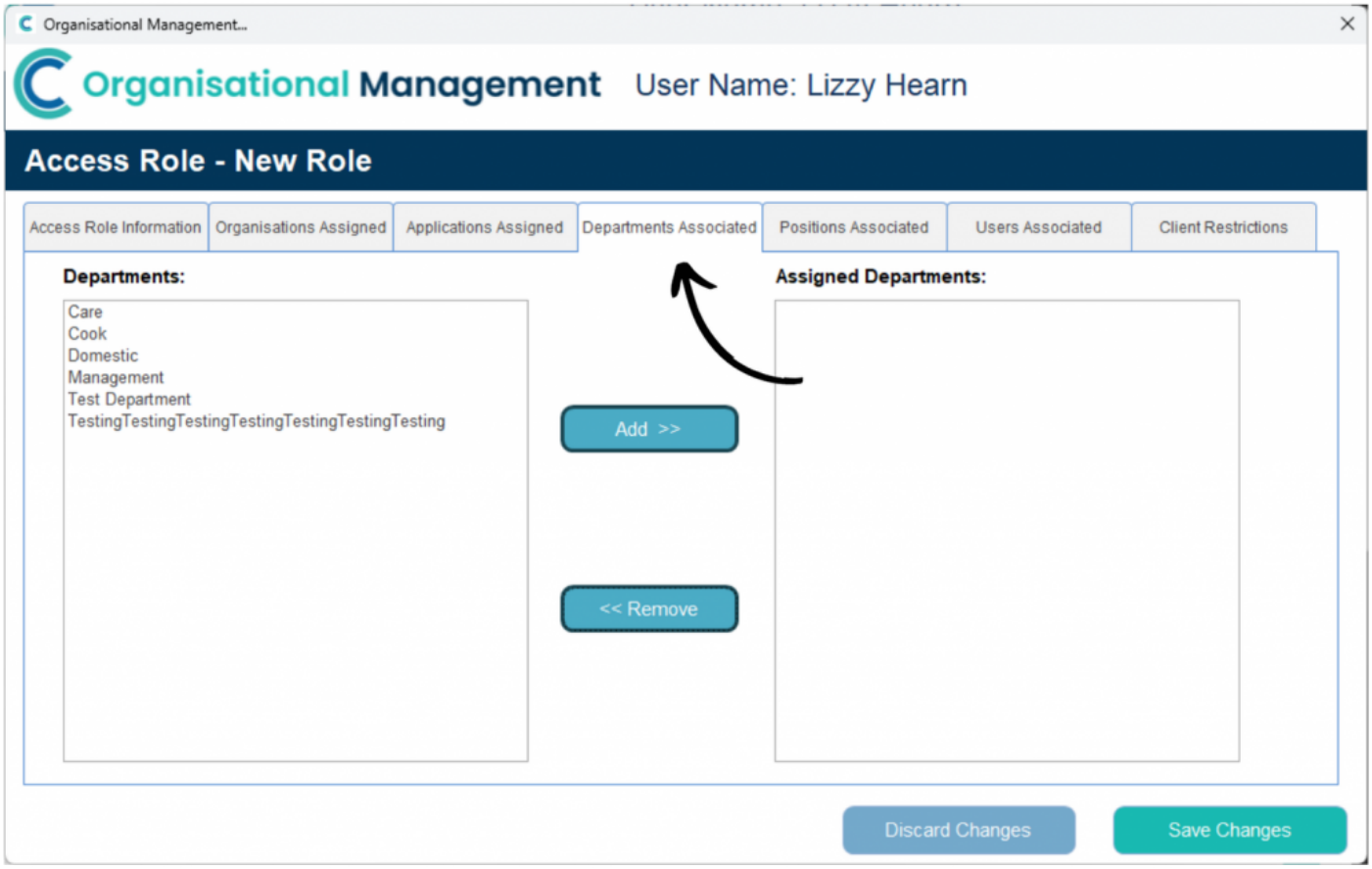

Organisational Management...
Organisational Management
User Name: Lizzy Hearn
Access Role - New Role
Access Role Information
Organisations Assigned
Applications Assigned
Departments Associated
Positions Associated
Users Associated
Client Restrictions
All Applications - only check this if you want this role to always have all applications assigned
Applications:
Admin
Care Planning
eMar
Income
Insights
My Account
Payroll
Pharma
Roster
Add >>
<< Remove
Assigned Applications:
Discard Changes
Save Changes

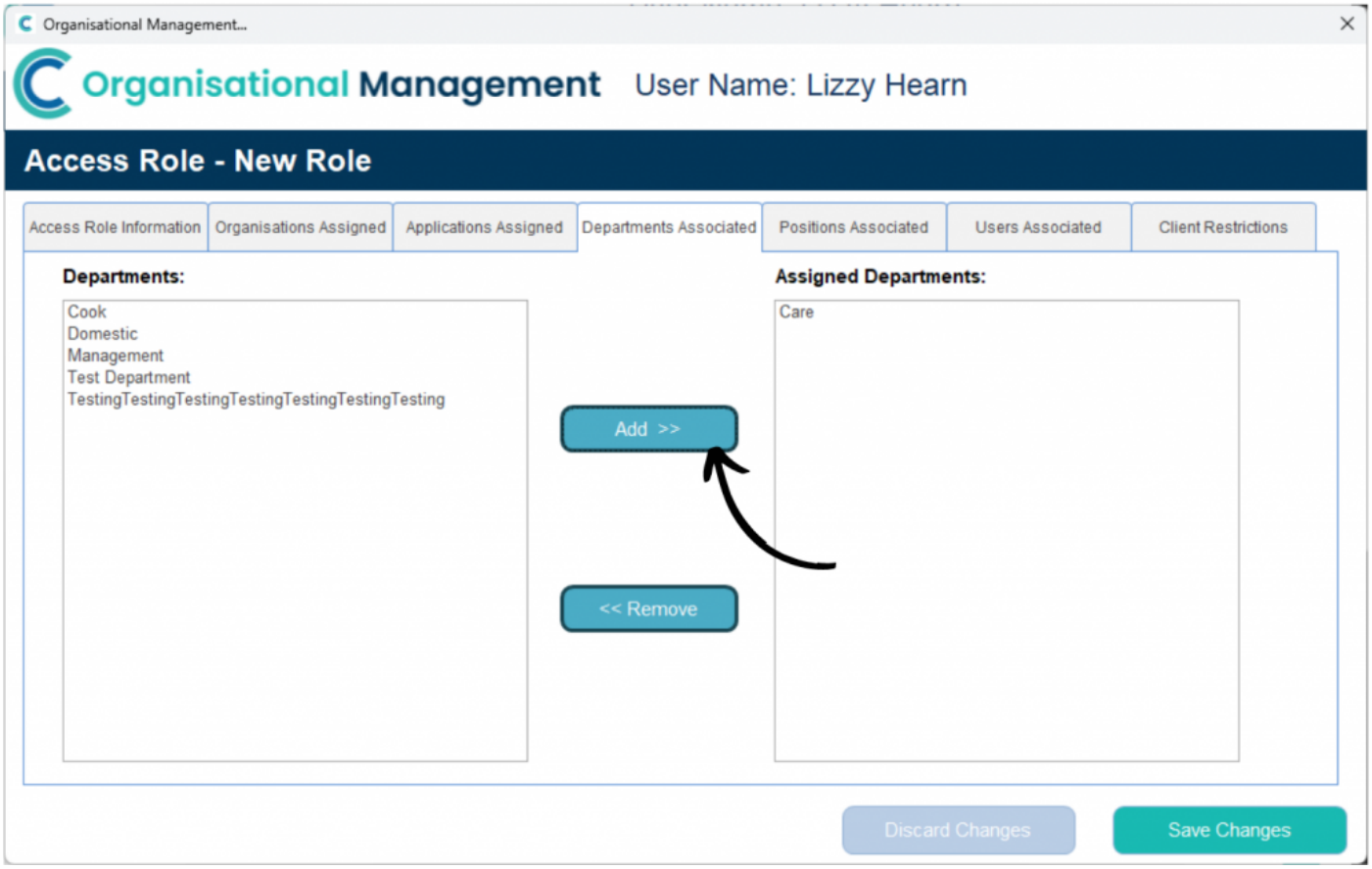


8

The **Departments Associated** tab is where departments are assigned to the new access role. These departments are Care Control Clouds equivalent of staff categories. Select the relevant departments and press **Add**.

In this example, our care assistant role would come under the **Care** department.

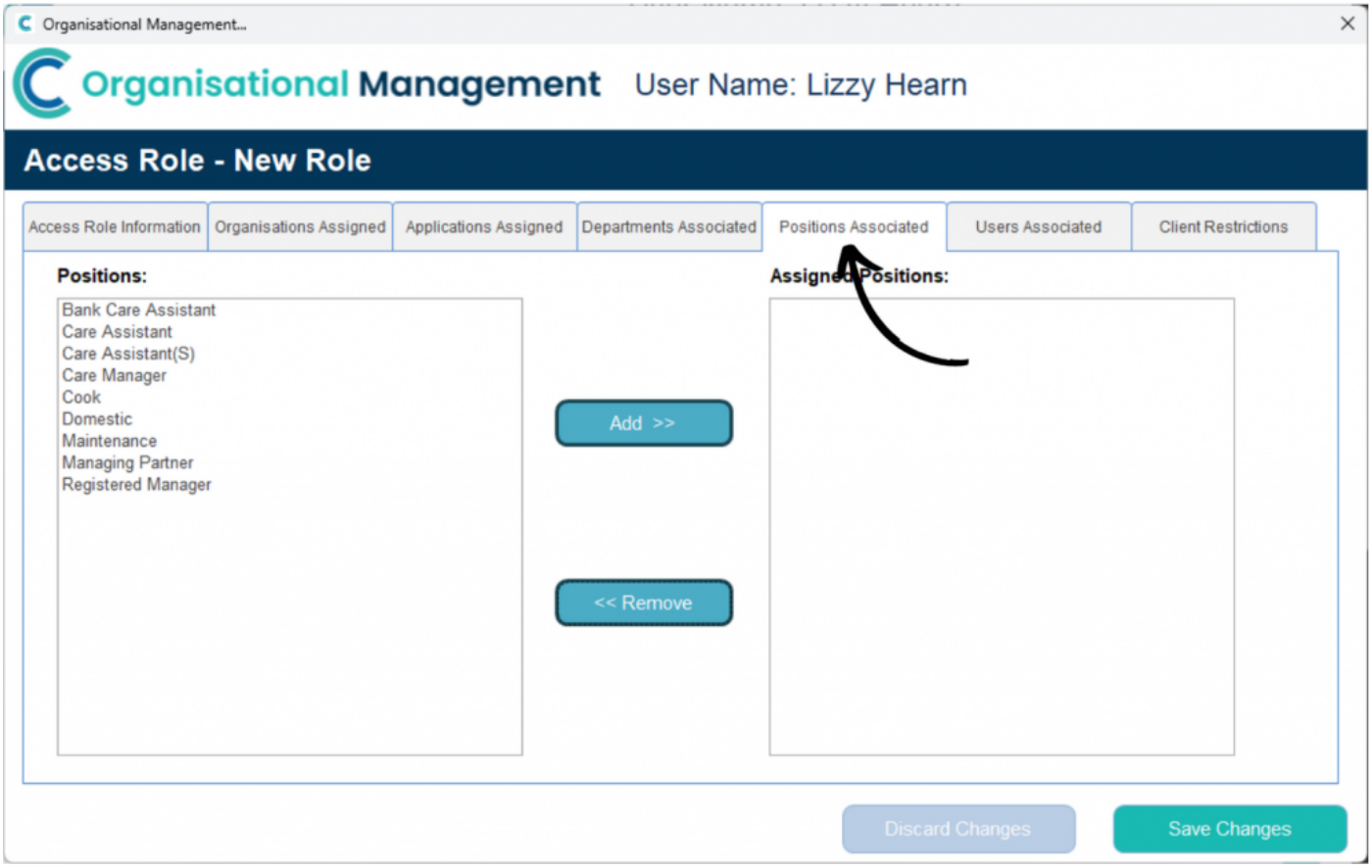

Organisational Management...
Organisational Management
User Name: Lizzy Hearn
Access Role - New Role
Access Role Information
Organisations Assigned
Applications Assigned
Departments Associated
Positions Associated
Users Associated
Client Restrictions
Departments:
Care
Cook
Domestic
Management
Test Department
TestingTestingTestingTestingTestingTestingTesting
Add >>
<< Remove
Assigned Departments:
Discard Changes
Save Changes

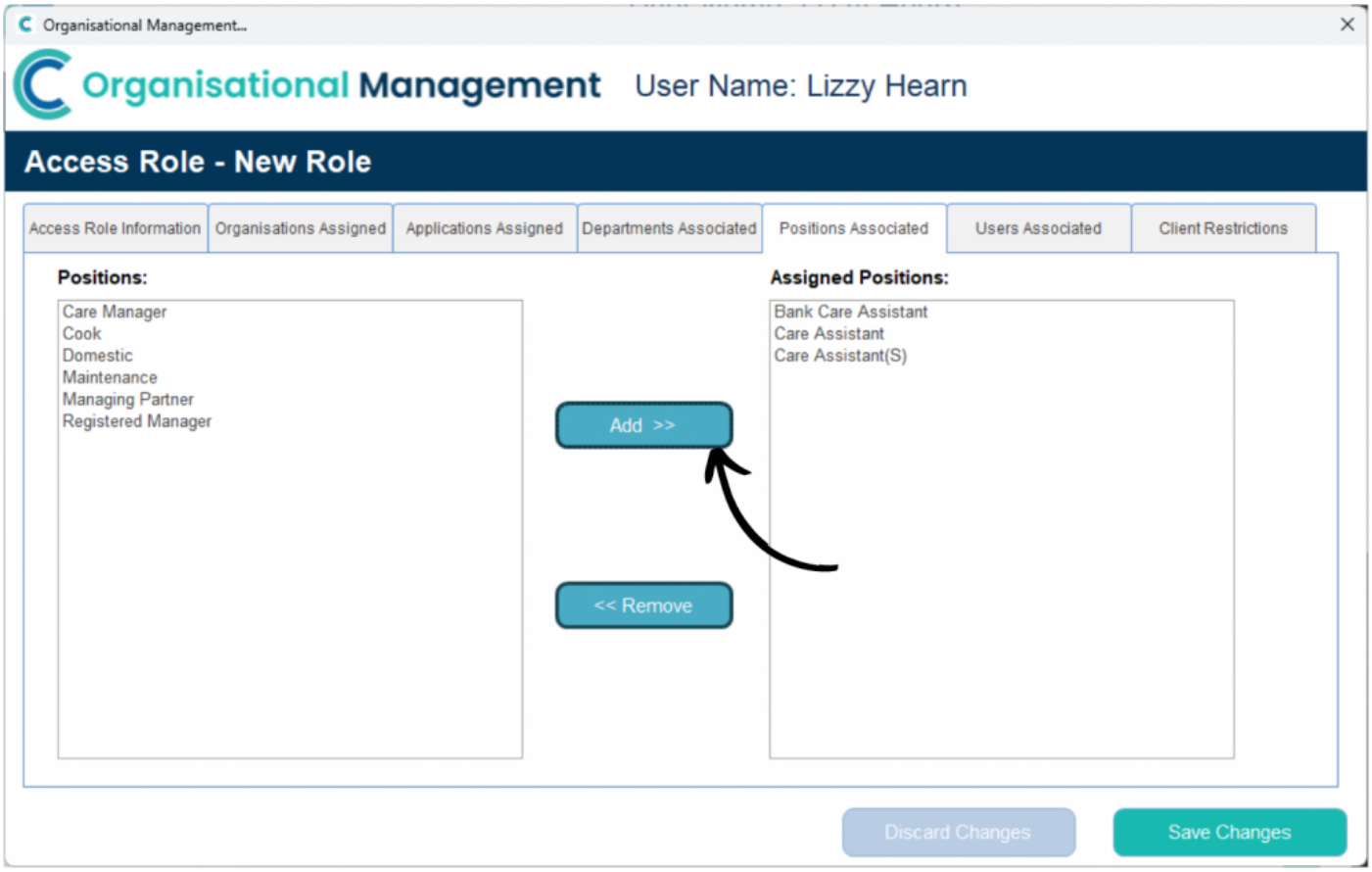


9

Similarly to step 8, the **Positions Associated** tab is where the new access role can be assigned to a job title. Again, the **position** terminology is Care Control Clouds equivalent to a job **role** on Care Control Windows.

For our example, we have assigned **Bank Care Assistant** and **Care Assistant** to the access role.

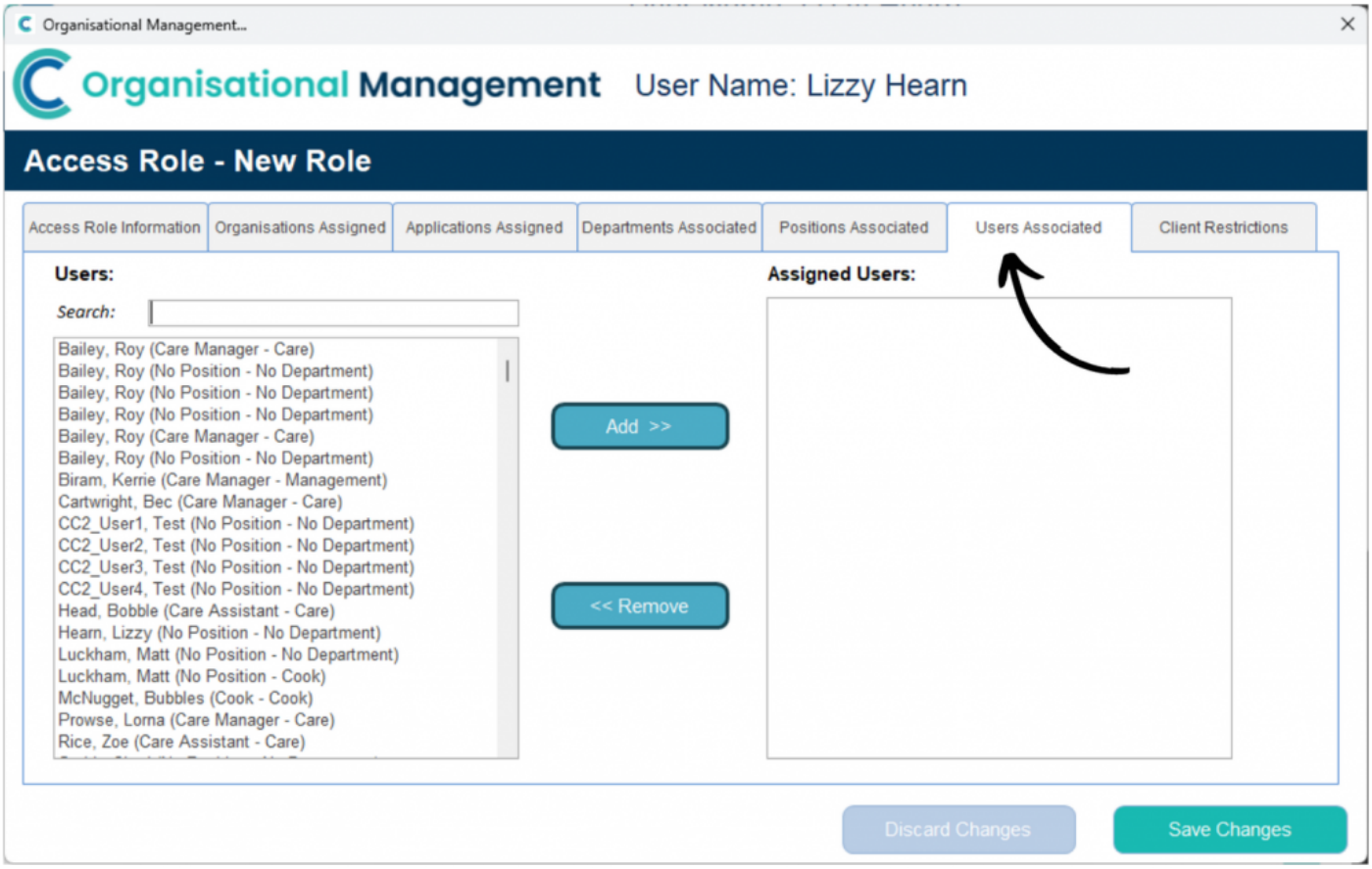

Organisational Management...
Organisational Management
User Name: Lizzy Hearn
Access Role - New Role
Access Role Information
Organisations Assigned
Applications Assigned
Departments Associated
Positions Associated
Users Associated
Client Restrictions
Positions:
Bank Care Assistant
Care Assistant
Care Assistant(S)
Care Manager
Cook
Domestic
Maintenance
Managing Partner
Registered Manager
Add >>
<< Remove
Assigned Positions:
Discard Changes
Save Changes

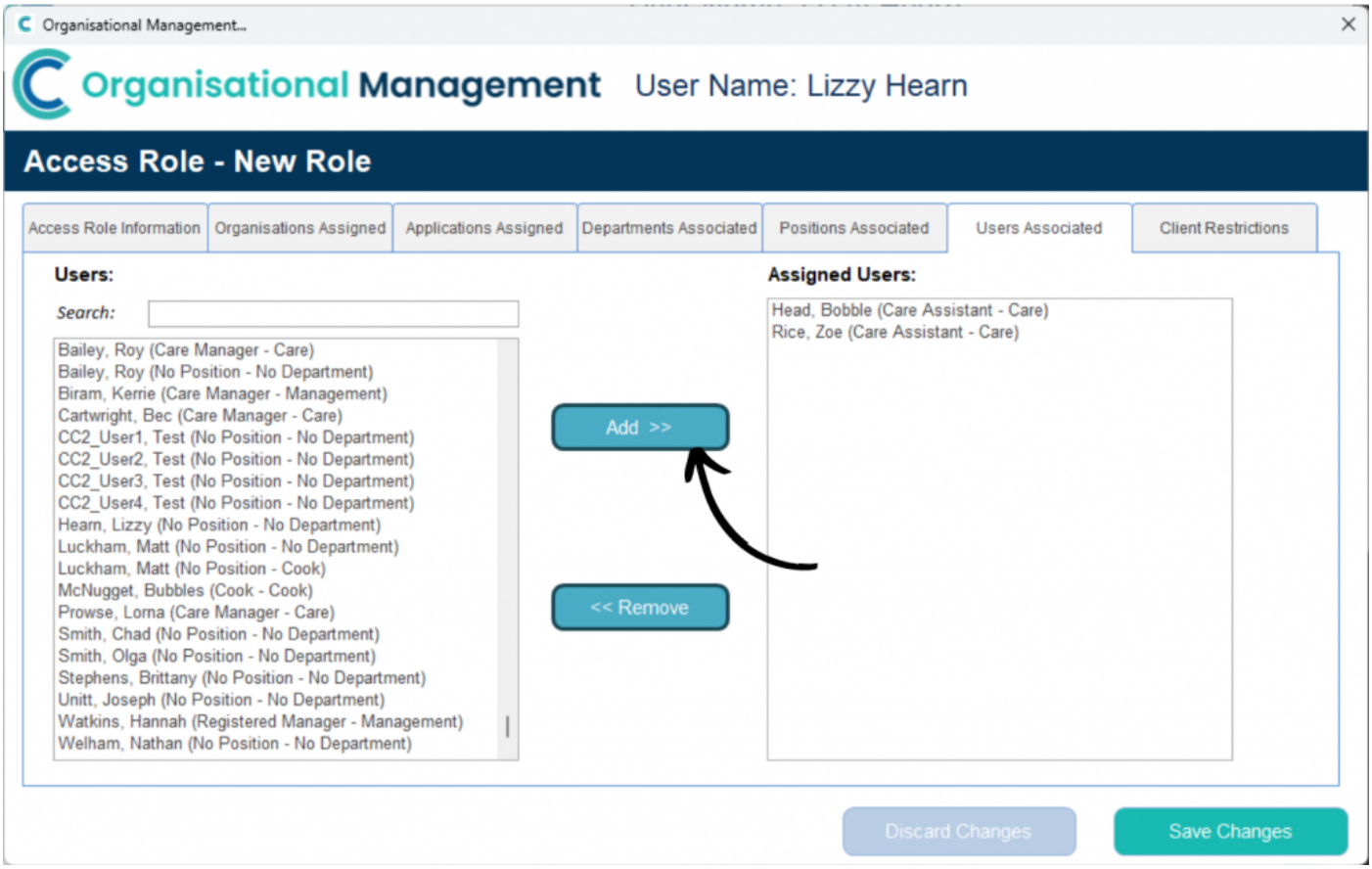


10

The next tab, titled **Users Associated**, is where individual staff members can be assigned to the access role. Simply search or select for existing staff members and **add** them to the right hand list.

In our example, care assistant staff members who work at the Springfield site only have been assigned to this access role.


Organisational Management...
Organisational Management
User Name: Lizzy Hearn
Access Role - New Role
Access Role Information
Organisations Assigned
Applications Assigned
Departments Associated
Positions Associated
Users Associated
Client Restrictions
Users:
Search:
Bailey, Roy (Care Manager - Care)
Bailey, Roy (No Position - No Department)
Bailey, Roy (No Position - No Department)
Bailey, Roy (No Position - No Department)
Bailey, Roy (Care Manager - Care)
Bailey, Roy (No Position - No Department)
Biram, Kerrie (Care Manager - Management)
Cartwright, Bec (Care Manager - Care)
CC2_User1, Test (No Position - No Department)
CC2_User2, Test (No Position - No Department)
CC2_User3, Test (No Position - No Department)
CC2_User4, Test (No Position - No Department)
Head, Bobble (Care Assistant - Care)
Hearn, Lizzy (No Position - No Department)
Luckham, Matt (No Position - No Department)
Luckham, Matt (No Position - Cook)
McNugget, Bubbles (Cook - Cook)
Prowse, Lorna (Care Manager - Care)
Rice, Zoe (Care Assistant - Care)
Add >>
<< Remove
Assigned Users:
Discard Changes
Save Changes

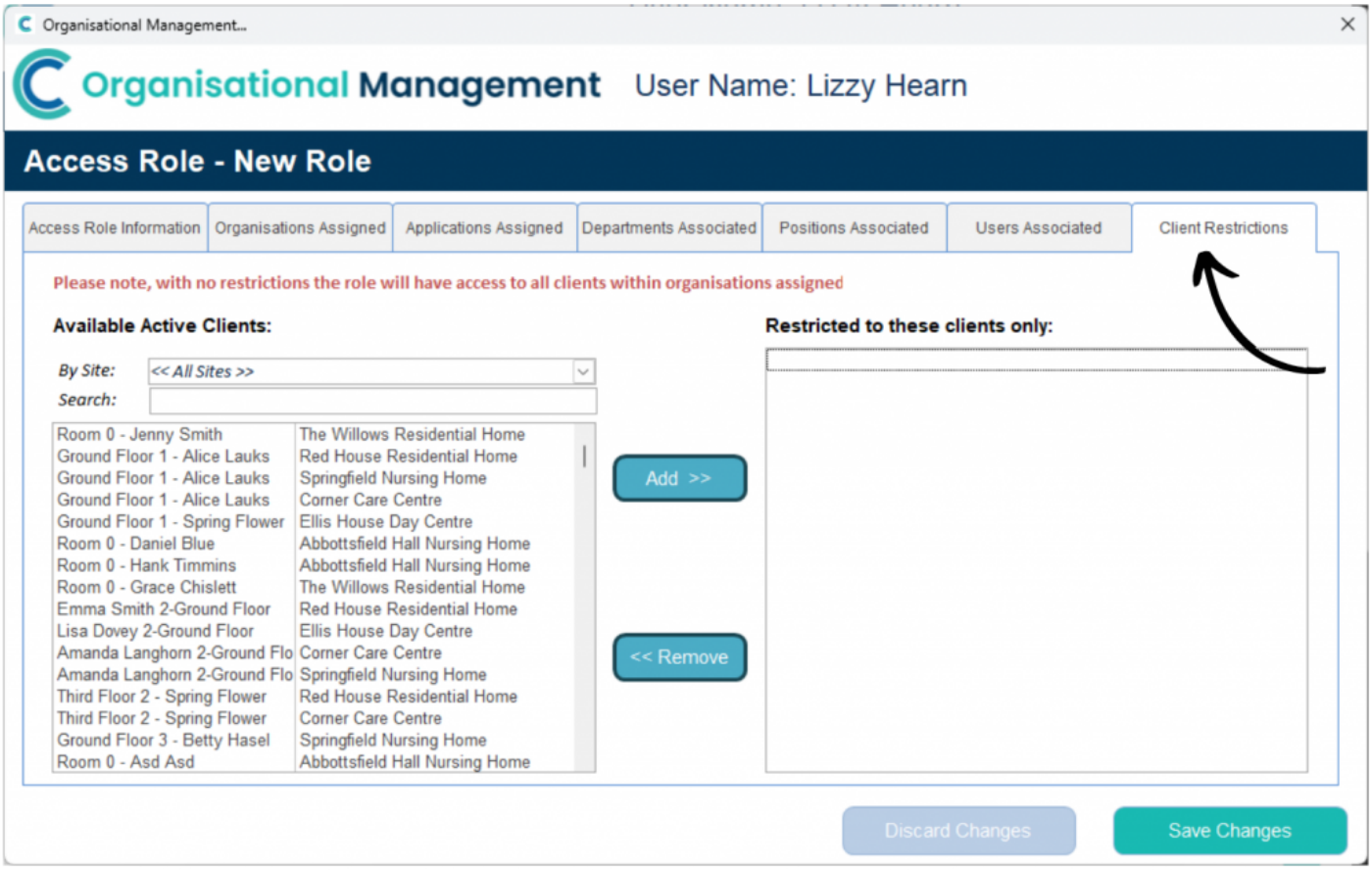


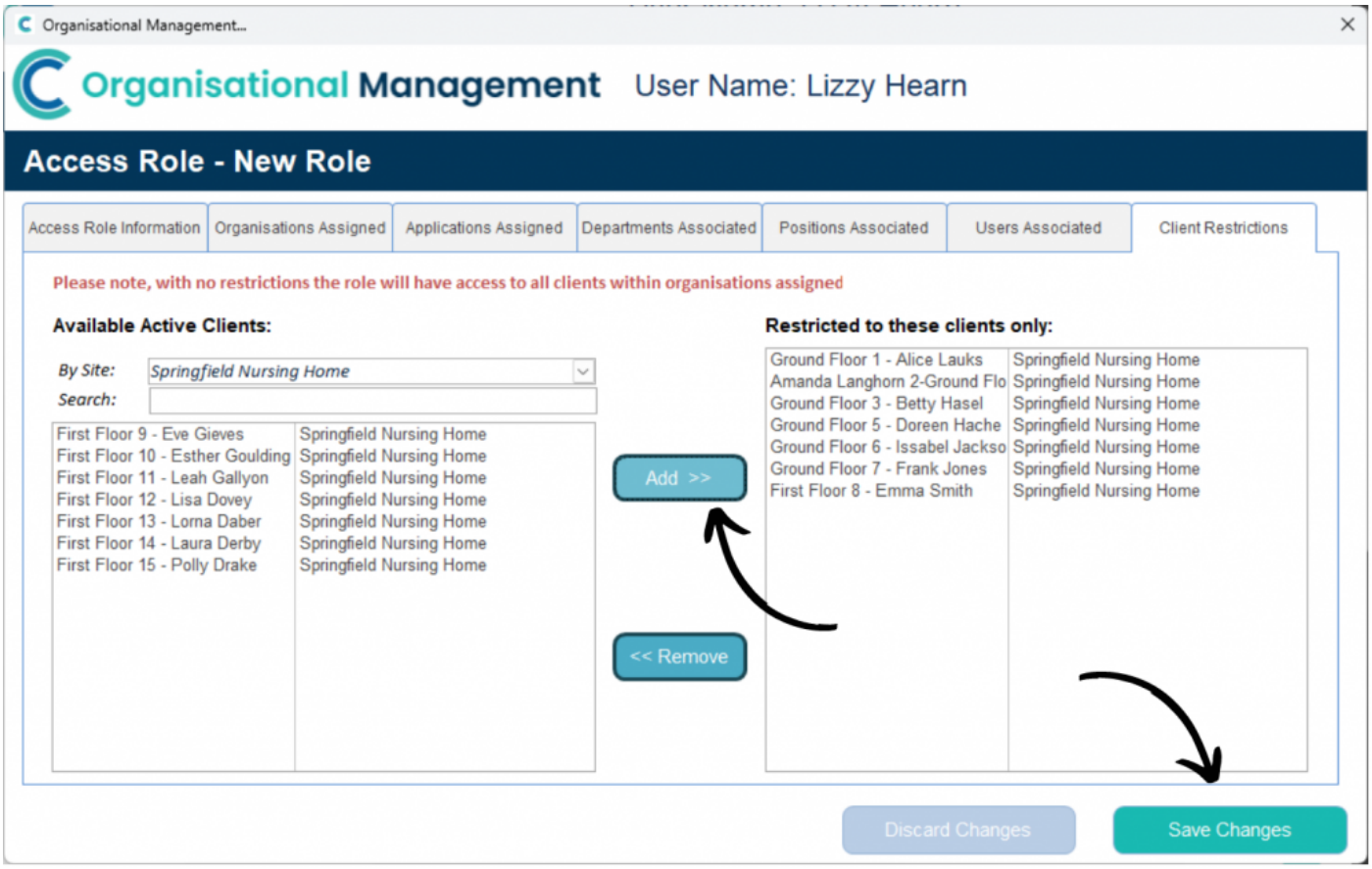
11

The final tab, **Client Restrictions**, is the final layer of customisation for the new access role. Here, you can restrict the role to certain service users, meaning the staff members with the role can only access and view the chosen SU's. In the same way as before, select users from the left and press **Add** to move them over to the right.

Note – if no users are selected then all clients will be available within existing restrictions (i.e all users within the Springfield site).

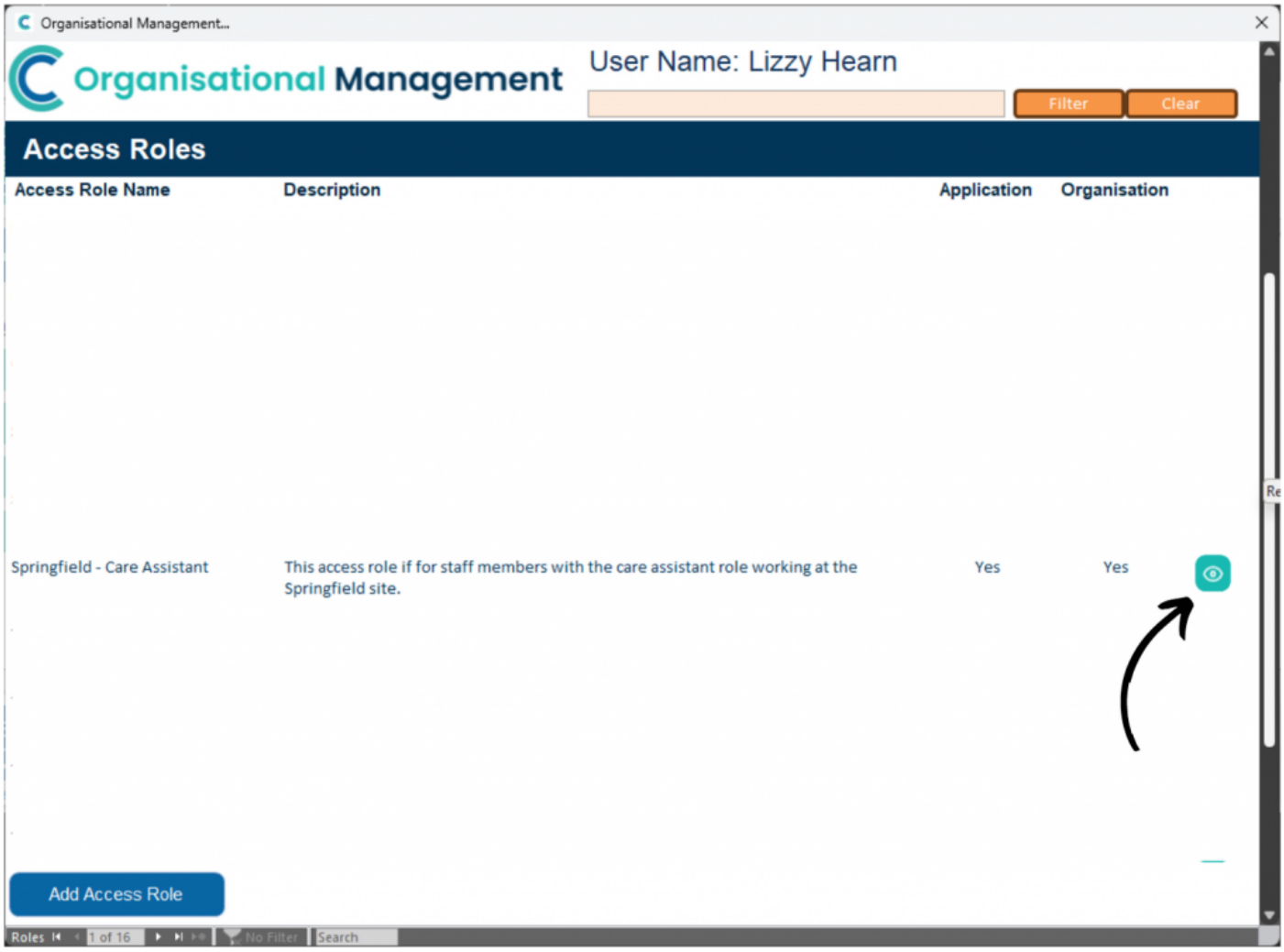
After completing the form, press **Save Changes**.


Organisational Management...
Organisational Management
User Name: Lizzy Hearn
Access Role - New Role
Access Role Information
Organisations Assigned
Applications Assigned
Departments Associated
Positions Associated
Users Associated
Client Restrictions
Please note, with no restrictions the role will have access to all clients within organisations assigned
Available Active Clients:
Restricted to these clients only:
By Site:
<< All Sites >>
Search:
Room 0 - Jenny Smith
The Willows Residential Home
Ground Floor 1 - Alice Lauks
Red House Residential Home
Ground Floor 1 - Alice Lauks
Springfield Nursing Home
Ground Floor 1 - Alice Lauks
Corner Care Centre
Ground Floor 1 - Spring Flower
Ellis House Day Centre
Room 0 - Daniel Blue
Abbottsfield Hall Nursing Home
Room 0 - Hank Timmins
Abbottsfield Hall Nursing Home
Room 0 - Grace Chislett
The Willows Residential Home
Emma Smith 2-Ground Floor
Red House Residential Home
Lisa Dovey 2-Ground Floor
Ellis House Day Centre
Amanda Langhorn 2-Ground Flo
Corner Care Centre
Amanda Langhorn 2-Ground Flo
Springfield Nursing Home
Third Floor 2 - Spring Flower
Red House Residential Home
Third Floor 2 - Spring Flower
Corner Care Centre
Ground Floor 3 - Betty Hasel
Springfield Nursing Home
Room 0 - Asd Asd
Abbottsfield Hall Nursing Home
Add >>
<< Remove
Discard Changes
Save Changes



12

You will now be able to view your new access role in the **Manage Access Roles** dashboard. You can edit the role by pressing the **eye icon** followed by the **Edit Role** button.


Organisational Management...
Organisational Management
User Name: Lizzy Hearn
Filter
Clear
Access Roles
Access Role Name
Description
Application
Organisation
Springfield - Care Assistant
This access role if for staff members with the care assistant role working at the Springfield site.
Yes
Yes
Add Access Role
Roles
1 of 16
No Filter
Search