DEOCS Portal: User Management Capabilities

August 2023

The *Defense Organizational Climate Survey* (*DEOCS*) is a tool that provides commanders and other Department of Defense (DoD) leaders with important feedback about the current climate within their unit or organization. The User Management page in the DEOCS Portal allows users to make updates to user accounts to reflect changing organizations and roles. This includes the creation of new users and editing of existing users, updating permissions for the accounts, and designating new user roles. This document provides an overview of the User Management page and outlines the user management capabilities available to users.

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About User Management

This section provides an overview of the User Management page and some of its more common uses. The *DEOCS* Portal User Management page allows users to make updates to user accounts and also allows for activation and inactivation of users.

Note: Not all *DEOCS* Portal users will have access to the User Management page. This function is typically reserved for users acting as Service users or Service administrators. If you do not have access to the User Management page and want to find out more, contact your Service's Military Equal Opportunity (MEO) representative.

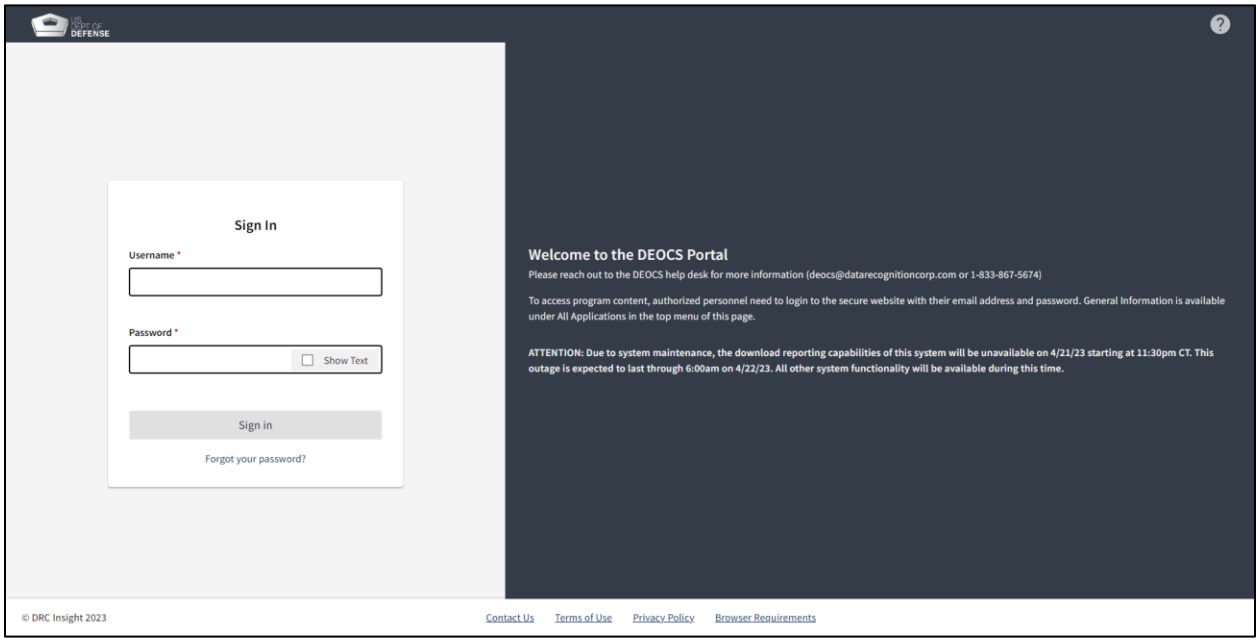
There are many reasons why the User Management function is important, but here are some of the more common uses of the functionality:

- **A new member of a unit or organization needs a *DEOCS* Portal account.** A user account can be set up for this member to streamline access.
- **A user no longer has access to the e-mail associated with the *DEOCS* Portal.** The user's account can be edited, and a new e-mail address can be assigned to the account.
- **A user is overseeing many different *DEOCS* administrations within their organization.** This user can be assigned access to view multiple administrations with a new access group (i.e., Service administrator or Service member).
- **A user has moved from one organization to another.** This user can be removed from their old organization and added to the new organization.
- **A user is no longer a member of the unit or organization.** This user's account can be inactivated.

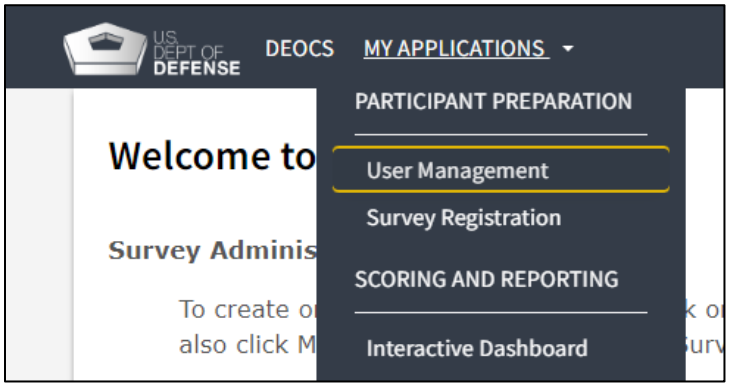
Accessing User Management

This section provides users with step-by-step instructions for accessing the User Management page within the *DEOCS* Portal.

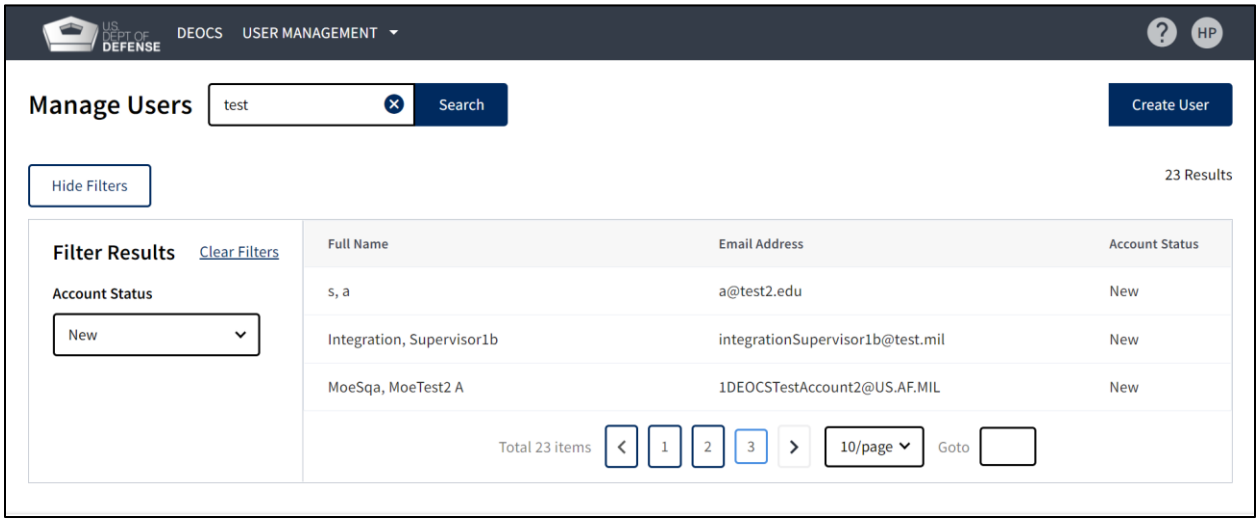
- **Step 1 – Log in to the *DEOCS* Portal (www.drcedirect.com/all/eca-portal-v2-ui/#/login/deocs).**
    - For best results, use Google Chrome, Mozilla Firefox, Microsoft Edge, or Apple Safari. Internet Explorer is not a supported browser at this time.



- **Step 2 – Navigate to the "My Applications" menu at the top of the page and then select "User Management."**



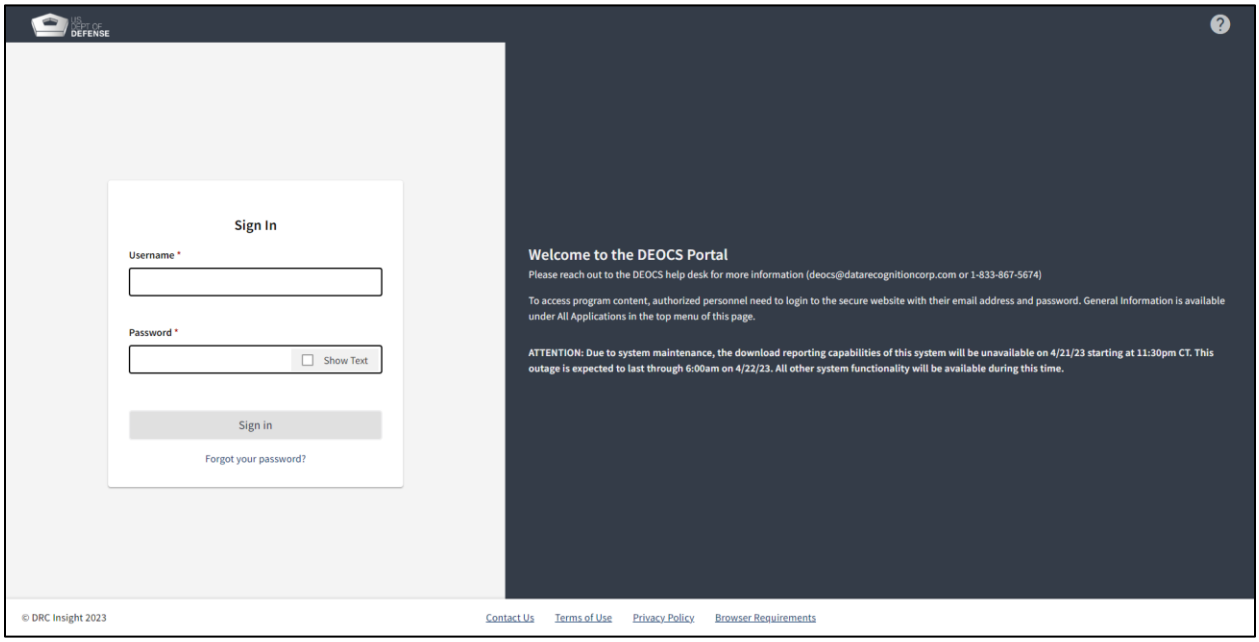
- **Step 3 – Search for users by name or e-mail in the search bar in the upper left corner of the screen.**
  - Search results will be displayed in the center of the screen.
  - Results can be filtered by account status by using the filters at left.
  - New users can be created by using the “Create User” button in the upper right corner of the screen.



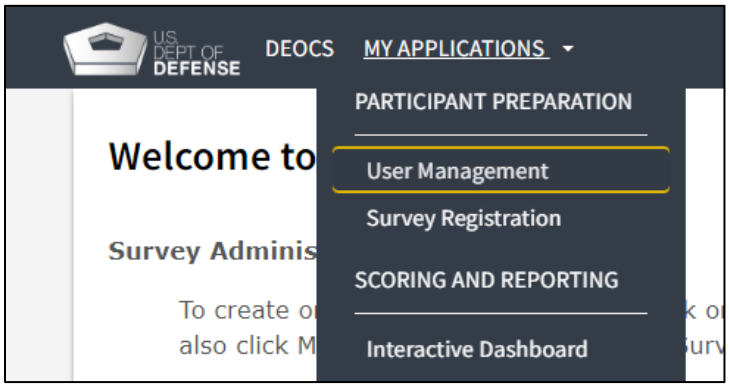
Creating New Users

This section provides step-by-step instructions to create new users within the User Management page.

- **Step 1 – Log in to the *DEOCS* Portal (www.drcedirect.com/all/eca-portal-v2-ui/#/login/deocs).**
    - Please use Google Chrome, Mozilla Firefox, Microsoft Edge, or Apple Safari. Internet Explorer is not a supported browser at this time.

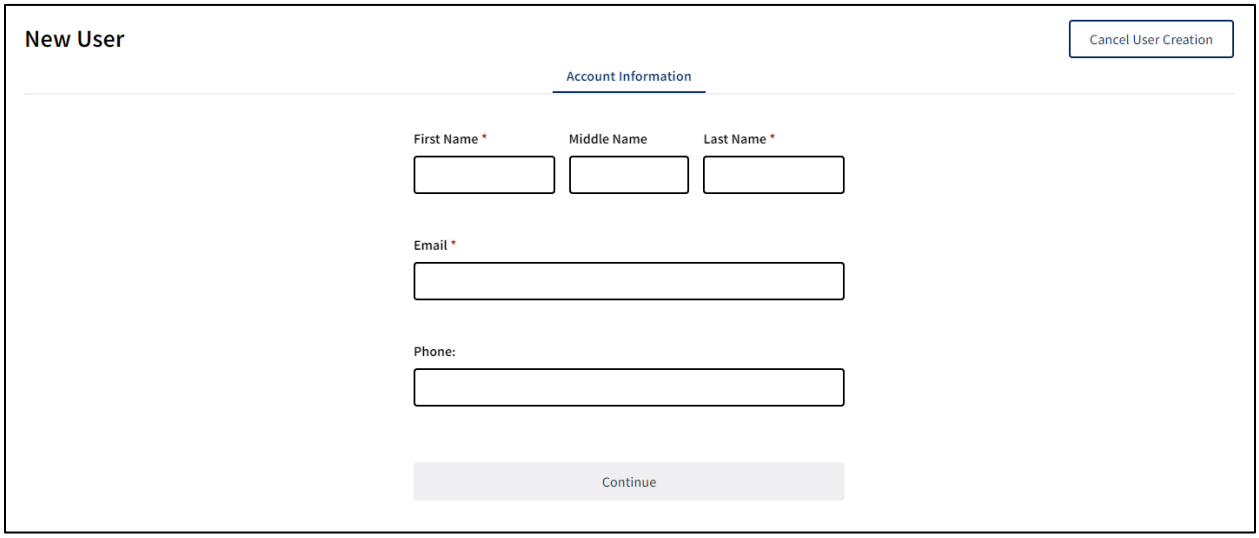


- **Step 2 – Navigate to the "My Applications" menu at the top of the page and then select "User Management."**

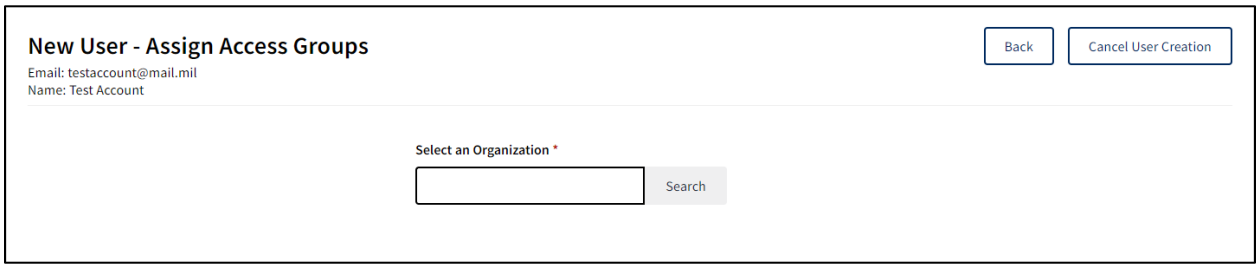


- **Step 3 – Click the "Create User" button at the top right of the screen.**

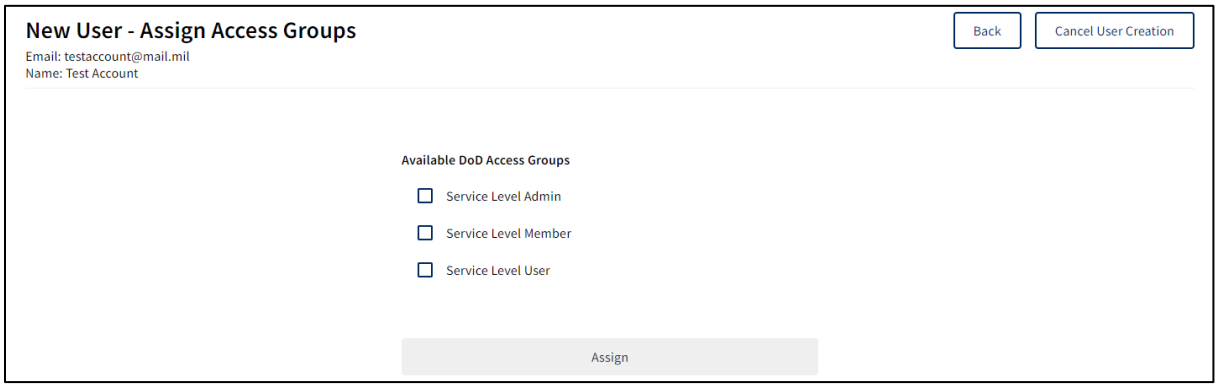
- **Step 4 – Enter the new user's account information.** The "New User" page will ask for the following information:
  - **First Name.** This field is required.
  - **Middle Name.**
  - **Last Name.** This field is required.
  - **E-mail.** This field is required. A .mil e-mail address must be used.
  - **Phone.**



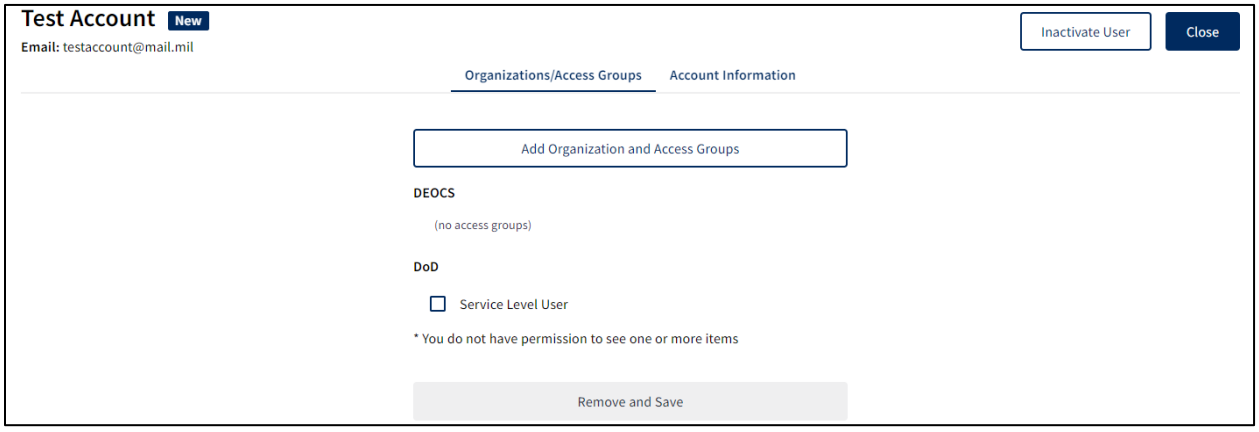
- **Step 5 – Click "Continue"**
- **Step 6 – Select an organization.**
  - Use the search bar to locate and select the appropriate organization.
  - Organizations include DoD, Joint Service, National Guard, active duty and Reserve options for all Services, and the Military Service Academies (MSA) and MSA Preparatory Schools.



- **Step 7 – Assign access groups.**
  - Select the appropriate access group(s) and click "Assign." This selection will assign the new user with a level of access to the *DEOCS* Portal.
  - The access groups available for assignment in this step are dependent upon the user that is creating the new account. Users may not assign a higher access group than they possess.
  - Available user access groups include Service Level Administrator, Service Level Member, and Service Level User.[1]



- **Step 8 – Confirm that the information entered is accurate.**
  - The new user's account will be displayed. The "Organizations/Access Groups" tab displays the organizations and access groups assigned to the user, while the "Account Information" tab displays their name, e-mail, and phone number.
  - If the information displayed is accurate, no further action is needed. The new user will receive an e-mail notification to create their password and activate their account.
  - If the information displayed is not accurate, navigate to the appropriate tab and make necessary changes using the instructions outlined in Steps 4–7.

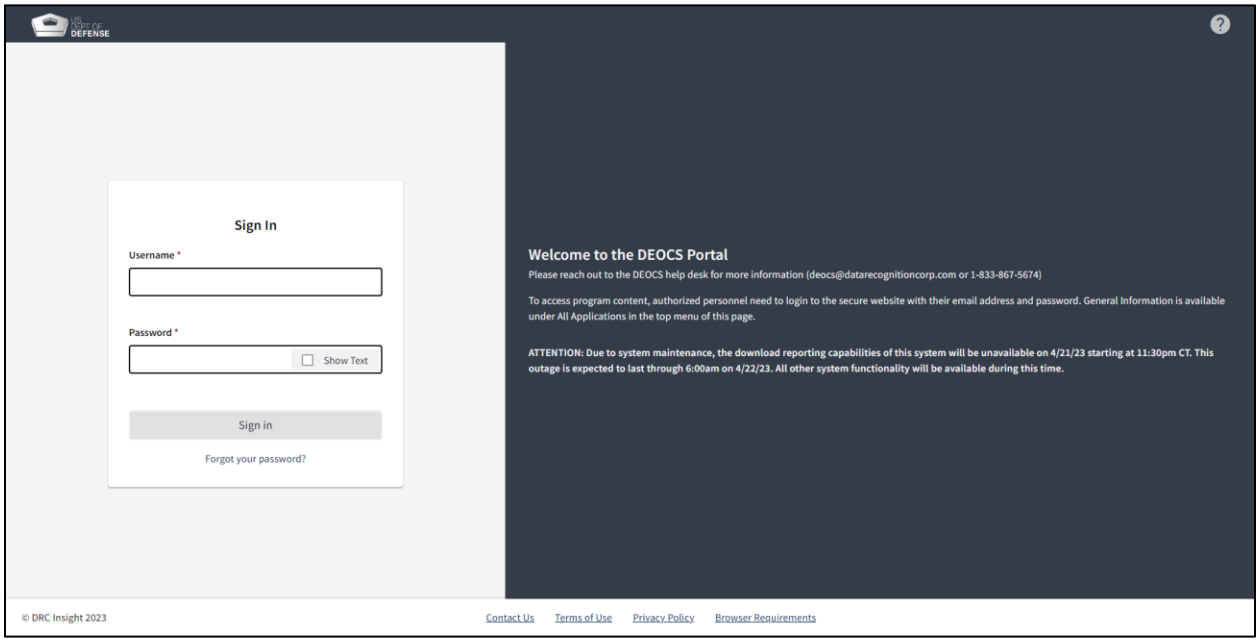


[1] For a description of *DEOCS* user roles, click here, and under step 1, "Prepare," select the document titled "User Roles and the DEOCS Process."

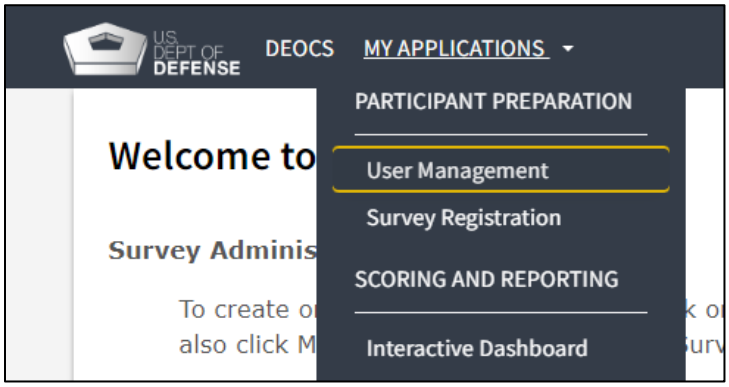
Editing Existing Users

This section provides step-by-step instructions to make edits to existing user accounts within the User Management page.

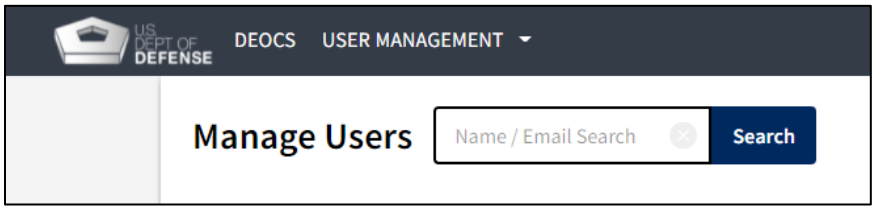
- **Step 1 – Log in to the *DEOCS* Portal (www.drcedirect.com/all/eca-portal-v2-ui/#/login/deocs).**
    - Please use Google Chrome, Mozilla Firefox, Microsoft Edge, or Apple Safari. Internet Explorer is not a supported browser at this time.



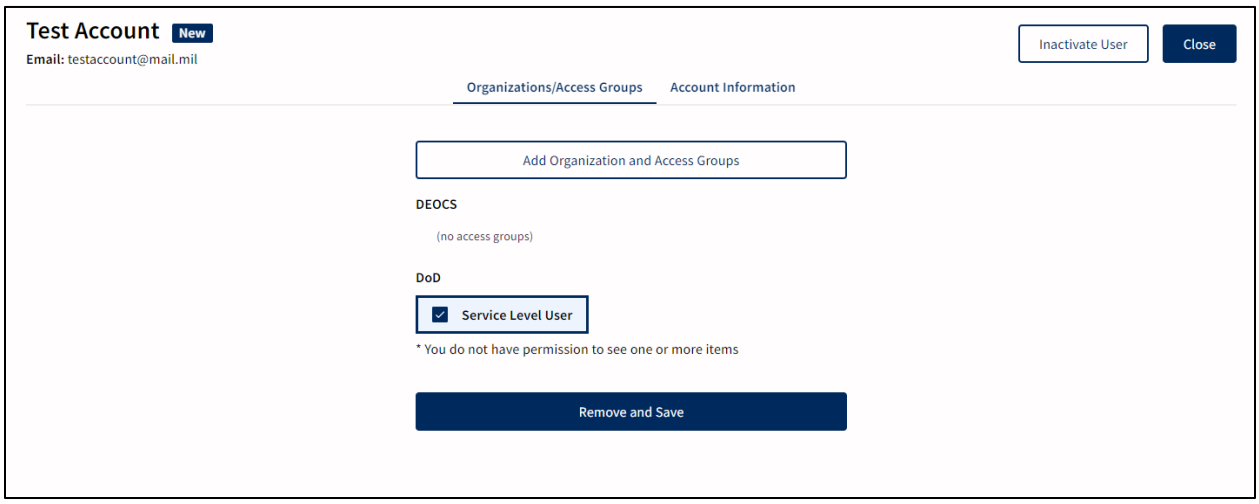
- **Step 2 – Navigate to the "My Applications" menu at the top of the page and then select "User Management."**



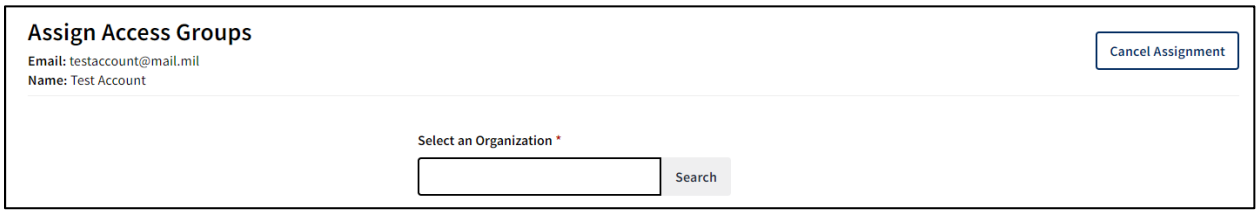
- **Step 3 – Using the search bar in the upper left corner of the screen, locate the appropriate user to edit.**
  - Click anywhere on the user's information to be taken to the user's account.
  - To make edits to the user's organization or access groups, continue to Step 4.
  - To make edits to the user's account information, skip to Step 9.
  - To inactivate the user's account, skip to Step 11.



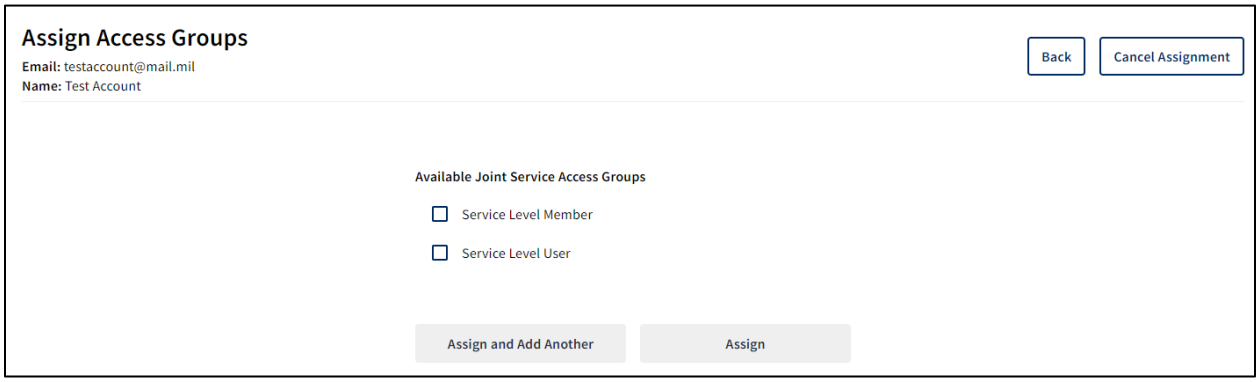
- **Step 4 – Remove access groups**. Click the check box next to the access group to be removed and then click "Remove and Save." This will revoke the user's membership to the specified access group.



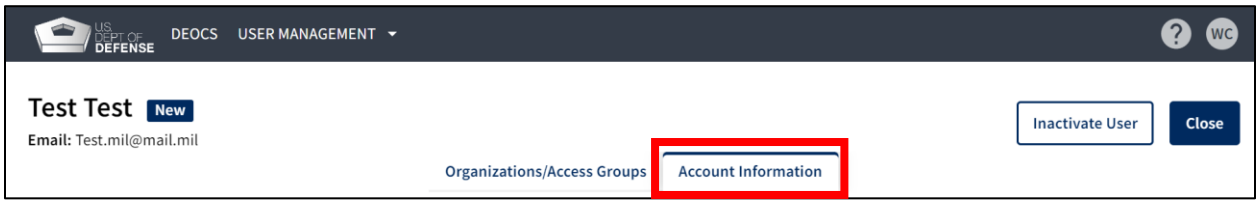
- **Step 5 – Click the "Add Organizations and Access Groups" button.**
- **Step 6 – Select an organization.**
  - Use the search bar to locate and select the appropriate organization.
  - Organizations include DoD, Joint Service, National Guard, active duty and Reserve options for all Services, and the Military Service Academies (MSA) and MSA Preparatory Schools.



- **Step 7 – Assign access groups.**
  - Select the appropriate access group(s) and click "Assign." This selection will decide the level of access to the *DEOCS* Portal that the new user will have.
  - The access groups available for assignment in this step are dependent upon the user that is creating the new account. Users may not assign a higher access group than they possess.
  - Available user access groups include Service Level Administrator, Service Level Member, and Service Level User.[2]

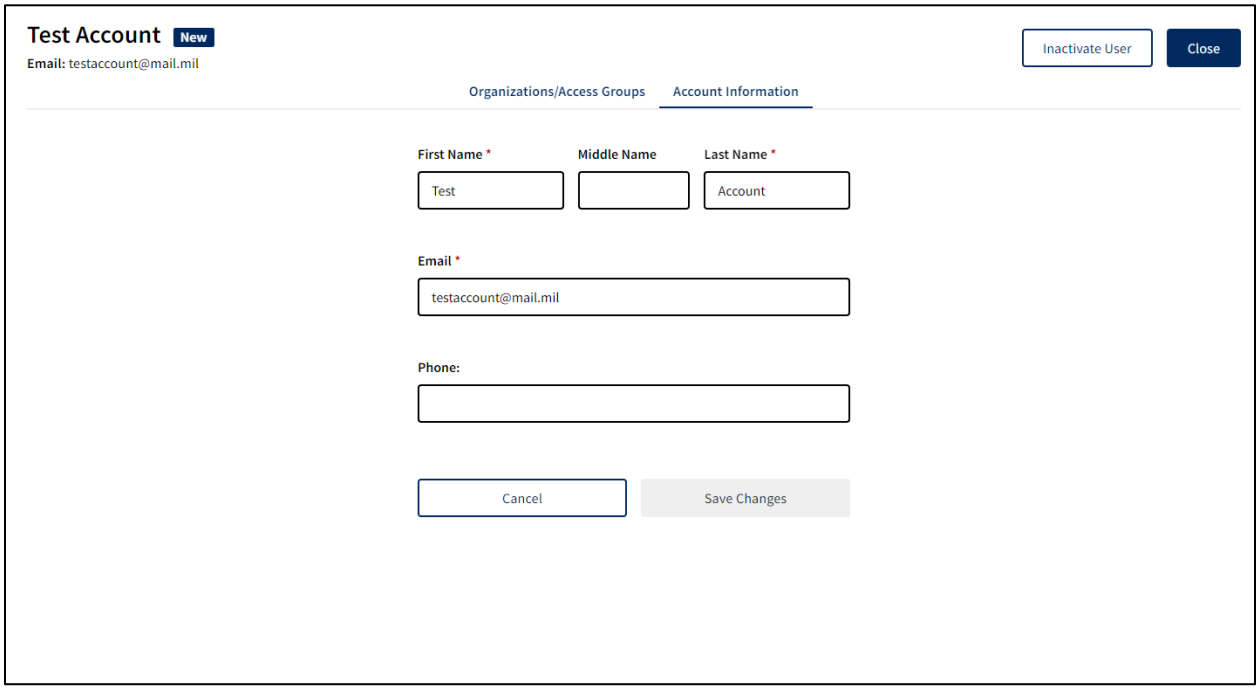


- **Step 8 – Confirm that the information entered is accurate.**
  - The new user's account will be displayed. The "Organizations/Access Groups" tab displays the organizations and access groups assigned to the user, while the Account Information tab displays their name, e-mail, and phone number.
  - If the information displayed is accurate, no further action is needed. The new user will receive an e-mail notification to create their password and activate their account.
  - If the information displayed is not accurate, navigate to the appropriate tab and make necessary changes using the instructions outlined in steps 4–7.
- **Step 9 – Navigate to the "Account Information" tab.** Click the "Account Information" tab to view the user's account information.

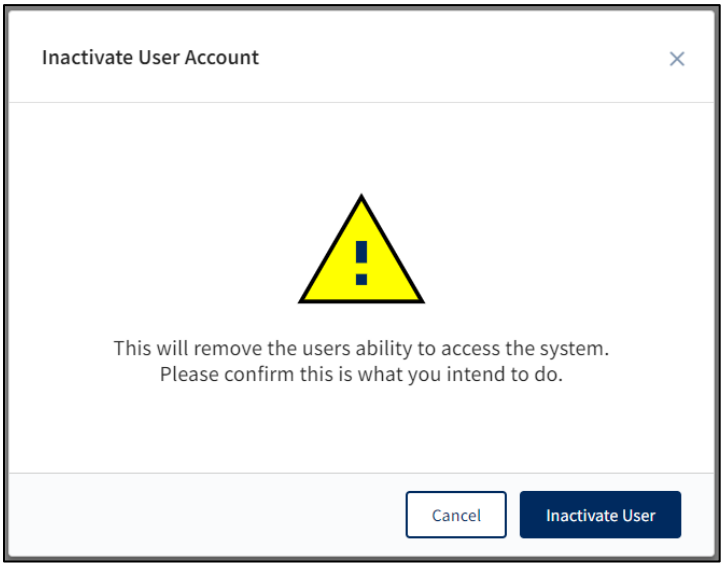


[2] For a description of *DEOCS* user roles, click here, and under step 1, "Prepare," select the document titled "User Roles and the DEOCS Process."

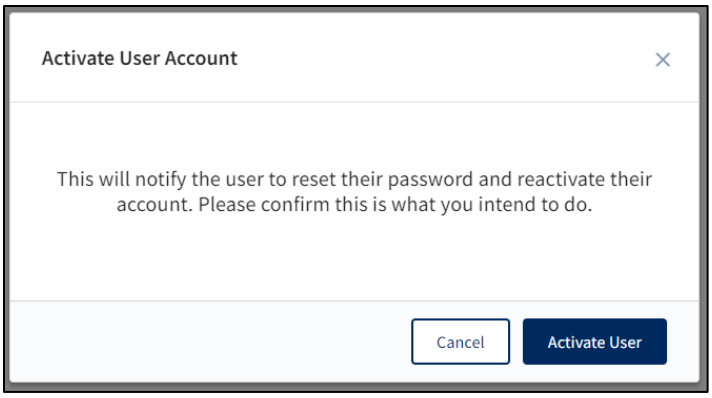
- **Step 10 – Edit the user's account information.** Edits can be made to the user's name, e-mail address, and phone number. Once finished, click "Save Changes." The user's account information is now updated.



- **Step 11 – Inactivate a user.** Click the "Inactivate User" button at the top right of the user's account. When prompted by a pop-up window, select "Inactivate User." Note that a user cannot interact with the *DEOCS* once their account is inactivated.



- **Step 12 – Activate a user.** Click the "Activate User" button at the top right of an inactive user's account. When prompted by a pop-up window, select "Activate User." The user will receive an e-mail notification to reset their password and activate their account.



Contacting the *DEOCS* Help Desk

If you have questions or have any problems with User Management, please contact our help desk at:

- deocs@datarecognitioncorp.com
- 1-833-867-5674