# 2

MANAGING ORGANISATIONS AND USERS

2. Managing Organisations and Users

2.1 Update Organisation Details

Organisation admins are responsible for keeping their organisation's details up-to-date in OPS. This includes the organisation's:

- Address;
- Head of Organisation name or contact details;
- Homes England viability and governance scores of your organisation (if applicable).

To update your organisation's details, click on 'Organisations' from the menu bar, then 'Manage Organisations':
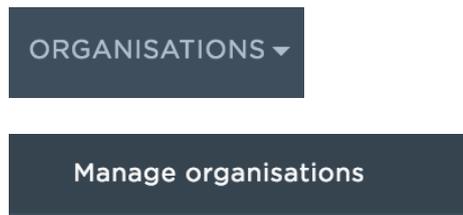
You will see a table listing all the organisations linked to your user registration:

Click on the relevant organisation name in the table and you will be directed to the 'Organisations' screen.

Click on:

EDIT ✎

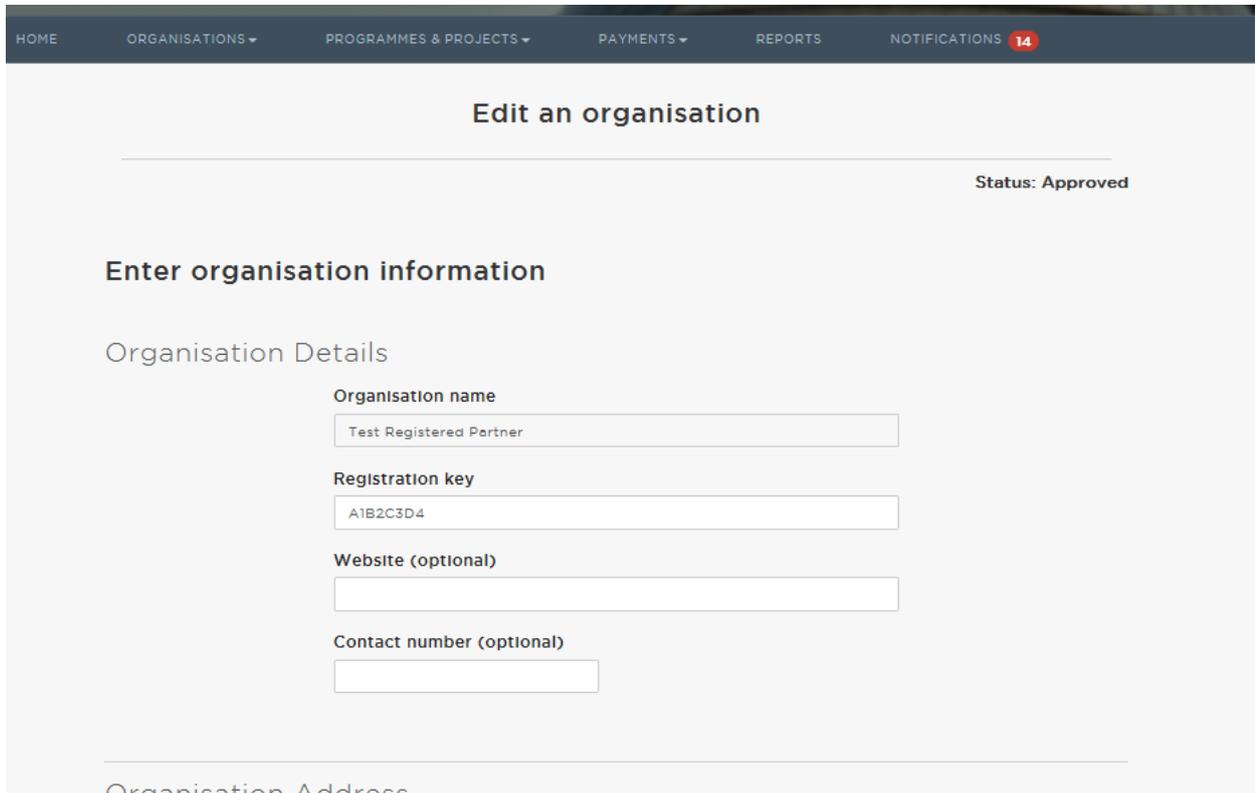You will then be directed to the 'Edit an organisation' screen:

Update the relevant fields, then click 'Save'.

SAVE

If there are changes to your organisation name or IMS provider code, please speak to your GLA contact who will advise you how to change these details.

2.2   Approve new users and remove inactive users

Organisations registered on OPS are responsible for managing their own users. This is done through the 'Organisation Admin' role which is assigned to the user who first submitted the organisation's registration request.

The Organisation Admins should invite other users within their organisation to use OPS. They can do this by giving users their organisation's registration key and directing them to the OPS registration page:

https://ops.london.gov.uk/#/registration

The registration key can be found by clicking 'Organisations' from the menu bar, 'Manage Organisations', then the name of your Organisation. Organisation admins can update the registration key at any time by clicking 'edit'.

To approve users, Organisation Administrators should click on 'Organisations' from the menu bar, then on 'All Users'

Admins can search for a specific user or filter by pending requests:
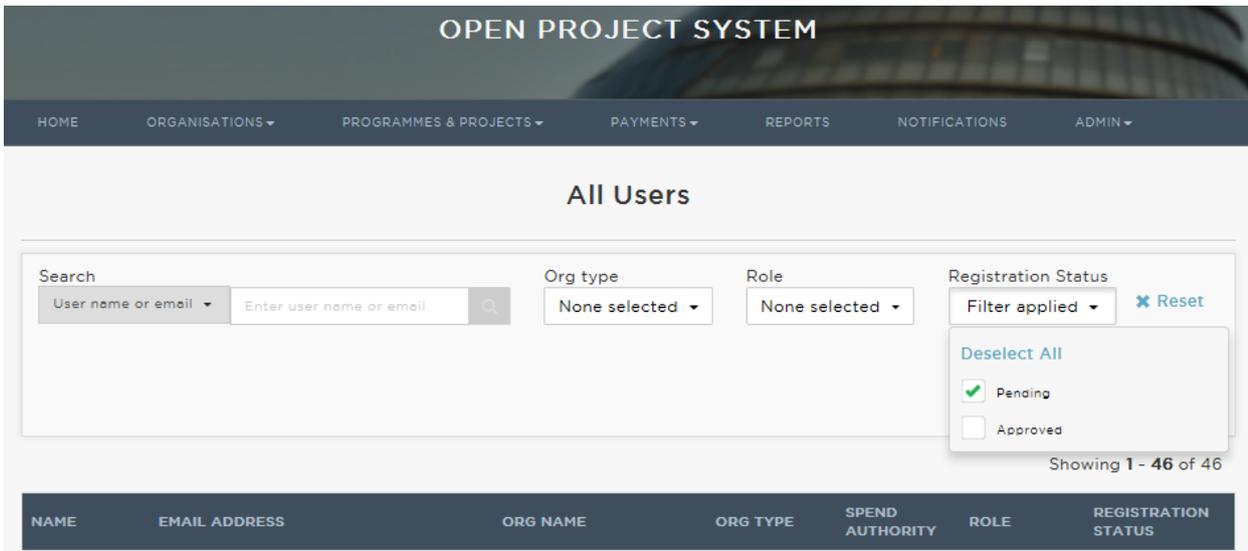
To approve a user, click their name in the table. This will take you to their account profile page. click 'edit'.

To approve a user's registration, click 'Approve'

The new user will then have access to your organisation in the system and by default will be assigned the Project Editor role (roles are defined in section 2.3 below). User roles can be changed in the role dropdown.
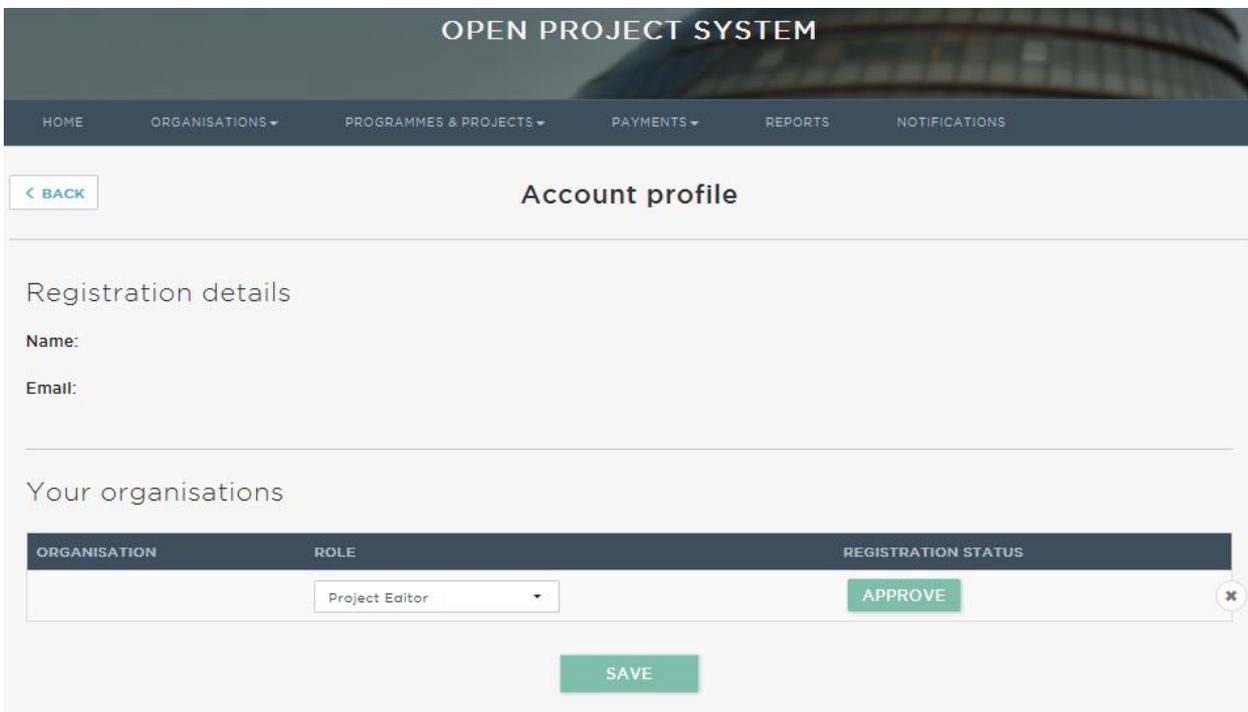
To reject a user or to remove an inactive user, for example someone who has left the organisation, click on the 'X' icon.

You will see a warning message asking if you are sure that you want to remove and delete the user. If deleted, the user will remain registered on GLA-OPS but will no longer be linked to your organisation.

Are you sure you want to remove **Sarah Peters** from Potters Fields HA?

Sarah Peters will remain registered on GLA OPS but will no longer be assigned to Potters Fields HA.

KEEP   DELETE

2.3   Manage User Roles

There are three types of external GLA-OPS users:

    i.   Organisation Administrators

        There should be a minimum of two Organisation Administrators per organisation.

        Organisation Administrators are responsible for:
- updating organisation details on a regular basis;
- approving new users and removing inactive users;
- changing user roles;
- creating consortiums and partnerships (if relevant).

        The Organisation Administrator user role also includes the Project Editor permissions.

    ii.   Project Editors

        Project Editors are responsible for inputting, submitting and processing projects on GLA-OPS.

    iii.   Project Readers

        Project Readers can access and view all pages but cannot edit projects or submit requests to the GLA or MOPAC.

2.4   Request Access on behalf of another Organisation

Users can access GLA-OPS as a user for multiple organisations using the same email and password login. This option is available to all roles.

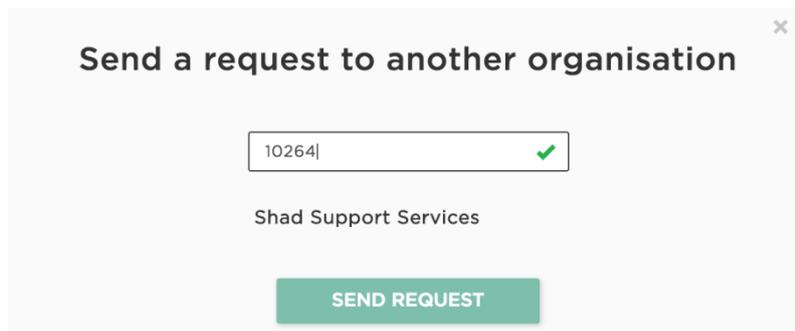To access another organisation, click on:

From the dropdown menu, click on:

Then click on:

This will take you to the 'Send a request to another organisation' page:

Enter the second organisation's registration key and click on:

Once a request has been sent, the Organisation Administrator for the second organisation will review the request.

2.5   Create a Consortium or Partnership Record

To deliver projects as part of a consortium or in partnership[1] with one or more organisations, you must create a consortium or partnership record in GLA-OPS.

Please speak to your Organisation Administrator if you require a consortium or partnership to be set up.

To create the consortium or partnership record, Organisation Administrators should click on:

From the dropdown menu, click on:

If you are a lead provider for a consortium or partnership, you will see a table listing any consortiums and/or partnerships which have already been created and linked to your provider and this funding programme.

If this is the first time your organisation has created a partnership or consortium, this table will be hidden.

To create a new consortium and or partnership, click on:

You will then be asked to provide basic information about your consortium.

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[1] 'Consortium' and 'Partnership' are defined in GLA-OPS User Guide 7. GLOSSARY & DROPDOWN MENU OPTIONS.

You will first need to select the programme for which the consortium or partnership is being created. You can only create one consortium or partnership per programme.

Next, select if you want to create a consortium or partnership and enter a name for your consortium or partnership.

In naming your consortium or partnership, please ensure your name is unique to the organisations you will be working with, for example, please avoid using just the programme name.

If you are an Organisation Admin for more than one organisation, you will need to select the lead organisation for the consortium or partnership you are creating. If you only work for one organisation, this field will be pre-filled.

Lastly, you will need to list all the developing organisations you will be working with to deliver projects under this programme.

NOTE – a developing organisation must be registered on OPS before it can be added to your consortium or partnership. If your developing organisations are not yet registered on OPS (and therefore do not have an OPS organisation code), please follow the steps in OPS User Guide 1. REGISTER.

To add a developing organisation, you will need to input each organisation's GLA-OPS organisation code and click on:

SELECT

The organisation will then be added to your consortium or partnership.

Once you have added all your developing organisations, click on:

CREATE

Your consortium or partnership has now been created and you are ready to create projects.