



Add and edit a user

Task card

This task card discusses the following:

- [Access levels](#)
- [Access the manage users link](#)
- [Add a new user](#)
- [Assign an outlet and program activity to a user](#)
 - [To assign an outlet to a user](#)
 - [To assign a program activity to a user](#)
- [Viewing a user's role](#)
- [Editing a user](#)
 - [Upgrading a user's role to a Data Exchange Organisation administrator](#)
 - [Removing Organisation administrator access](#)

KEY HIGHLIGHTS

- Prior to requesting a Data Exchange account an individual account holder must have their own Digital ID (myID).
- 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.

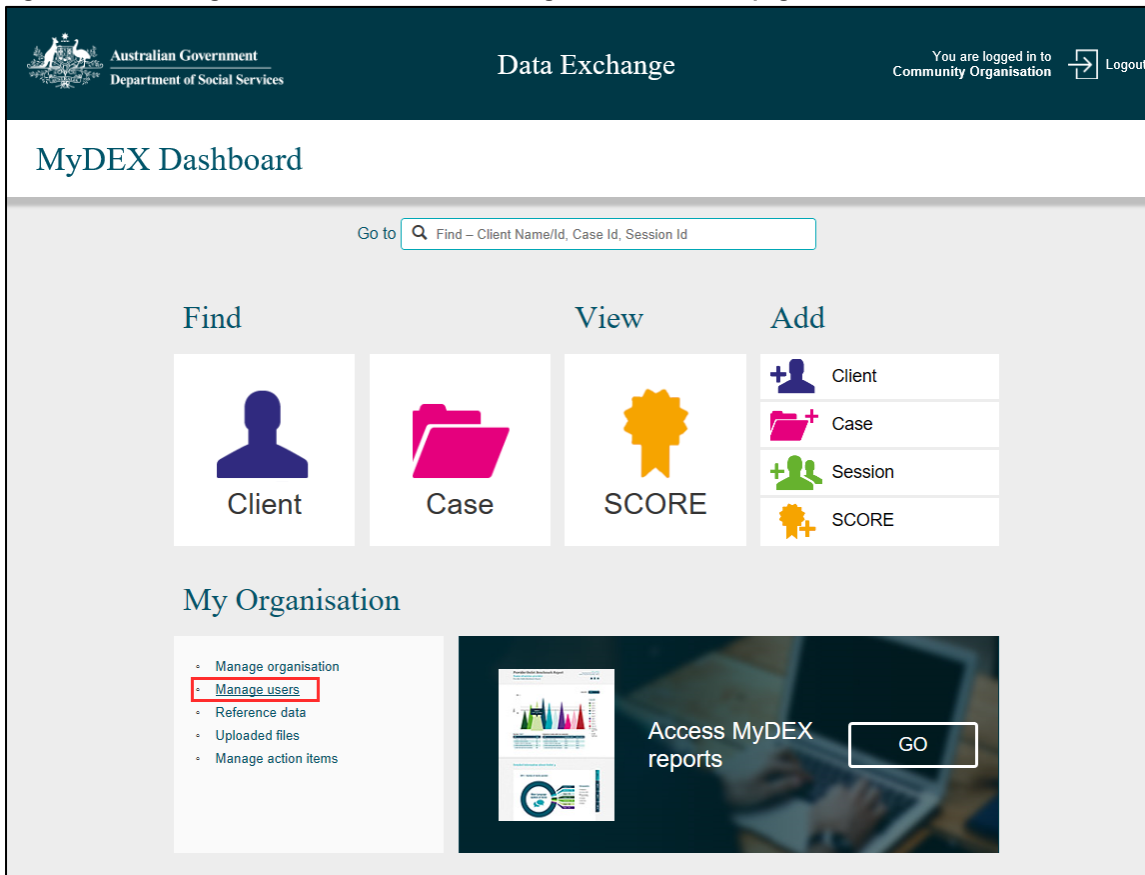
All clients entered into the Data Exchange web-based portal by the service are visible to **all users** within the organisation.

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

Access the Manage users link

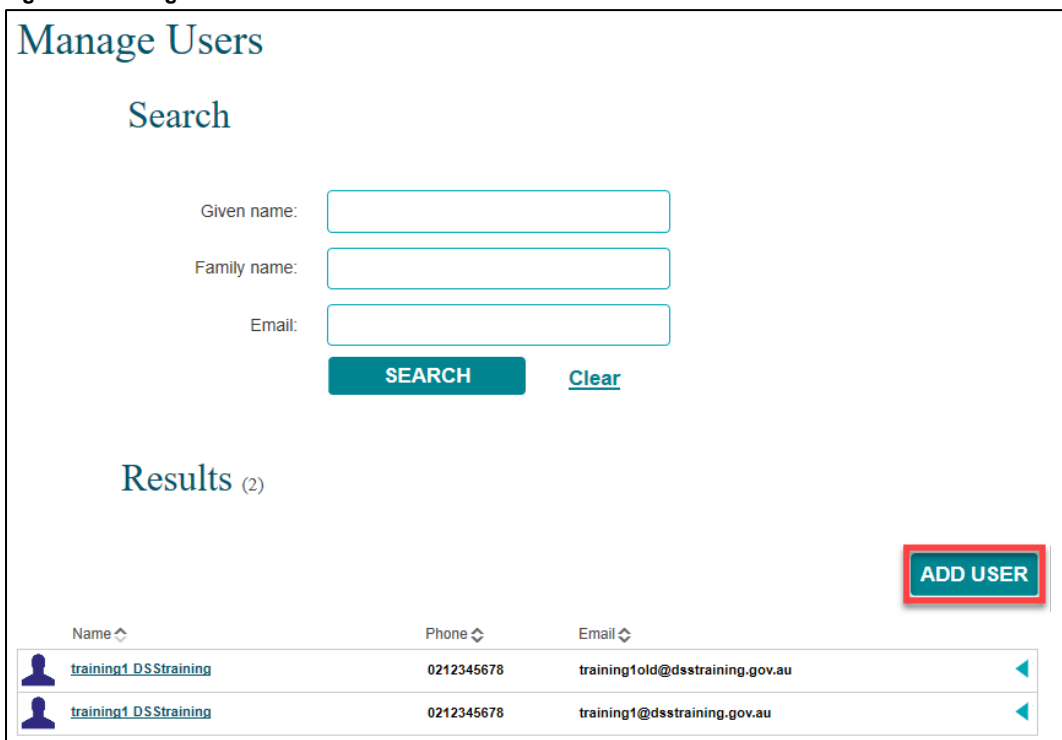
As a Data Exchange **Org** Administrator, log into the Data Exchange web-based portal and select the **Manage users** link under the My Organisation heading. Refer Figure 1.

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

Home > Manage business users > Add user

Add user

All fields marked with an asterisk (*) are required.

User details

Given name: *

Family name: *

Phone: *
Must enter 10 digits

Mobile:
Must enter 10 digits

Email: *

System role: *

Conditions of Data Exchange User Access

Individual user account and password security is provided to access the DSS IT resources. User accounts and passwords must not be disclosed or shared with other people.

Information stored on the Data Exchange is protected under the Privacy Act. Access to records is on a need to know basis and information should only be accessed for the purpose(s) under which it was collected.

Actions prejudicial to security may result in access being suspended or ceased without notice.

Everyone with access to DSS IT resources have particular responsibilities in respect of:

- Password security. No-one is to attempt to bypass or defeat DSS' IT security system.
- Everyone is responsible for maintaining the integrity of software and hardware under their ownership and ensuring that its condition does not prejudice the integrity of DSS' propriety or licensed software or hardware.

By creating this person as a Data Exchange user, I am agreeing to inform the user of the Conditions of access outlined above. *

I certify that the nominated user needs access to the Data Exchange, that their user details are correct, and they are authorised to access this information on behalf of my organisation. *

[Cancel](#)

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: <ul style="list-style-type: none"> ▪ 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

The screenshot displays the 'User profile' interface. At the top, the title 'User profile' is followed by three teal buttons: 'DELETE USER', 'EDIT USER DETAILS', and 'GRANT ADMIN ACCESS'. Below this is the 'User details' section, which lists personal and organizational information for a user named Jenny Jones. The 'Linked credentials' section indicates no credentials are linked. The 'Outlets' section shows no associated outlets, with a 'MANAGE OUTLETS' button. The 'Program activities' section shows no associated activities, with a 'MANAGE PROGRAM ACTIVITIES' button. A '< BACK' button is located at the bottom left.

User profile

[DELETE USER](#) [EDIT USER DETAILS](#) [GRANT ADMIN ACCESS](#)

User details

Given name: Jenny
Family name: Jones
Phone: 0261465604
Mobile: 0401010101
Email: jenny.jones@org.com.au
System role: OrgEditor

Organisation: Community Organisation
ABN: 11005906054
Source Organisation ID: 4-13UI4P
Source Organisation name: Community Organisation

Linked credentials

User has not linked any credentials to this account.

Outlets

No outlets are associated with this user account

[MANAGE OUTLETS](#)

Program activities

No program activities are associated with this user account

[MANAGE PROGRAM ACTIVITIES](#)

[< BACK](#)

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.

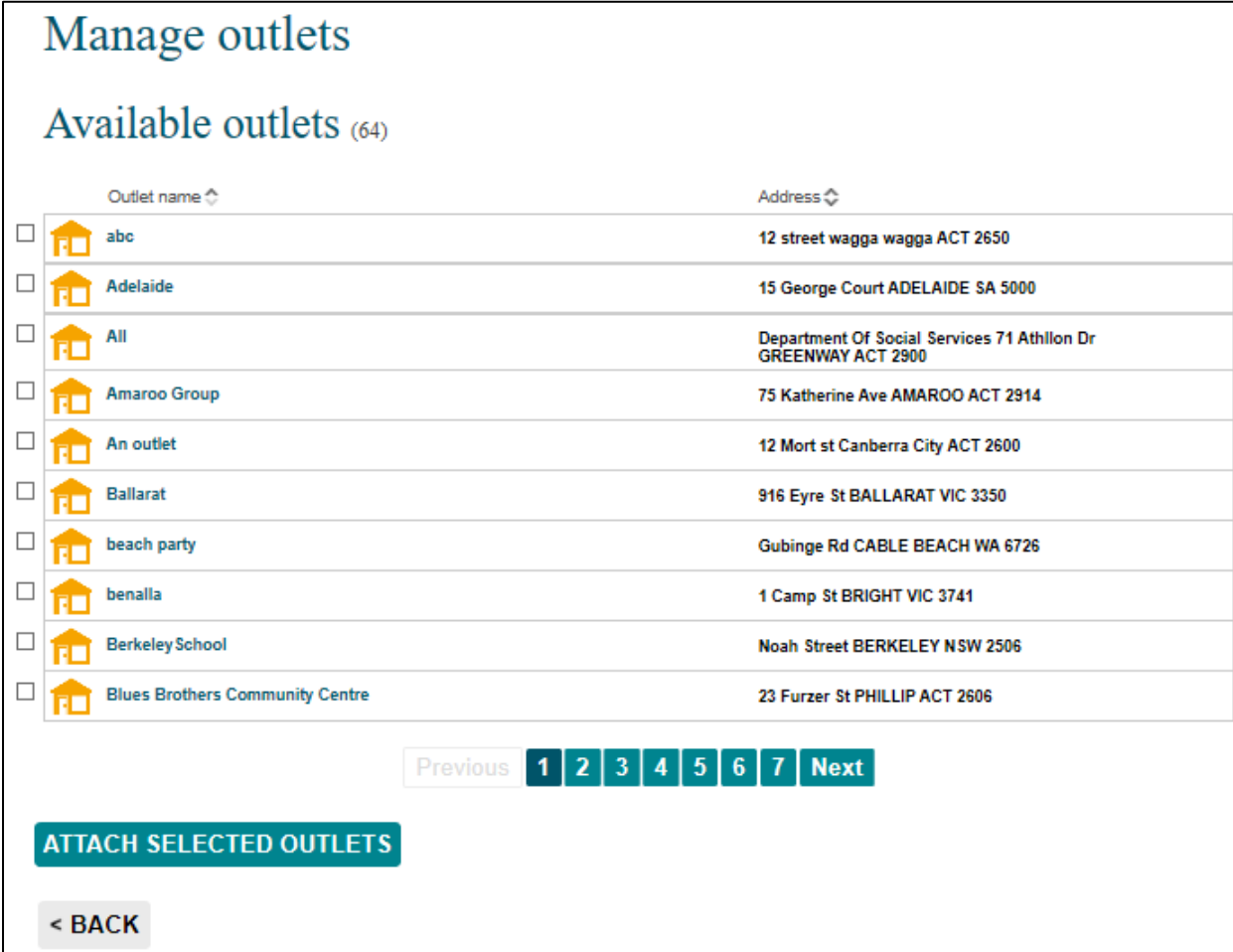
Users will **only** be able to view the detailed case and session details for outlets and program activities they have been assigned to via this function by their Data Exchange Organisation administrator. However, users will still be able to see any clients that the organisation has engaged with and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



The screenshot shows the 'Manage outlets' interface. At the top, it says 'Manage outlets' and 'Available outlets (64)'. Below this is a table with two columns: 'Outlet name' and 'Address'. Each row has a checkbox on the left and a house icon next to the outlet name. The table lists several outlets, including 'abc', 'Adelaide', 'All', 'Amaroo Group', 'An outlet', 'Ballarat', 'beach party', 'benalla', 'Berkeley School', and 'Blues Brothers Community Centre'. At the bottom of the table, there are pagination buttons: 'Previous', '1', '2', '3', '4', '5', '6', '7', and 'Next'. Below the table is a large green button labeled 'ATTACH SELECTED OUTLETS' and a grey button labeled '< BACK'.

Outlet name	Address
<input type="checkbox"/> abc	12 street wagga wagga ACT 2650
<input type="checkbox"/> Adelaide	15 George Court ADELAIDE SA 5000
<input type="checkbox"/> All	Department Of Social Services 71 Athllon Dr GREENWAY ACT 2900
<input type="checkbox"/> Amaroo Group	75 Katherine Ave AMAROO ACT 2914
<input type="checkbox"/> An outlet	12 Mort st Canberra City ACT 2600
<input type="checkbox"/> Ballarat	916 Eyre St BALLARAT VIC 3350
<input type="checkbox"/> beach party	Gubinge Rd CABLE BEACH WA 6726
<input type="checkbox"/> benalla	1 Camp St BRIGHT VIC 3741
<input type="checkbox"/> Berkeley School	Noah Street BERKELEY NSW 2506
<input type="checkbox"/> Blues Brothers Community Centre	23 Furzer St PHILLIP ACT 2606

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 screenshot shows a web interface for selecting outlets. The title is "Available outlets (64)". Below the title is a table with two columns: "Outlet name" and "Address". The table lists 10 outlets. Two outlets, "Amaroo Group" and "An outlet", are selected, indicated by checked checkboxes and a red rectangular highlight around their rows. Below the table is a pagination bar with "Previous", numbers 1 through 7, and "Next". At the bottom left, there is a blue button labeled "ATTACH SELECTED OUTLETS" and a grey button labeled "< BACK".

Outlet name	Address
<input type="checkbox"/> abc	12 street wagga wagga ACT 2650
<input type="checkbox"/> Adelaide	15 George Court ADELAIDE SA 5000
<input type="checkbox"/> All	Department Of Social Services 71 Athllon Dr GREENWAY ACT 2900
<input checked="" type="checkbox"/> Amaroo Group	75 Katherine Ave AMAROO ACT 2914
<input checked="" type="checkbox"/> An outlet	12 Mort st Canberra City ACT 2600
<input type="checkbox"/> Ballarat	916 Eyre St BALLARAT VIC 3350
<input type="checkbox"/> beach party	Gubinge Rd CABLE BEACH WA 6726
<input type="checkbox"/> benalla	1 Camp St BRIGHT VIC 3741
<input type="checkbox"/> Berkeley School	Noah Street BERKELEY NSW 2506
<input type="checkbox"/> Blues Brothers Community Centre	23 Furzer St PHILLIP ACT 2606

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 screenshot shows a web interface for managing outlets. The title is "Manage outlets". Below the title is a section titled "Available outlets (62)" with a table of 10 outlets. Below this table is a pagination bar with "Previous", numbers 1 through 7, and "Next". Below the pagination bar is a blue button labeled "ATTACH SELECTED OUTLETS". Below that is a section titled "Selected outlets (2)" with a table of 2 outlets. This section is highlighted with a red rectangular border. Below the "Selected outlets" table is a blue button labeled "REMOVE SELECTED OUTLETS" and a grey button labeled "< BACK".

Outlet name	Address
<input type="checkbox"/> abc	12 street wagga wagga ACT 2650
<input type="checkbox"/> Adelaide	15 George Court ADELAIDE SA 5000
<input type="checkbox"/> All	Department Of Social Services 71 Athllon Dr GREENWAY ACT 2900
<input type="checkbox"/> Ballarat	916 Eyre St BALLARAT VIC 3350
<input type="checkbox"/> beach party	Gubinge Rd CABLE BEACH WA 6726
<input type="checkbox"/> benalla	1 Camp St BRIGHT VIC 3741
<input type="checkbox"/> Berkeley School	Noah Street BERKELEY NSW 2506
<input type="checkbox"/> Blues Brothers Community Centre	23 Furzer St PHILLIP ACT 2606
<input type="checkbox"/> Brendos Laundry	71 Athllon Dr TUGGERANONG ACT 2619
<input type="checkbox"/> Brisbane	100 Creek st Brisbane QLD 4000

Outlet name	Address
<input type="checkbox"/> Amaroo Group	75 Katherine Ave AMAROO ACT 2914
<input type="checkbox"/> An outlet	12 Mort st Canberra City ACT 2600

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

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

The screenshot displays the 'User profile' screen for a user named 'New PERSON'. At the top, a breadcrumb trail shows 'Home > Manage users > User Profile: New Person'. A blue information icon is followed by a message: 'User New PERSON has not been assigned to outlets and/or program activities. This user must be assigned to at least one outlet and program activity. The outlet must deliver that program activity in order to view and enter data within the system.' Below this, the 'User profile' section includes three buttons: 'DELETE USER', 'EDIT USER DETAILS', and 'GRANT ADMIN ACCESS'. The 'User details' section lists the following information: Given name: New; Family name: Person; Phone: 0936728191; Mobile: (blank); Email: new@man.com.au; System role: OrgEditor; Organisation: Community Organisation; ABN: 11005906054; Source Organisation ID: 4-13UI4P; Source Organisation name: Community Organisation. The 'Linked credentials' section states 'User has not linked any credentials to this account.' The 'Outlets (2)' section features a 'MANAGE OUTLETS' button and a table with two entries: 'Amaroo Group' at '75 Katherine Ave AMAROO ACT 2914' and 'An outlet' at '12 Mort st Canberra City ACT 2600'. The 'Program activities' section has a 'MANAGE PROGRAM ACTIVITIES' button and a message: 'No program activities are associated with this user account'. A '< BACK' button is located at the bottom left. On the right side, a purple header 'I WANT TO...' is followed by a list of actions: Find a client, Find a case, View a client SCORE, Add a client, Add a case, Add a session, Add a client SCORE, Manage organisation, Manage users, Reference data, Uploaded files, and Go to home page.

Home > Manage users > User Profile: New Person

i User New PERSON has not been assigned to outlets and/or program activities. This user must be assigned to at least one outlet and program activity. The outlet must deliver that program activity in order to view and enter data within the system.

User profile

DELETE USER **EDIT USER DETAILS** **GRANT ADMIN ACCESS**

User details

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

Linked credentials

User has not linked any credentials to this account.

Outlets (2)

MANAGE OUTLETS

Outlet name	Address
Amaroo Group	75 Katherine Ave AMAROO ACT 2914
An outlet	12 Mort st Canberra City ACT 2600

Program activities

MANAGE PROGRAM ACTIVITIES

No program activities are associated with this user account

< BACK

I WANT TO...

- Find a client
- Find a case
- View a client SCORE
- Add a client
- Add a case
- Add a session
- Add a client SCORE
- Manage organisation
- Manage users
- Reference data
- Uploaded files
- Go to home page

To assign a program activity to a user

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

Figure 9 – User profile screen

The screenshot shows the 'User profile' screen for a user named 'New PERSON'. The breadcrumb trail is 'Home > Manage users > User Profile: New Person'. A message states: 'User New PERSON has not been assigned to outlets and/or program activities. This user must be assigned to at least one outlet and program activity. The outlet must deliver that program activity in order to view and enter data within the system.' Below this is the 'User profile' section with buttons for 'DELETE USER', 'EDIT USER DETAILS', and 'GRANT ADMIN ACCESS'. The 'User details' section lists: Given name: New, Family name: Person, Phone: 0936728191, Mobile: (blank), Email: new@man.com.au, System role: OrgEditor, Organisation: Community Organisation, ABN: 11005906054, Source Organisation ID: 4-13UI4P, Source Organisation name: Community Organisation. The 'Linked credentials' section states 'User has not linked any credentials to this account.' The 'Outlets (2)' section has a 'MANAGE OUTLETS' button and a table with two rows: 'Amaroo Group' at '75 Katherine Ave AMAROO ACT 2914' and 'An outlet' at '12 Mort et Canberra City ACT 2600'. The 'Program activities' section has a 'MANAGE PROGRAM ACTIVITIES' button (highlighted with a red box) and states 'No program activities are associated with this user account'. A '< BACK' button is at the bottom left. On the right, a purple sidebar titled 'I WANT TO...' contains a list of actions: Find a client, Find a case, View a client SCORE, Add a client, Add a case, Add a session, Add a client SCORE, Manage organisation, Manage users, Reference data, Uploaded files, and Go to home page.

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

Home > Manage Users > User profile: New PERSON > Manage program activities

Manage program activities

Available program activities (98)

<input type="checkbox"/>	Program activity	Start date	End date
<input checked="" type="checkbox"/>	Assistance with Care and Housing	1/07/2014	31/12/2025
<input checked="" type="checkbox"/>	Be Connected	1/07/2014	31/12/2025
<input checked="" type="checkbox"/>	Beyond Barbed Wire	1/01/2019	31/12/2025
<input type="checkbox"/>	Budget Based Funded Program	1/07/2014	31/12/2025
<input type="checkbox"/>	Building Capacity in Australian Parents	1/07/2014	30/06/2019
<input type="checkbox"/>	Care Relationships and Carer Support	1/07/2014	31/12/2025
<input type="checkbox"/>	Career Pathways Pilot for Humanitarian Entrants	1/07/2014	31/12/2025
<input type="checkbox"/>	Carer Information and Support Service	1/07/2014	31/12/2025
<input type="checkbox"/>	Carers and Work	1/07/2014	31/12/2025
<input type="checkbox"/>	Children and Parent Support Services	1/07/2014	31/12/2025

Previous 1 2 3 4 5 6 ... 8 9 10 Next

ATTACH SELECTED PROGRAM ACTIVITIES

< BACK

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

Successfully attached program activity/s

Manage program activities

Available program activities (95)

<input type="checkbox"/>	Program activity	Start date	End date
<input type="checkbox"/>	Budget Based Funded Program	1/07/2014	31/12/2025
<input type="checkbox"/>	Building Capacity in Australian Parents	1/07/2014	30/06/2019
<input type="checkbox"/>	Care Relationships and Carer Support	1/07/2014	31/12/2025
<input type="checkbox"/>	Career Pathways Pilot for Humanitarian Entrants	1/07/2014	31/12/2025
<input type="checkbox"/>	Carer Information and Support Service	1/07/2014	31/12/2025
<input type="checkbox"/>	Carers and Work	1/07/2014	31/12/2025
<input type="checkbox"/>	Children and Parent Support Services	1/07/2014	31/12/2025
<input type="checkbox"/>	Children's Contact Services	1/07/2014	31/12/2025
<input type="checkbox"/>	Commonwealth Financial Counselling and Financial Capability	1/07/2014	31/12/2025
<input type="checkbox"/>	Commonwealth Financial Counselling and Financial Capability - Service Continuity	1/01/2018	31/12/2025

Previous 1 2 3 4 5 6 ... 8 9 10 Next

ATTACH SELECTED PROGRAM ACTIVITIES

Selected program activities (3)

<input type="checkbox"/>	Program activity	Start date	End date
<input type="checkbox"/>	Assistance with Care and Housing	1/07/2014	31/12/2025
<input type="checkbox"/>	Be Connected	1/07/2014	31/12/2025
<input type="checkbox"/>	Beyond Barbed Wire	1/01/2019	31/12/2025

REMOVE SELECTED PROGRAM ACTIVITIES

< BACK

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

Figure 12 – User profile screen

The screenshot displays the 'User profile' screen for a user named 'New Person'. At the top, there is a breadcrumb trail: 'Home > Manage users > User Profile: New Person'. The main heading is 'User profile', followed by three action buttons: 'DELETE USER', 'EDIT USER DETAILS', and 'GRANT ADMIN ACCESS'. Below this is the 'User details' section, which lists various attributes for the user, including their name, contact information, and organizational affiliation. The 'Linked credentials' section indicates that no credentials are currently linked. The 'Outlets' section shows two entries: 'Amaroo Group' and 'An outlet', each with its respective address. Finally, the 'Program activities' section lists three activities: 'Assistance with Care and Housing', 'Be Connected', and 'Beyond Barbed Wire', each with a start and end date. A sidebar on the right contains a 'I WANT TO...' menu with various navigation options.

Home > Manage users > User Profile: New Person

User profile

[DELETE USER](#) [EDIT USER DETAILS](#) [GRANT ADMIN ACCESS](#)

User details

Given name: New
Family name: Person
Phone: 0936728191
Mobile:
Email: new@man.com.au
System role: OrgEditor

Organisation: Community Organisation
ABN: 11005906054
Source Organisation ID: 4-13UI4P
Source Organisation name: Community Organisation

Linked credentials

User has not linked any credentials to this account.

Outlets (2)

[MANAGE OUTLETS](#)

Outlet name	Address
Amaroo Group	75 Katherine Ave AMAROO ACT 2914
An outlet	12 Mort st Canberra City ACT 2600

Program activities (3)

[MANAGE PROGRAM ACTIVITIES](#)

Program activity	Start date	End date
Assistance with Care and Housing	1/07/2014	31/12/2025
Be Connected	1/07/2014	31/12/2025
Beyond Barbed Wire	1/01/2019	31/12/2025

I WANT TO...

- Find a client
- Find a case
- View a client SCORE
- Add a client
- Add a case
- Add a session
- Add a client SCORE
- Manage organisation
- Manage users
- Reference data
- Uploaded files
- Go to home page

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


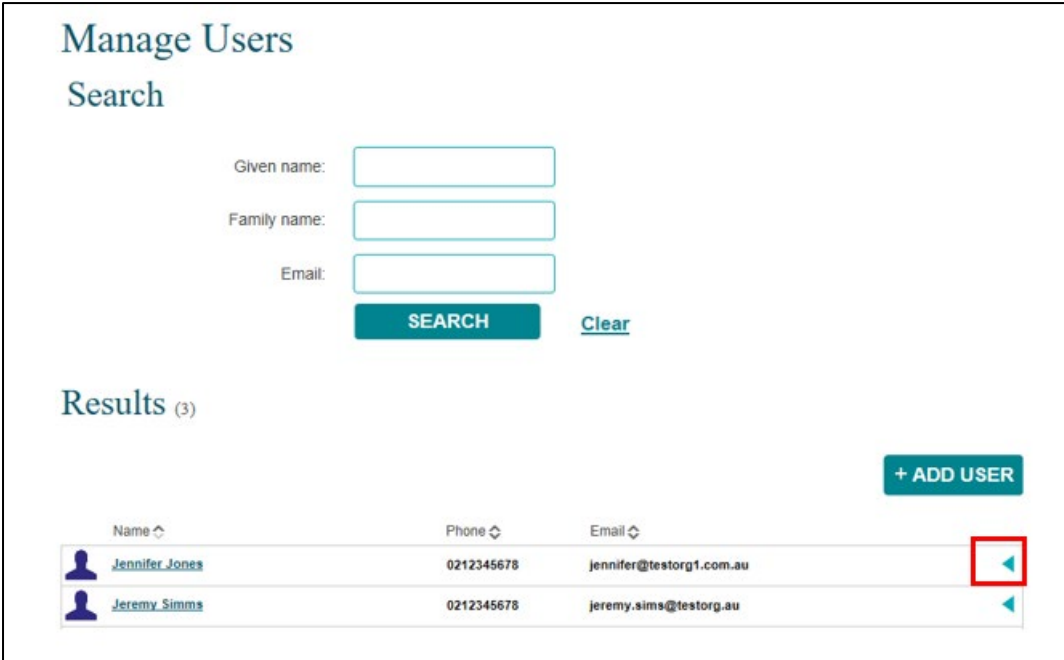
Go to the **Manage Users** screen and search for the relevant user. Select the  next to the user's name. Refer Figure 15.

Figure 15 – Manage Users screen

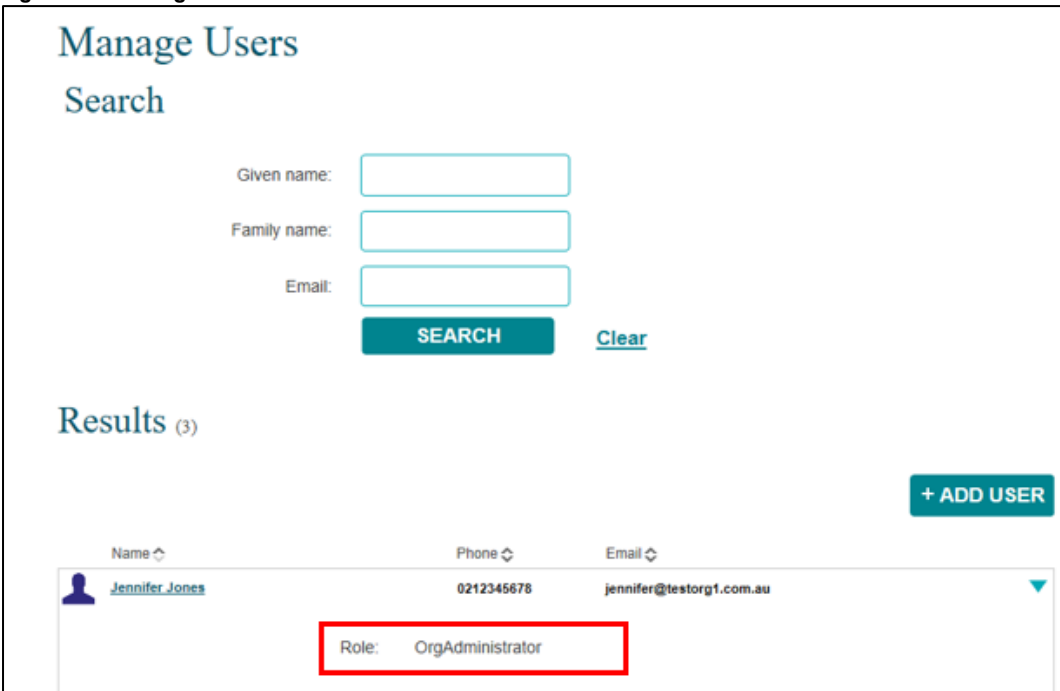


The screenshot shows the 'Manage Users' interface. At the top, there is a search section with three input fields: 'Given name:', 'Family name:', and 'Email:'. Below these fields are a teal 'SEARCH' button and a 'Clear' link. Underneath the search section is a 'Results (3)' section. On the right side of this section is a '+ ADD USER' button. Below the button is a table with three columns: 'Name', 'Phone', and 'Email'. The table contains two rows of data. The first row is for 'Jennifer Jones' with phone number '0212345678' and email 'jennifer@testorg1.com.au'. A red box highlights a teal arrow icon to the right of the first row. The second row is for 'Jeremy Simms' with phone number '0212345678' and email 'jeremy.sims@testorg.au'.

Name	Phone	Email
Jennifer Jones	0212345678	jennifer@testorg1.com.au
Jeremy Simms	0212345678	jeremy.sims@testorg.au


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

Figure 16 – Manage Users screen – user role



The screenshot shows the 'Manage Users' interface, similar to Figure 15. The search section and table are the same. However, the first row of the table is expanded to show a 'Role' field. A red box highlights the text 'Role: OrgAdministrator'.

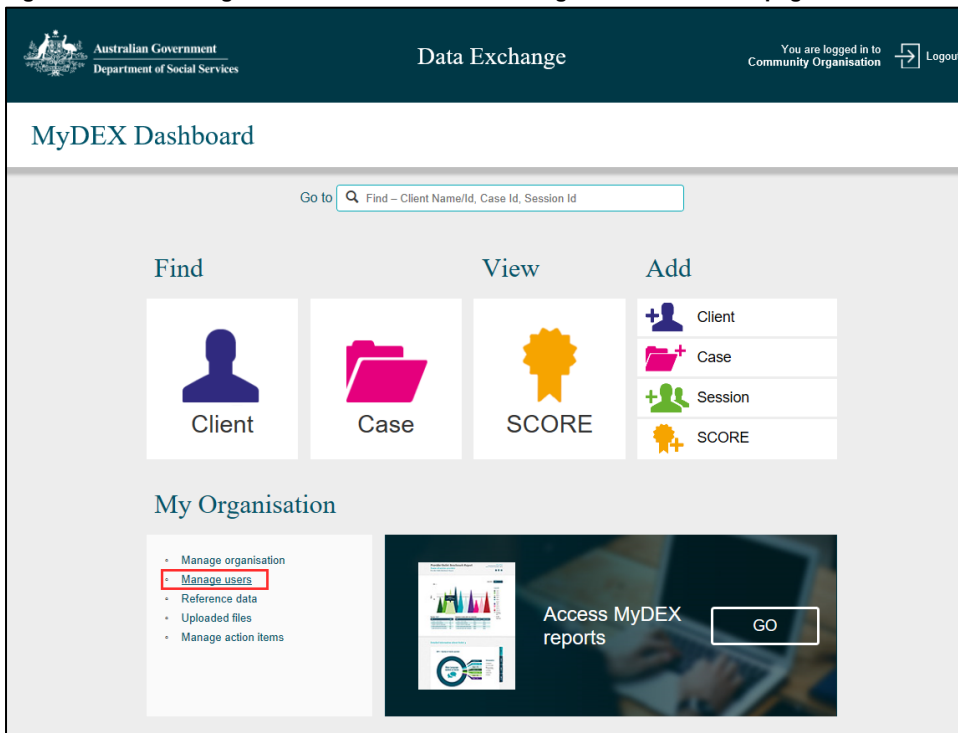
Name	Phone	Email
Jennifer Jones	0212345678	jennifer@testorg1.com.au

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.

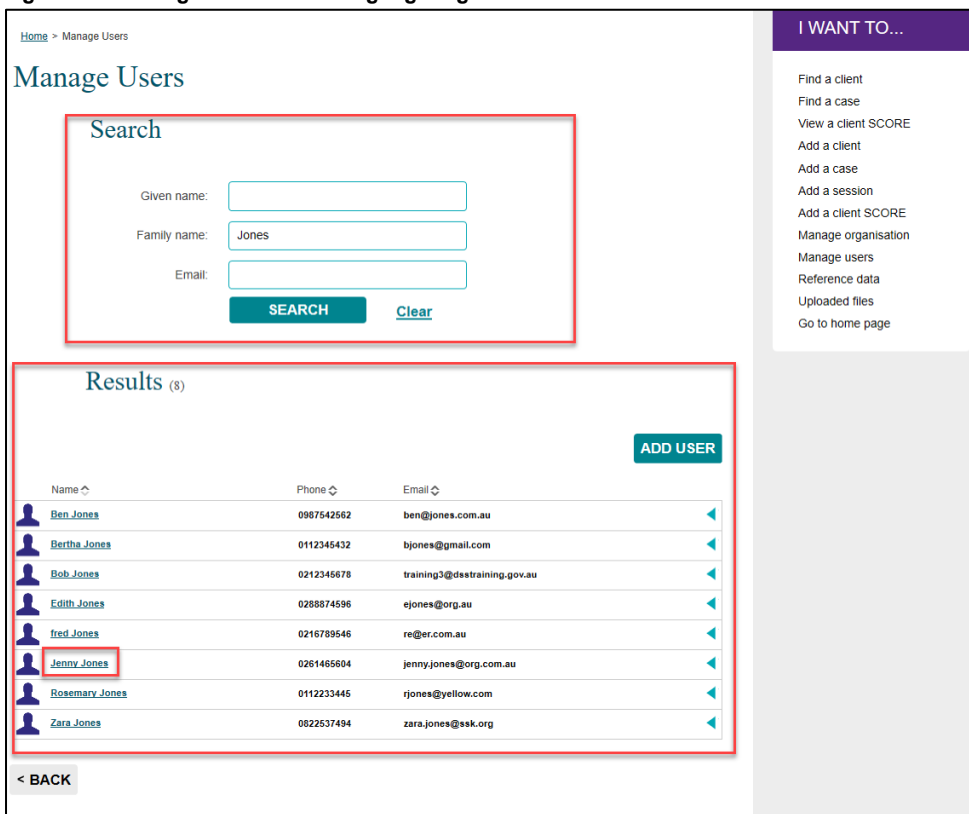
Figure 17 – The Manage users link on the Data Exchange web-based home page



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 screenshot shows the 'User profile' page with three buttons at the top: 'DELETE USER', 'EDIT USER DETAILS' (highlighted with a red box), and 'GRANT ADMIN ACCESS'. Below the buttons is the 'User details' section with the following information:

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

Below this is the 'Linked credentials' section, which states 'User has not linked any credentials to this account.' The 'Outlets (2)' section contains a table with two entries:

Outlet name	Address
Amaroo Group	75 Katherine Ave AMAROO ACT 2914
An outlet	12 Mort st Canberra City ACT 2600

The 'Program activities (3)' section contains a table with three entries:

Program activity	Start date	End date
Assistance with Care and Housing	1/07/2014	31/12/2025
Be Connected	1/07/2014	31/12/2025
Beyond Barbed Wire	1/01/2019	31/12/2025

At the bottom left is a '< BACK' button.

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

Figure 20 – Edit user details screen

The screenshot shows the 'Edit user details' screen with the breadcrumb 'Home > Manage business users > Edit user details'. Below the title is a note: 'All fields marked with an asterisk (*) are required.' The 'User details' section contains the following fields:

- User type: Business
- Given name: * Jennifer
- Family name: * Jones
- Phone: * 0261465604
- Mobile: 0401010101
- Email: * jenny.jones@org.com.au
- System role: * Organisation Editor (dropdown menu)

At the bottom left is a 'Cancel' button and at the bottom right is a 'SAVE' button.

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

Home > Manage users > User Profile: Jennifer Jones

Successfully saved.

User profile

DELETE USER **EDIT USER DETAILS** **GRANT ADMIN ACCESS**

User details

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

I WANT TO...

- Find a client
- Find a case
- View a client SCORE
- Add a client
- Add a case
- Add a session
- Add a client SCORE
- Manage organisation
- Manage users
- Reference data
- Uploaded files
- Go to home page

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

Figure 22 – Grant admin access? pop up box

Grant admin access?

Organisation Administrator access allows a user to read and create records, manage Outlets and administer user access within your organisation.

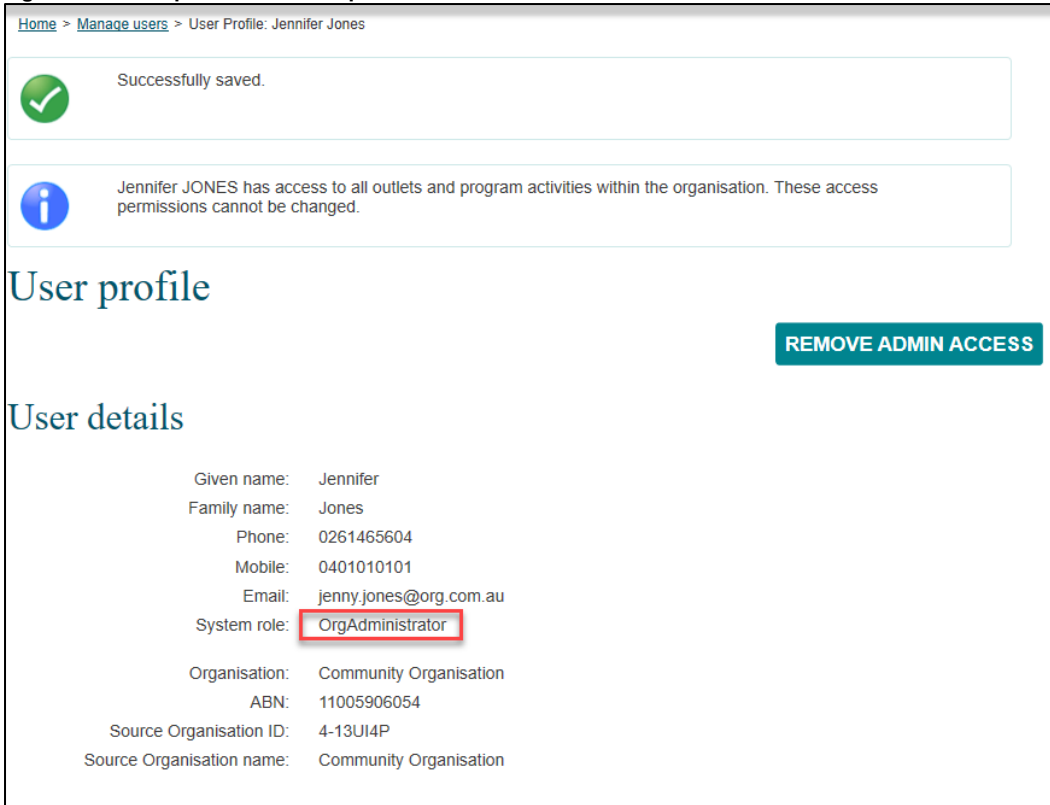
As the highest level of access, Organisation Administrators will automatically be granted full access to all Outlets and Program Activities within an organisation. Are you sure you wish to proceed?

YES **NO**

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



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.

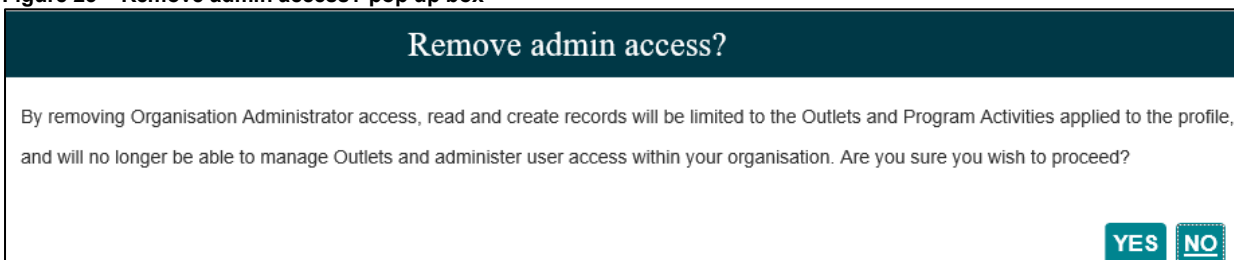
Select **REMOVE ADMIN ACCESS** from the User profile screen. Refer Figure 24.

Figure 24 – User profile screen – Removing admin access



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

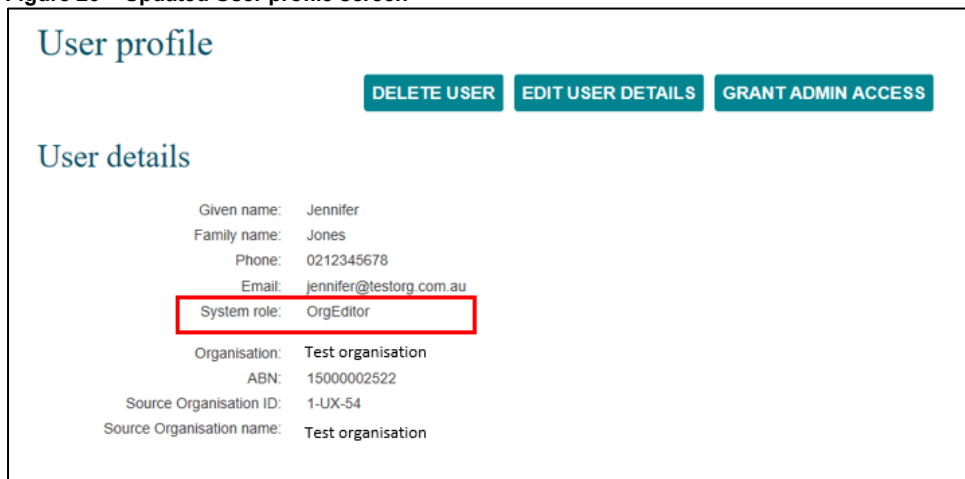
Figure 25 – Remove admin access? pop up box



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.

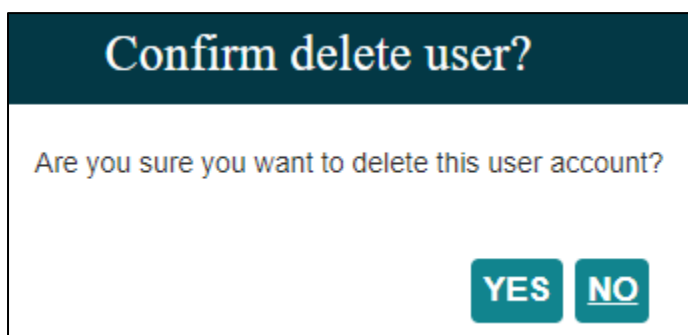
Select **DELETE USER** from the User profile screen. Refer Figure 27.

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.