

Understanding the Functionality of the “Admin” Role

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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.”

Click "View My Profile" to see if you've been assigned the role of "Admin"

Roles

- Public in Armstrong
- Health Officer in Armstrong
- Admin in Armstrong**
- Health Alert and Communications Coordinator in Armstrong
- Emergency Management Coordinator in Armstrong

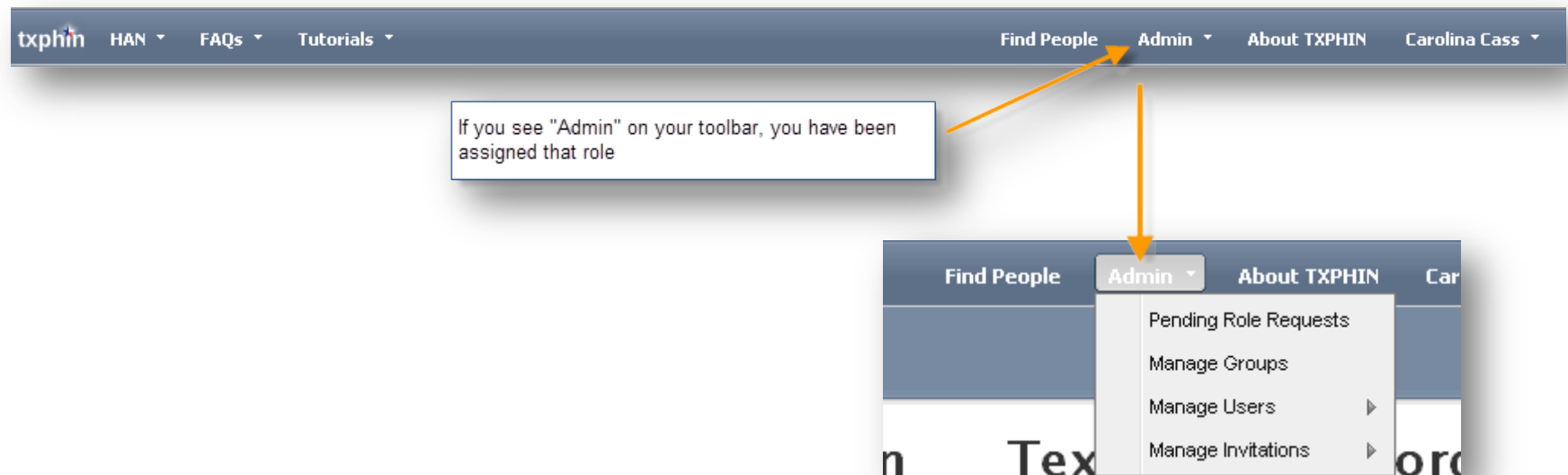
If you have been assigned the "Admin" role, you will see it listed here

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

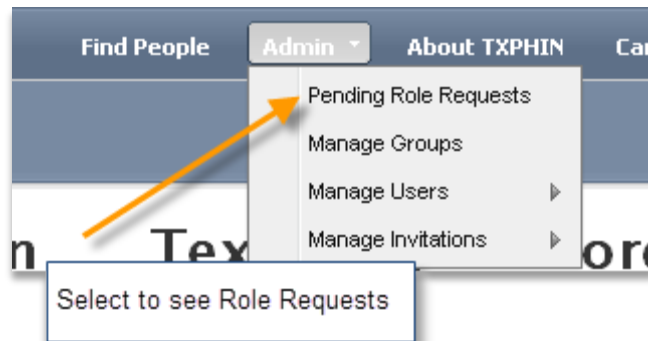
As an “Admin” in your jurisdiction, you will be able to see an “Admin” tab that appears in the upper right hand corner of your navigation toolbar. Once selected, this tab allows you to perform the following actions:

- 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

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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

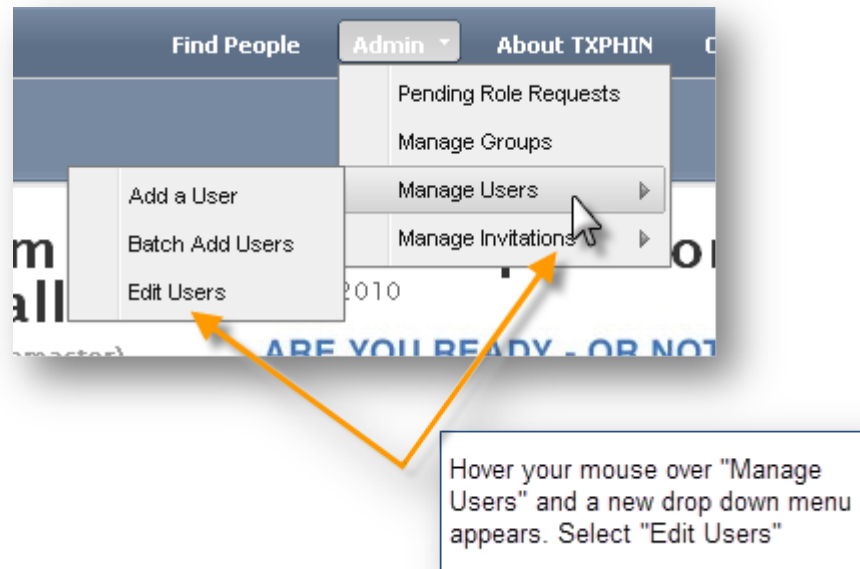
[ethanwaldo@yahoo.com](#)

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.”



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.

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FAQs

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Find People

Admin

About TXPHIN

Carolina Cass

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
<div><div></div><div>Carolina Cass ccass@talho.org</div></div>	Public in Armstrong Health Officer in Armstrong Admin in Armstrong Health Alert and Communications Coordinator in Armstrong Emergency Management Coordinator in Armstrong
<div><div></div><div>Final Opus finalopus@gmail.com</div></div>	Public in Armstrong
<div><div></div><div>Ethan Waldo ethanwaldo@yahoo.com</div></div>	Public in Armstrong Health Officer in Armstrong
<div><div></div><div>Ethan Weirido ewaldo@talho.org</div></div>	Public in Texas 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.

Documents

Forums

Links

OLD: Use TXPHIN 1.0

Need Help? Email: phinadmin@dshs.state.tx.us

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.

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Dashboard Edit Users

People Search

Name: ethan waldo

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

Search Results Page 1 of 1 Add User Edit User Delete User Displaying results

Search Results	Roles
 Ethan Waldo ethanwaldo@yahoo.com	Public in Armstrong Health Officer in Armstrong Chief Veterinarian in Armstrong

Search by Name, Email Address, Phone, and or Job Title

After entering necessary information click "Search" and the individual will appear to the right of the filters.

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

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.

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Dashboard Edit Users

People Search

Name:

Email Address:

Phone: Job Title:

Roles: (1 selected) Clear All

- FBI WMD/BT Agent
- Health Alert and Communications Coordinator
- Health Officer**
- Immunization Director
- Infection Control Practitioner

Jurisdictions: (none selected) Clear All

- Armstrong

Reset Search

Search Results Page 1 of 1 Add User Edit User Delete User Displaying results:

	Search Results	Roles
	Carolina Cass ccass@talho.org	Public in Armstrong Health Officer in Armstrong Admin in Armstrong Health Alert and Communications Coordinator in Armstrong Emergency Management Coordinator in Armstrong
	Ethan Waldo ethanwaldo@yahoo.com	Public in Armstrong Health Officer in Armstrong Chief Veterinarian in Armstrong

Documents Forums Links OLD: Use TXPHIN 1.0 Need Help? Email: phinadmin

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

Roles: (3 selected) Clear All

- FBI WMD/BT Agent
- Health Alert and Communications Coordinator
- Health Officer**
- Immunization Director**
- Infection Control Practitioner




Jurisdictions: (none selected) Clear All

Reset 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.

Page 1 of 1		Add User	Edit User	Delete User	Displaying
Search Results		Roles			
	Carolina Cass ccass@talho.org	Public in Armstrong Health Officer in Armstrong Admin in Armstrong Health Alert and Communications Coordinator in Armstrong Emergency Management Coordinator in Armstrong			
	Ethan Waldo ethanwaldo@yahoo.com	Public in Armstrong Health Officer in Armstrong Chief Veterinarian in Armstrong			
	Ethan Weirido ewaldo@talho.org	Public in Texas Public in Armstrong Admin in Armstrong Health Alert and Communications Coordinator in Armstrong			

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

Dashboard

Edit Users

Edit User: Ethan Waldo

First name:
Ethan

Last name:
Waldo

Display name:
Ethan Waldo

Email address:
ethanwaldo@yahoo.com

Language:
English

Privacy setting:
☐ Make this profile public?

Alerting Devices:

ethanwaldo@yahoo.com E-mail

Add device

Roles:

Public Armstrong

Health Officer

No Photo Uploaded

Picture to upload:

Browse...

Office phone:

Office fax:

Home phone:

Mobile phone:

Job title:

Employer:

Job description:

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 jurisdiction and role from the pull-down menu and click the "Apply Changes" button at the bottom of the profile.

Roles:

- Public** Armstrong
- Health Officer** Armstrong
- Chief Veterinarian** Armstrong

Request Role

Click to assign new role

Already assigned roles

Request Role

Job title: Employee

Role:

- Phin: Admin
- Phin: OrgAdmin
- Phin: Superadmin
- Phin: SuperAdmin
- Animal Control Director
- Behavioral Health Director
- BioTerrorism Coordinator
- Border Health Director
- Chief Epidemiologist

Jurisdiction:

Armstrong

Select your jurisdiction and then select a role

Add Cancel

After you select a role Click "Add"

Roles:

- Public** Armstrong
- Health Officer** Armstrong
- Chief Veterinarian** Armstrong
- Behavioral Health Director** Armstrong

needs to be saved

Request Role

Job description:

Bio:

Credentials:

Organizations:

No organizations to display

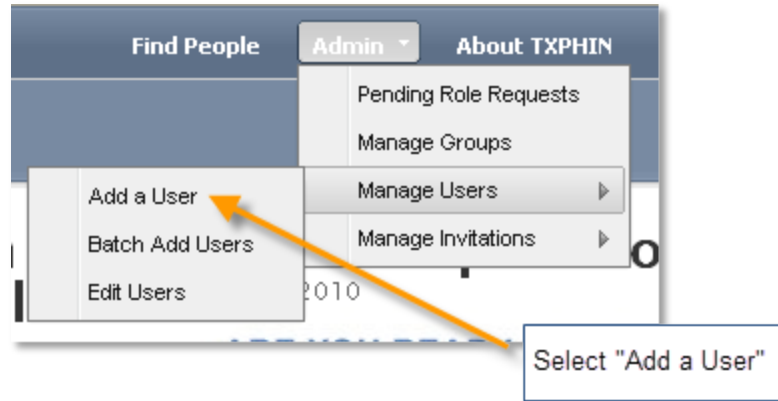
Request Organization

Note the role is not yet saved. If you are finished adding roles click "Apply Changes."

Apply Changes Cancel and Discard Changes

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

A screenshot of the 'Add A User' form. The form is divided into several sections. On the left, there are input fields for 'First name:', 'Last name:', 'Display name:', 'Email address:', 'Password:', 'Confirm password:', 'Job title:', 'Employer:', 'Office phone:', 'Office fax:', 'Home phone:', 'Mobile phone:', 'Language:', and a dropdown for 'English'. On the right, there are dropdown menus for 'Home Jurisdiction:', 'Roles:', 'Alerting Devices:', and 'Organizations:'. Each of these right-side sections has a 'Request' button. At the bottom right, there are 'Apply Changes' and 'Cancel and Discard Changes' buttons. A red rectangular box highlights the 'First name', 'Last name', 'Password', 'Confirm password', 'Job title', and 'Employer' fields. A red line points from the text 'Required Fields' at the bottom to this box.

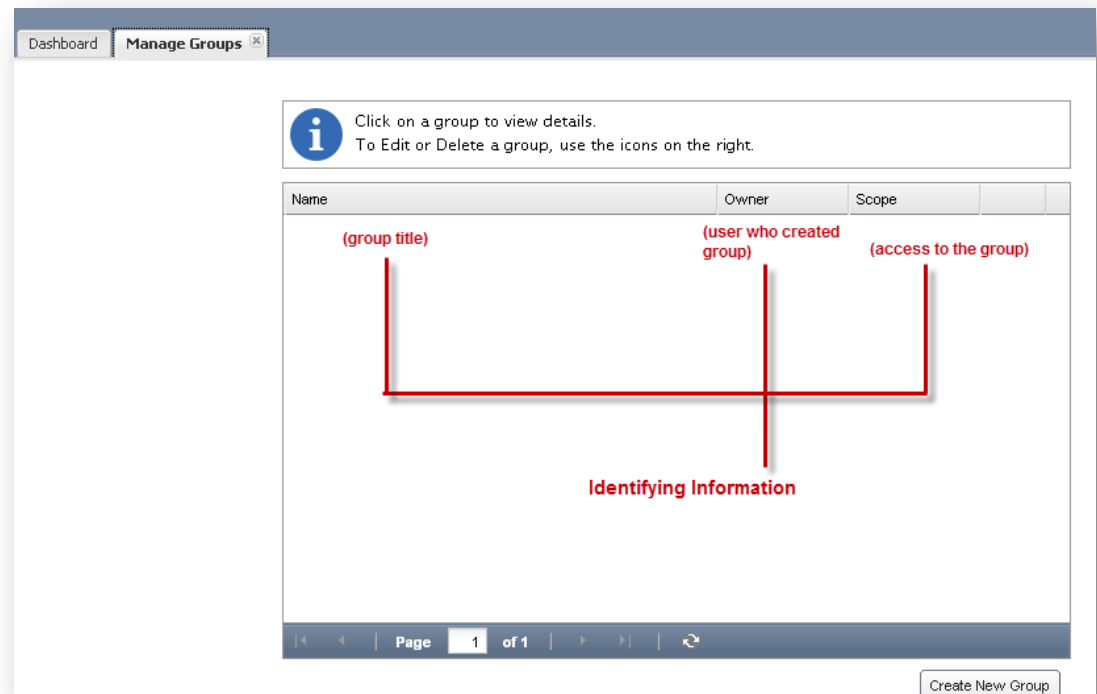
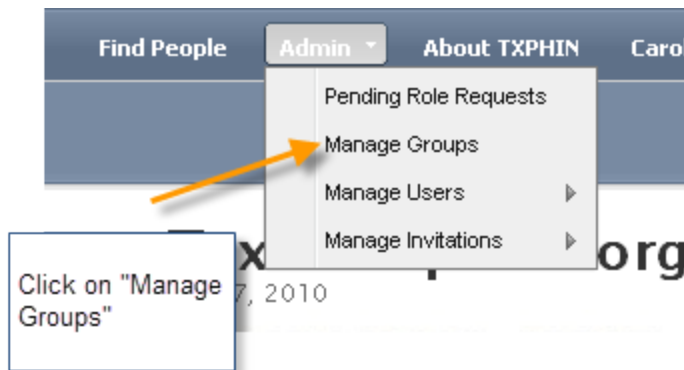
Fill out the fields; make the appropriate selections from the pull-down menus and click “Apply Changes” to create the new user profile. If all fields have been entered correctly, you will see a confirmation in yellow that says “This user has been successfully created.”

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

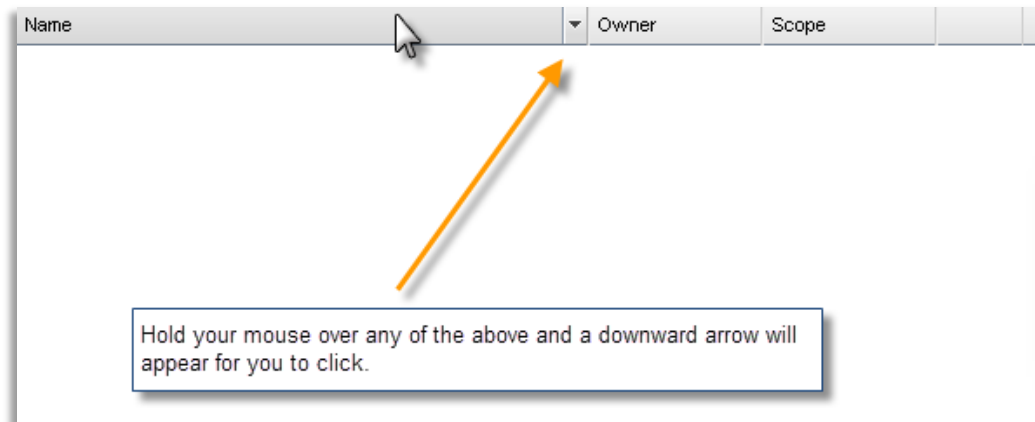
MANAGING EXISTING GROUPS

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:

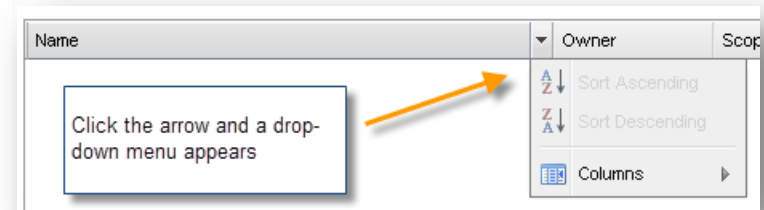
- Name (group title)
- Owner (user who created the group)
- Scope (access to the group)



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.

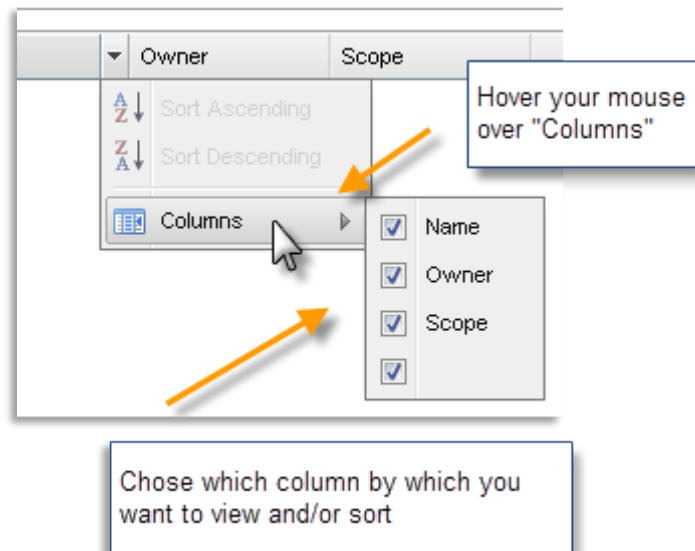


Click on the arrow and a drop-down menu will appear:

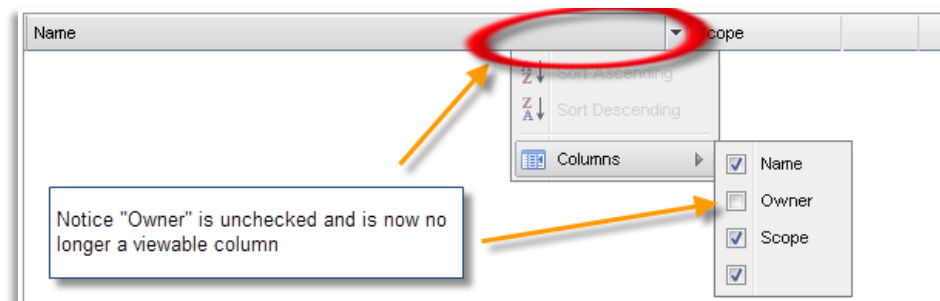


You are given a choice to sort the groups either in ascending order or descending order.

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:





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 Case	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.

Name	Owner	Scope	
Test	Carolina Cass	Personal	 

Click this icon to edit a group

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.

Group Name:

Scope:

Owner:

Jurisdiction:

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

Edit Jurisdictions, Roles, and Users

Search:

Clear Search

Roles

Users

Recipient Preview

Users

Carolina Cass



You can delete existing group members

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:

The screenshot shows a list of jurisdictions with checkboxes on the left. Annotations with red lines point to specific checkboxes:

- A red line points to the checkbox next to "Region 2/3" with the text: "Check the box to add Jurisdiction".
- A red line points to the checkbox next to "Callahan" with the text: "Uncheck to delete Jurisdiction".

The list includes: Federal, Texas, Region 1, Region 2/3, Archer, Baylor, Brown, Callahan, Clay, Coleman, Collin, Comanche, Cooke, and Cottle. At the bottom are "Search:" and "Clear Search" buttons.

Roles:

The screenshot shows a list of roles with checkboxes on the left. Annotations with red lines point to specific checkboxes:

- A red line points to the checkbox next to "Behavioral Health Director" with the text: "Check the box to add Role".
- A red line points to the checkbox next to "Chief Epidemiologist" with the text: "Uncheck to delete Role".

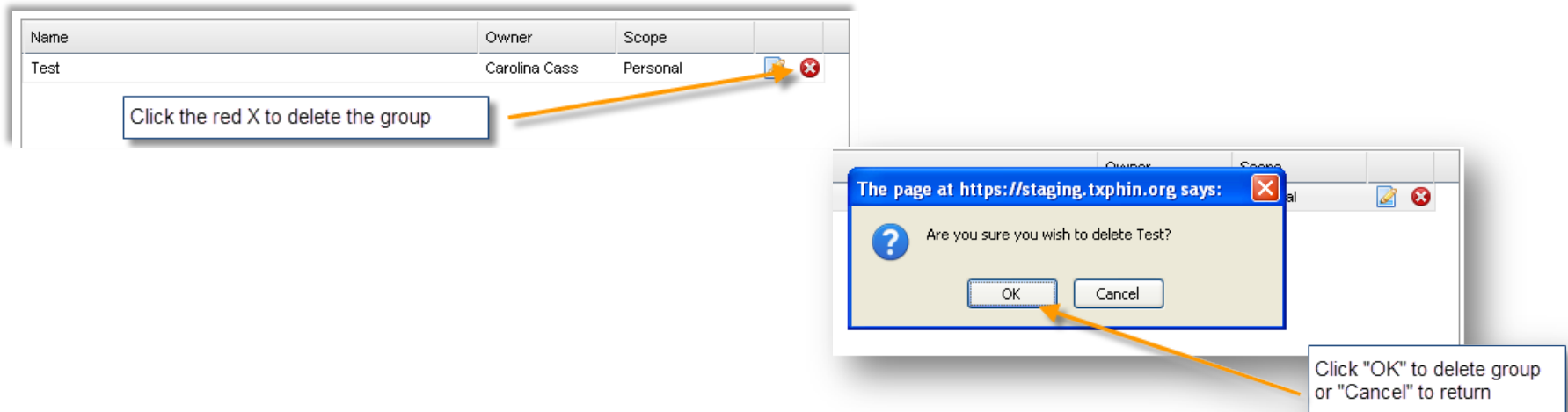
The list includes: Phin: Admin, Phin: OrgAdmin, Phin: Superadmin, Phin: SuperAdmin, Animal Control Director, Behavioral Health Director, BioTerrorism Coordinator, Border Health Director, Chief Epidemiologist, Chief Veterinarian, Communicable/Infectious Disease Coordinator, Emergency Management Coordinator, Emergency Medical Services Authority, and Emergency Operations Center Coordinator. At the bottom are "Search:" and "Clear Search" buttons.

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.

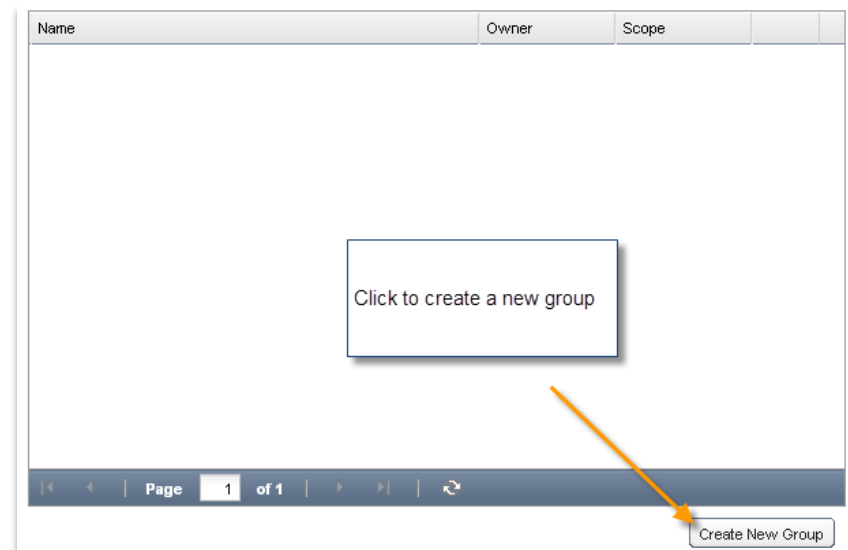
The screenshot shows the bottom of the screen with a "Clear Search" button and "Save" and "Cancel" buttons. A callout box with the text "Click 'Save' when your edits are complete" has an orange arrow pointing to the "Save" button.

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).

The screenshot shows a web form for creating a group. At the top, there are three input fields: "Group Name:" with a red line and text "Enter Group Name" above it; "Scope:" with a dropdown arrow; and "Owner Jurisdiction:" with a dropdown arrow. Below these is a "Jurisdictions" section with a list of options: "Federal", "Texas", "Region 6/5 South", "Region 7", "Region 8", "Region 9/10", "Region 11", and "Louisiana". Each option has a checkbox and a dropdown arrow. A callout box points to the "Scope" and "Owner Jurisdiction" dropdowns with the text: "Click for drop down menus to choose 'Scope' and 'Owner Jurisdiction'". To the right, two dropdown menus are shown. The top one is open, showing options: "Personal", "Jurisdiction", "Global", and "Organization". Red lines connect these options to the text "Choose 'Scope' (access)". The bottom dropdown menu shows the option "Armstrong", with a red line connecting it to the text "Chose 'Owner Jurisdiction'". At the bottom of the form, there is a "Search:" field and a "Clear Search" button. Below the search bar are two tabs: "Roles" and "Users".

Group Name: Enter Group Name

Scope:

Owner Jurisdiction:

Jurisdictions

- ☐ Federal
- ☐ Texas
- ☐ Region 6/5 South
- ☐ Region 7
- ☐ Region 8
- ☐ Region 9/10
- ☐ Region 11
- ☐ Louisiana

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

Personal

Jurisdiction

Global

Organization

Choose "Scope" (access)

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.

Search:

Clear Search

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.

Jurisdictions

☐

Federal

☐

Texas

☐

+ Region 1

☐

- Region 2/3

☒

Archer

☐

Baylor

☒

Brown

☐

Callahan

☐

Clay

☒

Coleman

☒

Collin

☐

Comanche

☐

Cooke

☐

Cottle

Search:

Clear Search

Recipient Preview

Jurisdictions

Coleman

Brown

Collin

Archer

Users

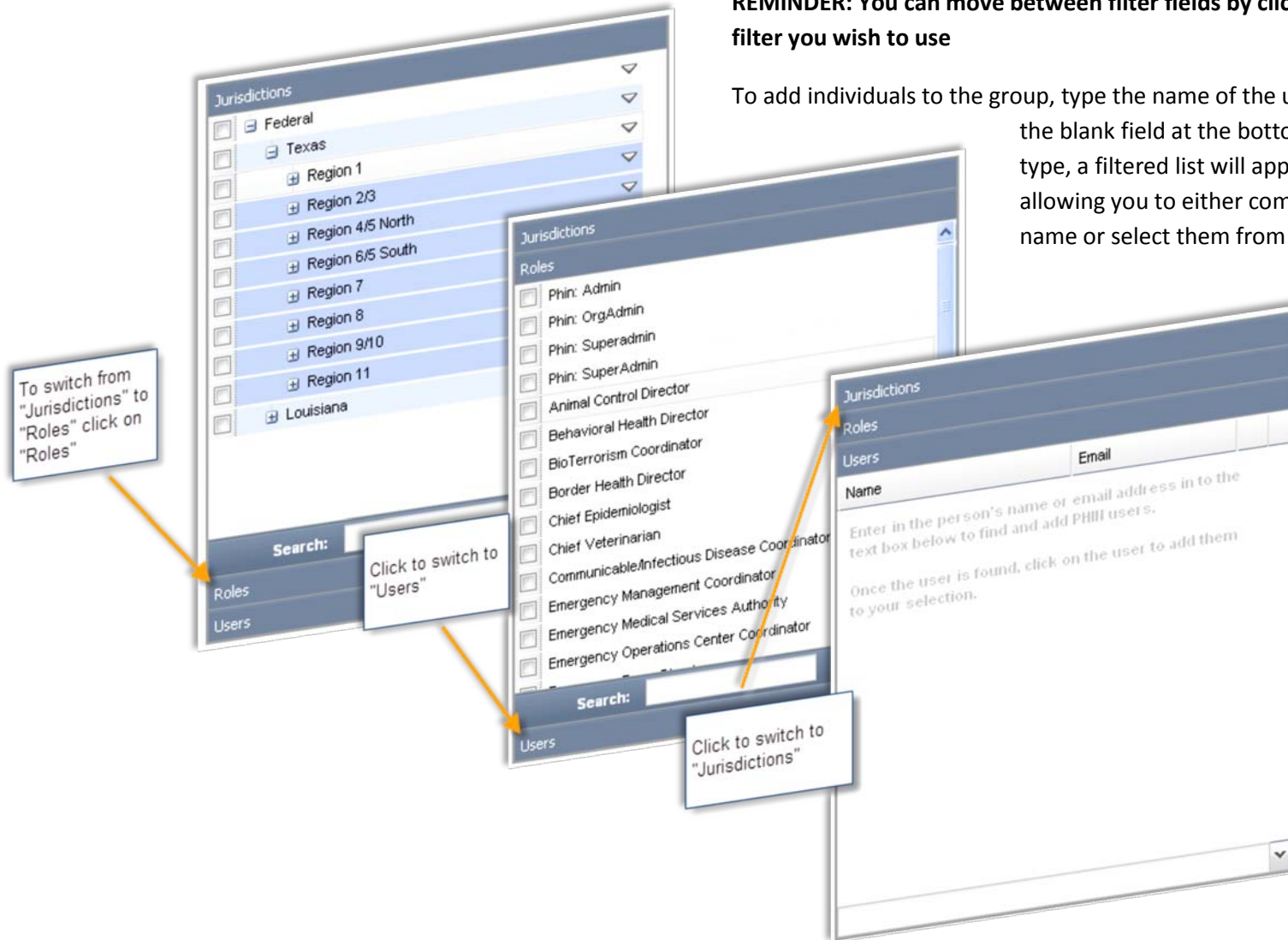
Carolina Cass

If you want to select these counties specifically **DO NOT** check the box next to the region

Notice the counties appear but **NOT** the Region

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.



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

The screenshot shows a web application interface for creating a new group. At the top, there are tabs for 'Dashboard' and 'Create New Group'. Below the tabs, the 'Owner' is set to 'Armstrong' and the 'Jurisdiction' is set to 'Texas'. A list of jurisdictions is shown on the left, including 'Federal', 'Texas', 'Region 1', 'Region 2/3', and several counties. A search bar is at the bottom of the list. On the right, a 'Recipient Preview' section shows a list of recipients with red 'X' marks next to them. At the bottom right, there are 'Save' and 'Cancel' buttons. A callout box with the text 'Don't forget to save your group!' points to the 'Save' button.

Dashboard Create New Group

Owner: Armstrong

Jurisdiction: Texas

Jurisdictions

- ☐ Federal
- ☐ Texas
 - ☐ Region 1
 - ☐ Region 2/3
 - ☒ Archer
 - ☐ Baylor
 - ☒ Brown
 - ☐ Callahan
 - ☐ Clay
 - ☒ Coleman
 - ☒ Collin
 - ☐ Comanche
 - ☐ Cooke
 - ☐ Cottle

Search:

Roles

Users

Recipient Preview

Jurisdictions

- Coleman
- Brown
- Collin
- Archer

Users

- Carolina Cass

Don't forget to save your group!

Save Cancel

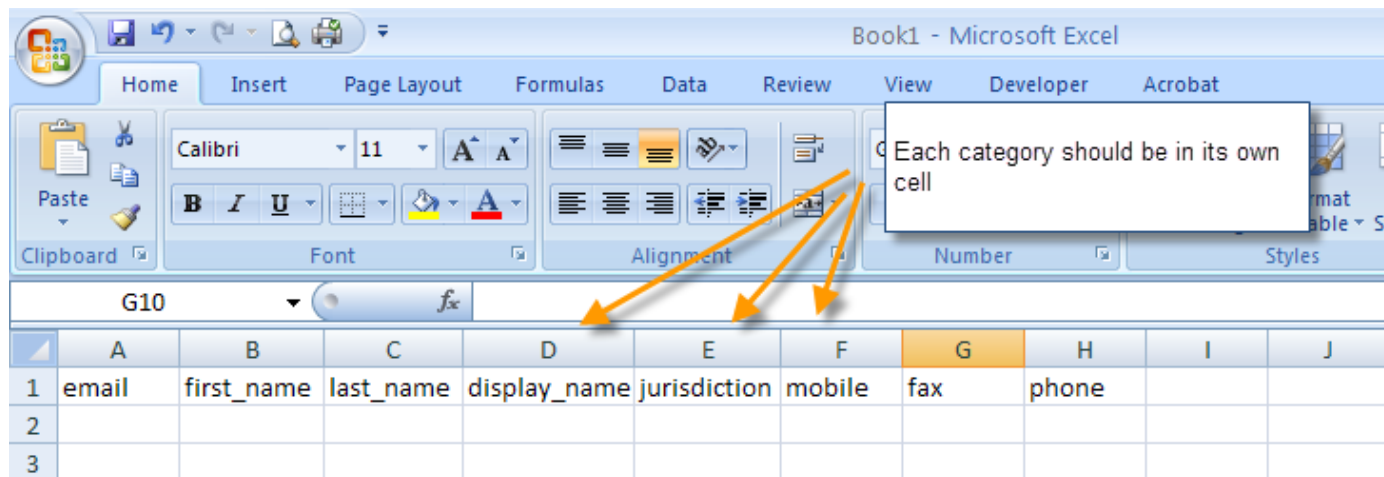
BATCH ADD USERS

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.

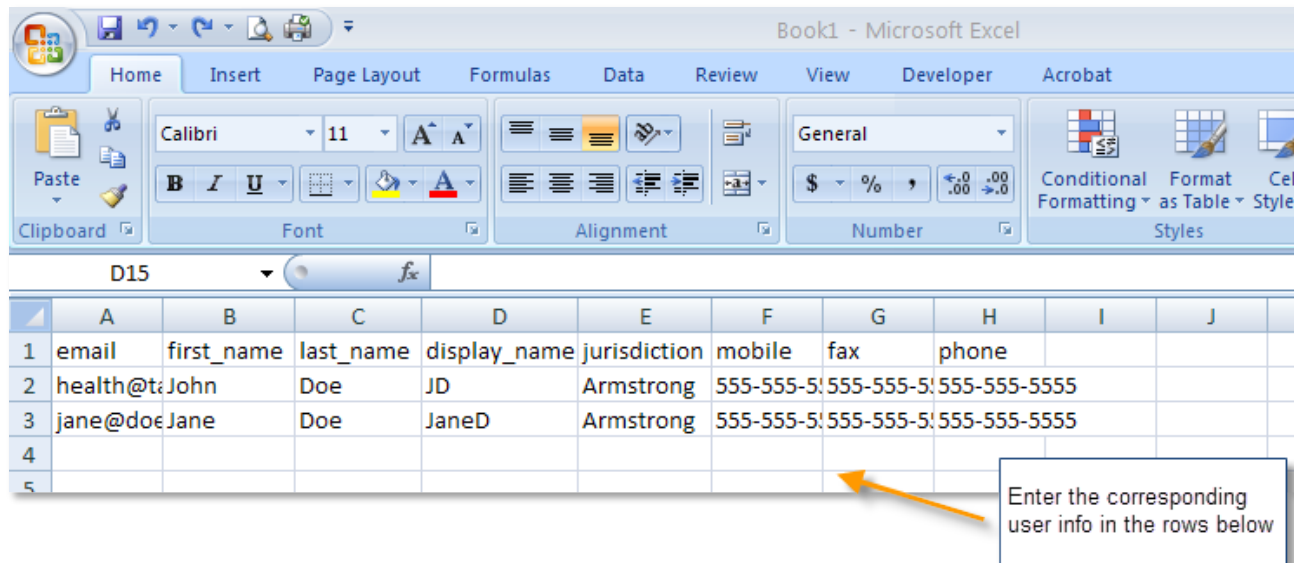
To create the correct type of file for upload, open an Excel file and, starting in cell A1, enter the following categories in the row. The success of your upload is dependent on the category order. The following are all required unless otherwise noted. Include, IN THIS ORDER:

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

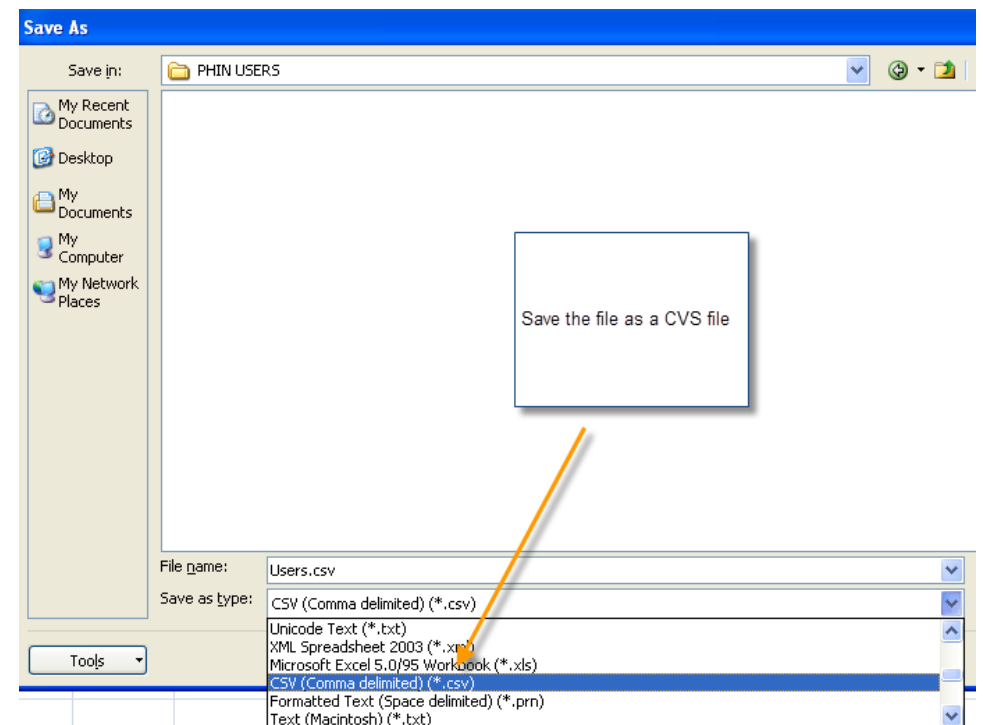
“Required” fields contain information that must be present in order to create a new user. “Optional” fields contain user information that you may or may not have. If you do not have the information, just leave the optional field blank.



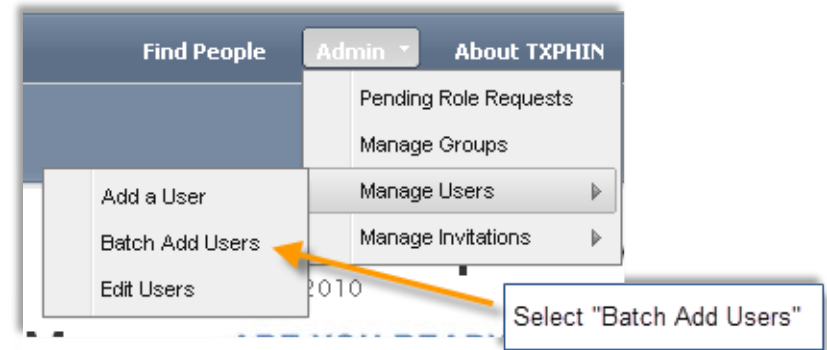
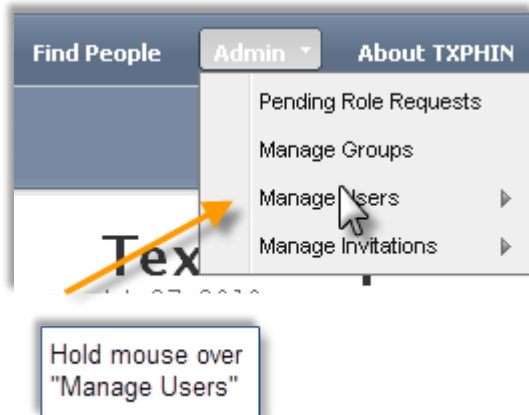
Once you have your categories entered, enter the corresponding user information in the rows below.



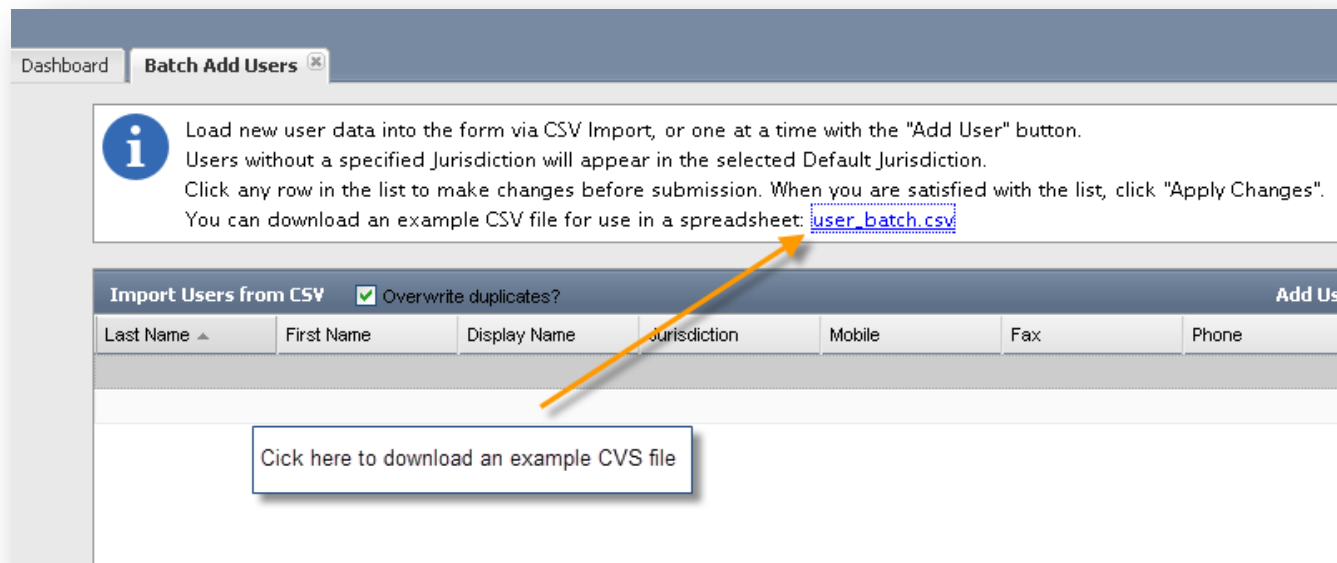
When your user list is complete save it as a “CVS (comma delimited)” file.



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.

The screenshot shows a web application interface for managing users. At the top, there is a navigation bar with a 'Dashboard' tab and an active 'Batch Add Users' tab. Below this, the main content area is titled 'Import Users from CSV' and includes a checked checkbox for 'Overwrite duplicates?'. To the right of this section are two buttons: 'Add User' and 'Remove User'. A table with eight columns is displayed: 'Last Name', 'First Name', 'Display Name', 'Jurisdiction', 'Mobile', 'Fax', 'Phone', and 'Email'. An orange arrow points from a text box to the 'Last Name' column header, with the instruction: 'Click on "Import Users from CSV" to upload file'. Another orange arrow points from a second text box to the 'Default Jurisdiction for this batch:' dropdown menu, with the instruction: 'Choose the default jurisdiction. (Only approved jurisdictions assigned to your profile will appear in this field)'. At the bottom right, there are two buttons: 'Apply Changes' and 'Cancel and Discard Changes'.

Dashboard Batch Add Users

Import Users from CSV ☒ Overwrite duplicates?

Add User Remove User

Last Name	First Name	Display Name	Jurisdiction	Mobile	Fax	Phone	Email
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Click on "Import Users from CSV" to upload file

Choose the default jurisdiction. (Only approved jurisdictions assigned to your profile will appear in this field)

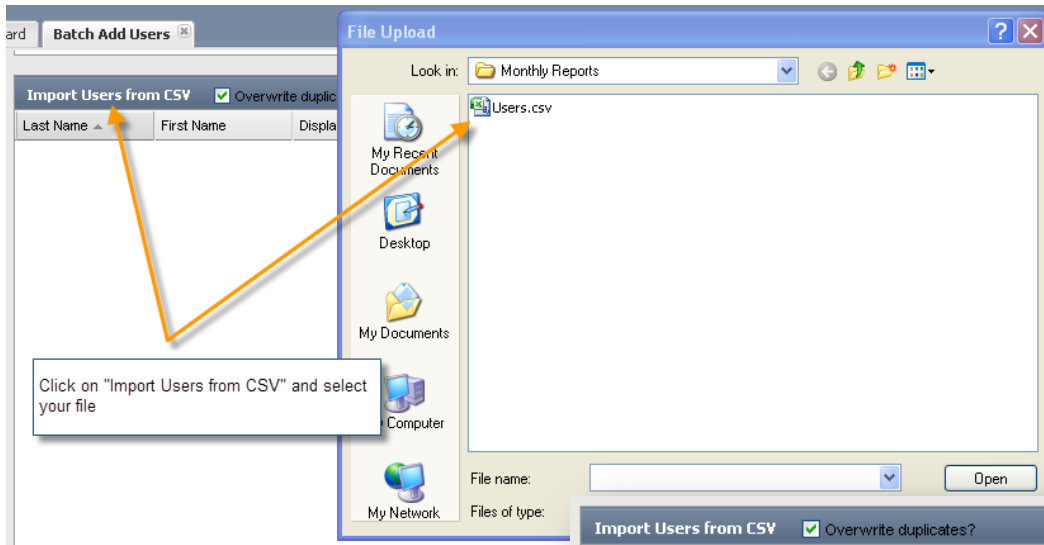
Default Jurisdiction for this batch:

Apply Changes Cancel and Discard Changes

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.)



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.

