

# Tracking System: Manage delegate

Operational Guide

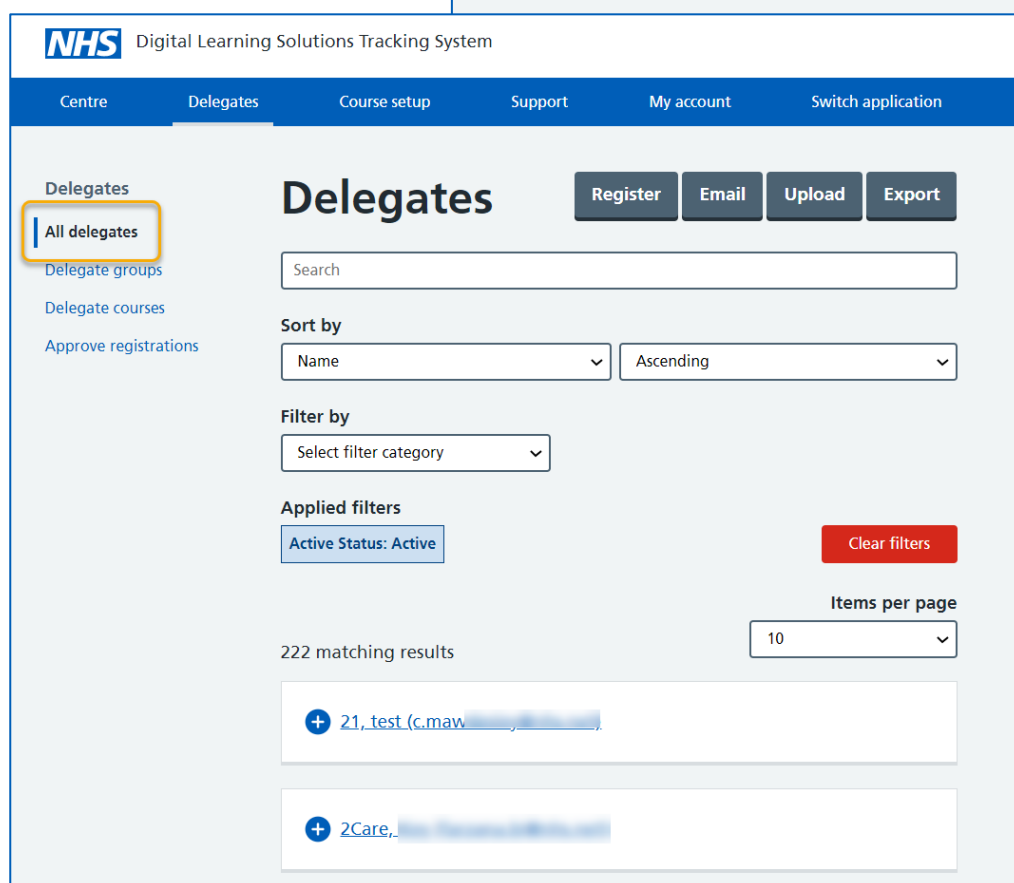
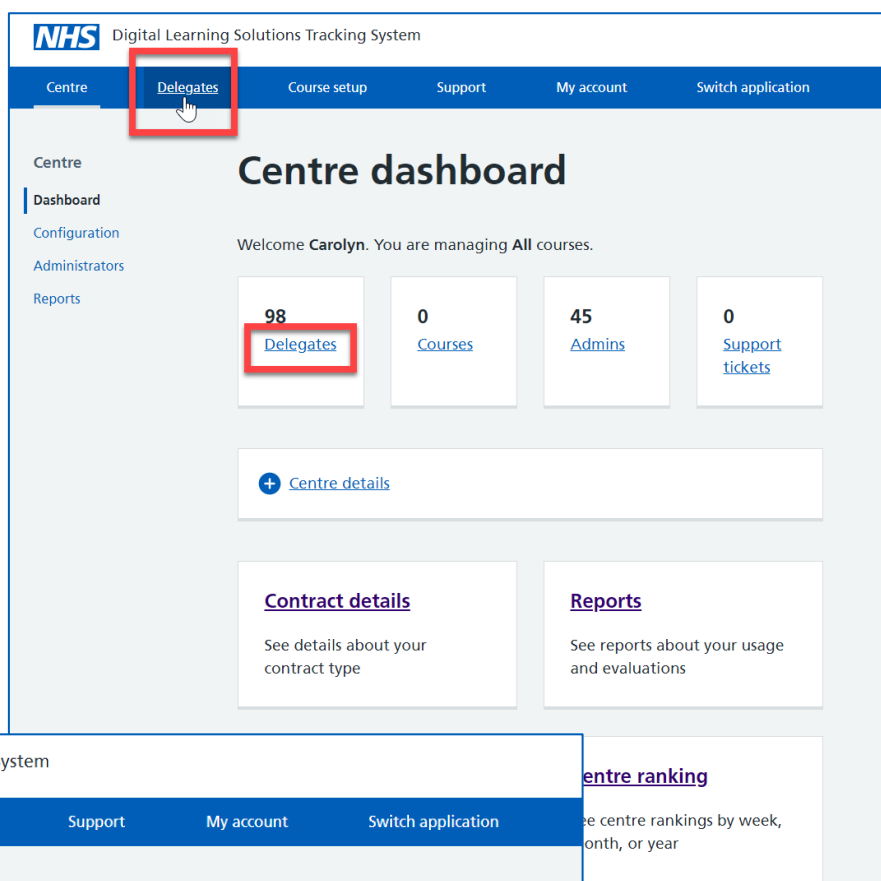
**Centre  
Manager**

**Administrator**

February 2022

# Go to the Tracking System and manage delegate

## 1. Select: Delegates




You've reached the **All delegates** page

### 3. Search for the delegate

For information: You can search by delegate **Name**, **Email** address or delegate **ID**

4. Select: **Expand** from the plus sign next to the delegate you want to manage


[21, test \(c.maw \[redacted\]\)](#)

Active

Password set

Self-registered

Name	test 21
Email	[redacted]
ID	T25
Registration date	16/06/2016
Job group	Nursing / midwifery
Professional Registration Number	Not yet provided
Base / office / place of work	Morpeth Site
Department / team	Ward 1-5
Contact telephone number	00000 000 0000
Year of study	-
Organisation / company	-

Manage delegate

Set password

## 5. Select: **Manage delegate**

The delegate card has tags to show their status, for example this delegate: is **Active**, has a **Password set** and they **Self-registered** to the system. If this delegate was also an admin this would be indicated by a tag

The delegate card for 'test 21' displays the following information:

- Status Tags:** Active, Password set, Self-registered.
- Buttons:** Send welcome email.
- Details Table:**

Name	test 21
Email	c.mawc
ID	T25
Alias	
Registration date	16/06/2016
Job group	Nursing / midwifery
Base / office / place of work	Morpeth Site
Department / team	Ward 1-5
Contact telephone number	00000 000 0000
Year of study	-
Organisation / company	-
Professional Registration Number	Not yet provided
- Action Buttons:** Edit details, Set password, Promote to admin, Deactivate account.
- Courses:** Entry Level - Win XP, Office 2003/07 OLD - Full Course 2003.

Callout boxes provide additional context:

- The delegates registration details are displayed:** Points to the 'Details' section.
- A Send welcome email button is available on the card:** Points to the 'Send welcome email' button.
- Courses:** Points to the 'Courses' section.
- The Courses a delegate is enrolled to are listed:** Points to the list of courses.

To enable centre managers and administrators to manage a delegate there is functionality to **Edit details** of the delegate registration, **Set password** (should a delegate for example experience an issue with forgot password), **Promote to admin** (centre managers only) and add administrator permissions, if appropriate, and **Deactivate account** to make a delegates account inactive

# Edit details

test 21

Send welcome email

Active

Password set

Self-registered

Details

Name	test 21
Email	c.mawr
ID	T25
Alias	
Registration date	16/06/2016
Job group	Nursing / midwifery
Base / office / place of work	Morpeth Site
Department / team	Ward 1-5
Contact telephone number	00000 000 0000
Year of study	-
Organisation / company	-
Professional Registration Number	Not yet provided

Edit details

Set password

Promote to admin

Deactivate account

1. Select: **Edit details**

2. Update the fields as appropriate
3. Select: **Save**

Edit delegate details

First name

test

Last name

21

Email address

c.mawr

Alias ID

Do they have a Professional Registration Number?

They should have a professional registration number if they are a health professional registered with a professional body such as the NMC, GMC or GDC.

No

Yes

Job group

Nursing / midwifery

Base / office / place of work

Morpeth Site

Department / team

Ward 1-5

Contact telephone number

00000 000 0000

Year of study

Select a year of study

Organisation / company

Save

Delegate details are updated and displayed in the registration card

# test 21

Send welcome email

Active

Password set

Self-registered

## Details

Name	test 21
Email	c.maw
ID	T25
Alias	
Registration date	16/06/2016
Job group	Nursing / midwifery
Base / office / place of work	Morpeth Site
Department / team	Ward 1-5
Contact telephone number	00000 000 0000
Year of study	Aug 2021
Organisation / company	HEE
Professional Registration Number	Not professionally registered

Edit details

Set password

Promote to admin

Deactivate account

# Set password

From time to time you may need to set a delegates password, should a delegate, for example, experience an issue with forgot password

1. From the delegate registration details card Select: **Set password**

test 21

Send welcome email

Active Password set Self-registered

Details

Name	test 21
Email	c.maww@nhs.uk
ID	T25
Alias	
Registration date	16/06/2016
Job group	Nursing / midwifery
Base / office / place of work	Morpeth Site
Department / team	Ward 1-5
Contact telephone number	00000 000 0000
Year of study	-
Organisation / company	-
Professional Registration Number	Not yet provided

Edit details

Set password

Promote to admin

Deactivate account

2. Complete the field with a password, the password should have a minimum of 8 characters with at least 1 letter, 1 number and 1 symbol
3. Select: **Save**

Set delegate user password

User: test 21

Password

Password should have a minimum of 8 characters with at least 1 letter, 1 number and 1 symbol.

two/dog0

Save

Cancel



# Delegate account password changed

You should contact the delegate to inform them of their login details and recommend that they change their password using the My account interface after login.

**Manage all delegates**

## 5. Delegate account password changed confirmation

*For information: You should contact the delegate to inform them of their new password and ask them to change the password at first login from **My account***

## 6. Select: **Manage all delegates** to return to **Delegates**

## Promote to admin

test 21

Send welcome email

Active

Password set

Self-registered

Details

Name	test 21
Email	c.maw...
ID	T25
Alias	
Registration date	16/06/2016
Job group	Nursing / midwifery
Base / office / place of work	Morpeth Site
Department / team	Ward 1-5
Contact telephone number	00000 000 0000
Year of study	-
Organisation / company	-
Professional Registration Number	Not yet provided

Edit details

Set password

Promote to admin

Deactivate account

Promote to admin

***Only the centre manager has access to promote a delegate and add admin or other role permissions. This provides access protection to the learners tracked data at your DLS centre.***

*For more guidance about Promote to admin see resource: **DLS010 Promote to admin***

# Deactivate account

When a delegate no longer requires access or has left the organisation their registration account can be deactivated. When a delegates account is deactivated they can no longer enrol on any new courses.

The **All delegates** list is filtered by default to show only active delegates.

test 21

Send welcome email

Active Password set Self-registered

Details

Name	test 21
Email	c.mawle@nhs.uk
ID	T25
Alias	
Registration date	16/06/2016
Job group	Nursing / midwifery
Base / office / place of work	Morpeth Site
Department / team	Ward 1-5
Contact telephone number	00000 000 0000
Year of study	-
Organisation / company	-
Professional Registration Number	Not yet provided

Edit details

Set password

Promote to admin

Deactivate account

1. Select: **Deactivate account** from the delegates registration details card

The delegate card is now tagged as **Inactive**

The delegates account can easily be reactivated by selecting the **Reactivate account** button

test 21

Inactive

Password set

Self-registered

Details

Name	test 21
Email	c.mawt...
ID	T25
Alias	
Registration date	16/06/2016
Job group	Nursing / midwifery
Base / office / place of work	Morpeth Site
Department / team	Ward 1-5
Contact telephone number	00000 000 0000
Year of study	Aug 2021
Organisation / company	HEE
Professional Registration Number	Not professionally registered

Reactivate account