Understanding the Functionality of the "Admin" Role

The "Admin" role is a unique role within the TxPHIN portal that provides designated users with administrative functionality that does not appear in the role's absence. Users who are assigned this role have the tools to approve roles within their jurisdiction(s), assign roles, create new user profiles, manage groups, and add multiple users to the PHIN portal through batch upload.

OVERVIEW/REQUESTING THE "Admin" ROLE

As a registered TxPHIN user, you will be directly assigned the role of "Admin" by the Texas Department of State Health Services (DSHS). To determine if you have already been assigned the role, login to your profile at TxPHIN.org and click on your name on the far right of the TxPHIN toolbar. From the drop-down menu select "View My Profile."

If the role has been assigned to you, it will appear under the "Roles" section of your "My Profile" page. If the role does not appear, you will need to request it by emailing phinadmin@dshs.state.tx.us. After the request is reviewed by DSHS, it will either be approved or denied.

"Admin" FEATURES

As an "Admin" in your jurisdiction, you will be able to see an "Admin" tab that appears in the upper right hand corner of your navigation toolbar. Once selected, this tab allows you to perform the following actions:

- Pending Role Requests
- Manage Groups
- Manage Users
- Manage Invitations
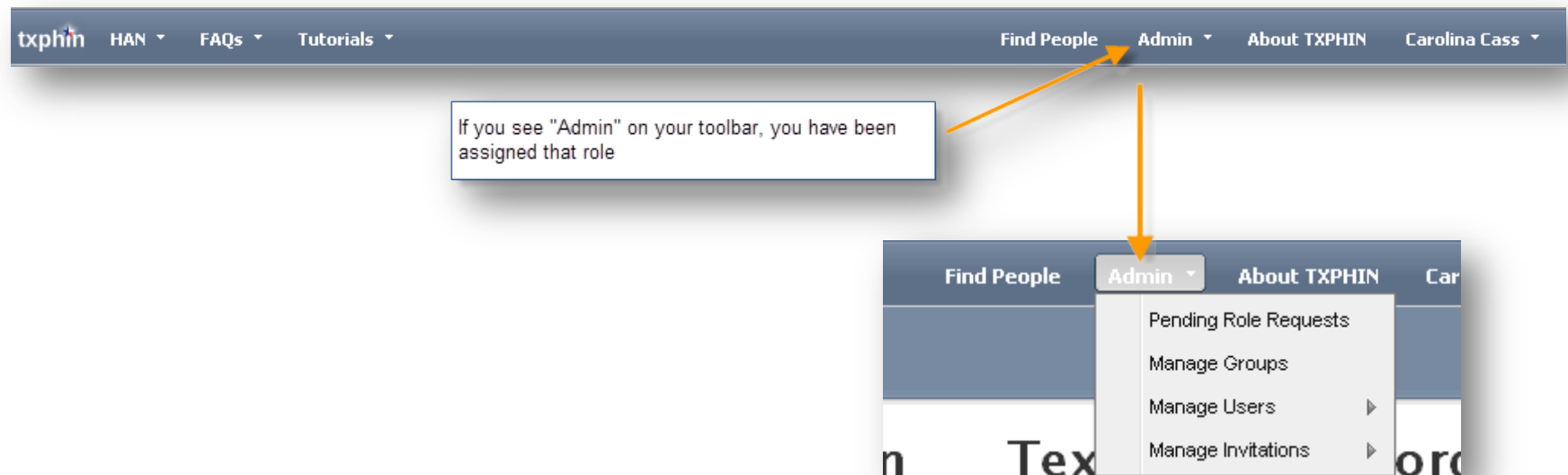
PENDING ROLE REQUESTS

A Registered User in your jurisdiction(s) will submit a role request from his or her TxPHIN account that will appear on your "Pending Role Requests" page.
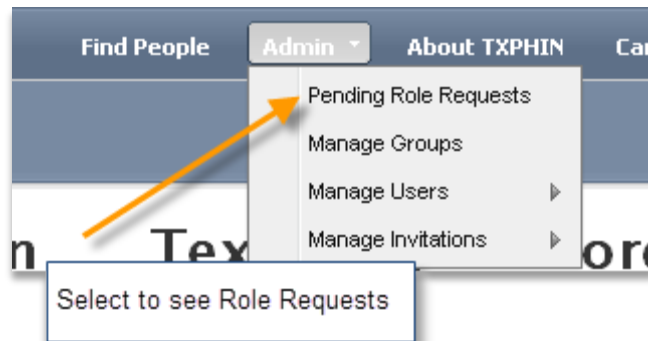
A pending request will show a registered user's email address, desired role, and jurisdiction giving you the option to approve or deny the role directly from this page by clicking "Approve" or "Deny."

If you need to know more about a user before approving or denying his or her role request, simply click on the email address in the request and the user's profile will appear. Click the back button in your browser to return to the Pending Role Requests page.

Pending Role Requests ⊠

Pending Role Requests

Requester	Role	Jurisdiction	Actions
ethanwaldo@yahoo.com	Health Officer	Armstrong	Deny | Approve

To view a user's information, click on the email address associated with the requester's profile

txphin   HAN ▾   FAQs ▾   Tutorials ▾   Find People   Admin ▾   About TXPHIN   Carolina Cass ▾

Dashboard   **Pending Role Requests** ⊠

Ethan Waldo

Public: No

Credentials: None Given

Office Phone:

Office Fax:

Home Phone:

Mobile Phone:

Employer: None Given

Experience
None Given

Bio
None Given

Organizations
Roles
Public in Armstrong

No Photo Uploaded

Devices
ethanwaldo@yahoo.com

Documents   Forums   Links   OLD: Use TXPHIN 1.0   Need Help? Email: phinadmin@dshs.state.tx.us

ASSIGNING ROLES

As an "Admin" you can assign roles to registered users in your jurisdiction(s). Go to the "Admin" pull-down menu and find "Manage Users." When you hover your mouse over it, another pull-down menu appears where you can select (1) Add a User, (2) Batch Add Users, and (3) Edit Users. To assign roles you will need to select "Edit Users."

Hover your mouse over "Manage Users" and a new drop down menu appears. Select "Edit Users"
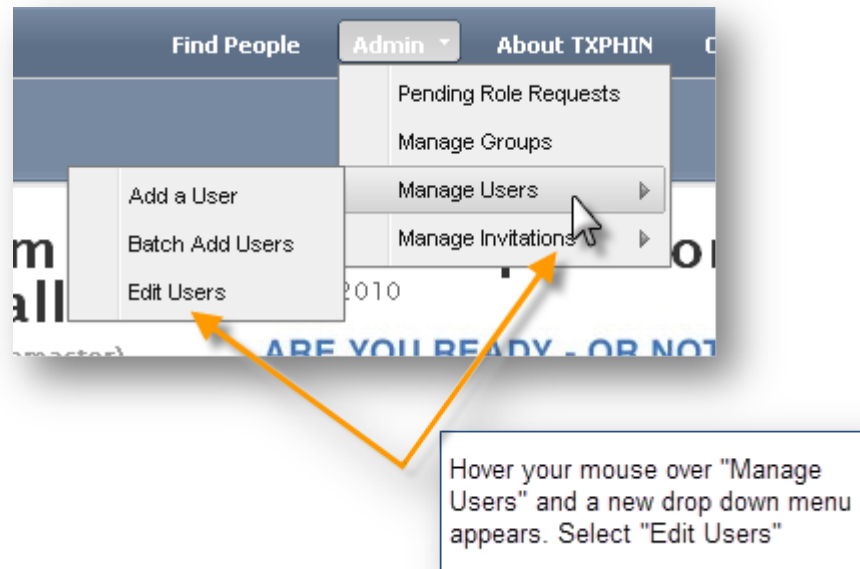
On the "Edit Users" screen you will see a list of all users in your jurisdiction on the right hand side. If you want to filter your search for a specific user or users, you can search by Name, Email, Phone Number, and/or Job Title. You can also search by assigned roles or by jurisdiction.

Dashboard   **Edit Users** ⊠

People Search

Name:

Email Address:

Phone: Job Title:

Roles: *(none selected)*   **Clear All**

Phin: Admin

Phin: OrgAdmin

Phin: Superadmin

Phin: SuperAdmin

Animal Control Director

Jurisdictions: *(none selected)*   **Clear All**

Armstrong

Reset   Search

| ⏮ ◀ | Page | 1 | of 1 | ▶ ⏭ | ⟳ | Add User | Edit User | Delete User | **Displaying results** |

Search Results ▲   Roles

Carolina Cass   Public in Armstrong
ccass@talho.org   Health Officer in Armstrong
                                     Admin in Armstrong
                                     Health Alert and Communications Coordinator in Armstrong
                                     Emergency Management Coordinator in Armstrong

Final Opus   Public in Armstrong
finalopus@gmail.com

Ethan Waldo   Public in Armstrong
ethanwaldo@yahoo.com   Health Officer in Armstrong

Ethan Weirdo   Public in Texas
ewaldo@talho.org   Public in Armstrong
                                     Admin in Armstrong
                                     Health Alert and Communications Coordinator in Armstrong

You can search for an individual user or many users by using any or all of these filters.

People Search

Enter the user's name, email, phone number, and/or job title. Once the appropriate fields are filled in, click search, and the user should appear on the right.

Role(s) Search

To search by role simply click on the role you're interested in and click send. All users with that role will appear to the right.

You can also search for multiple roles at once. Click each role you're interested

in and then click search.

Jurisdiction Search

If you are "Admin" for more than one jurisdiction you can also search with this option. Just select the desired jurisdiction, click send and all users within that jurisdiction will appear on the right.

When you have found the user to which you want to add a role, click on their name. When you double-click on the user, their profile will appear on the screen.

Double-click anywhere in the box of the user you will be editing to open their profile

Scroll down the user's profile to the "Roles" section where you will see both a list of roles that are already assigned and a pull-down menu that allows you to assign new roles. To assign a new role, select the appropriate juristdiction and role from the pull-down menu and click the "Apply Changes" button at the bottom of the profile.

ADDING USERS

As an "Admin" you are able to create user profiles for people who are not already registered TxPHIN users. First, open the "Admin" pull-down menu and hover over "Manage Users." When the pull-down menu appears, select "Add a User".
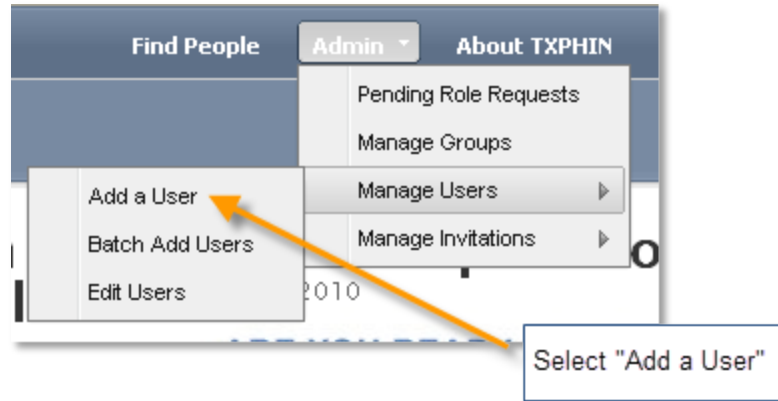
The "Add a User" page will prompt you to fill out the following fields*:

- First Name
- Last Name
- Display Name
- Password/Confirm Password
- Job Title & Employer
- Office Phone/Fax
- Home/Mobile Phone
- Preferred Language

- Jurisdiction
- Roles
- Alerting Devices
- Organizations

*Not all fields are required

Fill out the fields; make the appropriate selections from the pull-down menus and click "Apply Changes" to create the new user profile. If all fields have been entered correctly, you will see a confirmation in yellow that says "This user has been successfully created."

NOTE: When entering passwords for a new user, you must use at least 1 digit, 1 capital letter, and a minimum of 6 characters
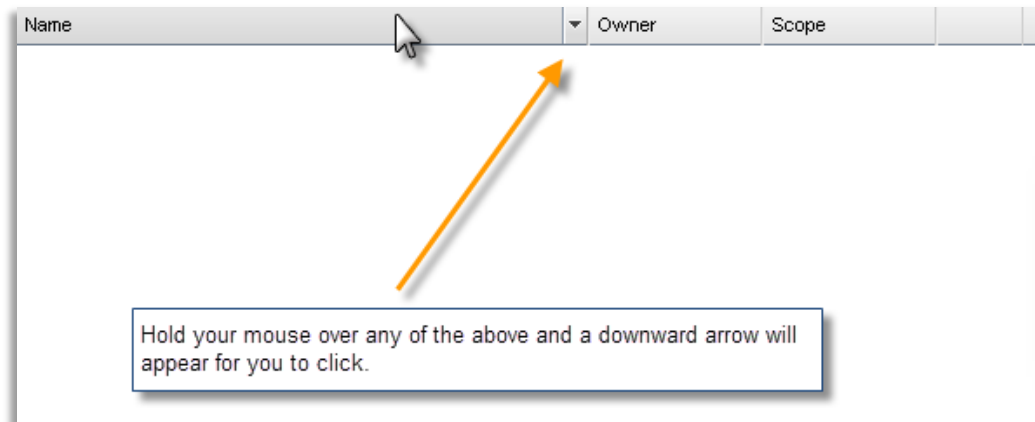
MANAGING EXISTING GROUPS

If you are an "Admin" you have access to the tools to manage existing groups. First, navigate to the "Admin" pull-down menu. From there, select "Manage Groups." A list of groups will appear with the following identifying information:
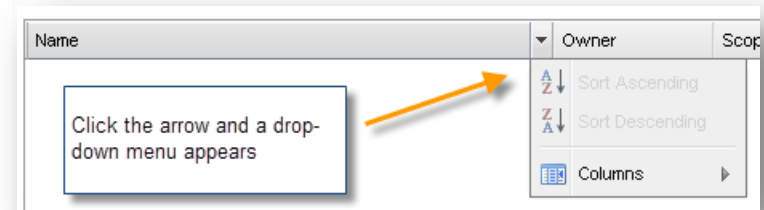
- Name (group title)
- Owner (user who created the group)
- Scope (access to the group)
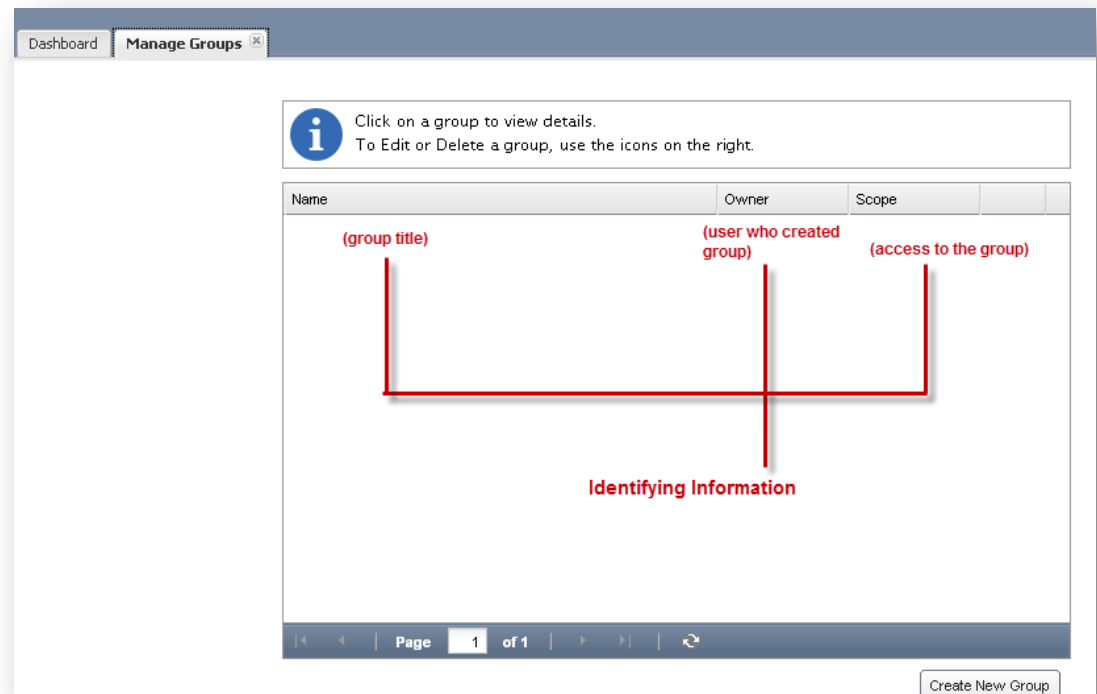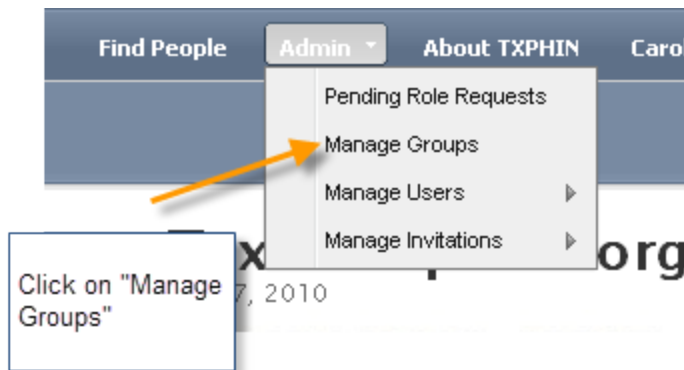
In order to locate a group, look at the bar containing "Name," "Owner," and "Scope." If you hover over any of these with your mouse a downward arrow appears on which you can click.
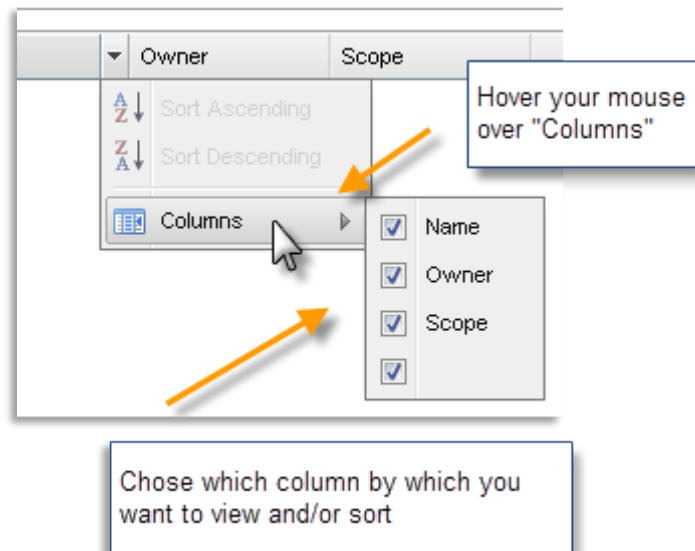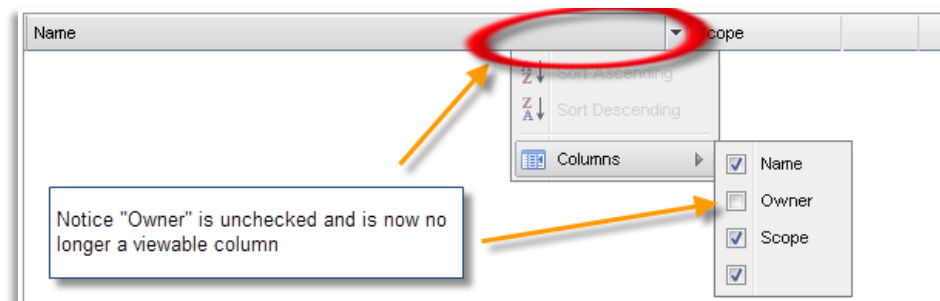
Click on the arrow and a drop-down menu will appear:

Name	▼ Owner	Scope	

Hold your mouse over any of the above and a downward arrow will appear for you to click.

Name		▼ Owner	Scop

Click the arrow and a drop-down menu appears

A↓ Sort Ascending
Z↓ Sort Descending
Columns ▶

You are given a choice to sort the groups either in ascending order or descending order.

Hold your mouse over "Columns" and another pull-down menu appears where you can choose to sort and/or view one, some or all of the columns:

When you click off the checkmarks, that column will disappear from the window:

▼ Owner	Scope	

A↓ Sort Ascending
Z↓ Sort Descending

Hover your mouse over "Columns"

Columns ▶
☑ Name
☑ Owner
☑ Scope
☑

Chose which column by which you want to view and/or sort

Name		▼	cope	

Z↓ Sort Ascending
Z↓ Sort Descending

Columns ▶ ☑ Name
☐ Owner
☑ Scope
☑

Notice "Owner" is unchecked and is now no longer a viewable column

All groups are designated as one of the following:

- Personal
- Jurisdiction
- Global

These designations are what define access (the Scope column).

Ex:

Name	Owner	Scope		
Test	Carolina Cas	Personal		

See that the designation is found under "Scope"

Personal

Only the group's creator can edit or destroy a group designated as "Personal."

Jurisdiction

A group designated as "Jurisdiction" can be edited or destroyed by any "Admin" within the jurisdiction where the group originated.

Global

Any "Admin" can edit or destroy a "Global" group.

To edit a group, simply click on the "Edit" button located on the right side of the group name to expand your selection.

The icon looks like a sheet of notepaper and a pencil.

If you have permission to edit the group, then the Jurisdictions, Roles and People who have previously been assigned to the group will appear. From this screen, you may delete existing group members or add new Jurisdictions, Roles and People.

To add Jurisdictions or Roles, check the box next to the Jurisdiction or Role of your choice. To delete Jurisdictions or Roles, uncheck the box next to the Jurisdiction or Role of your choice.

Jurisdictions: Roles:

Editing and adding Jurisdictions, Roles and Users is exactly the same system as choosing Recipients for Health Alerts.

When you are completed with your edits, click "Save" at the bottom right of the screen. Or if you do not want to save your changes, click "Cancel" and you will return to previous screen.

To delete a group, click the Red X found at the far right of the group name. A dialogue box will appear asking you to confirm your selection. Click "Ok" to destroy the group or "Cancel" to maintain the group and return to the previous screen.
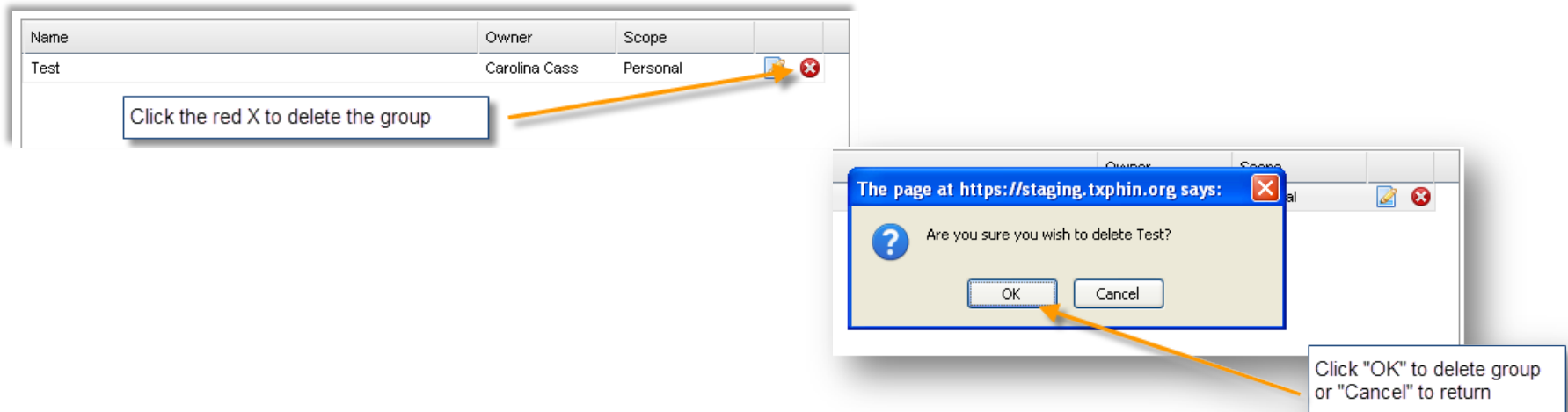
CREATING NEW GROUPS

A user with a "Admin" role has the ability to create a new group by first navigating to the "Admin" drop-down menu. Select "Manage Groups." The same screen appears as that of the "Edit Groups" but here you will click "Create New Group" at the bottom right, to create a new group.
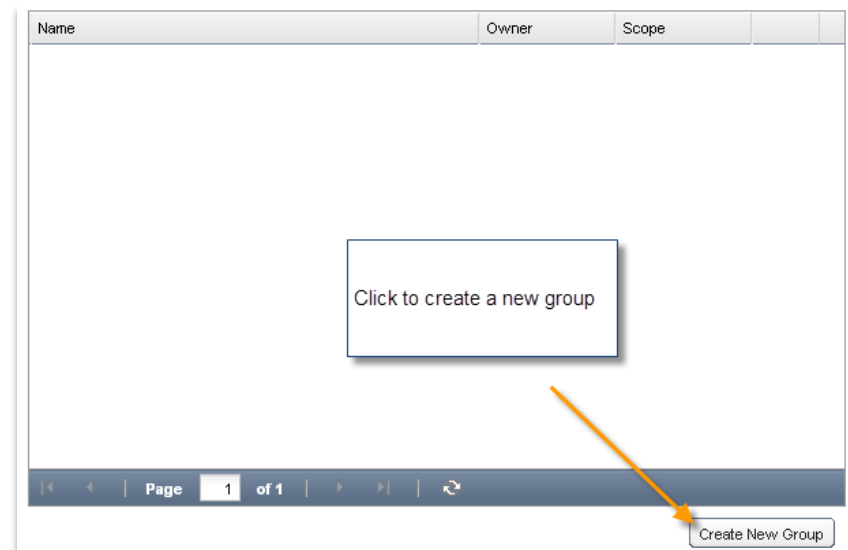
This screen is just like the one for editing groups except here you can create a title for your group as well as choose the level of access (Scope).

Group Name: ———————————— **Enter Group Name**

Scope:

Owner
Jurisdiction:

Jurisdictions

☐ ⊟ Federal

☐ ⊟ Texas

Click for drop down menus to
choose "Scope" and "Owner
Jurisdiction"

Personal ————
Jurisdiction ———— **Choose "Scope"**
Global ———————— **(access)**
Organization ————

☐ ⊞ Region 6/5 South
☐ ⊞ Region 7
☐ ⊞ Region 8
☐ ⊞ Region 9/10
☐ ⊞ Region 11
☐ ⊞ Louisiana

Armstrong ———————— **Chose "Owner
Jurisdiction"**

Search: _____ **Clear Search**

Roles

Users

You can now begin adding Jurisdictions, Roles, and Users to your group. To add a Jurisdiction or Role, check the box next to the selection of your choice. For ease of use, you may type the name of the Jurisdiction or Role in the "Search" bar found at the bottom of each filter set.

If you are trying to create a group within a single county or counties, you must be sure to leave the region checkbox unchecked. Click on the + to the left of the Region affiliated with the county you wish to add. By doing so, a subcategory of counties will appear. Check the county of your choice.

REMINDER: You can move between filter fields by clicking the name of the filter you wish to use

To add individuals to the group, type the name of the user you wish to add in the blank field at the bottom of the filter. As you type, a filtered list will appear in real time, allowing you to either completely type the user's name or select them from the list of possible choices.

Jurisdictions
- Federal
  - Texas
    - Region 1
    - Region 2/3
    - Region 4/5 North
    - Region 6/5 South
    - Region 7
    - Region 8
    - Region 9/10
    - Region 11
  - Louisiana

Search:

Roles
Users

To switch from "Jurisdictions" to "Roles" click on "Roles"

Click to switch to "Users"

Jurisdictions
Roles
- Phin: Admin
- Phin: OrgAdmin
- Phin: Superadmin
- Phin: SuperAdmin
- Animal Control Director
- Behavioral Health Director
- BioTerrorism Coordinator
- Border Health Director
- Chief Epidemiologist
- Chief Veterinarian
- Communicable/Infectious Disease Coordinator
- Emergency Management Coordinator
- Emergency Medical Services Authority
- Emergency Operations Center Coordinator

Search:

Users

Click to switch to "Jurisdictions"

Jurisdictions
Roles
Users   Email
Name

Enter in the person's name or email address in to the text box below to find and add PHIII users.

Once the user is found, click on the user to add them to your selection.

Be sure to save your new group by clicking "Save" at the bottom of the page when you are finished.

BATCH ADD USERS

An "Admin" has the ability to "Batch Add Users"; a page where CSV (comma separated value) files containing specific information fields can be uploaded to create profiles for multiple users. In order to upload multiple users at a time, you must first make sure your CSV file is formatted correctly.

To create the correct type of file for upload, open an Excel file and, starting in cell A1, enter the following categories in the row. The success of your upload is dependent on the category order. The following are all required unless otherwise noted. Include, IN THIS ORDER:

(A) Email address
(B) First Name
(C) Last Name
(D) Display Name
(E) Jurisdiction
(F) Mobile (optional)
(G) Fax (optional)
(H) Phone (optional)

"Required" fields contain information that must be present in order to create a new user. "Optional" fields contain user information that you may or may not have. If you do not have the information, just leave the optional field blank.
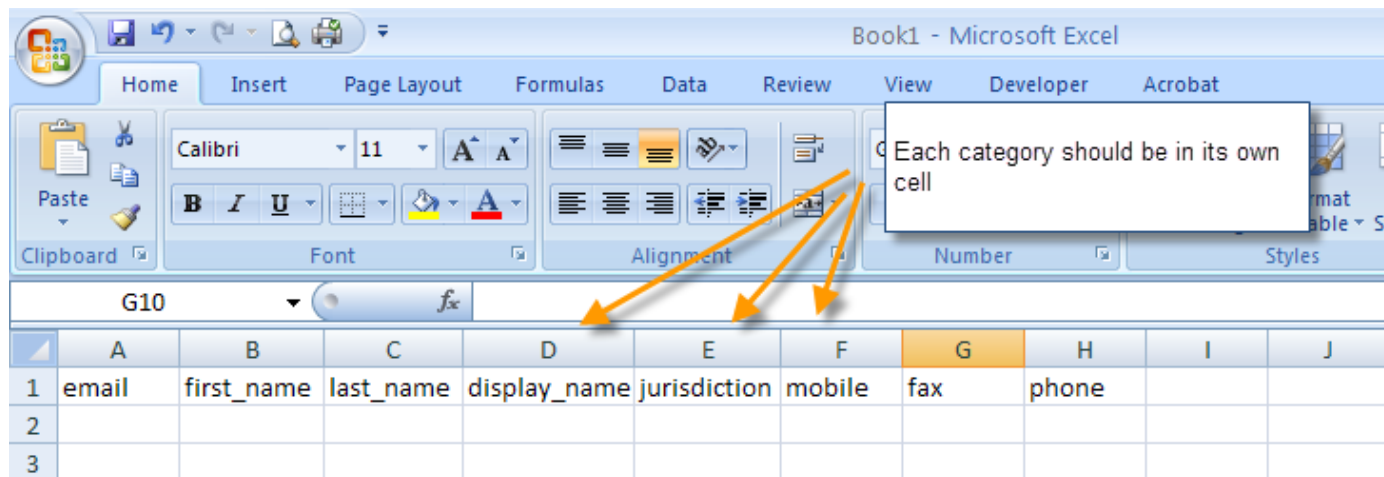
Once you have your categories entered, enter the corresponding user information in the rows below.


Enter the corresponding user info in the rows below
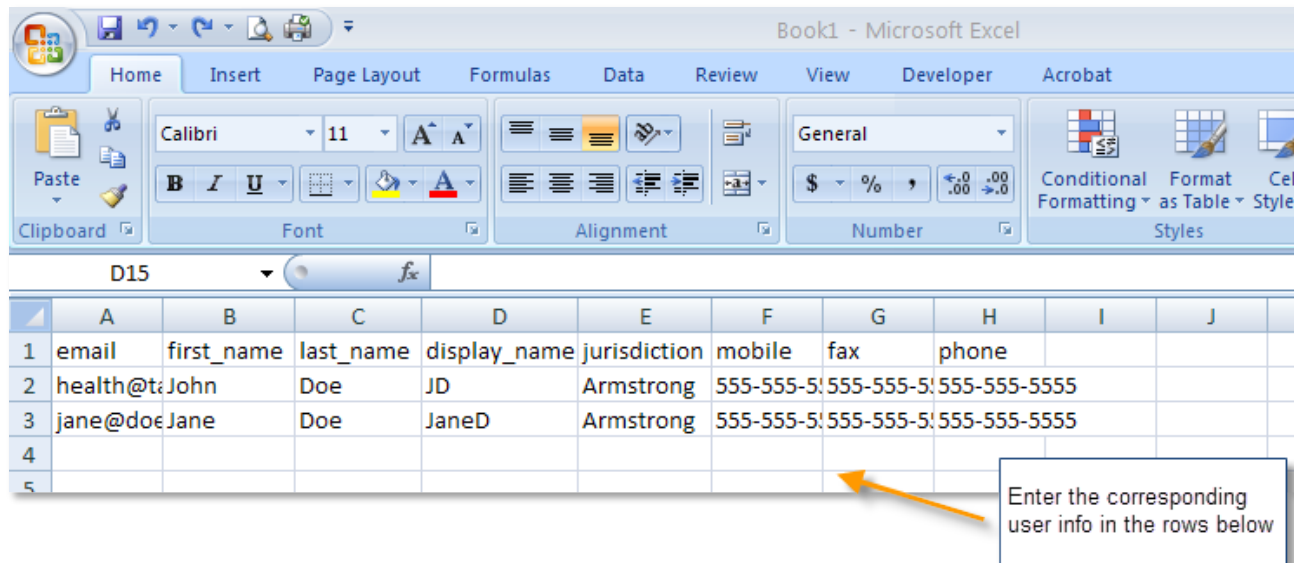
When your user list is complete save it as a "CVS (comma delimited)" file.

Save the file as a CVS file
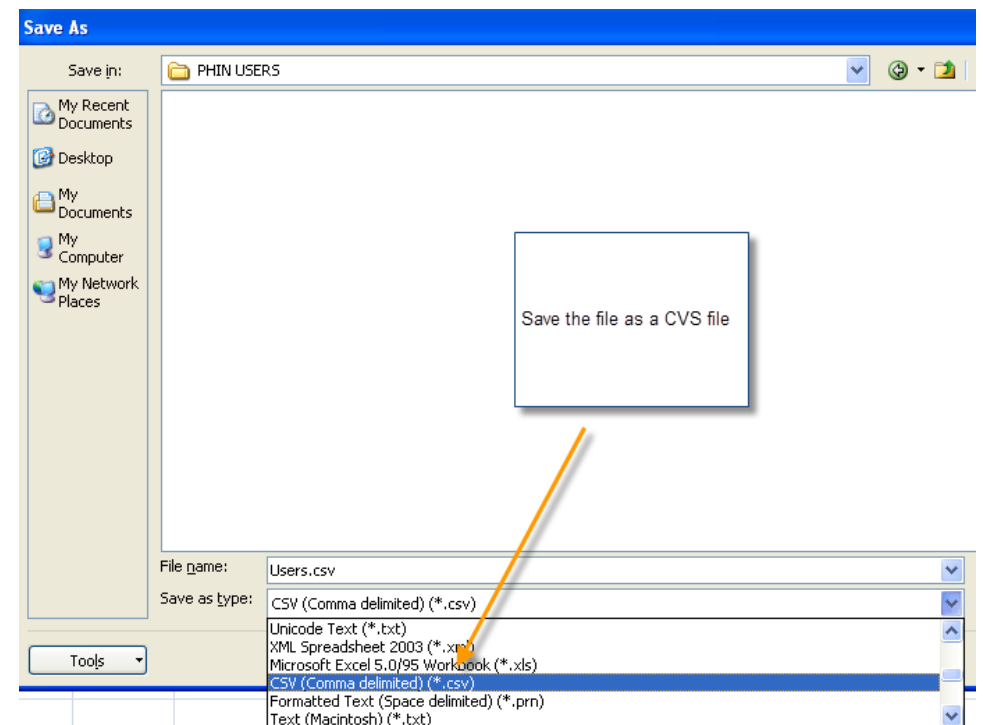
Navigate to the "Admin" pull-down menu and hold your mouse over "Manage Users." When the drop-down menu appears, select "Batch Add Users."
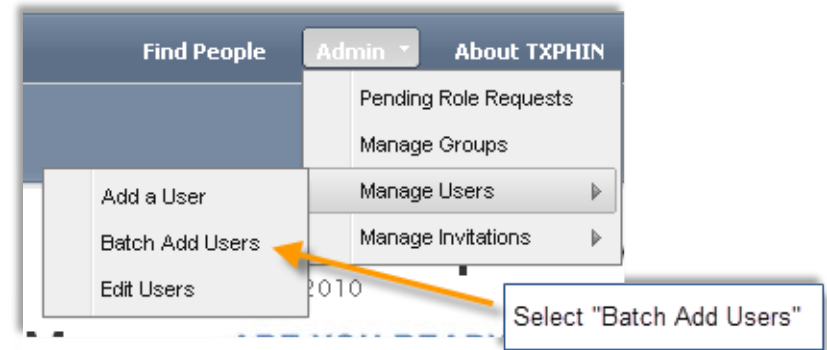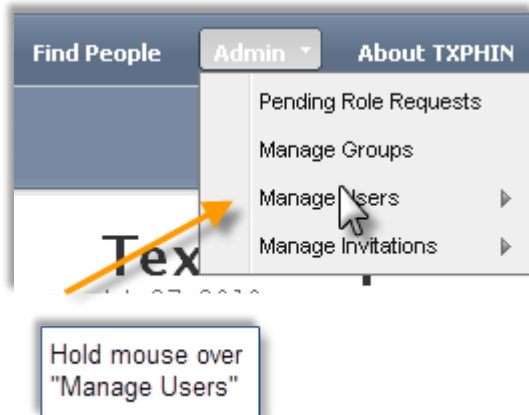
(On this page you have the option of downloading an example CVS file to use if you do not want to create your own)
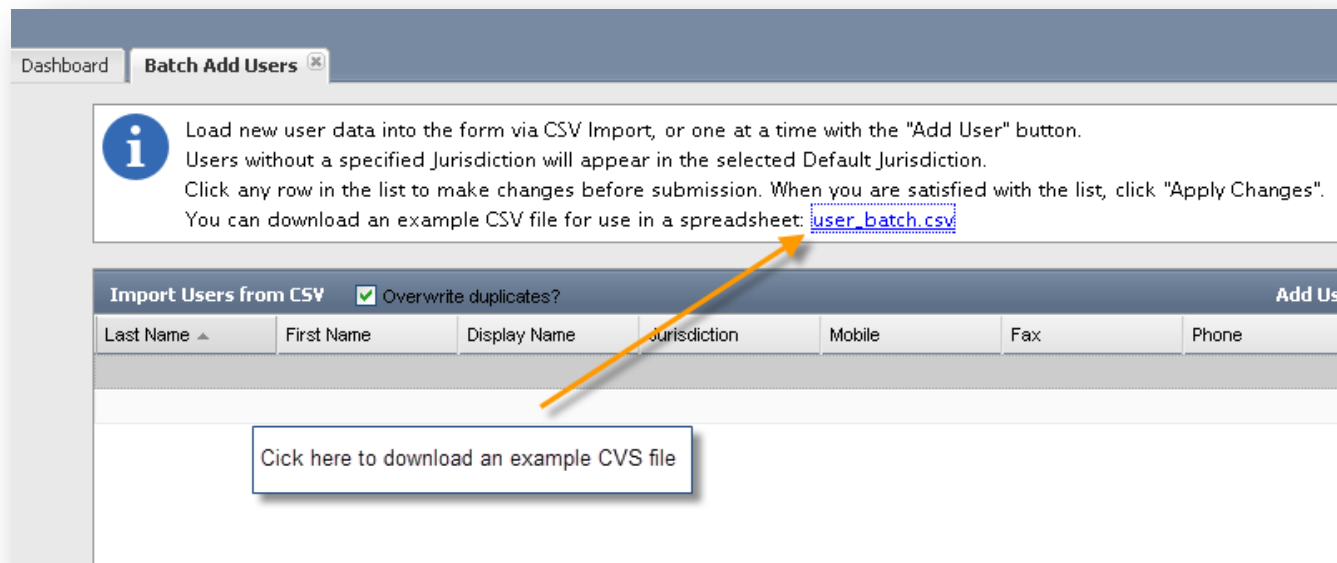
Because all users are required to have a jurisdiction associated with their profiles, you will be prompted to select a "default jurisdiction." Only approved jurisdictions assigned to your profile will appear to this field.

Click on "Import Users from CSV" found at the top left of the page. A dialogue box will appear where you can browse for the appropriate file. Select the file and it will automatically be uploaded.

(NOTE: You can only upload your file once since a Display Name (user name) will already be in use on a second try. Each CSV file that you upload may contain users in only one jurisdiction. Do not mix multiple jurisdictions.)

Click on "Import Users from CSV" and select your file
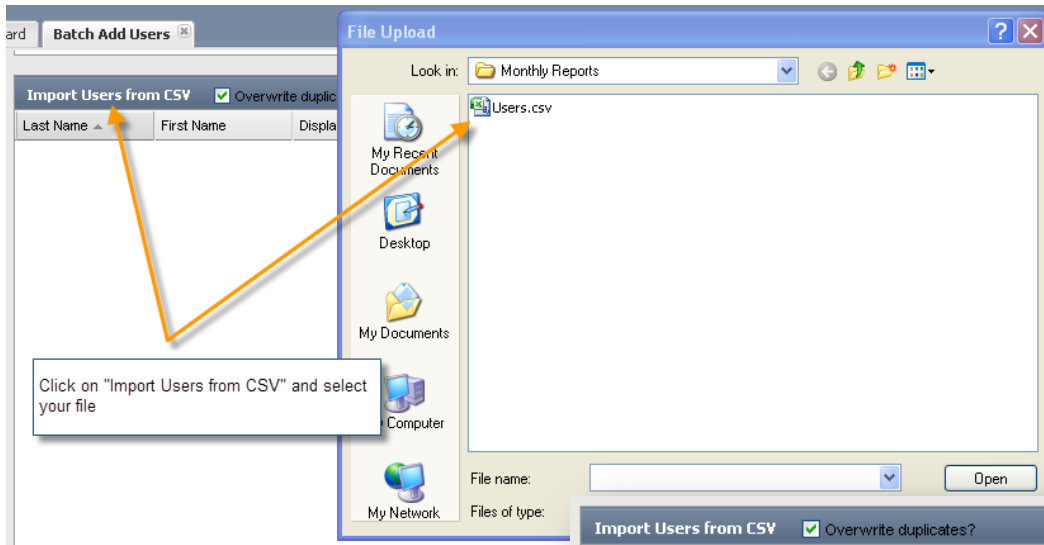
Once uploaded, the user information will appear on the page. You may sort and edit as before. When you are satisfied with the additions, click "Apply Changes" at the bottom right of the page.

Click to save users

Last Name ▲	First Name	Display Name	Jurisdiction	Mobile	Fax	Phone	Email
Doe	John	JD	Armstrong	555-555-5555	555-555-5555	555-555-5555	health@talho.org
Doe	Jane	JaneD	Armstrong	555-555-5555	555-555-5555	555-555-5555	jane@doe.com

Default Jurisdiction for this batch:

Apply Changes   Cancel and Discard Changes