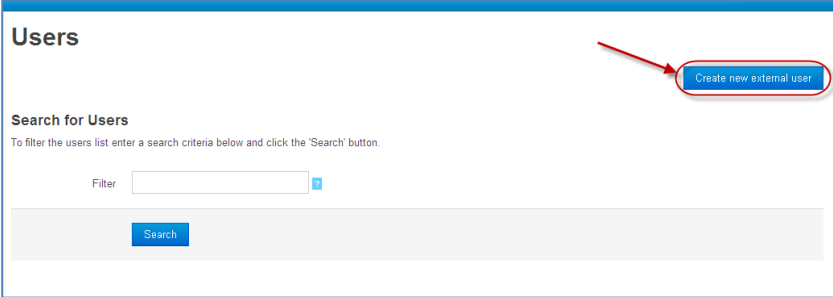
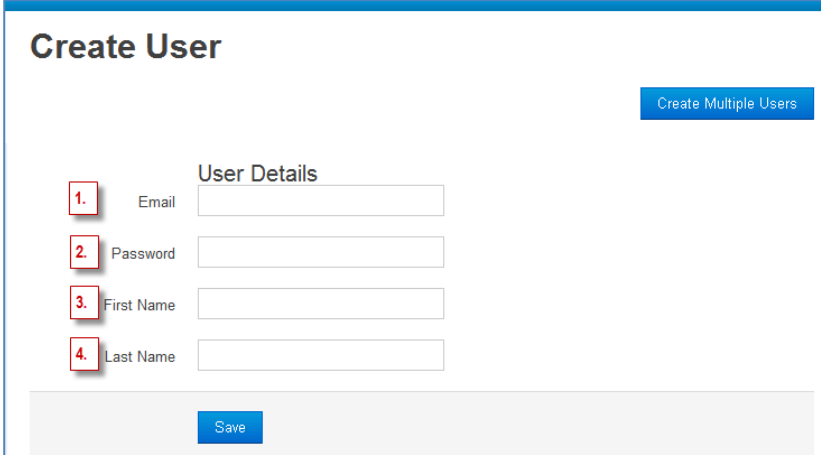
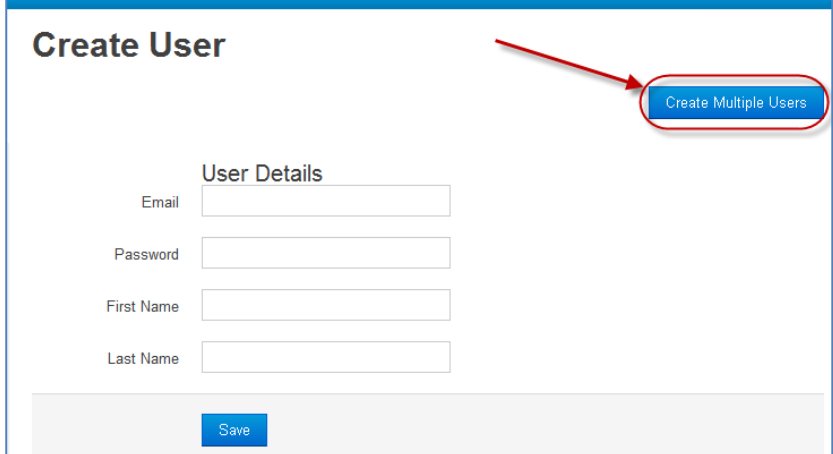


ARef-01 - Administrator Reference Sheet – Add, Disable and Edit Users.

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 with a search bar and a 'Create new external user' button highlighted by a red arrow.</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 with fields for Email, Password, First Name, and Last Name, each with a red numbered box next to it. 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 with a 'Create Multiple Users' button highlighted by a red arrow in the top right corner.</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

7.

When Manually entering details, you must either:

- **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.

Once entered, click **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

Browse...

Upload

OR

Paste user's details

```
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
```

Upload

8.

Once uploaded you can view the results of users that have been added in the **Results** list.

Results

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

9.

Any users that did not upload correctly will display with a red status and a reason for the error.

Results

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	

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.

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

Filter

1 Results Previous Next

User Name	Full Name	Disciplines	Manager Areas	Director Areas	Education Providers	Roles	Actions
spot.user1@spotapp.com.au	John Smith					edit	<input type="button" value="Edit"/> <input type="button" value="Disable"/>

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

1 Results Previous Next

User Name	Full Name	Disciplines	Manager Areas	Director Areas	Education Providers	Roles	Actions
spot.user1@spotapp.com.au	John Smith					edit	<input type="button" value="Edit"/> <input type="button" value="Enable"/>

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

1 Results Previous Next

User Name	Full Name	Disciplines	Manager Areas	Director Areas	Education Providers	Roles	Actions
spot.user1@spotapp.com.au	John Smith					edit	<input type="button" value="Edit"/> <input type="button" value="Disable"/>

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 user's details have been updated.

Email

First Name

Last Name

Phone

Pager

New Password

Receive Emails