



GDPRiS Platform v2 Guidance for Users

Document Version: 1.01
Revision Date: 20/02/2023

DP Staff

User Management

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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

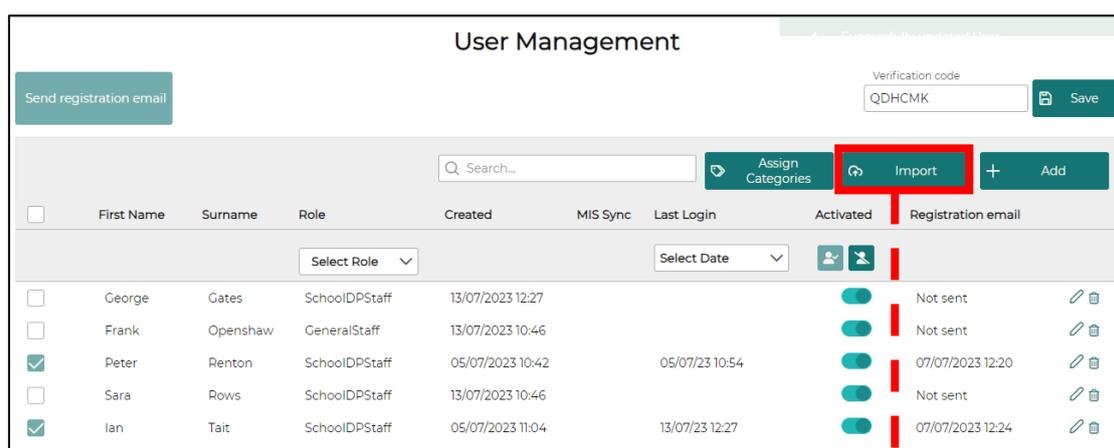
Note: Bulk Imports must be completed using an .xlsx file

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

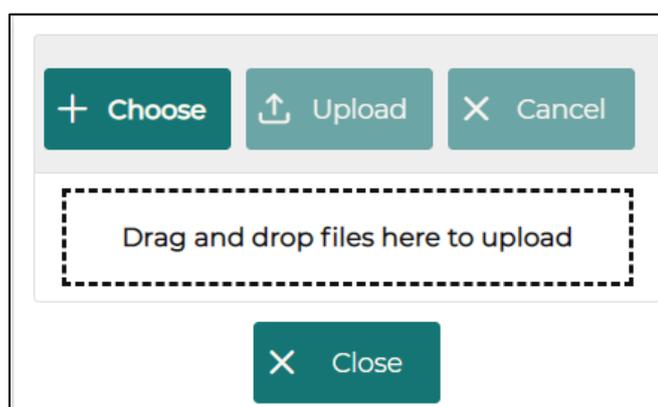
[User Import Template](#)

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

Click **Import**



The screenshot shows the 'User Management' interface. At the top right, there is a 'Verification code' field with the value 'QDHCMK' and a 'Save' button. Below this is a search bar and three buttons: 'Assign Categories', 'Import' (highlighted with a red box), and 'Add'. A table below lists users with columns for 'First Name', 'Surname', 'Role', 'Created', 'MIS Sync', 'Last Login', 'Activated', and 'Registration email'. The 'Import' button is highlighted with a red box, and a red dashed line points from it to the 'Upload' dialog box shown below.



The screenshot shows the 'Upload' dialog box. It has three buttons at the top: '+ Choose', 'Upload', and 'Cancel'. Below these is a dashed box containing the text 'Drag and drop files here to upload'. At the bottom is a 'Close' button.

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.

<input type="checkbox"/>	First Name	Surname	Role	Created	MIS Sync	Last Login	Activated	Registration email
<input type="checkbox"/>	George	Gates	SchoolDPStaff	13/07/2023 12:27			<input checked="" type="checkbox"/>	Not sent
<input type="checkbox"/>	Frank	Openshaw	GeneralStaff	13/07/2023 10:46			<input checked="" type="checkbox"/>	Not sent
<input checked="" type="checkbox"/>	Peter	Renton	SchoolDPStaff	05/07/2023 10:42		05/07/23 10:54	<input checked="" type="checkbox"/>	07/07/2023 12:20
<input type="checkbox"/>	Sara	Rows	SchoolDPStaff	13/07/2023 10:46			<input checked="" type="checkbox"/>	Not sent
<input checked="" type="checkbox"/>	Ian	Tait	SchoolDPStaff	05/07/2023 11:04		13/07/23 12:27	<input checked="" type="checkbox"/>	07/07/2023 12:24

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

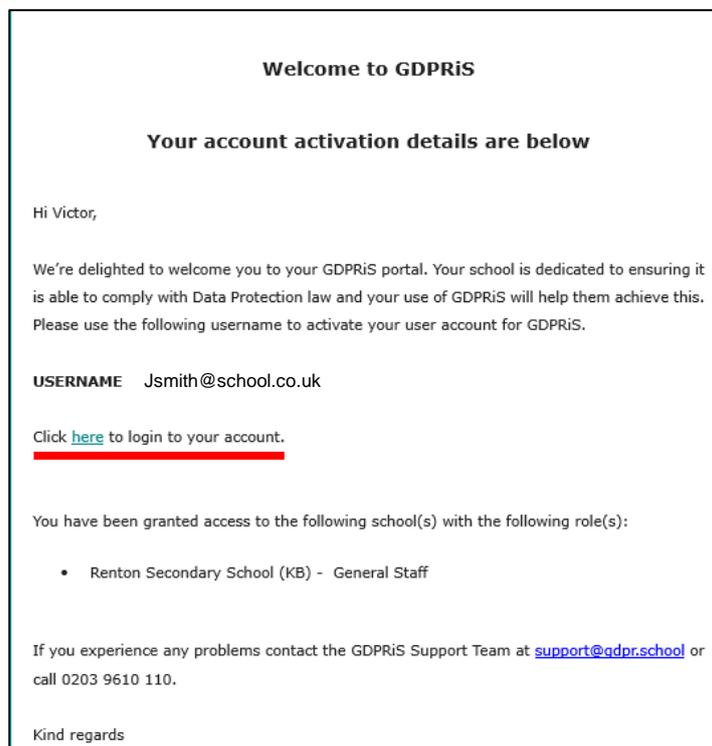
Click **Send Registration Email**

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

<input type="checkbox"/>	First Name	Surname	Role	Created	MIS Sync	Last Login	Activated	Registration email
<input checked="" type="checkbox"/>	George	Gates	SchoolDPStaff	13/07/2023 12:27			<input checked="" type="checkbox"/>	Not sent
<input checked="" type="checkbox"/>	Harry	Lawson	GeneralStaff	13/07/2023 12:46			<input checked="" type="checkbox"/>	Not sent
<input type="checkbox"/>	Frank	Openshaw	GeneralStaff	13/07/2023 10:46			<input checked="" type="checkbox"/>	Not sent
<input checked="" type="checkbox"/>	Peter	Renton	SchoolDPStaff	05/07/2023 10:42		05/07/23 10:54	<input checked="" type="checkbox"/>	07/07/2023 12:20
<input type="checkbox"/>	Sara	Rows	SchoolDPStaff	13/07/2023 10:46			<input checked="" type="checkbox"/>	Not sent
<input checked="" type="checkbox"/>	Ian	Tait	SchoolDPStaff	05/07/2023 11:04		13/07/23 14:09	<input checked="" type="checkbox"/>	07/07/2023 12:24

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.

<input type="checkbox"/>	First Name	Surname	Role	Created	Last Login	Activated	Registration email	
<input type="checkbox"/>	Helen	Abrams	GeneralStaff	31/05/2018 13:42		<input type="checkbox"/>	31/05/2018 13:42	
<input type="checkbox"/>	David	Arnold	GeneralStaff	24/02/2023 08:46		<input type="checkbox"/>	24/02/2023 08:46	

Add a New User Manually

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

User Management

Send registration email

Verification code

Save

Assign Categories

Import

+ Add

Add User

Save

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

SAVE.

An Update User window will appear.

Update User

First Name	Surname
<input type="text" value="Harry"/>	<input type="text" value="Lawson"/>
Email Address	
<input type="text" value="FCole@coagentcs.co.uk"/>	
Role	
<input style="border-bottom: 1px solid #ccc;" type="text" value="General Staff"/>	
Category	
<input style="border-bottom: 1px solid #ccc;" type="text" value=""/>	

Main School	Schools Linked
No	1

MIS ID	Xporter ID

Registration email	Not sent

Send registration email

Save

Activated

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.

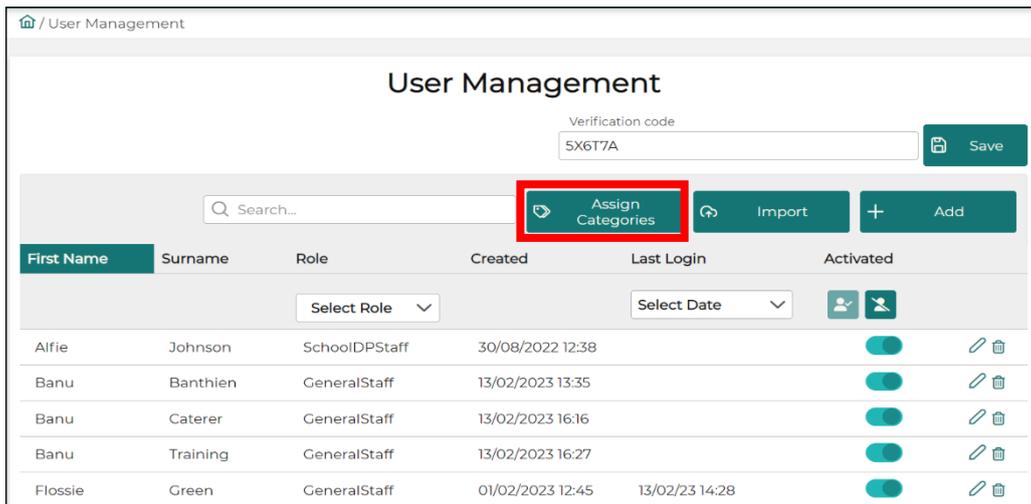


Categorise Staff

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**.



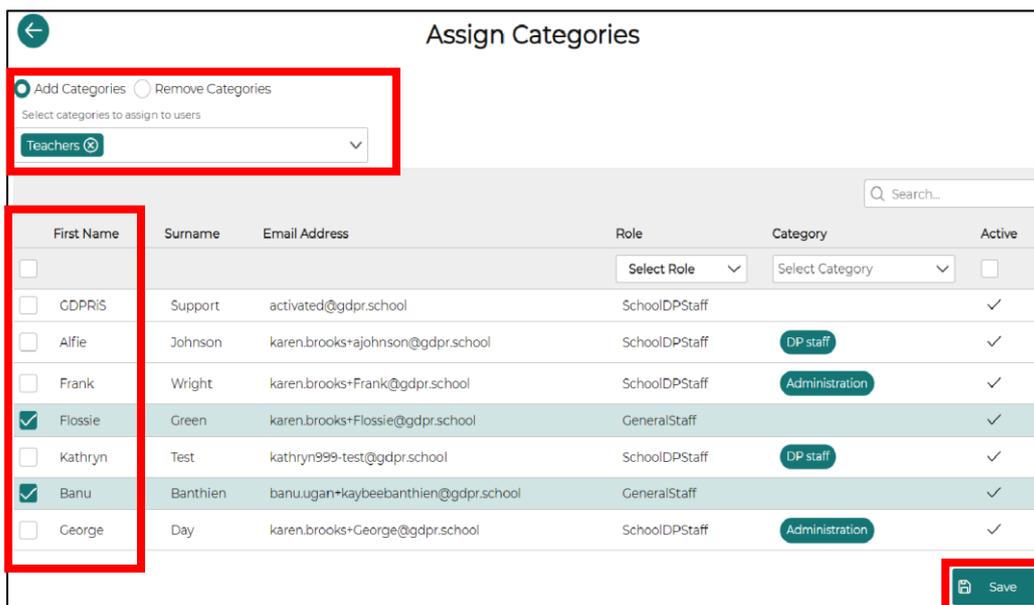
You will see a list of your staff that have accounts on the GDPRiS portal.

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.

The screenshot shows the 'Assign Categories' interface. At the top, there are radio buttons for 'Add Categories' (selected) and 'Remove Categories'. Below is a dropdown menu labeled 'Select categories to assign to users'. The main area is a table with columns: First Name, Surname, Email Address, Role, Category, and Active. The first row is highlighted, and the 'Category' dropdown is set to 'No Category'. A 'Save' button is at the bottom right.

	First Name	Surname	Email Address	Role	Category	Active
<input type="checkbox"/>				Select Role	No Category	<input type="checkbox"/>
<input type="checkbox"/>	GDPRIS	Support	activated@gdpr.school	SchoolDPStaff		✓
<input type="checkbox"/>	George	Day	karen.brooks+George@gdpr.school	SchoolDPStaff		✓

*Note! Clicking save will add the DP Staff and Teacher categories to all selected users.

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.

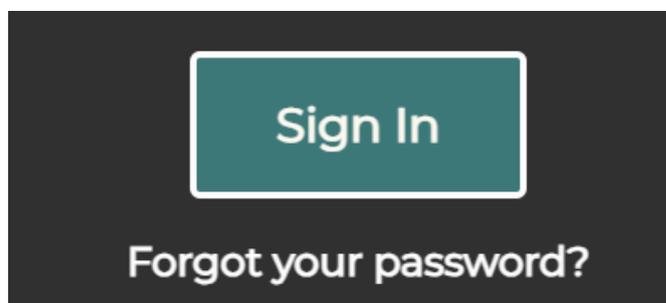
Please check the **confirmation message** and click **SAVE** again

The screenshot shows the 'Assign Categories' interface in 'Remove Categories' mode. The 'Remove Categories' radio button is selected. The dropdown menu is set to 'Teachers'. The table has columns: First Name, Surname, Email Address, Role, Category, and Active. The first column is highlighted, and the 'Save' button is highlighted at the bottom right.

	First Name	Surname	Email Address	Role	Category	Active
<input type="checkbox"/>				Select Role	Select Category	<input type="checkbox"/>
<input type="checkbox"/>	GDPRIS	Support	activated@gdpr.school	SchoolDPStaff		✓
<input type="checkbox"/>	Alfie	Johnson	karen.brooks+ajohnson@gdpr.school	SchoolDPStaff	DP staff	✓
<input type="checkbox"/>	Frank	Wright	karen.brooks+Frank@gdpr.school	SchoolDPStaff	Administration	✓
<input checked="" type="checkbox"/>	Flossie	Green	karen.brooks+Flossie@gdpr.school	GeneralStaff	Teachers	✓
<input type="checkbox"/>	Kathryn	Test	kathryn999-test@gdpr.school	SchoolDPStaff	DP staff	✓
<input checked="" type="checkbox"/>	Banu	Banthien	banu.ugan+kaybeebanthien@gdpr.school	GeneralStaff	Teachers	✓
<input type="checkbox"/>	George	Day	karen.brooks+George@gdpr.school	SchoolDPStaff	Administration	✓

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.

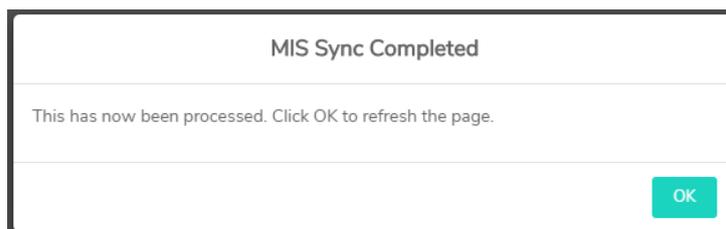
Once we have processed your schools request, you will receive an email which will take you through the process via Groupcall's XoD portal. Information on this can be found via this URL: <https://www.youtube.com/watch?v=JMoBMg-xYM&feature=youtu.be>

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.

The screenshot shows the 'User Management' interface. At the top right, there is a 'Verification code' field with 'xxxxxx' and a 'Save' button. Below this is a search bar and three buttons: 'Import', 'Add', and 'MIS Sync Now' (highlighted in red). The main part of the interface is a table with the following columns: First Name, Surname, Role, Created, MIS Sync, Last Login, and Activated. The table contains four rows of user data.

First Name	Surname	Role	Created	MIS Sync	Last Login	Activated
John	Smith	SchoolDPStaff	04/02/2020 12:45		Never	On
Frank	Lawson	SchoolDPStaff	29/01/2020 11:06		Never	On
Alfie	Johnson	GeneralStaff	30/05/2019 10:39	30/05/2019 10:39	Never	Off
Luke	Ward	GeneralStaff	30/05/2019 10:39	30/05/2019 10:39	Never	Off

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.



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