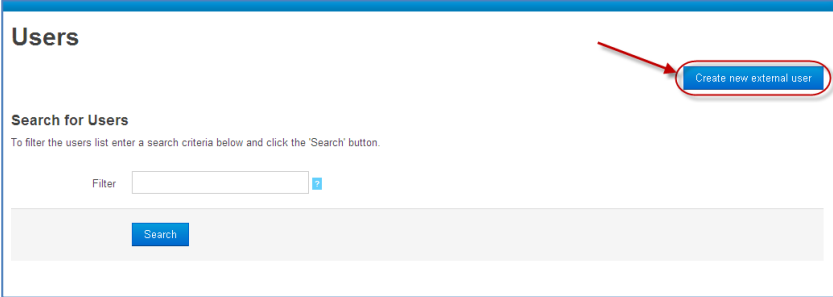
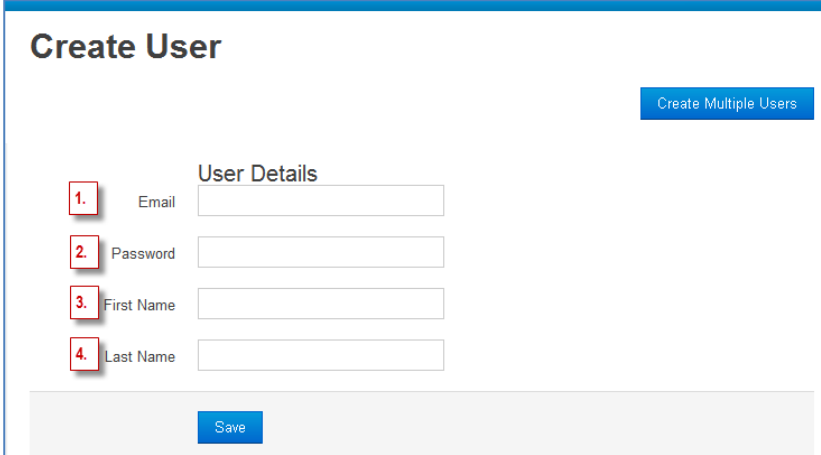
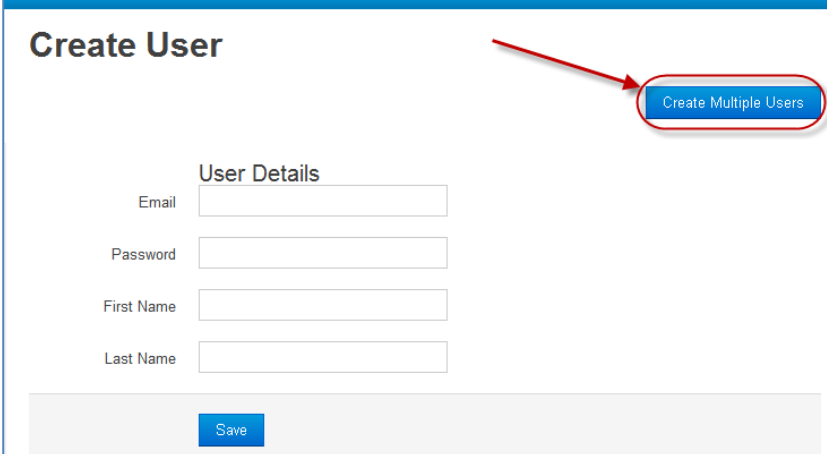


## ARef-01 - Administrator Reference Sheet – Add, Disable, Copy and Edit Users.

Steps	Action	What it looks like
1.	<p>From the <b>Administer Users</b> screen, click on the <b>Create new external user</b> button.</p> <p>This navigates to the <b>Create User</b> screen.</p>	
2.	<p>To create a <u>single</u> user, type in the:</p> <ol style="list-style-type: none"> <li>1. User's email address that they will use to log into SPOT in the <b>Email</b> field.</li> <li>2. The password the user will use the first time they log into SPOT in the <b>Password</b> field.</li> <li>3. The user's preferred first name in the <b>First Name</b> field.</li> <li>4. The user's last name in the <b>Last Name</b> field.</li> </ol> <p>Once completed click the <b>Save</b> button and the user is added.</p> <p><i>Note that using this option will <b>not</b> email the user with their username and password, this will need to be done manually.</i></p>	
3.	<p>To add multiple users at once from a document or spreadsheet, click the <b>Create Multiple Users</b> button.</p>	

4.

To upload multiple users you have two options; **Uploading a file** or **Manually entering details** by either typing or copy/pasting.

*Note that using either of these two options **will** email the user with their username and a system generated password.*

### Upload Users

Upload any csv file or paste your user's details directly into the box below. Once the user's details have been uploaded, they will be emailed with their password. User's details should be in the following format:

```
email, firstname, lastname, role1, role2, etc
email, firstname, lastname, role1, role2, etc
```

1. Upload a file

**OR**

Paste user's details

2.

### Results

5.

When Uploading a file, it must:

- Be a ".csv" format file (you can create these with Microsoft Excel with the "Save as type:" set to **(\* .csv)**)
- Have the following columns:
  - A. Users' email
  - B. First (preferred) name
  - C. Last name
  - D+. Any number of Roles you want to assign the User.

	A	B	C	D	E
1	spot.user1@spotapp.com.au	John	Smith	Manager	Supervisor
2	spot.user2@spotapp.com.au	Jack	Smyth	Supervisor	
3	spot.user3@spotapp.com.au	Jill	Smith	Supervisor	
4	spot.user4@spotapp.com.au	Joan	Smart	Supervisor	
5	spot.user5@spotapp.com.au	Jackie	Smiles	Supervisor	Facilitator

6.

Once you have the file in the correct format you can upload it by clicking the **Browse** button, selecting the appropriate file and clicking **Upload**.

### Upload Users

Upload any csv file or paste your user's details directly into the box below. Once the user's details have been uploaded, they will be emailed with their password. User's details should be in the following format:

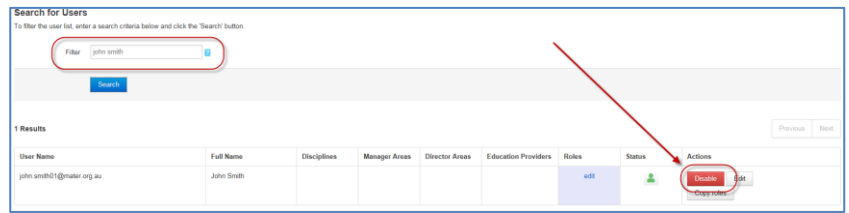
```
email, firstname, lastname, role1, role2, etc
email, firstname, lastname, role1, role2, etc
```

Upload a file

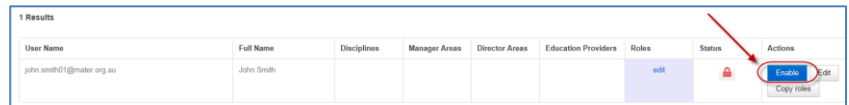
<p>7.</p> <p>When <u>Manually entering details</u>, you must either:</p> <ul style="list-style-type: none"> <li>- <b>Copy/Paste</b> from an excel sheet in the same format as in the above action 5, OR</li> <li>- <b>Type</b> the Users' email, first (preferred) name, last name and any number of roles you want to assign with each entry separated by a comma.</li> </ul> <p>Once entered, click <b>Upload</b>.</p>	<div data-bbox="662 347 1476 873"> <h3>Upload Users</h3> <p>Upload any csv file or paste your user's details directly into the box below. Once the user's details have been uploaded, they will be emailed with their password. User's details should be in the following format:</p> <pre>email, firstname, lastname, role1, role2, etc email, firstname, lastname, role1, role2, etc</pre> <p>Upload a file <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/></p> <p><b>OR</b></p> <p>Paste user's details <input type="text" value="spot.user1@spotapp.com.au, John, Smith, Manager, Supervisor spot.user2@spotapp.com.au, Jack, Smyth, Supervisor spot.user3@spotapp.com.au, Jill, Smith, Supervisor"/> <input type="button" value="Upload"/></p> </div>																														
<p>8.</p> <p>Once uploaded you can view the results of users that have been added in the <b>Results</b> list.</p>	<div data-bbox="662 996 1476 1310"> <h3>Results</h3> <table border="1"> <thead> <tr> <th>Status</th> <th>Email</th> <th>First Name</th> <th>Last Name</th> <th>Roles</th> </tr> </thead> <tbody> <tr> <td>Created</td> <td>spot.user1@spotapp.com.au</td> <td>John</td> <td>Smith</td> <td>Manager, Supervisor</td> </tr> <tr> <td>Created</td> <td>spot.user2@spotapp.com.au</td> <td>Jack</td> <td>Smythe</td> <td>Supervisor</td> </tr> <tr> <td>Created</td> <td>spot.user3@spotapp.com.au</td> <td>Jill</td> <td>Smirth</td> <td>Supervisor</td> </tr> <tr> <td>Created</td> <td>spot.user4@spotapp.com.au</td> <td>Joan</td> <td>Smart</td> <td>Supervisor</td> </tr> <tr> <td>Created</td> <td>spot.user5@spotapp.com.au</td> <td>Jackie</td> <td>Smiles</td> <td>Supervisor, Facilitator</td> </tr> </tbody> </table> </div>	Status	Email	First Name	Last Name	Roles	Created	spot.user1@spotapp.com.au	John	Smith	Manager, Supervisor	Created	spot.user2@spotapp.com.au	Jack	Smythe	Supervisor	Created	spot.user3@spotapp.com.au	Jill	Smirth	Supervisor	Created	spot.user4@spotapp.com.au	Joan	Smart	Supervisor	Created	spot.user5@spotapp.com.au	Jackie	Smiles	Supervisor, Facilitator
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<p>9.</p> <p>Any users that did not upload correctly will display with a red status and a reason for the error.</p>	<div data-bbox="662 1433 1476 1657"> <h3>Results</h3> <table border="1"> <thead> <tr> <th>Status</th> <th>Email</th> <th>First Name</th> <th>Last Name</th> <th>Roles</th> </tr> </thead> <tbody> <tr> <td>User already exists</td> <td>spot.user1@spotapp.com.au</td> <td>John</td> <td>Smith</td> <td></td> </tr> <tr> <td>User already exists</td> <td>spot.user2@spotapp.com.au</td> <td>Jack</td> <td>Smythe</td> <td></td> </tr> <tr> <td>User already exists</td> <td>spot.user3@spotapp.com.au</td> <td>Jill</td> <td>Smirth</td> <td></td> </tr> </tbody> </table> </div>	Status	Email	First Name	Last Name	Roles	User already exists	spot.user1@spotapp.com.au	John	Smith		User already exists	spot.user2@spotapp.com.au	Jack	Smythe		User already exists	spot.user3@spotapp.com.au	Jill	Smirth											
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10. To disable a user's profile, search for the user in the **Administer Users** screen by typing their name into the **Filter** field and then click on the **Disable** button.

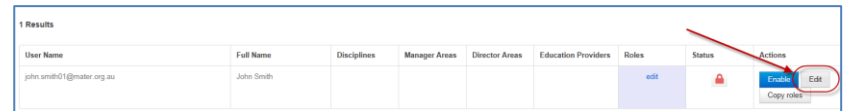
The user's record will turn grey and will no longer be able to be logged into by the user.



11. To enable a user's profile again once it has been disabled, click on the **Enable** button.



12. To edit a user's details, click on the **Edit** button. This navigates to the User's screen.



13. In the User's screen you can edit the User's **Email** address, **First** and **Last Names** and **Phone** and **Pager** numbers.

The Phone and Pager numbers are optional but all users must have an Email address as well as First and Last Names.

You can also:

- Manually reset a User's Password by typing in the **New Password** field and clicking **Save** (*Note that using this option will **not** email the user with their new password, this will need to be done manually.*)
- Stop the User receiving any non-vital system generated emails by unticking the **Receive Emails** box

Click **Save** once complete.

**Success.** The users's details have been updated.

[< Back](#)

Email	<input type="text" value="spot.user1@spotapp.com.au"/>
First Name	<input type="text" value="John"/>
Last Name	<input type="text" value="Smith"/>
Phone	<input type="text" value="0400 400 400"/>
Pager	<input type="text" value="400"/>
New Password	<input type="password"/>
Receive Emails	<input checked="" type="checkbox"/>

[Save](#)

14. To copy a user's permissions, click on the **Copy Roles** button. This navigates to the **Copying Roles** screen.

User Name	Full Name	Disciplines	Manager Areas	Director Areas	Education Providers	Roles	Status	Actions
john.smith01@mater.org.au	John Smith	edit		edit		edit		<a href="#">Erase</a> <a href="#">Edit</a> <a href="#">Copy roles</a>

15. In the Copy Roles screen you select the user you wish to assign roles and permissions to. Select **Copy To** to complete the process.

*Note that copying roles cannot be reversed.*

**Copying Roles from John Smith (john.smith01@mater.org.au)**

**Search for Users**  
To filter the user list, enter a search criteria below and click the 'Search' button.

Filter:  [Clear](#)

[Search](#)

**1 Results**

User Name	Full Name	Status	Actions
Supervisor1@hotmail.com	Supervisor 1		<a href="#">Copy To</a>

Note: copying can NOT be reversed