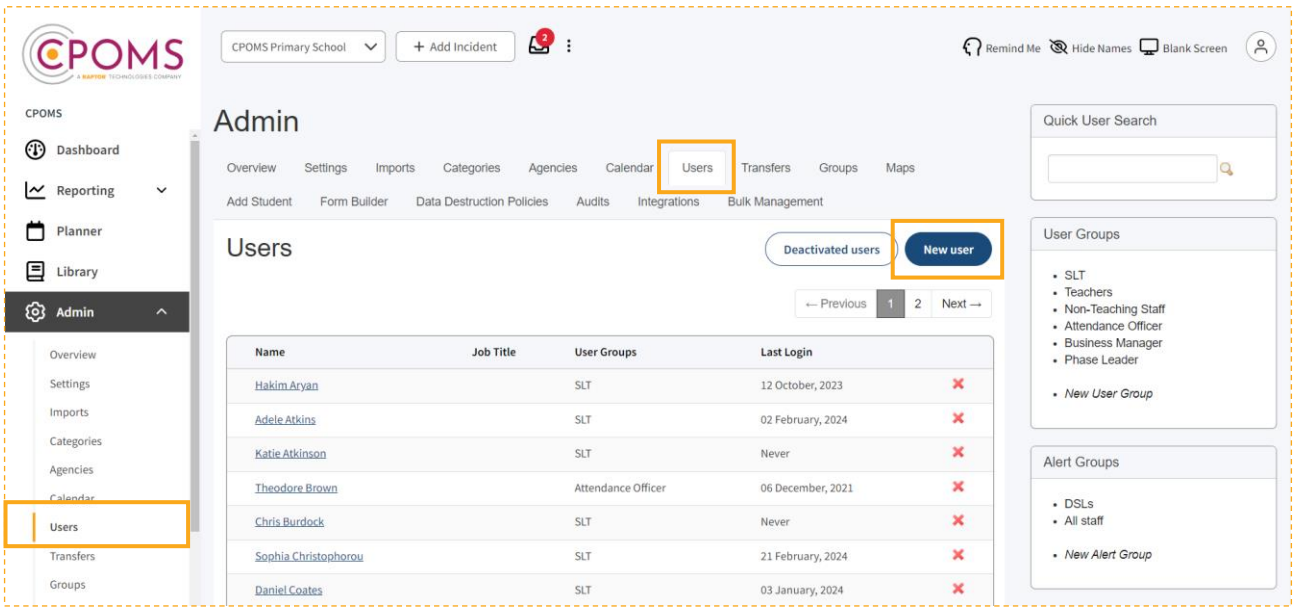
Manage Users

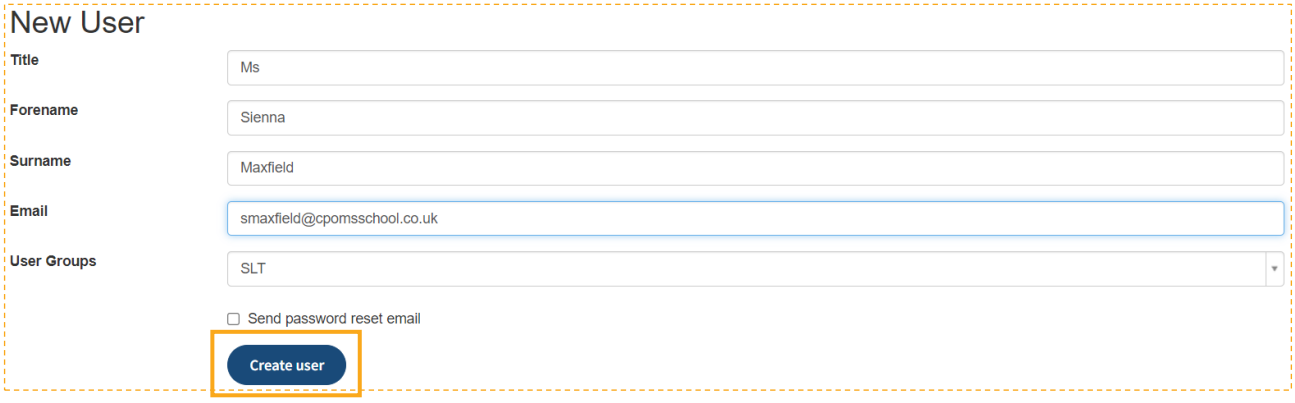
A CPOMS **Admin Key Holder** in school may manage and update your CPOMS Users by clicking on the **'Admin'** button, in the left-hand navigation panel, and selecting the **'Users'** tab.



How to add a new user

To add a new user to CPOMS, go to **'Admin'**, click on the **'Users'** tab and select the **'New User'** button, to the right-hand side of the screen.

Simply select the name of the member of staff you would like to add from the list of users available to add. Next, input their email address and assign a user group. If you would like to send a reset password email now, please also tick 'Send password reset email'. Once you have filled in all of the fields click **'Create User'.**



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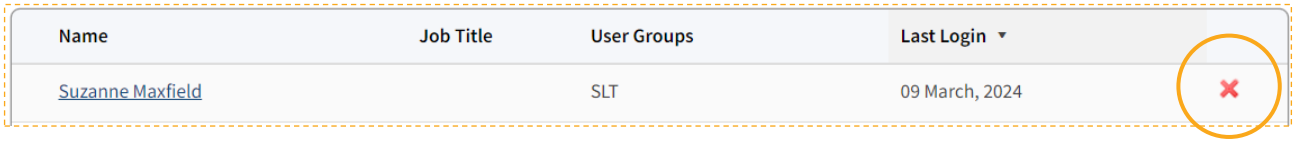
Staff will only appear in the 'New User' list if they have been added to your MIS as a permanent staff member, with a current start date and a full time member of staff. If the user will not be added to your MIS for any reason, you can also choose to **'Add Non-MIS Users'** here.

Higher Level Users

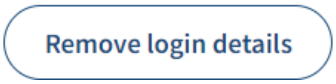
If you add a new user in a higher level user group, i.e. a member of the SLT/ Safeguarding Team, they will need to **create a 'Soft Key' using the CPOMS Authenticator App,** in their own login, for the higher level permissions to take effect.

How to ✖ deactivate a user

To deactivate a user's account in CPOMS, go to **'Admin'**, click on the **'Users'** tab and simply click on the red '✖' icon at the end of the user's row, who you would like to remove from the system.



Once the user has been deactivated, they will appear within the 'Deactivated users' section. Next to their name, there will be an additional option to 'Remove login details'.



We recommend 'Remove login details' is also chosen at this point to remove their email address, <u>especially if they have a generic email address</u>, *e.g. head@ or office@,* as if you try to add the email address to a different user in the future you will receive an error message to say it is already in use which can cause confusion and delay.

How to ✓ reactivate a user

> *Once a user is removed from CPOMS, an additional button for 'Deactivated Users' will appear to the right-hand side of the Users tab (Next to the 'New User' button).*

To reactivate a user's account in CPOMS, go to **'Admin'**, click on the **'Users'** tab and select the **'Deactivated Users'** button, to the right-hand side of the screen.

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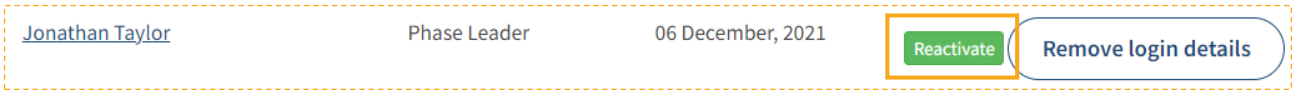
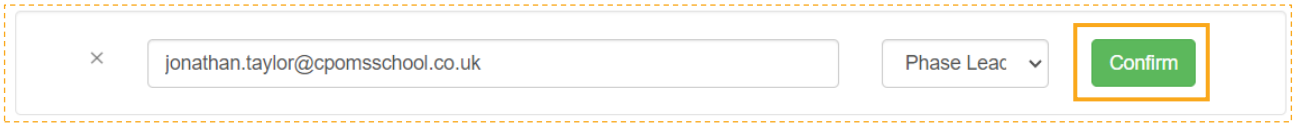
Here you will find a list of any users who have been deactivated in the past. Simply click on the green **'Reactivate'** button to re-add them to your system.



You will then be asked to input their email address and user group, and click **'Confirm'** to save.



How to change a user's email address

To change a user's email address in CPOMS, go to **'Admin'**, click on the **'Users'** tab and select the relevant user's name whose email address you would like to update. In their **'Personal Details'**, simply over-type their current email address and click **'Save details'.**

How to create a new User Group

> *A user's permissions in CPOMS are defined by the User Group they are placed in. Therefore, you can create as many groups as needed for different levels of access, i.e. you may have an SLT user group who can access all categories of incidents, whereas you may have a Teachers user group who can only access Behaviour incidents for example.*

To create a new User Group in CPOMS, go to **'Admin'**, click on the **'Users'** tab and select the **'New Group'** option, to the right-hand side of the screen, underneath your list of current User Groups.

On the New User Group screen, firstly **enter a Name** for the group.

Next, choose the **Category Permissions** for each of your categories and sub-categories, the permissions are:-

View Students	View Incidents	Add Incidents
This permission allows users in the group to view students 'monitored' for this category.	This permission allows users in the group to view incidents assigned to this category.	This permission allows users in the group to add new incidents to this category.

Set the category permissions for this group by ticking the relevant boxes against each of your category names.

If you do not want any user in this group to access any information in CPOMS, you may choose to tick the Add Incidents column only.

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Next, choose the **System Permissions** for this group.

If the user(s) in this group will have a key:-	**If the user(s) in this group will not have a key:-**
• Under **General,** we recommend you tick:- • **View Student List** – To allow the user to click into the class structure from the main dashboard • **View Student Details** – To allow the user to access a student's profile • **Add new Incident/ Action** – To allow the user to add incidents and actions to your CPOMS system Other permissions you may wish to allow for the user group are:- • **Reporting > Run Reports** • **Planner** • And **Library** **Administration privileges should only ever be given to senior members of staff.** Once you are happy with the permissions set, please click **'Save User Group'.**	If the users in this group will not have a key, you will only need to tick **Add New Incident/Action** under **General.** Other permissions you may wish to allow for the user group are:- • **Library**

How to change a user's permissions/ User Group

Go to **'Admin'** > **'Users'** and click on the user's name from your list of users. In their profile, click on **'Permissions'**. Choose a different user group name from the User Group drop-down here and '**Save Details'.**

How to delete a User Group

It is not possible to delete a user group which is currently assigned to users in the system. In order to delete a user group you must firstly re-assign all users (including deactivated users) in the user group, to a different one.

To re-assign a staff members user group, go to **'Admin'** > **'Users'** and click on the user's name from your list of users. In their profile, click on **'Permissions'**. Choose a different user group name from the User Group drop-down here and **'Save Details'.**

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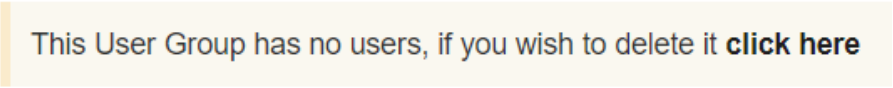
Once you have moved all users out of the group, go to **'Admin' > 'Users'** and click on the User Group name to the right-hand side. There will be an option at the top of the page which says **'This User Group has no users, if you wish to delete it click here'**. *Please follow the on-screen steps.* If this option does not appear, it means there are still users within it – make sure you have checked your Deactivated Users section.



For further assistance on any of the above please do not hesitate to contact us on **01756 797766** or **support@cpoms.co.uk**.

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