

How to add a New Key Holder in CPOMS

A CPOMS Admin Key Holder in school may follow the below instructions to add a New Key Holder in CPOMS.

Step 1 - Add the user to CPOMS

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 this user requires higher level access, please choose the user group which includes the relevant system permissions for their role. If a suitable user group is not yet available, please create a new one for this purpose. See **'How to create a new User Group' on page 2 before proceeding.*

***If this user has already been added to CPOMS previously, you may need to amend their user group to a Higher Level one. See **'How to change a user's Permissions/ User Group'** on page 2.*

If you would like to send a reset password email now please also tick **'Send password reset email'** as well.

Once you have filled in all of the fields click **'Create User'**.

New User

Title	<input type="text" value="Ms"/>
Forename	<input type="text" value="Sienna"/>
Surname	<input type="text" value="Maxfield"/>
Email	<input type="text" value="smaxfield@cpomsschool.co.uk"/>
User Groups	<input type="text" value="SLT"/>
<input type="checkbox"/> Send password reset email	
<input type="button" value="Create user"/>	

*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 the relevant higher level user group name from the **User Group** drop-down list here, and **'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 see if a student is '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.

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

<p><u>If the user(s) in this group will have a key:-</u></p> <ul style="list-style-type: none"> • 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 <p>Other permissions you may wish to allow for the user group are:-</p> <ul style="list-style-type: none"> • Reporting > Run Reports • Planner • And Library 	<p><u>If the user(s) in this group will not have a key:-</u></p> <p>If the users in this group will <u>not</u> have a key, you will only need to tick Add New Incident/Action under General.</p> <p>Other permissions you may wish to allow for the user group are:-</p> <ul style="list-style-type: none"> • Library
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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'**.

Step 2 – Ask the user to create a 'Key' using the CPOMS Authenticator app

*For any type of higher level access in CPOMS, each user would require a **Soft Key**, using the **CPOMS Authenticator App**.*

Once the user has been added to CPOMS, please ask them to follow the **'CPOMS Help Sheet - CPOMS Authenticator Setup and FAQs'** on their own device.

For further assistance on any of the above please do not hesitate to contact us on

01756 797766 or support@cpoms.co.uk.

