

# Module 5: Admin functions

For further information, contact:

[ROOT@rcslt.org](mailto:ROOT@rcslt.org)

# *Introduction*

- This module is designed to guide you through using the admin functions on the ROOT
- It is relevant to users that have admin rights
- The module will cover:
  - Adding and removing users from the ROOT
  - Generating admin reports
  - Setting up user defined/custom fields
- **Please note: the Admin Functions remain under development and are subject to change. We would really welcome your feedback on this functionality.**

## Therapy Outcome Measures



Admin users have access to an additional tab, “**admin**”

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### NEWS

#### WELCOME TO YOUR 'NEW-LOOK' ROOT!

As you may already be aware, at the RCSLT we are currently in the process of transitioning the RCSLT website and other online tools and resources across to a new digital platform as part of the RCSLT's digital transformation. We have updated the design of the ROOT for consistency across our digital estate, including use of the new RCSLT digital logo. We'd love to hear what you think!

#### Recent changes to the ROOT

The next time that you log in to use the ROOT, you will be asked to give consent for your personal data to be collected and used in relation to your use of the ROOT, confirm that your details are correct and complete an acceptable use agreement.

Our new Privacy Policy will make it easier for you to find out how we collect, use and protect your personal data in relation to the ROOT. [Click here](#) to view the privacy policy.

#### Erratum for the TOMs AAC adapted scale

The third edition of 'Therapy Outcome Measures for Rehabilitation Professionals' (Enderby and John, 2015) details on page 102 that it is necessary to consider and score the activity, participation and well-being without AAC and with AAC. This has not been found to be practical and it has been decided that clients should be rated in the same way as on other adapted scales i.e. as they present at a particular time point: initial, intermediate (if required) and at end of episode of care or discharge. The ROOT has been adapted to accommodate this change in the TOMs. For further information, please contact [ROOT@rcslt.org](mailto:ROOT@rcslt.org)

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### Administration

Please use the links above to navigate the Admin section

These are the additional features available to Admin users

# Login history

Click **login history** to view a list of users in your service and log-in history

## Login History

Dates:

Forename	Surname	Username	Login Count	Incorrect Logins	Last Login
Admin	2	admin2@test.base	39	0	01/05/2019 14:53:16
Admin	1	admin1@test.base	24	0	09/03/2020 11:28:37
Test	User	test.user@test.base	11	0	24/12/2018 10:05:31

# Login history

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### Login History

Dates:

All ▼

Forename	Surname	Username	Login Count	Incorrect Logins	Last Login
Admin	2	admin2@test.base	39	0	01/05/2019 14:53:16
Admin	1	admin1@test.base	24	0	09/03/2020 11:28:37
Test	User	test.user@test.base	11	0	24/12/2018 10:05:31

Use the drop-down box here to filter by date range:

- **This week**
- **This month**
- **All**

# Manage user accounts

Click **Manage Users** to add, edit and remove user accounts

## Manage Users

Status:

Username	Forename	Surname	Role	Last Login	Status	
admin1@test.base	Admin	1	Local Admin	09/03/2020 11:28:37	Active Agreed Acceptable Use: Yes	<a href="#">Edit</a> <a href="#">Remove</a>
admin2@test.base	Admin	2	Local User	01/05/2019 14:53:16	Active Agreed Acceptable Use: Yes	<a href="#">Edit</a> <a href="#">Remove</a>
test.user@test.base	Test	User	Local User	24/12/2018 10:05:31	Active Agreed Acceptable Use: Yes	<a href="#">Edit</a> <a href="#">Remove</a>
admin2@test.base	Admin	2	Local Admin	15/07/2019 15:25:02	Active Agreed Acceptable Use: Yes	<a href="#">Edit</a> <a href="#">Remove</a>

# Manage user accounts

test1@test.base	test	User	Local User	07/11/2018 10:28:02	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test2@test.base	Test	User	Local Admin	07/11/2018 10:30:20	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test3@test.base	Test	User	Local User	31/05/2016 11:20:15	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test4@test.base	Test	User	Local User	17/05/2016 09:50:01	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test5@test.base	Test	User	Local User		Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test6@test.base	Test	User	Local User	23/02/2018 12:21:46	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test7@test.base	Test	User	Local User	09/12/2016 15:53:12	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test8@test.base	Test	User	Local User		Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test9@test.base	Test	User	Local User	23/02/2018 12:22:34	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test10@test.base	Test	User	Local User		Active	<a href="#">Edit</a>	<a href="#">Remove</a>

[Add New User](#)

Click **Add New User** to set up a new account

# Manage user accounts

## Add New User

Email address:

Forename:

Surname:

Role:

 

Save User

Cancel and Close

Enter the new user's email address, forename and surname. If they also require admin rights, please alter their 'role' to 'Local Admin' and click **Save User**.

The new user will then be sent an automated email to finish setting up their account. This will contain a link that is live for 7 days.

# Manage user accounts

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Click **Edit** to update/amend account details, including type of user (see next slide)

### Manage Users

Username	Forename	Surname	Role	Last Login	Status		
test1@test.base	Test	User	Local User	07/11/2018 10:28:02	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test2@test.base	Test	User	Local Admin	07/11/2018 10:30:20	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test3@test.base	Test	User	Local User	31/05/2016 11:20:15	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test4@test.base	Test	User	Local User	17/05/2016 09:50:01	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test5@test.base	Test	User	Local User		Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test6@test.base	Test	User	Local User	23/02/2018 12:21:46	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test7@test.base	Test	User	Local User	09/12/2016 15:53:12	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test8@test.base	Test	User	Local User		Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test9@test.base	Test	User	Local User	23/02/2018 12:22:34	Active	<a href="#">Edit</a>	<a href="#">Remove</a>

# Manage user accounts

RCSLT Online Outcome Tool

Use can manually update the user's name, email address and role here.

## Add New User

Email address:

admin1@test.base

Password:

unchanged

Keep this box blank to leave the password

Forename:

Admin

Surname:

1

Role:

Local Admin

You can manually enter a new password above. Or you can send a reset password email to the user by clicking the button below.

Save User

Reset Password

Cancel and Close

Click this link to send an email inviting the user to reset their password

# Manage user accounts

## Add New User

Email address:

Password:  Keep this box blank to leave the password unchanged

Forename:

Surname:

Role:

You can manually enter a new password above. Or you can send a reset password email to the user by clicking the button below.

After making any changes, click **save user**, otherwise click **cancel and close**.

# Manage user accounts

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Click **Remove** to disable access for a user

### Manage Users

Username	Forename	Surname	Role	Last Login	Status		
test1@test.base	Test	User	Local User	07/11/2018 10:28:02	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test2@test.base	Test	User	Local Admin	07/11/2018 10:30:20	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test3@test.base	Test	User	Local User	31/05/2016 11:20:15	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test4@test.base	Test	User	Local User	17/05/2016 09:50:01	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test5@test.base	Test	User	Local User		Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test6@test.base	Test	User	Local User	23/02/2018 12:21:46	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test7@test.base	Test	User	Local User	09/12/2016 15:53:12	Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test8@test.base	Test	User	Local User		Active	<a href="#">Edit</a>	<a href="#">Remove</a>
test9@test.base	Test	User	Local User	23/02/2018 12:22:34	Active	<a href="#">Edit</a>	<a href="#">Remove</a>

# Manage user accounts

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You can toggle between the lists of **'active'** and **'inactive'** user accounts using this drop-down box

### Manage Users

Status:

Username	Forename	Surname	Role	Last Login	Status	
admin1@test.base	Admin	1	Local Admin	09/03/2020 11:28:37	Active Agreed Acceptable Use: Yes	<a href="#">Edit</a> <a href="#">Remove</a>
admin2@test.base	Admin	2	Local User	01/05/2019 14:53:16	Active Agreed Acceptable Use: Yes	<a href="#">Edit</a> <a href="#">Remove</a>
test.user@test.base	Test	User	Local User	24/12/2018 10:05:31	Active Agreed Acceptable Use: Yes	<a href="#">Edit</a> <a href="#">Remove</a>
admin2@test.base	Admin	2	Local Admin	15/07/2019 15:25:02	Active Agreed Acceptable Use: Yes	<a href="#">Edit</a> <a href="#">Remove</a>

# Manage user accounts

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To reinstate a user whose account has previously been removed from the system, select **inactive** and then click **reinstate**

### Manage Users

Selected Base:  Show Inactive Bases

Test Base

Status: Inactive

Username	Forename	Surname	Role	Last Login	Status	
test9@test.base	Test	User	Local User	23/02/2018 12:22:34	Removed on 09/03/2020 Agreed Acceptable Use: No	<input type="button" value="Reinstate"/>
test10@test.base	Test	User	Local User		Removed on 09/03/2020 Agreed Acceptable Use: No	<input type="button" value="Reinstate"/>

# Deleted episodes

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### Administration

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Click **Deleted Episodes** to view a list of episodes of care that have been deleted by colleagues in your service .

# Patient list

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### Patients

Status:

Active

A full list of patients recorded on the ROOT by your service will appear here

Gender	Year of Birth	Identifiers	Episode Count	Delete	
M	1954	tsy1954;	2		
M	1959	tt1959;	2		
M	1923	zzzzzzzzzzzzzzzzzzzz;	1		
F	1914		1		
F	1919		1		
F	2010	kl2010;	1		
M	1999	thy1212;	1		
F	1986	OKM;	1		17

# Patient list

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#### Patients

You can toggle between the lists of **'active'** and **'inactive'** patients using this drop-down box

Status:

Active ▼

Gender	Year of Birth	Identifiers	Episode Count	Delete	
M	1954	tsy1954;	2		
M	1959	tt1959;	2		
M	1923	zzzzzzzzzzzzzzzzzzzz;	1		
F	1914		1		
F	1919		1		
F	2010	kl2010;	1		
M	1999	thy1212;	1		
F	1986	OKM;	1		18

# Patient list

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#### Patients

You can toggle between the lists of **'active'**, **'inactive'** and **'removed'** patients using this drop-down box

Status:

Active ▼

Gender	Year of Birth	Identifiers	Episode Count	Delete	
M	1954	tsy1954;	2		
M	1959	tt1959;			
M	1923	zzzzzzzzzzzzzzzzzzzz;			
F	1914				
F	1919				
F	2010	kl2010;			
M	1999	thy1212;			
F	1986	OKM;			

**'Active'**: patients with an open episode of care on the ROOT  
**'Inactive'**: patients with closed episode(s) of care on the ROOT  
**'Removed'**: patients who have been removed from the system by colleagues in your service

# Reinstate a deleted patient

### Therapy Outcome Measures

Patients who have been removed from the ROOT can be reinstated, if required. Open the **'removed'** tab and click **'reinstate'**

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### Patients

Status:

Removed ▼

Gender	Year of Birth	Identifiers	Episode Count	Delete	
F	1980	0000;	1	08 Dec 2017 11:39	<a href="#">Reinstate</a>
			0		<a href="#">Reinstate</a>
M	1977	01275154;01322441;01636955;01251690;01246077;01206046;00330669;02007372;00527212;	0	05 Dec 2017 02:36	<a href="#">Reinstate</a>
M	1977	00527212;	0	02 Oct 2018 10:31	<a href="#">Reinstate</a>

# View service admin reports

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### Administration

Please use the links above to navigate the Admin section

# View service admin reports

## Service Admin Reports

Thumbnail showing a summary table for 'Number of Episodes' with columns for 'Number of Episodes' and 'Proportion'.

### A 01 Number of Episodes

Count and proportion of episodes of care in ROOT, both closed and open (ongoing).

- Advanced
- B&W Version

Show

Thumbnail showing a summary table for 'Number of Logins' with columns for 'Number of Logins' and 'Proportion'.

### A 02 Number of Logins

Count and proportion of logins for your service in ROOT.

- Advanced
- B&W Version

Show

Thumbnail showing a detailed table for 'Number of Logins Detail' with columns for 'User', 'User Type', and 'Count'.

### A 03 Number of Logins Detail

Count and proportion of logins by user and user type in for your service in ROOT.

Show

Thumbnail showing a detailed table for 'Number of Logins Detail List' with columns for 'User', 'User Type', and 'Count'.

### A 04 Number of Logins Detail List

Count and proportion of logins by user and user type in for your service in ROOT.

Show

Thumbnail showing a detailed table for 'Number of Logins Detail List Full' with columns for 'User', 'User Type', and 'Date'.

### A 05 Number of Logins Detail List Full

List of logins by user and user type and date logged in for your service in ROOT.

Show

### A 06 Flat Export (Excel)

Summary of all ROOT data between two specified dates for export to Excel

- Advanced
- B&W Version

Show

Additional reports are available to users with admin rights, including high-level summary reports (A01), use of the system (A02-A05) and the ability to export data back to Excel (A06).

# Set up user defined fields

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### Administration

Please use the links above to navigate the Admin section

The ROOT also has the capability to record additional data items required locally: **user defined fields**

Any user defined fields set up on the ROOT must be authorised by data protection leads and comply with local information governance policies.

# Set up user defined fields

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### User Defined Fields

Field Name	Object Type	Data Type	Sort Order	Minimum Value	Maximum Value
No records to display.					

[Add New Field](#)

Select **Add New Field**

# Set up user defined fields

Field Name:

Object Type:

Data Type:

Sort Order:

Max Length (number of characters):

Enter the name of the new field that you wish to add in **Field Name**

# Set up user defined fields

Field Name:

Object Type:

Data Type:

Sort Order:

Max Length (number of characters):

Select the **Object Type** from the drop down list (please see next slide)

# *Set up user defined fields*

- **Base** - not currently available
- **Patient** – this category is for information that is collected about a patient once only, and does not vary. For example, date of admission, patient ID.
- **Episode** – this category is for information that is collected about a specific episode of care. There will be one value per episode of care. Examples include: total number of contacts, setting(s) in which the intervention was delivered, the type of intervention(s). This is the most common type of category.
- **Rating** – this category is for information that is collected each time a TOMs rating is made. It may be something that accumulates across the episode of care, such as ‘number of contacts since the last rating’, or information that compliments the rating, such as an additional measure of risk or confidence.
- **Score** – not currently available

# Set up user defined fields

Close

Field Name:

Object Type:

Base 

Data Type:

Free text 

Sort Order:

Date  
Free text  
Integer (whole number)  
List (multi select)  
List (single select)  
Number

Max Length (number of characters):

Select the **Data Type** from the drop down list (please see next slide)

## ***Set up user defined fields***

- **Date** – this type of field will always be in date format (i.e. DD/MM/YYYY)
- **Integer (whole number)** – this type of field will always be a whole number
- **List (single select)** – this type of field will contain values from a list of discrete options. These options may change over time.
- **Number** – this type of field will contain numerical values that are not whole numbers (i.e. with decimal places)

# Set up user defined fields

Field Name:

Object Type:

Data Type:

Sort Order:

Max Length (number of characters):

Once complete, click **Save**

**Please note:** this functionality is currently under development and it is advised that you contact [ROOT@rcslt.org](mailto:ROOT@rcslt.org) for further information. Please also let us know any feedback that you have.

# Training resources

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### Administration

Please use the links above to navigate the Admin section

Resources to support with using the admin functions are available here

***NEXT STEPS***

# Next steps

- Contact [ROOT@rcslt.org](mailto:ROOT@rcslt.org) should you have any queries or questions.
- Please let us know what you think. Use the 'Leave Feedback' button on the ROOT to tell us about your experiences of using the tool and to make suggestions for what could be improved.