



DDMS LOGIN GUIDE

DDMS by Xplor

Logins

If you are an **Admin** DDMS login, you'll have access to the Logins page. This page allows you to create DDMS logins for other members of your organisation, granting them access to the DDMS system.



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HOMELOGINSBENEFICIARIESCUSTOMERSREPORTS

Log out

SetupActiveLockedNew

Test Service, Test Service, Test Service.

DDMS Secure Area > Xplor - Demo > All Branches > Logins > Login Configuration

ID	Scope	Beneficiary	Login	First	Last	Email	Site	Old Lock	Read Only	View
163251	Service	Branch 1	XplorTechnologies	XplorTest	XplorTest		New	Yes	No	
162235	Service	Branch 1	GVGROUP	GVG	GVG		New	Yes	No	
162317	Service	Branch 1	LVarcoedemo				New	Yes	No	
162806	Service	Branch 1	francescatest	Francesca	Hobbs		New	Yes	No	
163255	Beneficiary	Branch 3	Branch3	BRANCH	USER		New	Yes	No	
163250	Beneficiary	Branch 2	Branch2	BRANCH	USER		New	Yes	No	
162420	Service	Branch 1	247Fitness	Francesca	Hobbs	Francesca.Thurston-Hobbs@xplortechnologies.com	New	Yes	No	
163248	Beneficiary	Branch 1	XplorTest	XplorTest	XplorTest		New	Yes	No	

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Sorting on 'I.UserID'

Logins

Setting up a new user

You can create two types of DDMS logins, a Beneficiary user or a Service user.

Beneficiary level user

To create a login at beneficiary level, granting access to one beneficiary only, you must first select the Beneficiary you wish to grant access to.

Service level user

To create a login at service level, granting access to ALL beneficiaries within your service, you must first select your oldest Beneficiary (lowest number beneficiary ID). You can locate your oldest beneficiary by clicking on the arrow below which sorts the list by oldest to newest.

Test Service, Test Service, Test Service.

DDMS-EU > Xplor - Demo (68) > Branch 1 (1445233) > Beneficiaries > All Beneficiaries

ID	Name	Sys	OIN	Closed	Select	View
1445233	Branch 1	BACS	Xplor - Demo			
6459843	Branch 2	BACS	256337			
6469067	Branch 3	BACS	256337	True		

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Logins

Setting up a new user

Once you have made your Beneficiary or Service level selection, click on the LOGINS page.

To set up a **new login** click 'New'

Test Service, Test Service, Test Service.

DDMS Secure Area > Xplor - Demo > Branch 1 > Logins > Login Configuration

ID	Scope	Login	First	Last	Email	Site	Old Lock	Read Only	View
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Logins

Setting up a new user

If you have the oldest beneficiary selected, you will be able to choose whether the login is service or beneficiary level

Test Service, Test Service, Test Service.

DDMS Secure Area > Xplor - Demo > Branch 1 > Logins > Add Login

Login Details

Login Type Service User ▼

- Bene User
- Service User

Logins

Setting up a new user

User Details:

Enter the user's name, email address and phone number

Login Details (details needed to login):

Complete all fields within this section

Name* = Username needed to login

Password* = needed to login

Read Only = Select Yes or No.

Selecting 'No' will give the user the ability to make all changes within the system. Selecting 'Yes' gives the user the ability to view information only

You must make a note of the user's Name* and Password and send these to them manually, these are the details they'll need to login. Nothing is sent to them automatically.

The screenshot shows a web application interface for adding a new login. At the top, a breadcrumb trail reads "DDMS Secure Area > Xplor - Demo > Branch 1 > Logins > Add Login". Below this is a tabbed interface with a "Login Details" tab selected. The form is divided into two main sections: "User Details" and "Login Details".

User Details

- First Name:
- Last Name:
- Email:
- Phone:

Login Details

- Name *:
- Password *:
- Read Only: (with a dropdown arrow)

A teal "Select" button is located at the bottom right of the form.

Logins

Status

You can filter your logins by status

Locked = due to inactivity or incorrect password attempts

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Log out

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DDMS Secure Area > Xplor - Demo > All Branches > Logins > Login Configuration

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Sorting on 'L.UserID'

Logins

To select a login, click the magnifying glass 

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Logins

Amending a user's access level

Within the summary page, you can amend a login's login **name** & **access level** by selecting 'Edit'

DDMS Secure Area > Xplor - Demo > Branch 1 > Logins > View Login : 163251

Summary Settings Events

Scope Service

Service Xplor - Demo

Beneficiary Branch 1

Login XplorTechnologies

Name XplorTest XplorTest

Email

Phone

Read Only No

Edit Reset Password Delete



DDMS Secure Area > Xplor - Demo > Branch 1 > Logins > View Login : 163251

Summary Settings Events

Scope Service

Service Xplor - Demo

Beneficiary Branch 1

Login XplorTechnologies

First Name * XplorTest

Last Name * XplorTest

Email *

Enter an email address

Phone

Read Only No

No

Yes

Add Only

Logins

Resetting passwords and deleting users

Within the summary page, you can **reset a login's password** by clicking 'Reset Password' or **delete a login** by clicking 'Delete'

DDMS Secure Area > Xplor - Demo > Branch 1 > Logins > View Login : 163251

Summary Settings Events

Scope Service

Service Xplor - Demo

Beneficiary Branch 1

Login XplorTechnologies

Name XplorTest XplorTest

Email

Phone

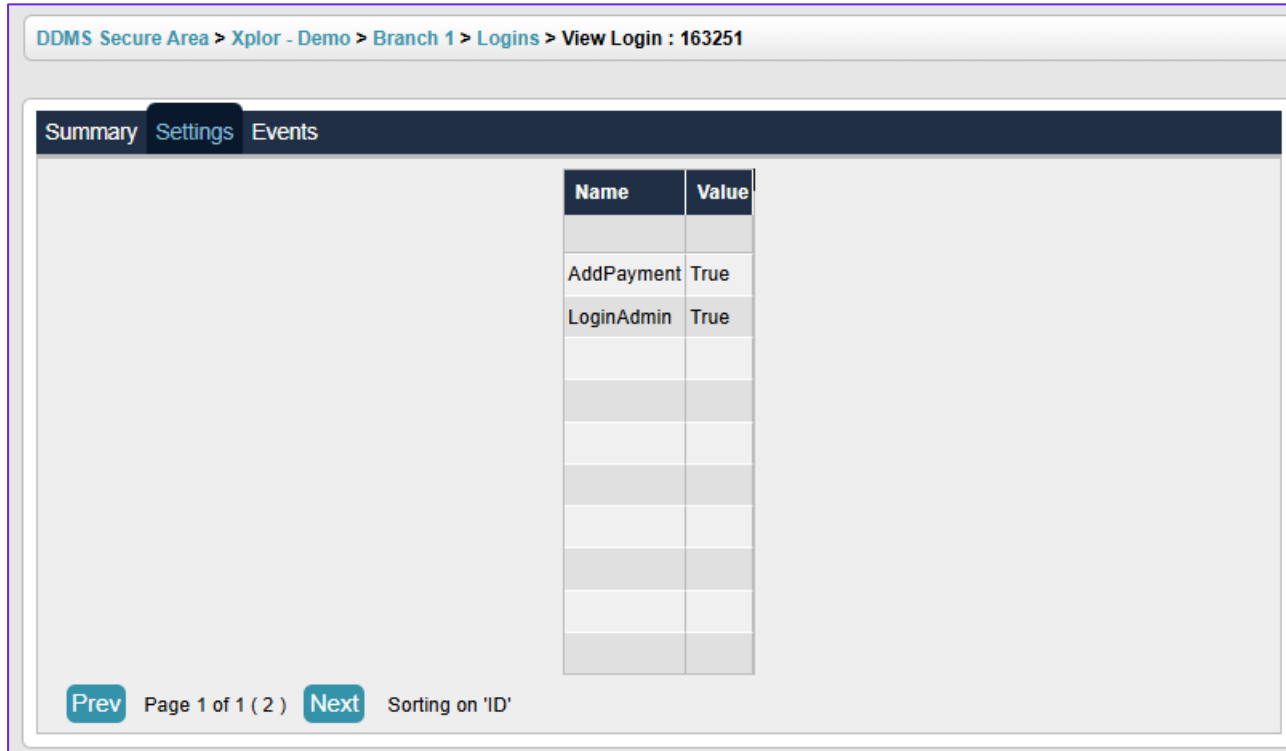
Read Only No

Edit Reset Password Delete

Logins

User Settings

In the settings page, you can see the extra setting permissions a login has



DDMS Secure Area > Xplor - Demo > Branch 1 > Logins > View Login : 163251

Summary Settings Events

Name	Value
AddPayment	True
LoginAdmin	True

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Settings are set at login level by the Xplor team and include the following:

- AddPayment – allows adding customer payments in their payments page
- LoginAdmin – this makes them an admin login with ability to set up new and amend existing users

To find out more about what settings are available for you and your team, please contact Client Support:

<https://www.harlandsgroup.co.uk/clients/#form>