



# NCIS QUICK GUIDE

## Setting up Users on NCIS Training and NCIS Production

## 1. Background

This guide is intended for the NCIS Local Administrators to explain the requirements for accessing NCIS and the operational flow for user set up. This guide also includes step by step instructions on setting up user accounts within NCIS.

There are two environments that hospital users may need access to:

- Training – used for practicing and training. Does not have live interfaces to PAS and the Lab.
- Production –the live environment with real patient data and live interfaces.

## 2. Requirements for accessing NCIS Training and Chart

NCIS is accessed via the Citrix Storefront. The requirements for accessing training and production are different.

Where possible, it is recommended that access to the training application is set up with the user's local domain account so that the production and training applications are accessed using different accounts. Note – local domains are no longer available to use with NCIS in Voluntary Hospitals and are currently being phased out Nationally.

To access NCIS Training with a local domain account, a user must have:

1. Assignment to Active Directory Group(s) for access to NCIS Training Icon(s)
2. A user account in NCIS Chart and NCIS Med in the training environment

To access NCIS Production a user must have:

1. A HealthIrl Domain Account
2. Assignment to Active Directory Group(s) for access to NCIS Production Icon(s)
3. An user account in NCIS Chart and NCIS Med in the production environment

### **What is Citrix StoreFront?**

Citrix Storefront is the HSE's portal for securely accessing applications such as NCIS.

### **What is a local domain account?**

A domain user is one whose username and password are stored on a domain controller rather than the computer the user is logging into. Hospital staff are given local domain accounts so that they can log into any computer in the hospital using their username and password for their local domain.

### **What is a HealthIrl Domain Account?**

Nationally all local domain accounts are being migrated to HealthIrl. If your hospital has not migrated to HealthIrl prior to your NCIS Go Live, then HealthIrl accounts will need to be requested for your users to access production.

### **What are Active Directory (AD) Groups?**

In the NCIS Project, Active Directory Groups are used to collect user domain accounts into manageable units. The AD Groups used by NCIS determine which Icons are available to users in Citrix Storefront.

### What are the NCIS Icons?

When a user logs into Citrix, they will see the NCIS Chart icon which will open NCIS.Chart. Users can also be given a “direct access” icon for NCIS Med. This means they will be able to click on the direct access NCIS Med button and be taken directly to the NCIS Med application without needing to log into NCIS Chart first.

### What are user accounts in NCIS Chart and NCIS Med?

A user needs an account in both Chart and Med so that they can be assigned the appropriate permissions and hospital in each module.

## 3. Logging Into Citrix Storefront

Citrix Storefront should be accessed using explorer web browser at the following address:

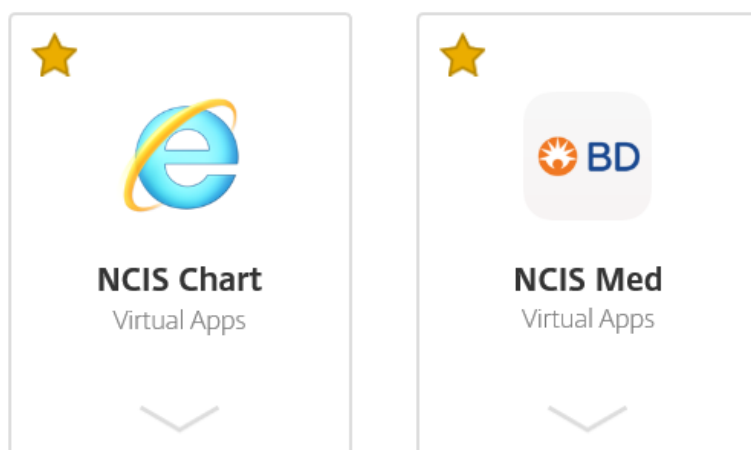
<https://storefront.healthirl.net>

- To access the Production environment the user should use their **HealthIrl domain** username and password.
- Training is access either using the users **local domain** or **HealthIrl domain** username and password

## 4. Active Directory (AD) Groups for access to NCIS Icons

When a user logs in Citrix Storefront they will be able to see the icon for NCIS.Chart. Clicking on this icon will allow them to log into NCIS.Chart and also transition to NCIS.Med.

Users may also be able to see the direct access icon for NCIS.Med in Production only. This will allow staff to log directly into NCIS.Med without needing to log into NCIS.Chart first.



To access the NCIS Icons the user needs to be added to the appropriate AD Group . Table 1 describes the NCIS environments, icons and associated AD Group Name.

*Table 1. AD Group names*

Environment	Domain account	Icon	AD Group Name
Training	Local or HealthIrl	NCIS.Chart	CTX-MOCIS-Users-Train
Production	HealthIrl	NCIS.Chart	CTX-MOCIS-Users
Production	HealthIrl	NCIS.Med (Direct access)	e.g. CTX-MOCIS-Users-Pharm-GUH CTX-MOCIS-Users-Pharm-SLH

## 5. Permissions and Active Directory Groups for Role Assignment

Permissions need to be assigned in both NCIS.Med and NCIS.Chart. This determines what functionality a user has access to in NCIS e.g. only pharmacists can pharmacy verify in NCIS.Med. Please see below for the explanation of permissions in NCIS.Med and NCIS.Chart.

### 5.1 Permissions in NCIS.Med

NCIS Med has several user groups with associated permissions, which are assigned during user setup. The table below gives a high-level understanding of the main permissions associated with each user group.

NCIS.Med User Group	Permissions
NCIS_Physician	Permission to physician verify (prescribe).
NCIS_Nurse_Level_I	Permission to manage the bed manager and administration of medications.
NCIS_Nurse_Level_II	Permission to manage the bed manager and administration of medications with additional prescribing permissions.
NCIS_Pharmacist	Permission to pharmacist verify, prepare/dispense medications, lot management, and certain reports.
NCIS_Pharmacy_Technician	Permissions to prepare/dispense medications, lot management, and certain reports.
NCIS_Transcription_Pharmacist	Permission to physician verify and pharmacy verify SACT medications for non-cancer patients
NCIS_Clinic_Ward_Clerk	Permission to manage the bed manager, view patients and therapy plans.
NCIS_Local_Administrator	Permission to create users, manage local units and cost centres, delete certain items, and access to reports.
NCIS_Read_Only_Access	Read only access to patients and therapy plans

## 5.2 Permissions in NCIS Chart

Most users will have the permission level of “doctor/documentary” in Chart. “Case manager” and “Administrator” have additional permissions and will be required for certain users e.g. MDM Coordinator and Local Administrator.

Access	Permissions
Doctor/documentary	Permission to view and amend patient cases, participate in MDM.
Case manager	Permission to view and amend patient cases, participate in MDM. Permission to create conferences, record conference outcomes and lock conferences. Also has permission to transfer patient cases to the hospital that they have access to.
Administrator	Permission to view and amend patient cases, participate in MDM. Permission to create conferences, record conference outcomes, lock conferences. Also has permission to transfer patient cases to the hospital that they have access to. Permission to create users and manage user accounts, delete certain items.

*Table 2. Requirements for training v's production*

Request:	Domain Account type	AD Group name for NCIS.Chart Icon	AD Group name for NCIS.Med Direct Access Icon	NCIS.Chart account	NCIS.Med account
Training:	Local Domain or HealthIrl Account	CTX-MOCIS-Users-Train	Not applicable	Username can be locally defined but must match NCIS.Med username	Username can be locally defined but must match NCIS.Chart username
Production:	HealthIrl Domain Account	CTX-MOCIS-Users	A hospital specific AD Group name will be made for direct access e.g. CTX-MOCIS-Users-Pharm-GUH	Username can be locally defined but must match NCIS.Med username	Username can be locally defined but must match NCIS.Chart username

Three forms are required to set up a user:

- Domain/Email Application ID form available at: [http://hse.net.hse.ie/OoCIO/Service\\_Management/ICT\\_National\\_Forms/](http://hse.net.hse.ie/OoCIO/Service_Management/ICT_National_Forms/)
- Add user to a group form: Will be provided to the Local Administrator at the start of the NCIS Project
- Production System Access Form: Will be provided to the Local Administrator at the start of the NCIS Project

Table 3. Description of request, associated form and where to send forms for user access to NCIS.

Request	Form Name	Who completes the form?	Who sends the form?	Send to
HealthIrl Domain Account	Domain/Email Application ID form	User completes form, line manager signs.	Line manager	Local ICT where applicable, otherwise HSE Service Desk ( <a href="mailto:service.desk@hse.ie">service.desk@hse.ie</a> )
Addition to an AD Group for access to NCIS icons	Add user to a group form	Line manager	NCIS Local Administrator	Local ICT where applicable, otherwise HSE Service Desk ( <a href="mailto:service.desk@hse.ie">service.desk@hse.ie</a> )
NCIS application user account	Production System Access Form	Line Manager	Line manager	NCIS Local Administrator

Depending on local arrangements, some local hospital ICT departments will be able to set up HealthIrl domain accounts and add users to AD Groups. Prior to Go Live the NCIS Local Administrator or designee should clarify the local process with their ICT Department.

If your local hospital ICT cannot set up HealthIrl Accounts or add users to AD Groups then these requests must go through the HSE Service Desk ([service.desk@hse.ie](mailto:service.desk@hse.ie)). **Please allow approx. 6 weeks for this to be completed.**

## 6. How to set up a user account in NCIS.Chart

While not necessary for functionality, it is recommended that the username used in NCIS.Chart matches that used for the domain login.

It is a requirement for transitioning from NCIS.Med to NCIS.Chart that the usernames between the two applications are equivalent.

The following steps explain user set up in Chart:

1. Log into NCIS.Chart with NCIS Local Administrator account.
2. Go to Settings from the Menu at the right side of the screen



3. Select the "User" tab:

c37.CancerCenter  
**TEST Hospital**

Online: administrator  
A. Administrator

Personnel **User** Change password Default entries Study management Exports Imports

**User** [Help]

User > User (Found: 72) New user

Filter options

User/personnel  Client Show all  automatically generated user  
User identification  Facility Show all  search duplicate entries  
Alternative HIS ID  User group Show all

Search  
Reset filter

Results per page 10

User Identifier Personnel Access rights Facility Language Last login Action

4. Search for the user to ensure that a duplicate has not been created.

Personnel **User** Change password Default entries Study management Exports Imports

**User** User groups Emergency access [Help]

User > User (Found: 0) New user

Filter options

User/personnel  Client Show all  automatically generated user  
User identification  Healthlrl username Facility Show all  search duplicate entries  
Alternative HIS ID  User group Show all

Search  
Reset filter

No entry found!

User Identifier Personnel Access rights Facility Language Last login Action

5. If no entry is found for that user then select the new user button:

Personnel **User** Change password Default entries Study management Exports Imports

**User** User groups Emergency access [Help]

User > User (Found: 0) New user

Filter options

User/personnel  Client Show all  automatically generated user  
User identification  Healthlrl username Facility Show all  search duplicate entries  
Alternative HIS ID  User group Show all

Search  
Reset filter

User Identifier Personnel Access rights Facility Language Last login Action

6. In the "user" section enter:

- i. Title (if appropriate)
- ii. Surname
- iii. First name
- iv. Facility
- v. Language –English (very important –this determines what language the application will be in for the user)
- vi. Ensure active is ticked

The other fields are not required.

7. If the user will complete patient assessment forms or are involved in MDM, then they should have their personnel record linked to their user account. This ensures that their name will auto-populate in patient assessment forms where the user who performs the action needs to be documented e.g. height and weight.

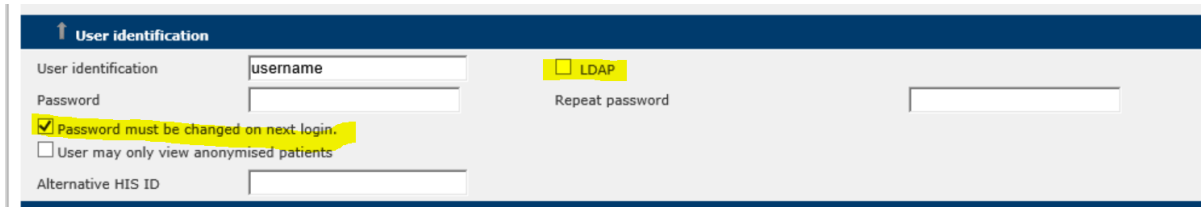
To link the personnel file to the user account, click the star beside the “corresponding med. Personnel” field. Search and select the correct Personnel Record to link it to the user profile.

If there is no personnel file for the user and one is required, it will be necessary to add a new entry to the personnel file (Please see separate guide).

8. Under the User Identification section, Ensure that the LDAP button is **NOT** checked. The “user identification” is the username that the user will log into NCIS with. **This must be exactly the same as the NCIS.Med username.**



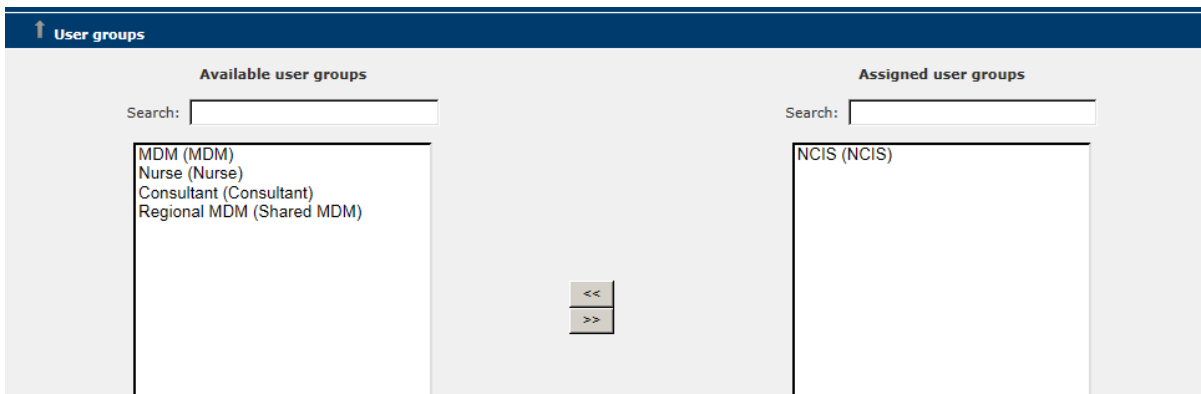
Tick the check box “Password must be changed on next login” and complete a temporary password in the “Password” and “Repeat Password” boxes. The user will enter their temporary password on first login and are then required to change it.



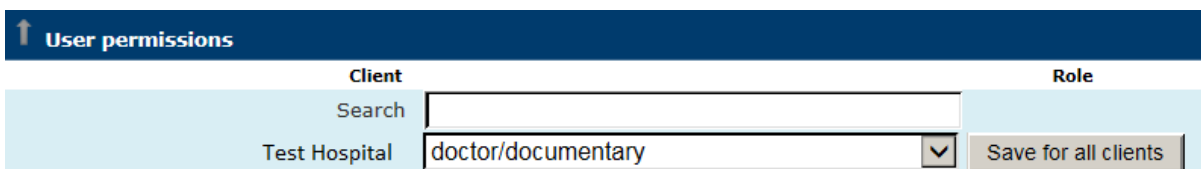
9. Under the User Group section, all users should be assigned either:
- a. the NCIS User group.
  - b. NCIS\_physician
  - c. NCIS\_pharmacst
  - d. NCIS-Nurse

This ensures that the NCIS View is assigned to the User at log in. The NCIS\_physician, NCIS\_pharmacist and NCIS\_nurse user groups have the additional functionality of allowing the patients case notes to be filtered by user group (see the NCIS Quick Guide on Case Notes for a full description)

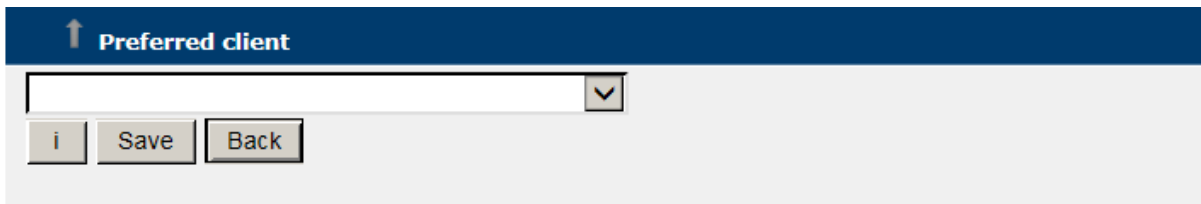
The other user groups are not currently relevant; do not assign these to any users.



10. Under “user permissions”, select the appropriate permission level for the user.



11. Leave the preferred client blank and click save



The user account in NCIS Chart has now been created

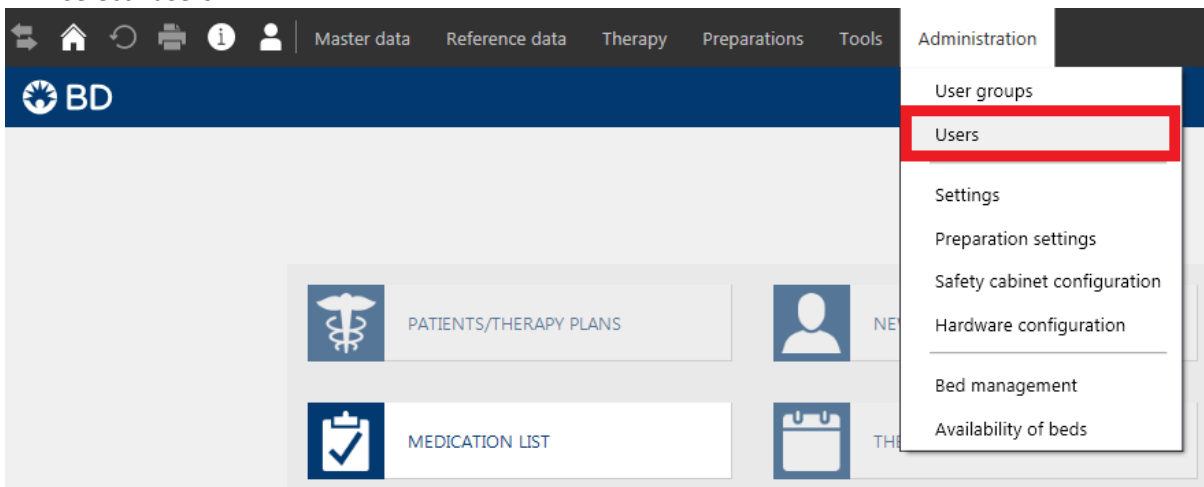
## 7. How to set up a user account in NCIS.Med

While not necessary for functionality, it is recommended that the username used in NCIS.Med matches that used for the domain login.

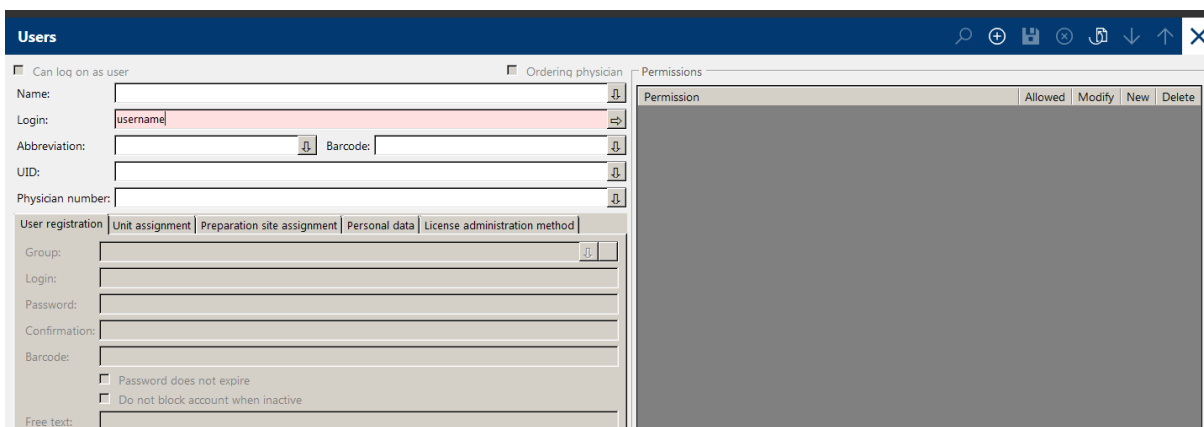
It is a requirement for transitioning from NCIS.Med to NCIS.Chart that the usernames between the two applications are equivalent.

The following steps explain user set up in NCIS Med:

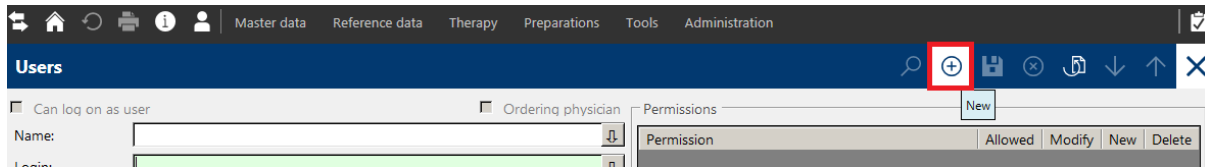
1. Log into NCIS Med with an NCIS Local Administrator account. Select the administration tab and select "users":



2. Perform a search to ensure that the user does not have an existing account.



3. Select the “new” button to create a new user:



4. The “can log on as user” button must be ticked. Also the following registration details should be entered:

- Last name
- First name
- Abbreviation –Recommend that the first letter of the first name and the surname be used as the abbreviation so that it is obvious to identify the user. The system will only allow unique abbreviations in the system. If another user has the same abbreviation then add a number to the end.
- Physician number: Any professional registration number can be entered here.
- Group: Select the appropriate user group from the list.
- Login: The “login” is the username that the user will log into NCIS with. **This must be exactly the same as the NCIS.Chart username.**
- Enter a temporary password in the “Password” and “Confirmation” boxes. The user will enter their temporary password on first login and are then required to change it.

**Users**

Can log on as user  Ordering physician

Last name: Last name

First name: First name

Abbreviation: FName Title:

UID:

Physician number: MCN111111

User registration | Unit assignment | Preparation site assignment | Personal data | License adm

Group: NCIS\_Physician

Login: username

Password:

Confirmation:

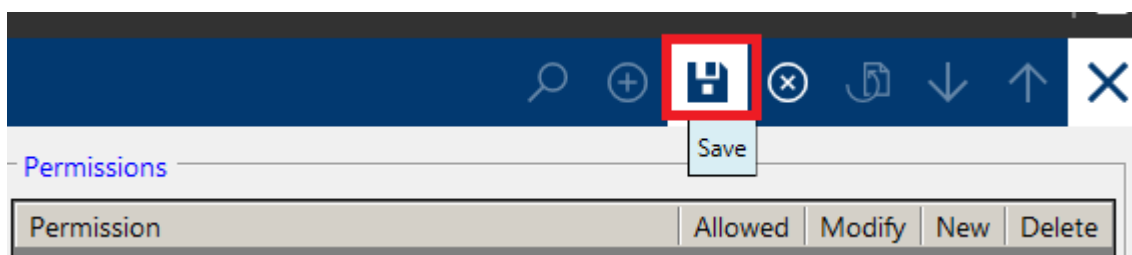
Barcode:

Password does not expire

Do not block account when inactive

Free text:

5. These details must be saved before proceeding with the next steps. Select save on the top right.



6. Next, select the “unit assignment” tab. Select the drop down list for “Centre/unit”. Select the appropriate units for the user.

User registration | **Unit assignment** | Preparation site assignment | Personal data | License administration method

Cost center: [ ]

**Center / unit:** [ ]

Designation

- TEST [All Units]
- SPEC [All Units]
- TEST - Haematology Oncology Day Ward
- TEST - TEST Ward
- TEST - Dr. Test Doctor
- SPEC - Haematology Adult
- SPEC - Haematology Paediatric
- SPEC - Medical Oncology Adult
- SPEC - Oncology Paediatric
- SPEC - Transcription Only

Assigning all of the units of your hospital to the user means that they will be able to see all patients assigned to your hospital. Assigning “SPEC [All units]” means that the user will be able to see regimens from all the specialties i.e. oncology/haematology etc.

User registration | Unit assignment | Preparation site assignment | Personal data | License administration method

Cost center: [ ]

Center / unit: [ ]

Add Delete

Designation

- TEST [All units]
- SPEC [All units]

- Next, select the “preparation site assignment” tab. Un-tick “access to all preparation sites” and select the preparation site of your hospital from the drop down list.

User registration | Unit assignment | **Preparation site assignment** | Personal data | License administration method

Access to all preparation sites

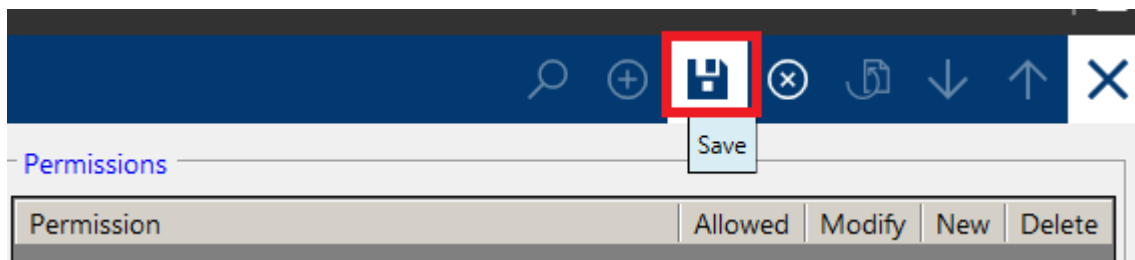
Preparation site: [ ]

Add Delete

Designation

- TEST

- To complete the account set-up in NCIS Med, click the “save” icon.



The user account has now been created.

## 8. How to deactivate a user in NCIS

User accounts in NCIS cannot be deleted. They can only be deactivated. When a user finishes employment in a hospital, the NCIS Local Administrator can deactivate the user in NCIS. Managing leavers will be performed as per local hospital policy. The steps to deactivate a user in NCIS are outlined below:

1. Log into NCIS.Chart and un-tick “active”. Remove the hospital from “facility”

A screenshot of the NCIS 'User 10 Doctor' form. The form is divided into two columns. The left column contains fields for: NCIS ID (381), Salutation (dropdown), Title, Surname (10), First name (Doctor), E-Mail address, Phone number (E.164 recommendation), Facility (TEST Hospital, highlighted with a red box), Language (English, dropdown), and Acronym. The right column contains: Corresponding med. personnel (Keine, dropdown with asterisk), Limit access to the following user's patients (Keine, dropdown with asterisk), Consultation group, Scheduled access control (from and to date pickers), and a checkbox for 'active' which is checked (highlighted with a red box). The top navigation bar includes 'Personnel', 'User' (selected), 'Change password', 'Default entries', 'Study management', 'Exports', and 'Imports'.

2. Under user permissions, set the permission level to blank and remember to click save.

3. Transition to NCISMed and look up the user. Un-tick the box, “can log on as user”.

### 9. How to set up a user in Production who previously had an NCIS account

If a user had an NCIS account at another hospital, they will need to be re-assigned in the application to their new hospital. At this time it is not possible for the NCIS Local Administrator to do this directly in the application. The following process should be followed by the NCIS Local Administrator:

- Send the “Production system access” form to the NCIS Office. The NCIS Office will be able to switch the user to the new hospital and will inform the NCIS Local Administrator.

Table 3. Description of request, associated form and where to send forms for users who previously had access to NCIS.

Request	Form Name	Who completes the form?	Who sends the form?	Send to
NCIS application user account	Production System Access Form	Line Manager	NCIS Local Administrator	NCIS Office <a href="mailto:NCIS@cancercontrol.ie">NCIS@cancercontrol.ie</a>