



Department
for Work &
Pensions

Service admin – Add an organisation and user (1)

[Prototype](#)

Discussion guide

Participants

8 users

POST team

Health service management team

Methodology

Face to face interviews

Objectives

- To understand more about the role of a service admin
- To explore the journey for a service admin adding an organisation and user.
 - Check understanding of the dashboard
 - Explore whether the flow of the journey/screens make sense to users

Scenarios

- You've been asked to on-board Sheffield Council to the admin portal. Please can you show me how you would on-board them to the system?

All users had a basic knowledge/awareness of authenticate, however the POST team had a negative experience

“I’ve not heard much about authenticate, so I know very little.”
– U05

“No real pre-conceptions but I would judge it against features on other systems.” – U08

“Not good experience of authenticate.” – U03

“I’m aware of authenticate as a thing, but I’m not sure on the exact nature.” – U07

“Authenticate process is not currently a great experience.”

Recommendation:

Continue to inform services in detail about authenticate and what it allows. This is so that users have some awareness/understanding first.

Work towards creating a consistent way to talk about authenticate and the admin portal and what they offer.

Health users were concerned that they were not the right people to use the system for managing organisations and users, as this would not allow for segregation of duties

“User access forms [accessed by TechNow] include a users name, email, access right [that they should have] and job role [as this helps dictate permissions].” – U05

Segregation of duties

Not sure they would be allowed to use the system or perform any tasks, if they were also adding users.

“Would need information for organisations but I don’t do that job.” – U03

Recommendation:

Explore what risks are involved for a live service team to be managing organisations and users on a system that they also have access to. Find out how security feel about the level of risk and what we would do to mitigate it.

For the POST team, some users were unsure about the sign-in process as they do not currently use authenticate

DWP Authenticate

Sign in through DWP Authenticate

To use **HTDS**, you need to prove it's you signing in.

Email address

Password

Continue

Problems signing in

[I forgot my password](#)

▶ [I forgot my email address](#)

▶ [I don't have the mobile phone linked to my account](#)

GOV.UK Prototype Kit v9.3.0 Clear data

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Recommendation:
Carry out research with the POST team which starts from signing up to authenticate. This may help to better set the context for signing in.

"It's too long." – U03

Confused about what login would be and MFA screen – U01

"Is this something providers see? They get stuck." – U03

All users understood the term ‘Organisations’ and were able to explain what would be included within here. However, the POST team explained that ‘Providers’ would be better reflect the type of organisations on their service

The screenshot shows the 'DWP Authenticate' interface with a 'Sign out' link in the top right. The main content area is titled 'HTDS' and contains two columns: 'Organisations' with a count of 5 and links to 'Add an organisation' and 'View all organisations'; and 'Users' with a count of 74 and links to 'Add a user' and 'View all users'. Below these columns is a 'Clear data' button and a footer note about the 'Open Government Licence v3.0'. Three purple callout boxes provide user feedback: U04 suggests 'Providers' instead of 'Organisations'; U01 suggests 'Provider' is better than 'Organisation'; and U03 suggests 'Provider' instead of 'Organisations'. A cyan callout box provides a recommendation to explore the term 'Organisations' further.

DWP Authenticate Sign out

HTDS

Organisations	Users
5	74
Add an organisation View all organisations	Add a user View all users

Clear data

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Recommendation:
As users did understand what was meant by ‘Organisations’ it is important that we continue to explore whether this is the right term for most. If we do choose to keep the term ‘Organisations’ for all services, including PRAP this will need to be managed with the users.

“I would say this should say ‘Providers’ not ‘Organisations’.” – U04

“‘Provider’ might be better than ‘Organisation’.” – U01

“I’d put ‘Provider’ instead of ‘Organisations’.” - U03

When looking to add a new organisation, some users checked the organisation list first as they felt they'd need to check to prevent creating duplicate organisations

View Organisations
first looking for
Sheffield council –
U04

“I'd check to see if
the organisation is
already in the
system.” – U07

“I may check to see
if they're there first.”
– U06

Recommendation:

This was not a behavior we observed from all participants; therefore we need to ensure there is another way for users to identify if they are creating a duplicate organisation in the 'Add organisation' journey.

Users expected to enter additional information about an organisation such as their account number and contact information. Users felt this would make it easier for them to find the organisation and know who to contact in the future

"I'd expect to see the provider account number." - U01

"Maybe we need that shall information for an organisation." – U06

"I'd like to know more about an organisation incase I can't find out." – U06

"I'd like to see a breakdown. The office address. The region." – U07

"Mailbox for the admin, Some sort of contact details." – U08

Provider account number – some people subcontract so work across two contracts – they currently use different email details. – U04

"I'd expect it [the organisation name] to be a link... locations and maybe a contact." – U06

"You could have two organisations with similar names, the account number will help you ensure you have the right one." U04

Recommendation:

Allow users to add this information so that it is available for them. Explore whether this is information a user would know when setting up an organisation or whether it is something they want to do later.

Some users felt that organisations may need to be further split down into teams, groups or contracts as this better fits their current structures

Felt organisations might need further categorisation – U05

Explained how some organisations are also split into internal teams/groups – U06

Only 6 users per contract. It stops them from setting up loads of users.

Contracts, they have a limit of 6 people per contract.

Recommendation:

Explore whether it is the right approach to build in additional levels within an organisation, or whether there is another approach to help solve this problem

Users expected to add a staff number/ID so that they have a unique identifier for each user.

Expects to add a staff number to a new user account. – U02

“You need something unique to identify users. Staff numbers.” – U08

“[Staff number] it’s that extra layer of validation.” – U07

Name, staff number, location and office details – U07

Recommendation:

Explore whether a staff ID is the best way for a service admin to add a unique identifier for each user, if it is add this step to the set up process in the future. Continue to explore the format of staff ID’s as we on-board new services to authenticate. Continue to explore what information needs to be captured about users when adding them to authenticate.

Users expected more validation to check that they were entering the correct details, without error

“There’s no check to see if the email is right.” – U06

Add a user –
Validation is missing
e.g. enter email
twice

“There’s no verification. You could put anything in there.” - U06

“[From past experience I’d expect an] ‘Are you sure?’ step.” – U06

Expected to see some validation around the organisation name

Recommendation:

Add validation to ensure the format of information is correct and consider playing back information that has been entered to allow users an extra chance to check what they have input. To prevent fraud, explore whether an extra level of validation is needed when adding organisations.

Users wanted the list of organisations and users to be alphabetical. They also felt a sort or filter function would help them when looking for something/someone specific

DWP Authenticate			Sign out
← Back			
Users			
Add a user			
Name	Organisation	Status	
David Batty	Capita	Inactive	
Gary Speed	Capita	Inactive	
Gordon Strachan	Capita	Pending activation	
Gary McAllister	Capita	Active	
Tony Dorigo	Capita	Active	
Mel Sterland	Capita	Active	
Rod Wallace	Capita	Active	
Lee Chapman	Capita	Active	
Steve Hodge	Capita	Active	

“I’d expect them to be listed alphabetically. By users not organisations.” – U07

Organisations in alphabetical order would be better, or the ability to sort columns – U01

List in alphabetical order might be easier. – U04

“When it gets massive, you’re going to need a search option.” – U06

Recommendation:
By default, list users and organisers alphabetically to make it easier for users to identify the sequence and find what they’re looking for.

Users expected to have the ability to control what roles and responsibilities users were set. Users explained that these would be requested by the provider and would relate to the users job role

Providers may see a dropdown with their permissions to know what access they've got.

"You'd expect the role of the user to be defined by the organisation when they ask you to add a batch of users." – U05

Expected to see permissions in the user creation – U02

What does permission level mean? What's available admin or standard. U03

Needs to know what access he requires e.g. admin manager

Recommendation:

Continue to explore roles and responsibilities with the end services in order to understand the needs from a business perspective.

The Health team were unsure what 'Pending activation' meant, as they were less familiar with the Authenticate process

DWP Authenticate

Sign out

[Back](#)

Users

Add a user

Name	Organisation	Status
David Batty	Capita	Inactive
Gary Speed	Capita	Inactive
Gordon Strachan	Capita	Pending activation
Gary McAllister	Capita	Active
Tony Dorigo	Capita	Active
Mel Sterland	Capita	Active
Rod Wallace	Capita	Active
Lee Chapman	Capita	Active
Steve Hodge	Capita	Active

Understood
'Pending activation'.
- U04

"I'm assuming
'pending activation'
means somebody
else has got to do
something." – U08

"I wouldn't know
what pending
activation meant." –
U08

Recommendation:
Ensure all users are given the same
introduction into authenticate to
ensure they have they have an
understanding of the process

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Some users were unsure what was meant by ‘Suspended’. Some users felt it was if someone was on long term sick, or if they were inactive for 30 days

‘Suspend’ might not be needed.
– U01

Unsure about suspended.
Suspend means they’ve forgotten their password. -
U04

30 day = suspend
60 days = delete? – U04

Suspend? Why would I suspend someone?

Suspended is sick/marched off site. – U04

Which task would you like to perform?

- ☐ Resend invitation
- ☐ Suspend the user
- ☐ Delete the user

Continue

Recommendation:

Review the use of this status to ensure it is clear what is meant and why an account would be set to this.

Some users were unsure what the function ‘Resend invitation’ would do

Which task would you like to perform?

- ☐ Resend invitation
- ☐ Suspend the user
- ☐ Delete the user

Continue

‘Resend invitation’
this could be
reworded to help
people understand
it’s use - U02

‘Resend invitation’ –
not sure what it is.

Sometimes get
issues with re-
issuing link to sign
up – might be this?

Didn’t understand
re-sending invitation
option – U02

Recommendation:

Review the content to ensure all
these actions are explicitly clear

The most common request received by the POST team is users requesting their password to be reset.

Human error is the biggest issue for support.

“Most queries are to reset a password.” – U04

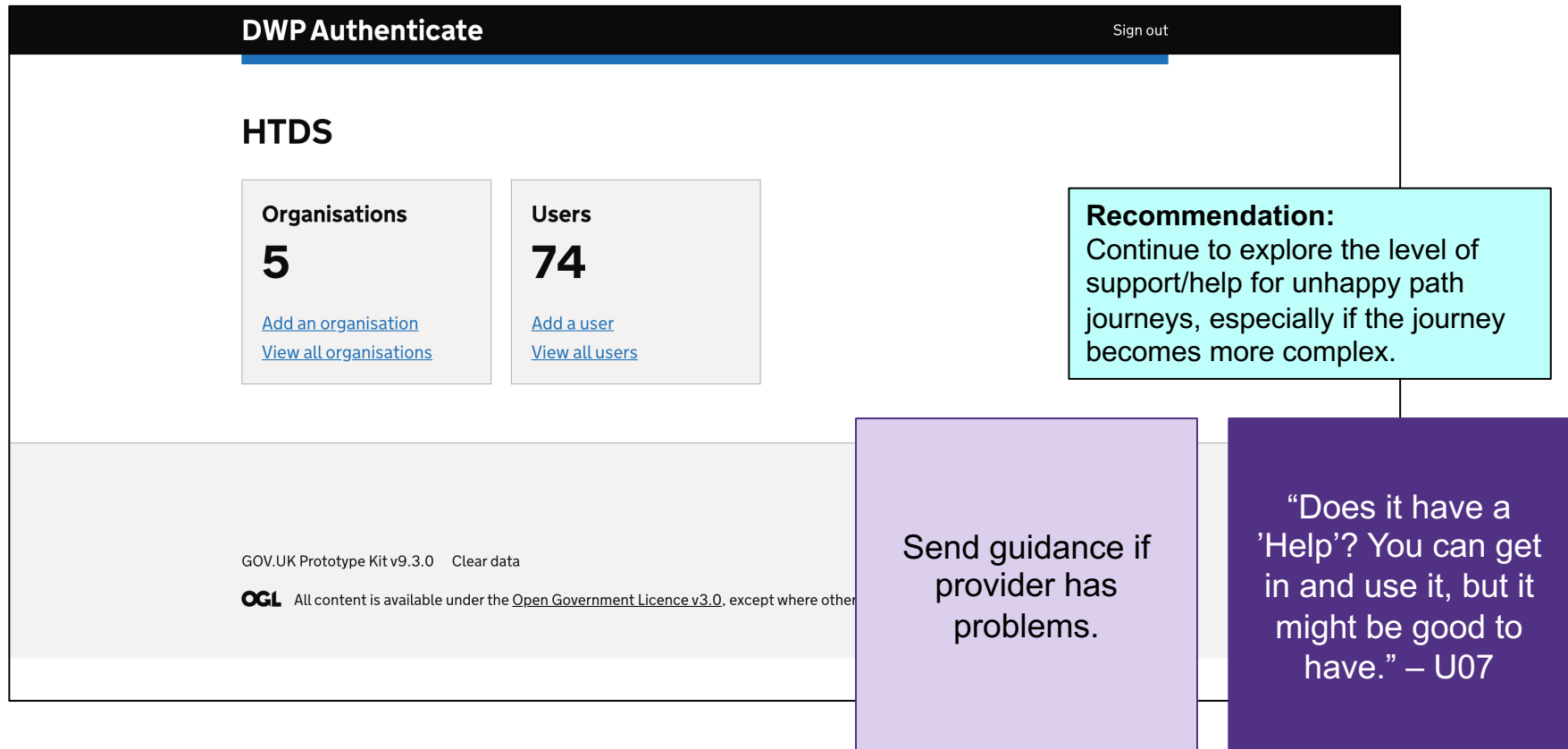
Helpdesk queries are mainly about password resets

Biggest issue is password reset because of people forgetting their information.

Recommendation:

Make sure there is a way for end users to reset their own password as we need to reduce this overhead on the POST and service management team.

Although all users were able to complete tasks without issues, some users mentioned the possible need for support



Overall, all users were able to complete the tasks of adding an organisation and user with ease. They felt the process was easy to use and straight forward

“It’s as self explanatory as you’d expect it to be.” – U06

“It’s quite self explanatory really.” – U08

“It’s self explanatory.” – U05

“Process was easy enough.”

“Very straightforward.” – U04

“Simple enough.” – U07

Recommendation:

Continue to develop the service with the simple layout and user journeys. Continue to research with users from different services to check their understanding and validate the user needs.

Key findings

- The live service teams were unsure if they were the right users for managing people on our system due to the need for segregation of duties.
- Some users did check the Organisations listed before adding an organisation, however we cannot rely on this
- Users wanted to capture additional information about an organisation and a user so they could easily identify them and contact the right person if needed.
- Users were unsure what the functions, 'Suspend' and 'Pending activation' would do or when they would be used