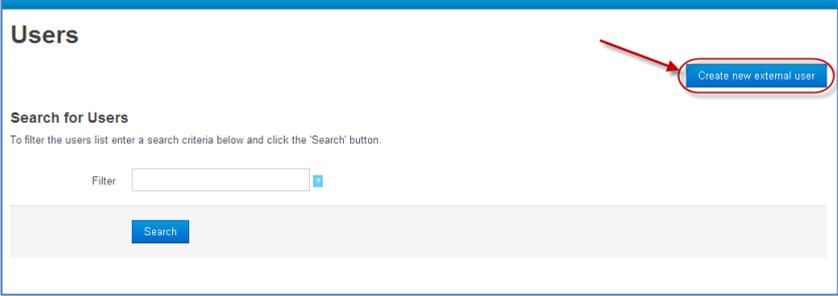
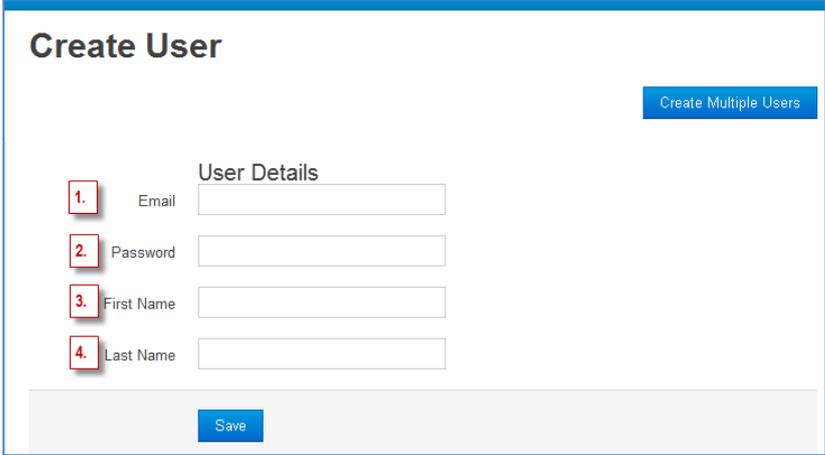
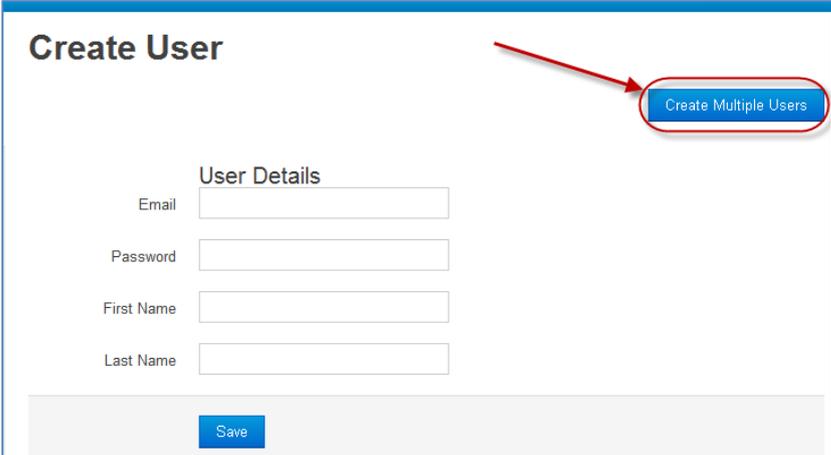


ARef-01 - Administrator Reference Sheet – Add, Disable, Copy and Edit Users.

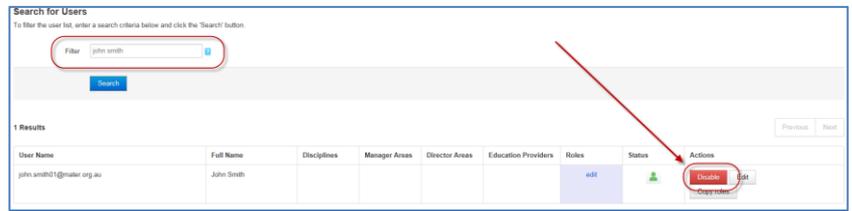
Steps	Action	What it looks like
1.	<p>From the Administer Users screen, click on the Create new external user button.</p> <p>This navigates to the Create User screen.</p>	 <p>The screenshot shows the 'Users' interface. At the top right, there is a blue button labeled 'Create new external user' which is circled in red with an arrow pointing to it. Below this is a 'Search for Users' section with a 'Filter' dropdown and a 'Search' button.</p>
2.	<p>To create a <u>single</u> user, type in the:</p> <ol style="list-style-type: none"> 1. User's email address that they will use to log into SPOT in the Email field. 2. The password the user will use the first time they log into SPOT in the Password field. 3. The user's preferred first name in the First Name field. 4. The user's last name in the Last Name field. <p>Once completed click the Save button and the user is added.</p> <p><i>Note that using this option will not email the user with their username and password, this will need to be done manually.</i></p>	 <p>The screenshot shows the 'Create User' form. The form has a 'Create Multiple Users' button in the top right. Below it are four input fields labeled 'User Details': 'Email', 'Password', 'First Name', and 'Last Name'. Each field is preceded by a red box containing a number (1, 2, 3, 4) corresponding to the instructions in the action column. A 'Save' button is at the bottom.</p>
3.	<p>To add multiple users at once from a document or spreadsheet, click the Create Multiple Users button.</p>	 <p>The screenshot shows the 'Create User' form. A red arrow points to a blue button labeled 'Create Multiple Users' in the top right corner. The form fields for 'Email', 'Password', 'First Name', and 'Last Name' are visible below, along with a 'Save' button at the bottom.</p>

<p>4.</p>	<p>To upload multiple users you have two options; Uploading a file or Manually entering details by either typing or copy/pasting.</p> <p><i>Note that using either of these two options will email the user with their username and a system generated password.</i></p>	<div data-bbox="651 338 1490 943"> <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>1. Upload a file <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/></p> <p>OR</p> <p>Paste user's details <input type="text"/> <input type="button" value="Upload"/></p> <p>2.</p> <h3>Results</h3> </div>																																				
<p>5.</p>	<p>When <u>Uploading a file</u>, it must:</p> <ul style="list-style-type: none"> - Be a ".csv" format file (you can create these with Microsoft Excel with the "Save as type:" set to (* .csv)) - Have the following columns: <ul style="list-style-type: none"> A. Users' email B. First (preferred) name C. Last name D+. Any number of Roles you want to assign the User. 	<table border="1"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> <th>E</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>spot.user1@spotapp.com.au</td> <td>John</td> <td>Smith</td> <td>Manager</td> <td>Supervisor</td> </tr> <tr> <td>2</td> <td>spot.user2@spotapp.com.au</td> <td>Jack</td> <td>Smyth</td> <td>Supervisor</td> <td></td> </tr> <tr> <td>3</td> <td>spot.user3@spotapp.com.au</td> <td>Jill</td> <td>Smith</td> <td>Supervisor</td> <td></td> </tr> <tr> <td>4</td> <td>spot.user4@spotapp.com.au</td> <td>Joan</td> <td>Smart</td> <td>Supervisor</td> <td></td> </tr> <tr> <td>5</td> <td>spot.user5@spotapp.com.au</td> <td>Jackie</td> <td>Smiles</td> <td>Supervisor</td> <td>Facilitator</td> </tr> </tbody> </table>		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
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<p>6.</p>	<p>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.</p>	<div data-bbox="651 1592 1490 1928"> <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> </div>																																				

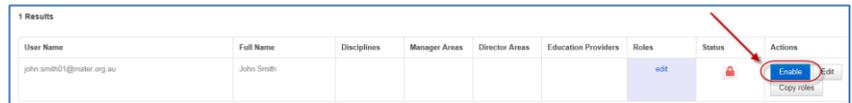
<p>7.</p> <p>When <u>Manually entering details</u>, you must either:</p> <ul style="list-style-type: none"> - Copy/Paste from an excel sheet in the same format as in the above action 5, OR - Type the Users' email, first (preferred) name, last name and any number of roles you want to assign with each entry separated by a comma. <p>Once entered, click Upload.</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>OR</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 Results 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		Erase Edit Copy roles

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:

1 Results

User Name	Full Name	Status	Actions
Supervisor1@hotmail.com	Supervisor 1		Copy To

Note: copying can NOT be reversed