Length: 10:03 min

# Section 1 - User Roles and Management

## Subsection 1 - User Roles

[Filmed]
Welcome to this session. We are going to talk about the different user roles and the management around these. When we are looking at the users and their assigned roles , we have to know the details about the terms authentication and authorization. With authentication, we look at who is accessing what and at what time and from which place are they accessing their information from. And with authorization, we look at the level of their access and level of activity they can perform at the system. In DHIS 2, there are 4 ways of creating users. 1. the self-registered users, the user detail way of creating users, the openID users and the email invited users.

When we are creating users, the first step is to go to 'settings' in order to enable communication using email and SMTP. This is done by the administrator. Go to 'apps' and click on 'settings'. Then go to 'access', here we have the field called 'enable user account invite' , once we check this mark we can create a user by sending a email invite. Or we could choose the self-registered user and select the lowest level of user role in the system. So that whoever is accessing with this type of user only has the limited authority to do something within the system. And then we have the Open ID-provider, this can be either a google,yahoo or facebook account. Now that we have made some changes, we save these settings.

So now that this is done, go back to 'apps' and click on 'users' and then select 'user'. Here we see the users that are already created within the system. To create a new user, click on 'add new'. Here we have several actions, we can create an account with user details or create an user by email invite. I type in the username and a password which should be at least a capital letter, numbers and more than 8 characters. Then retype that password. Give the user a Surname and a first name. Then provide the e-mail address and then the phonenumber and type of database they are going to use.
Next, I can choose the available roles, let's say that this user is going to be a super user.
In the next tables we have 'data capture' and 'data output'. It is always important to know what the user is accessing and how many org units they can access when they are logged in.

Let's say they are only supposed to access 'Bo', we check this mark, and then we uncheck 'Sierra Leone'. This means that when they are doing data captures they can only access 'Bo' and anything below this region.

And for data output, if we don't select anything, it will always be the highest level of hierarchy available by default. Or we can limit their access to 'Bo', so that when they are running reports they can only see anything that is below 'Bo'. Finally we click on 'add' to create the user.
So our user will now be assigned to 'Bo' and have access to all report that are under 'Bo'.

Another example is to create a user with an email invite.
Go back to ' users' under 'apps' and then select user again. Click on 'add new'.
This time choose the action called 'create account with email invite', and the screen is automatically reduced. Provide the email address. You can create a username for the user or encourage the user to create once you send the email invite.
Then give the user a user role, and then in the next tables select the level of access for both data input and output. Once this is done, click on 'add'. Now this user will have an email sent to them, and this will prompt the user to create a password and username if you have not provided one beforehand and then be able to access the system.

# Subsection 2- User management

Now we are going to look further into the user roles. Go back to 'apps' and click on 'users'. And then go to 'user roles'. It is very important to determine the level of authority each user has with our system. This is how we know who is doing what at a certain point. And it will also help us with the system maintenance and security of the system.
I'm going to click on 'add new' and create an example of a new user role. Let's call it 'data manager', and then I describe what the data manager will do, which is view data from districts. Once we have typed the description, we go to the data sets, there are some datasets present here that have already been created. This will determine what data sets they are accessing if they are going to be managing data. I want them to access three of these sets, then we go to the level of access, where we have to be very careful. We could give them the 'all' which defines all the roles that are there. Or we could try to limit their level of access to authorities by adding a filter. So I type in 'view' then click on 'filter' . Now I get all that is related to viewing and add this. And then I can do the same for 'add' and filter based on that. Next we click on 'add' and now we have our new role called 'data manager'. So you can go ahead and assign your users this role and see what they will be accessing up to what point.

# User Roles and User Management

## *Abstract flow*

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Go to ‘apps, and search for and select ‘pivot-tables’.
Choose ‘data-elements’ and select the data-element groups.
You can choose a couple or all from the sub-groups.
Go to ‘periods’(choose betwee fixed or relative) and select the periode type f.ex monthly.

By default DHIS  checks the last 12 months, remember to uncheck this if you select a periode.
Next choose ‘org-units’ and click on ‘update’ for example for the whole country which is ‘SL’ here.

You can choose the format by clicking on the button ‘layout’ above the table.
F.ex you can use the ‘filter’ function for a particular period, and anything you have for comparison can be a column or a row.