

Providing access to the Data Management Services portal

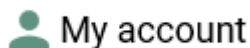
There are a few processes that schools will need to work through to ensure that all users of DMS resources in school have access to them via the portal. This document will guide school administrative staff through the steps needed to provide this access.

If you need support in creating/managing sub accounts, please do not hesitate to contact our Customer Services team via this [online form](#) or call **01438 845111 (option 4)** – **Ensure that you wait to hear all options before dialling.**

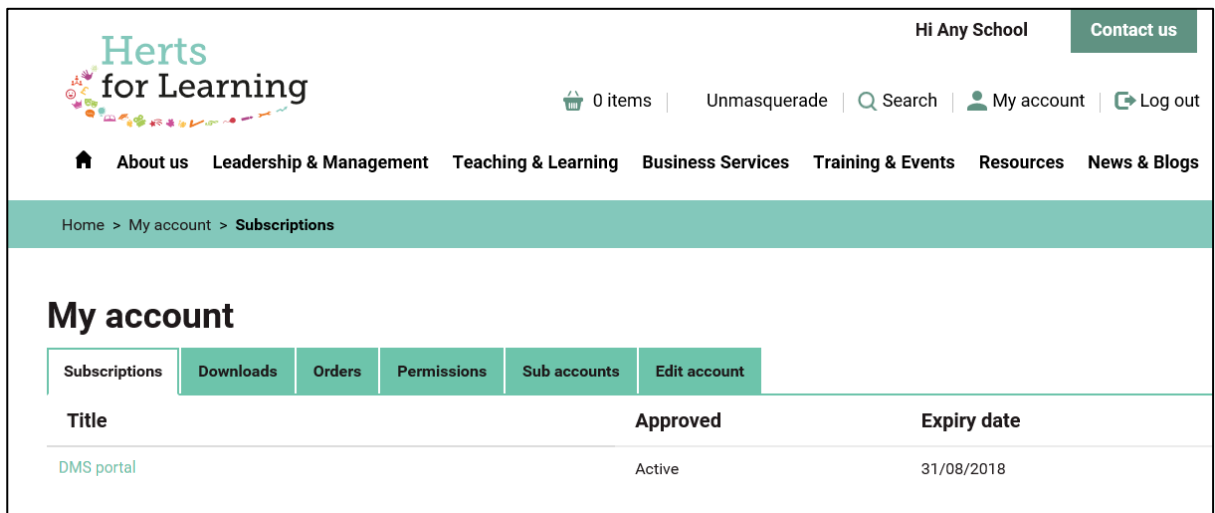
Creation of sub accounts for users

The first stage is to create sub accounts under the main school account, for any members of staff that require access to the resources within the portal:

1. Log into the HfL website at <http://www.hertsforlearning.co.uk>, using your school's main account credentials. The username is usually the school's 7 digit DfE number, however this may have been changed.
2. Click on the **My account** option towards the top right of the screen.



3. Once in the **My account** page you will see the following screen:

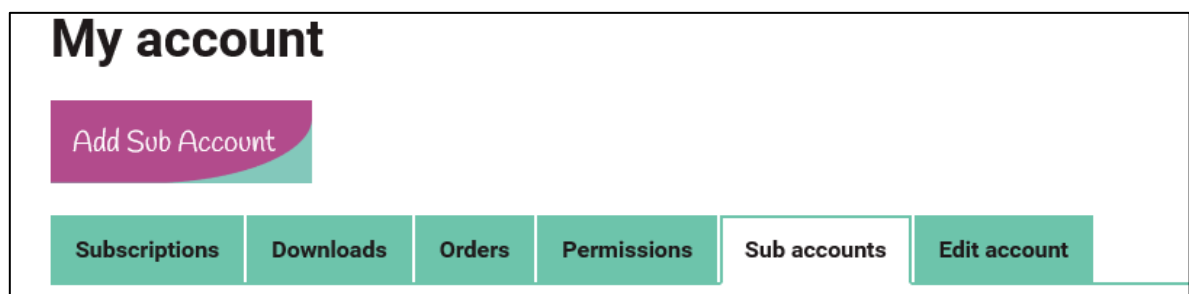


The screenshot shows the Herts for Learning website interface. At the top right, it says "Hi Any School" and "Contact us". Below the logo, there are navigation links: "0 items", "Unmasquerade", "Search", "My account", and "Log out". A main navigation bar includes "About us", "Leadership & Management", "Teaching & Learning", "Business Services", "Training & Events", "Resources", and "News & Blogs". The breadcrumb trail is "Home > My account > Subscriptions".

The "My account" section has tabs for "Subscriptions", "Downloads", "Orders", "Permissions", "Sub accounts", and "Edit account". Below these tabs is a table with the following data:

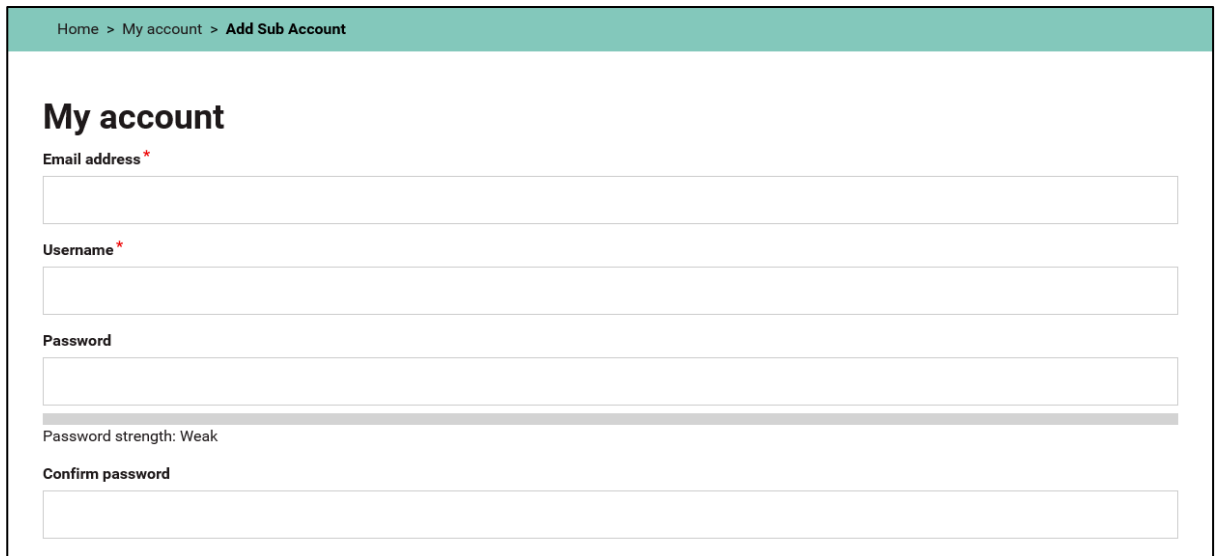
Title	Approved	Expiry date
DMS portal	Active	31/08/2018

4. To create a sub account, click on the **Sub accounts** option.

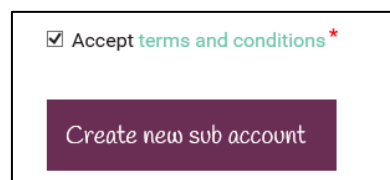


The screenshot shows the "My account" page with a prominent purple button labeled "Add Sub Account". Below this, there are tabs for "Subscriptions", "Downloads", "Orders", "Permissions", "Sub accounts", and "Edit account". The "Sub accounts" tab is highlighted.

- Click on the **Add Sub Account** button at the top of the page.



- Enter the details of the person you are creating a sub account for. A common practice is to set the username to be their email address.
- One option you may wish to consider is to set up a generic user account for a group of staff to use, to access specific resources on the school's main account, e.g. 919xxxxAdmin, and give the credentials to that group within the school. This way you only have a single account to maintain. If a member of that group were to subsequently leave the school, you would need to remember to change the password on that account, as you would any other shared resources they have access to.
- If you tick the **Notify user of new account** box, they will receive an email with their login details.
- Once you have entered all of the required information, you must tick the **Accept terms and conditions** box.



- Click on **Create new sub account**.
- Repeat this process until you have created sub accounts for all applicable staff members.
- The sub accounts created will be listed under **My account** and can be edited or deleted as necessary.

Subscriptions		Downloads		Orders		Permissions		Sub accounts		Edit account			
Name	Email						Created						
School sub account 1							08/11/2017 - 10:14					Edit	Delete
School sub account 2							08/11/2017 - 10:16					Edit	Delete

Allow sub accounts access to the DMS portal

Once the sub accounts have been created you will need to edit the permissions on the main account in order to allow the sub accounts access to the DMS portal:

1. Logged into the HfL website as the main school account, click on **My account** and go to the tab labelled **Permissions**. You will see which products, subscriptions and purchases your school has made and are available to the school's main account.

My account											
Subscriptions		Downloads		Orders		Permissions		Sub accounts		Edit account	
Title							Permissions				
Religion for Today and Tomorrow (digital download)							Edit Permissions				
DMS portal							Edit Permissions				

2. Click on the **Edit Permissions** link to the right hand side for the relevant product/subscription, in this case being the **DMS portal**.
3. Choose which sub account to give permission to access this resource by placing a tick against the name.

Users	
<input checked="" type="checkbox"/>	School sub account 1
<input type="checkbox"/>	School sub account 2
<div style="background-color: #800080; color: white; padding: 5px 20px; display: inline-block;">Save</div>	

4. Once you have given the relative sub account(s) permission, click on the **Save** button.
5. To give the sub accounts access to a different product or subscription, you will need to edit the permissions for each item on the **Permissions** tab.
6. While you are in your **My account** section, you will be able to see what your school can access. Please note, sub accounts will not be able to see what the main account can see, they will only see what they have been given access to by the main account.

7. If a member of staff leaves your school/setting, to remove their access to your subscriptions, downloads and orders, go to the **Sub accounts** page and choose **Delete** on the right hand side. Please make sure that you delete the correct account, as once deleted it cannot be undone and would need to be created again.