SPOT
Student Placement Online Tool

# ARef-02 - Administrator Reference Sheet – How to Administer Users.

<table>
<tr><th>Steps</th><th>Action</th><th>What it looks like</th></tr>
<tr><td>1.</td><td>

From the **Administer Users** screen, search for the user you wish to administer roles for by typing their name into the **Filter** field and then clicking the **Search** button.

*NOTE: You can also type a role into the **Filter** field, such as “Manager”, and this will display all users with the specified role.*

Click on the **edit** button in the Roles column to bring up the **Roles** pop up box.

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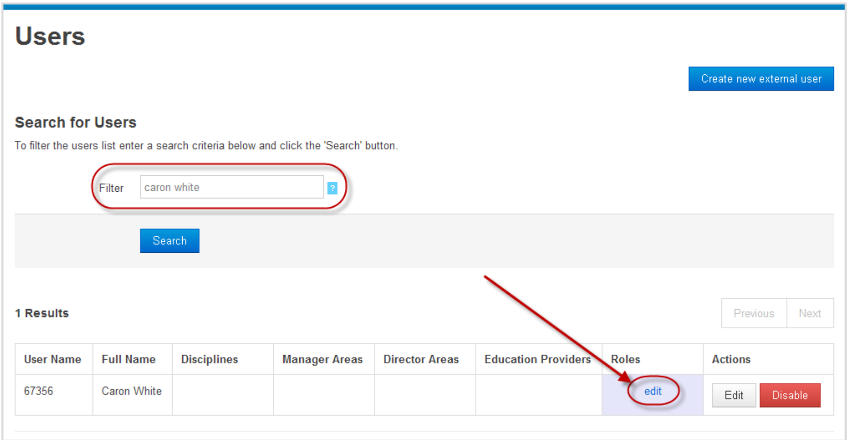


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<tr><td>2.</td><td>

The **Roles** pop up box displays all available roles a user can be allocated. Users may be assigned any combination of roles depending on their requirements for functionality.

Any roles the user currently has assigned will be ticked. To assign a role, click on the blank tick box to tick it. To unassign a role, click on the corresponding tick to untick it.

Then click the **Save** button.

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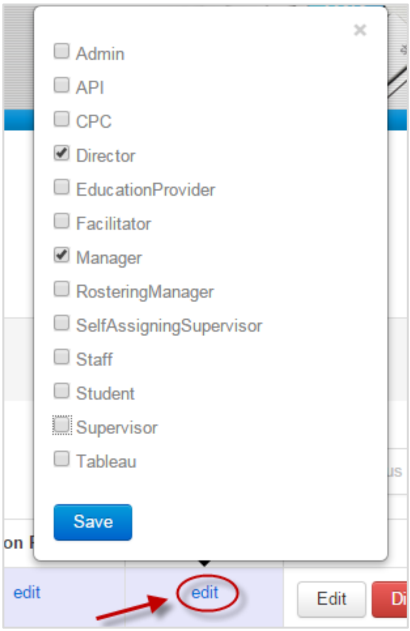


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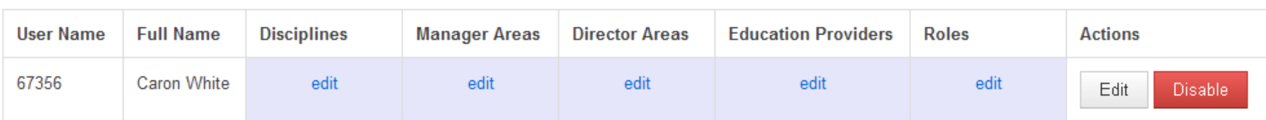
<tr><td>3.</td><td colspan="2">

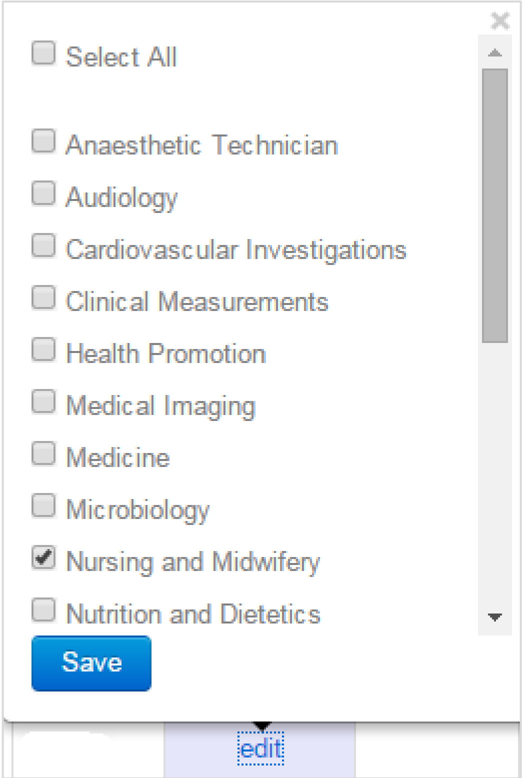
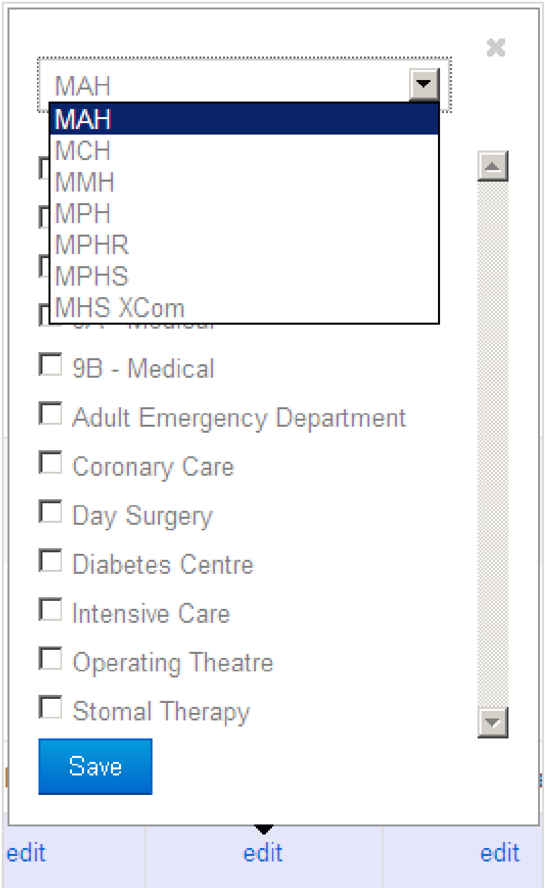
Additional **edit** fields will display based on the Roles assigned to the User. You will need to assign:

- **Disciplines** to all users
- **Manager Areas** to Managers, Rostering Managers and Self Assigning Supervisors
- **Director Areas** to Directors and CPCs
- **Education Providers** to Education Providers



| User Name | Full Name | Disciplines | Manager Areas | Director Areas | Education Providers | Roles | Actions |
|---|---|---|---|---|---|---|---|
| 67356 | Caron White | edit | edit | edit | edit | edit | Edit Disable |

</td></tr>
</table>

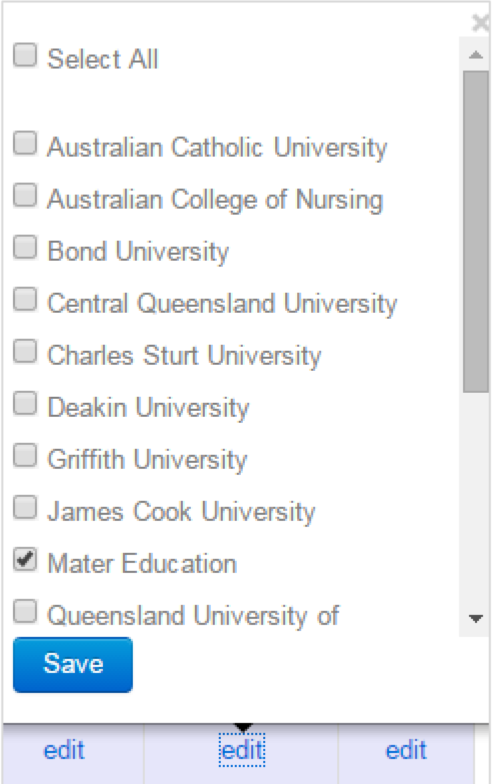
| | | |
|---|---|---|
| 4. | The **Disciplines** pop up box displays all disciplines that are assigned to the user.<br><br>Users will only have access to details of students and areas that correspond to their assigned disciplines. i.e. a Manager with Pharmacy assigned will only have access to Pharmacy student details.<br><br>Any disciplines the user currently has assigned will be ticked. To assign a discipline, click on the blank tick box to tick it. To unassign a discipline, click on the corresponding tick to untick it.<br><br>Then click the **Save** button. | <br> |
| 5. | The **Manager Areas** and **Director Areas** pop up box displays all Areas that have the corresponding discipline(s) that are assigned to the user.<br><br>Assigning Manager Areas gives the User access to the Area's Manager Dashboard, while assigning Director Areas gives the User access to allocate students to the Area and include the Area in reports in addition to viewing the Manager Dashboard.<br><br>Any Areas the user currently has assigned will be ticked. To assign Area(s), click on the Area's corresponding box to tick it. To unassign an Area(s), click on the corresponding box to untick it.<br><br>Then click the **Save** button. | <br> |

6. The **Education Providers** pop up box displays all Education Providers that are assigned to the user.

Users will only have access to details of students, and to request placements on behalf of those students, that correspond to their assigned Education Providers.

Any Education Providers the user currently has assigned will be ticked. To assign Education Provider(s), click on the Education Provider's corresponding box to tick it. To unassign an Education Provider(s), click on the corresponding box to untick it.

Then click the **Save** button.




7. ***Troubleshooting:***

If a **User** is not displaying in the search function, this will either be because:

a. Their name is misspelt, or they use a variation of their name in SPOT i.e. Robert is in SPOT as Bob.
**OR**

b. The User is not created in SPOT, either through an interface or manually.

Try a few different spellings of the user's name to start with. If that fails you will need to create the user profile, refer to Reference Sheet *ARef-01*.

If a **Discipline** is not displaying in the Discipline pop-up box, this will be because it has not been created, refer to Reference Sheet *ARef-05*.

If an **Area** is not displaying in either the Manager Areas or Director Areas pop-up box, this will either be because:

a. The User has not yet been assigned the corresponding Discipline.
**OR**

b. The Area does not have the Discipline assigned.
**OR**

c. The Area is not been created in SPOT.

Check the User has the correct Discipline assigned. Then check that the Area has been created and has the correct Discipline assigned, refer to Reference Sheet *ARef-10*.

If an **Education Provider** is not displaying in the Education Provider pop-up box, this will be because it has not been created, refer to Reference Sheet *ARef-04*.