Add and edit a user

Task card

This task card discusses the following:

KEY HIGHLIGHTS

- Prior to requesting a Data Exchange account an individual account holder must have their own Digital Identity (myGovID).
- Only a Data Exchange Organisation administrator can add and maintain user and outlet information in the Data Exchange.
- The email address entered for a new user must match the email address that has been set up in Relationship Authorisation Manager (RAM) for that user.
- A user can only edit or view information for an outlet or program activity that they have been attached to by the Data Exchange Organisation administrator.
- A user's access can be updated to a Data Exchange Organisation administrator by the organisation's current Data Exchange Organisation administrator at any time.

Access levels

The following access levels within the Data Exchange are available:

- **Data Exchange Organisation administrator (Org administrator) access:** Each organisation will need at least one Data Exchange **Organisation administrator** who will **set up** the organisation details, create and manage users, outlets, program activities and delivery partners. The Data Exchange Organisation administrator is the first person to access the web-based portal and will maintain user and outlet information.

  Data Exchange Organisation administration access should be granted to staff members who will be responsible for setting up the Data Exchange, managing users and if applicable, uploading XML files.

  NOTE: An organisation must have their first Data Exchange Organisation administrator complete a User access request form. Once this has been approved by the Data Exchange Helpdesk, they can then set up other Data Exchange Organisation administrators for their organisation via the Data Exchange web-based portal. Refer to the Updating a user's role to a Data Exchange Organisation administrator section in this task card.

- **Editor access:** A Data Exchange Organisation **Editor** has access to **add** and **edit** records within the web-based portal. Access is restricted to outlets and program activities to which the organisation's Data Exchange Org Administrator has granted access to the editor. This access is also mirrored in their access to data that can be viewed in reports. **Editor** access should be granted to program and activity delivery staff members that are required to enter data into the Data Exchange.

- **View only access:** A Data Exchange Organisation **View Only** user has access to **view** cases, clients and sessions but **cannot enter or edit records**. Access is restricted to outlets and program activities to which the organisation's Data Exchange Org Administrator has granted access to the view only user. This access is also mirrored in their access to data that can be viewed in reports. **View Only** access should be granted to organisation staff members who need information regarding clients and services, but are not expected to enter information.

All clients entered into the Data Exchange web-based portal by the service are visible to **all users** within the organisation.

Clients are associated to your organisation and not just the program that they may initially access.

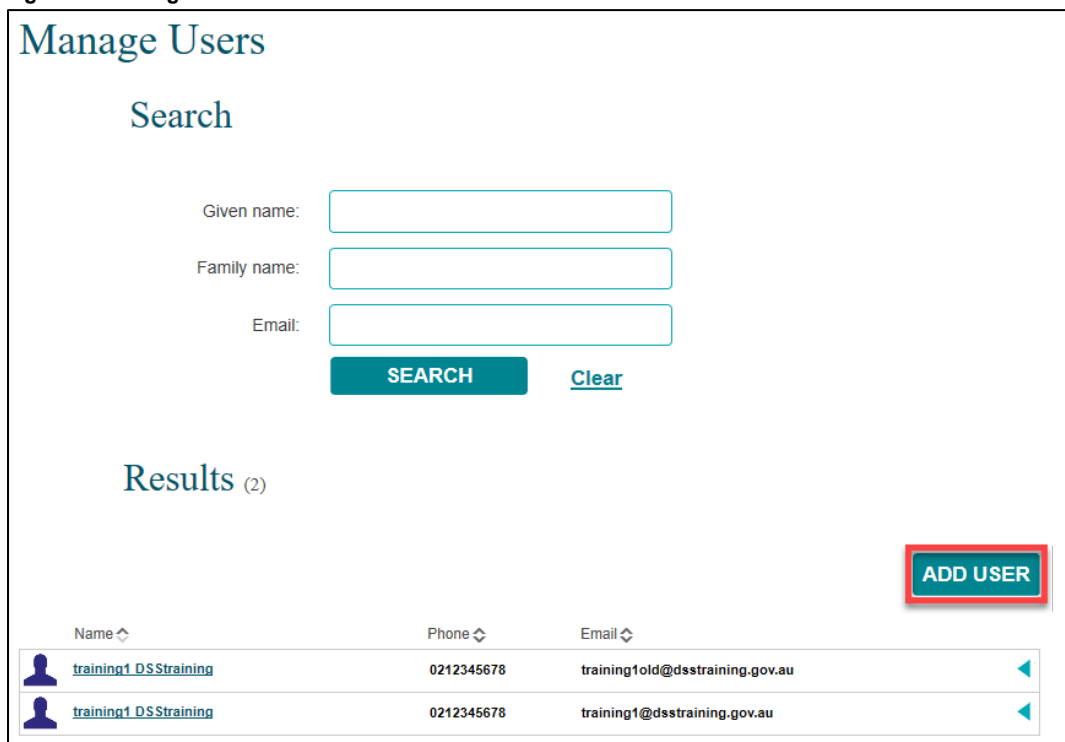# Access the Manage users link

As a Data Exchange **Org** Administrator, log into the Data Exchange web-based portal and select the **Manage users** link under the My Organisation heading. Refer Figure 1.

Figure 1 – The Manage users link on the Data Exchange web-based home page
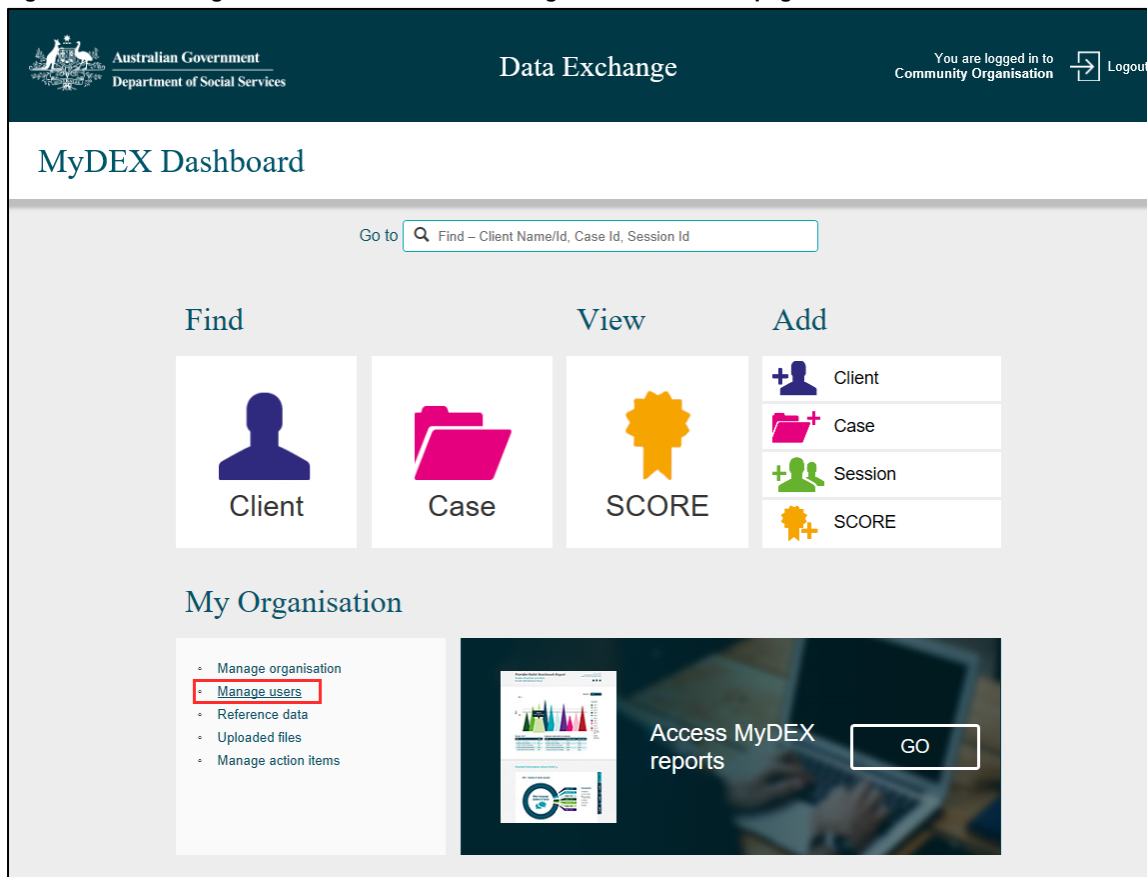
The **Manage users** screen will display. Refer Figure 2.

Figure 2 – Manage Users screen

Add a new user

If already created, a list of existing users will be displayed at the bottom of the screen.

If you wish to add a new user to the system, select `ADD USER`.

The **Add user** screen will display. Refer to Figure 3.

Fields marked with an * are mandatory and must be completed before you can move to the next screen.

Figure 3 – Add user screen

Table 1 – Add user screen field descriptions (Refer Figure 3)

FIELD	DESCRIPTION
Given name*	Enter the new user's given name.
Family name*	Enter the new user's family name. **Note:** Where the new user has only one name, you will need to enter the name into both the **Given name** and **Family name** fields.
Phone*	Enter the new user's work contact phone number.
Mobile	Enter the new user's mobile phone number.
Email*	Enter the new user's work email address.
System role*	Select the required system role: ▪ Organisation View Only – can only view records. ▪ Organisation Editor – can create, edit and view records. **Note:** These roles can be upgraded to a Data Exchange Organisation administrator by an organisation's current Data Exchange Organisation administrator at any time.
Conditions of Data Exchange User Access*	The Data Exchange Organisation administrator must check off the two mandatory items in this section to create and save this new user. They must advise the new user of the terms and conditions of Data Exchange user access.

Complete the required fields and select SAVE.

The **User profile** screen will display. Refer Figure 4.

Figure 4 – User profile screen

Assign an outlet and program activity to a user

Once a new user has been created, they need to be **assigned** to at least one outlet and one program activity to be able to enter and/or view data.

Users will **only** be able to view the detailed case and session details for outlets and program activities they have been assigned to via this function by their Data Exchange Organisation administrator. However, users will still be able to see any clients that the organisation has engaged with and recorded in the Data Exchange.

To assign an outlet to a user

Select MANAGE OUTLETS from the **User profile** screen. Refer to Figure 4.

The **Manage outlets** screen will display. Refer Figure 5.

Figure 5 – Manage outlets screen

Assign the outlet(s) to the user by checking the tick box(s) next to the relevant outlet(s) name.

Select ATTACH SELECTED OUTLETS. Refer Figure 6.

Figure 6 – Outlets selected

The outlets will display under the **Selected outlets** heading. Refer Figure 7.

Once you have assigned the outlet for the user, select **<BACK**.

Figure 7 – Selected outlets heading

The **User profile** screen will display. Refer Figure 8.

Figure 8 – User profile screen highlighting outlets attached to a user

To assign a program activity to a user

Select MANAGE PROGRAM ACTIVITES from the **User profile** screen. Refer to figure 9.

Figure 9 – User profile screen

The **Manage program activities** screen will display.

Only the program activity(s) that are attached to the selected outlet will display under the **Available program activities** heading.

1. Assign the program activity(s) to the user by checking the tick box(s) next to the relevant program activity(s) name.
2. Select ATTACH SELECTED PROGRAM ACTIVITIES. Refer Figure 10.

Figure 10 – Manage program activities screen

The program activities will display under the **Selected program activities** heading. Refer Figure 11.

Once you have assigned the program activities for the user, select <BACK.

Figure 11 - Selected program activities section

The **User profile** screen will display. Refer Figure 12.

Figure 12 – User profile screen

Note: Linked credentials information will update once the user has accessed the Data Exchange web-based portal for the first time.

Viewing a user's role
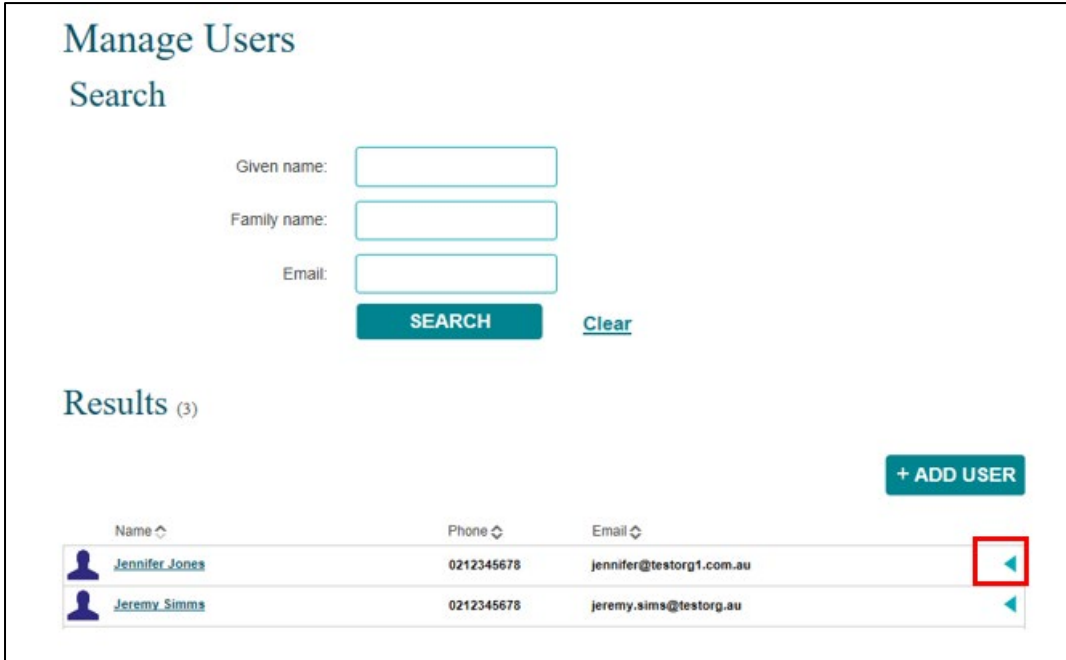
Go to the **Manage Users** screen and search for the relevant user. Select the ◀ next to the user's name. Refer Figure 15.

Figure 15 – Manage Users screen

The user's role will display. Refer Figure 16.

Figure 16 – Manage Users screen – user role

Select the ▼ to collapse the view.

Editing a user

A user's profile can be updated by an organisation's Data Exchange Organisation administrator at any time.

As a Data Exchange Organisation Administrator, log into the Data Exchange web-based portal and select the **Manage users** link under the **My Organisation** heading. Refer Figure 17.

Figure 17 – The Manage users link on the Data Exchange web-based home page
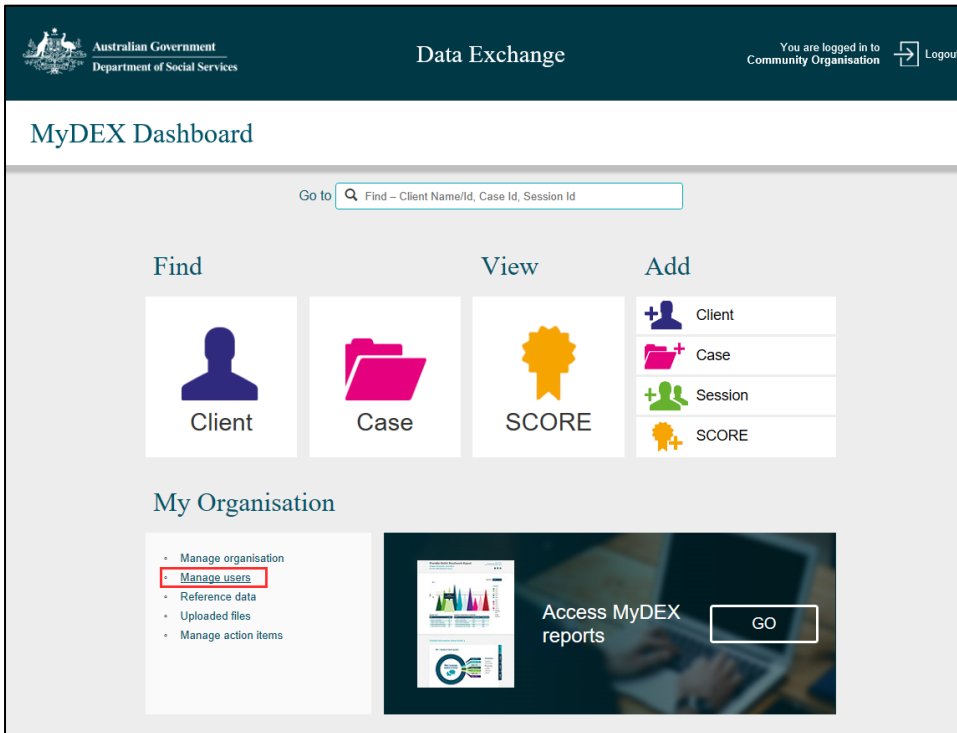
The **Manage Users** screen will display. Refer Figure 18.

Find the relevant user by either using the **Search** fields or the **Results** section.

Figure 18 – Manage Users screen highlighting relevant user
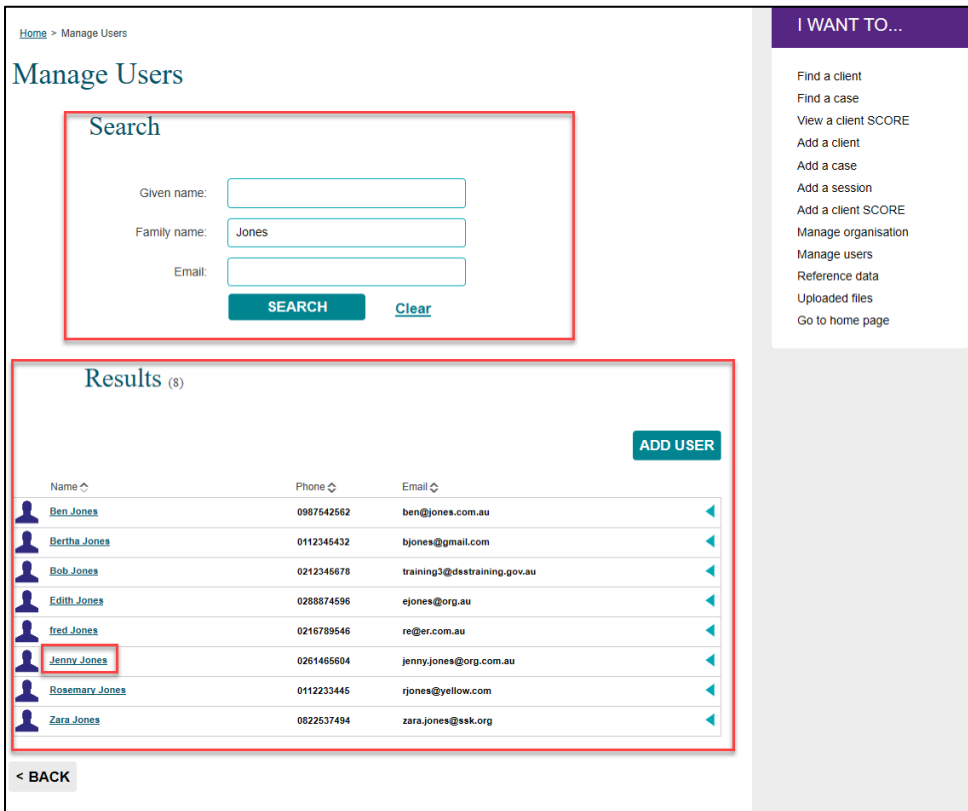
Select the hyperlink of the relevant user. The **User profile** screen will display. Refer Figure 19. Select EDIT USER DETAILS.

Figure 19 – User profile - Edit user details button

The **Edit user details** screen will display. Refer Figure 20.

Figure 20 – Edit user details screen

Update the details as required and select SAVE.

Upgrading a user's role to a Data Exchange Organisation administrator

A user's role can be upgraded from an Organisation **Editor** or Organisation **View only** to a **Data Exchange Organisation administrator**. This can be completed by the organisation's current Data Exchange Organisation administrator without the need of completing a User access request form.

Note: The change to the Data Exchange Organisation administrator user role will provide the user with access to data for all outlets and program activities for that organisation.

Select **GRANT ADMIN ACCESS** from the User profile screen. Refer Figure 21.

The system role in this example is **OrgEditor**.

Figure 21 – User profile screen updating role

The Grant admin access? pop up box will display. Refer Figure 22.

Figure 22 – Grant admin access? pop up box

Select **YES**.

The **User profile** screen will display with the users system role upgraded to OrgAdministrator **(Organisation Administrator)**. Refer Figure 23.

Figure 23 – User profile screen - Updated user details

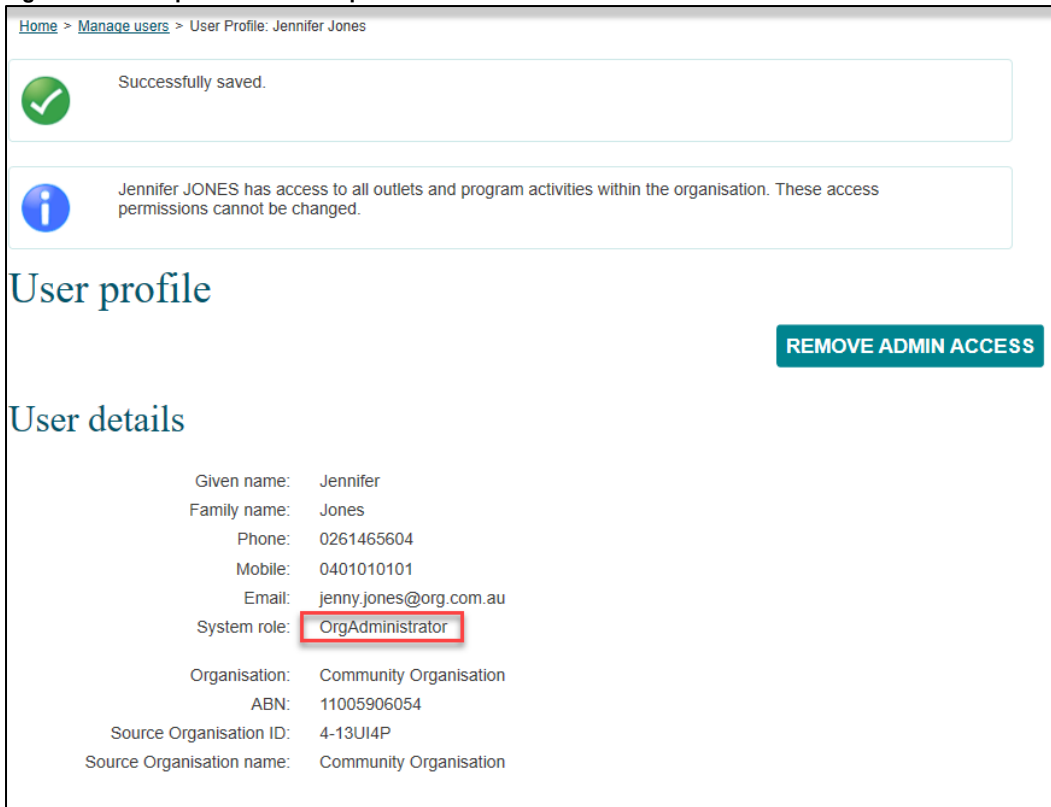Home > Manage users > User Profile: Jennifer Jones

✅ Successfully saved.

ℹ️ Jennifer JONES has access to all outlets and program activities within the organisation. These access permissions cannot be changed.

User profile

[REMOVE ADMIN ACCESS]

User details

Given name:	Jennifer
Family name:	Jones
Phone:	0261465604
Mobile:	0401010101
Email:	jenny.jones@org.com.au
System role:	OrgAdministrator
Organisation:	Community Organisation
ABN:	11005906054
Source Organisation ID:	4-13UI4P
Source Organisation name:	Community Organisation

Removing Organisation administrator access

A user can have their Data Exchange Organisation administrator access removed and reverted back to their original system role by another Data Exchange Organisation administrator.

Select **REMOVE ADMIN ACCESS** from the User profile screen. Refer Figure 24.

Figure 24 – User profile screen – Removing admin access

User profile

[REMOVE ADMIN ACCESS]

User details

Given name:	New
Family name:	Person
Phone:	0936728191
Mobile:	
Email:	new@man.com.au
System role:	OrgAdministrator
Organisation:	Community Organisation
ABN:	11005906054
Source Organisation ID:	4-13UI4P
Source Organisation name:	Community Organisation

The Remove admin access pop up box will display. Refer Figure 25.

Figure 25 – Remove admin access? pop up box

Remove admin access?

By removing Organisation Administrator access, read and create records will be limited to the Outlets and Program Activities applied to the profile, and will no longer be able to manage Outlets and administer user access within your organisation. Are you sure you wish to proceed?

[YES] [NO]
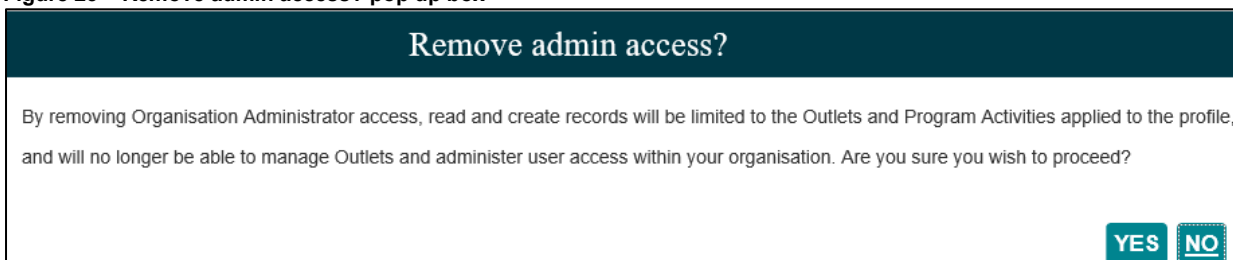
Select **YES**.

The **User profile** screen will display with the users system role updated to **Organisation Editor**. Refer Figure 26.

Figure 26 – Updated User profile screen
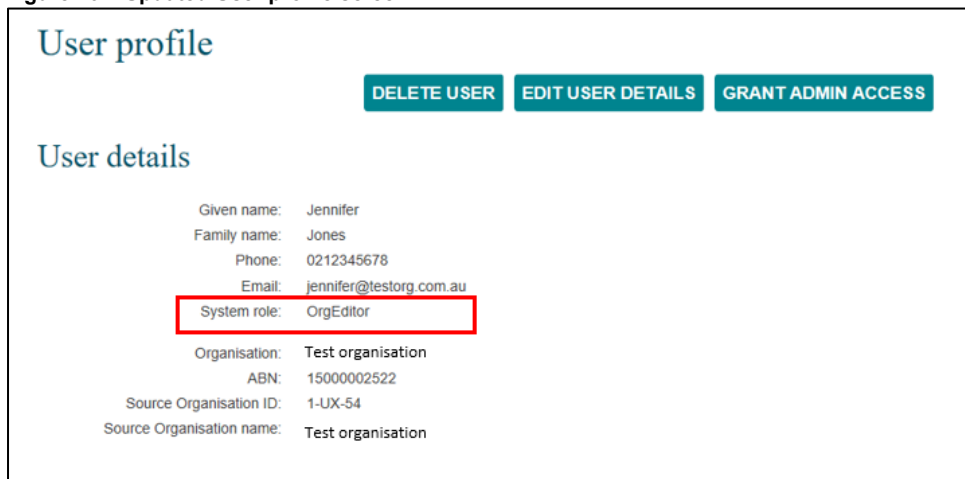
Deleting an organisation user

A Data Exchange organisation administrator can delete organisation users from the Data Exchange. The organisation administrator must revoke that user's admin access (if any) before proceeding with deleting them.
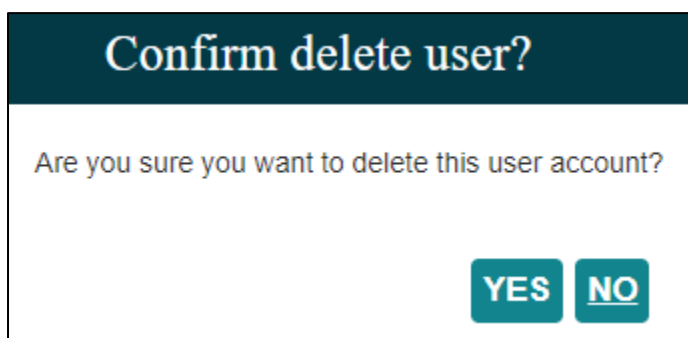
Select DELETE USER from the User profile screen. Refer Figure 27.

Figure 27 – Delete user profile screen

When the confirmation pop up box displays, select YES, as shown in Figure 28.

Figure 28 – Confirm delete user pop up box

You can find more information on outlets, clients, cases, and sessions on the Data Exchange Protocols, and Training page.

For technical support, contact the Data Exchange Helpdesk by email at dssdataexchange.helpdesk@dss.gov.au or on 1800 020 283.