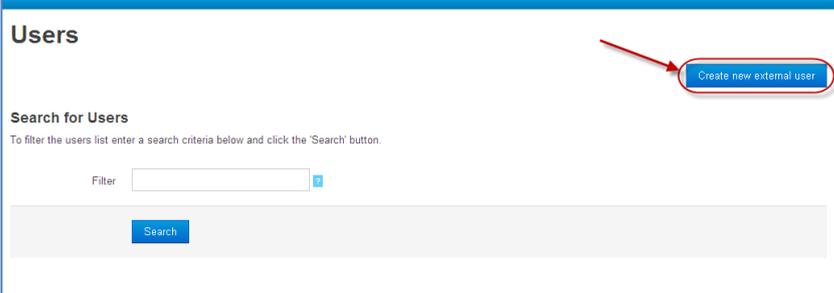
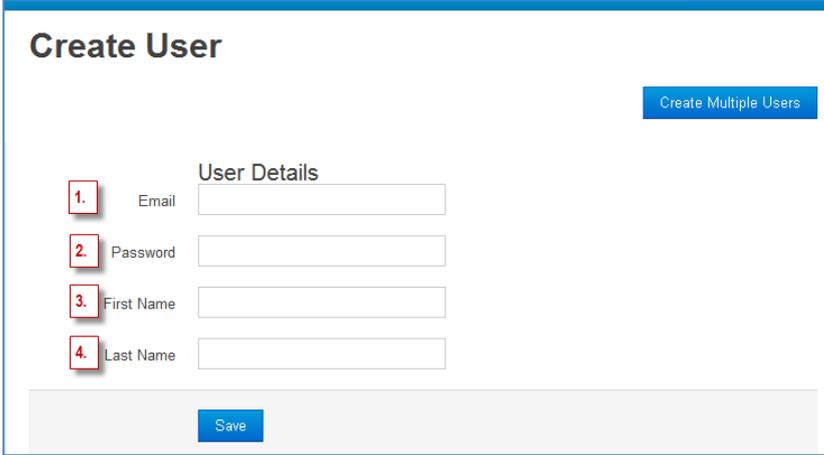
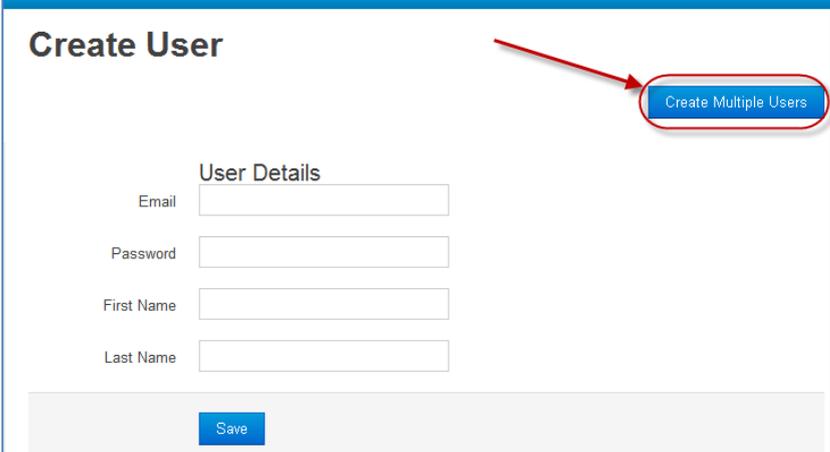


## ARef-01 - Administrator Reference Sheet – Add, Disable and Edit Users.

| 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>   |  <p>The screenshot shows the 'Users' interface. At the top right, there is a button labeled 'Create new external user' which is circled in red with an arrow pointing to it. Below this is a search section titled 'Search for Users' 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"> <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> |  <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 under the heading 'User Details': 'Email' (labeled 1), 'Password' (labeled 2), 'First Name' (labeled 3), and 'Last Name' (labeled 4). A 'Save' button is at the bottom.</p> |
| 3.    | <p>To add multiple users at once from a document or spreadsheet, click the <b>Create Multiple Users</b> button.</p>  |  <p>The screenshot shows the 'Create User' form. A red arrow points to the 'Create Multiple Users' button in the top right corner. The form fields for 'Email', 'Password', 'First Name', and 'Last Name' are visible below.</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