

Managing users in MD Administrative Application

Performing user administration tasks

You are responsible for maintaining all of the user accounts for your local view, so you should work with your local programme manager to ensure that you are notified when someone joins or leaves an organisation so that you can add user or remove user accounts from the local view, as appropriate.

Approve a new account registration

- View the user account registrations waiting to be processed. There are two ways to do this:
 - In the **Summary** tab, in the **Registrations** pane, click **Process new registrations**.
 - Select the **Registrations** tab.
 The **Process Registrations** page appears in the **Registrations** tab.
- If necessary, sort the list of user account registrations waiting to be processed.
- If you want to approve the user account registration without reviewing the user's details:
 - Select the check box to the left of the **Date registered** column for the user's registration entry.
 - Click **Activate selected**.
- If you want to review the user's details before approving the registration request:
 - Select the hyperlink for the user's name in the **Name** column. The **Details for <user name>** page appears, showing the details entered when the user registered.
 - Make any changes to the user account information, including assigning a default local view and role.
 - Click **Activate**.
 The **Assign role to applicant and activate** page appears.
- If you have not already assigned the user a role, in the **Roles** drop-down list, select the role that you want to assign to the user.
- If necessary, edit the subject line and message body for the registration approval email.
- Click **Assign role to selected users and activate**. The Map Display Administrative Application Administrative Application activates the user account, sends the approval email to the user, and returns you to the **Process Registrations** page.

Manually add a new user account

- Add a new user account from one of two places in the Map Display Administrative Application Administrative Application:
 - In the **Summary** tab, click **Add new user**.
 - In the **Users** tab, click **Add new user**.
 The **Add new user** page appears.
- Enter the new user's account information using the text fields and drop-down lists. Provide as much information about the user as you have. Some fields are **required** (marked with * on the page) and must be completed for a user account to be created.
- Click **Save changes**.
The Administrative Application adds the new user to the user account list and returns you to the **Add new user** page.

Reject a new user account registration

- View the user account registrations waiting to be processed. There are two ways to do this:
 - In the **Summary** tab, in the **Registrations** pane, click **Process new registrations**.
 - Select the **Registrations** tab.
 The **Process Registrations** page appears.
- If necessary, sort the list of user account registrations waiting to be processed.
- If you want to reject the user account registration without reviewing the user's details:
 - Select the check box to the left of the **Date registered** column for the user's registration entry.
 - Click **Reject selected**.
- If you want to review the user's details before rejecting the registration:
 - Select the hyperlinked user's name in the **Name** column. The **Details for <user name>** page appears, showing the details entered when the user registered.
 - Click **Reject**.
 The **Reject <number> applicants** page appears.
- If necessary, edit the subject line and message body for the registration rejection email.
- Click **Reject selected**. The Map Display Administrative Application Administrative Application rejects the user account, sends the rejection email to the user, and returns you to the **Process Registrations** page.

Standard email responses for accepted and rejected users

Make sure that you read and edit, if appropriate, the standard acceptance and rejection emails that users receive once you process their requests.

Change the user's default view

- Access the user account list from one of two places in the Map Display Administrative Application Administrative Application:
 - In the **Summary** tab, select the user's job title. The **Users** tab appears with the user account list pre-filtered by the selected job title.
 - Select the **Users** tab. The **Users** tab displays all user accounts sorted so that the user account with the oldest date registered appears first.
- If necessary, sort the list of user accounts.
- Select the hyperlink for the user's name in the **Name** column. The **Details for <user name>** page appears, showing the user's account information.
- Select the **Set as default variant** link for the view that you want to assign as the default view.
- Click **Save changes**. The Map Display Administrative Application Administrative Application updates the user account and returns you to the user account list on the **Users** tab.

Administering users for a view

You can only create users in and assign users to views where you have **Release Manager** permissions.

Managing users in MD Administrative Application

Assigning and changing user roles

You should not assign a user a role other than **Viewer** until the user has been trained for that role. You should ensure that you are notified when users are trained for a role other than **Viewer** so that you can add the additional role to their user accounts.

You should also ensure that when user with an additional role in your view other than **Viewer** leaves an organisation, that you assign that role to another qualified user so that the responsibilities associated with that role do not go unfilled in your view.

Change the user's role

1. Access the user account list from one of two places in the Map Display Administrative Application Administrative Application:
 - In the **Summary** tab, select the user's job title. The **Users** tab appears with the user account list pre-filtered by the selected job title.
 - Select the **Users** tab. The **Users** tab displays all user accounts sorted so that the user account with the oldest date registered appears first.
2. If necessary, sort the list of user accounts.
3. Select the hyperlink for the user's name in the **Name** column. The **Details for <user name>** page appears, showing the user's account information.
4. Select the user's new role from the **Role** drop-down list for that view.

5. If you need to assign additional roles to the user for a view:
 - a. Select the **Add** link next to the last role listed.
 - b. From the new drop-down list, select the additional role you want to assign to the user.
 - c. Repeat this process for each additional role that you want to assign to the user.
6. If you need to remove a role from a user for a view, select the **Remove role** link for the role.
7. Click **Save changes**. The Map Display Administrative Application Administrative Application updates the user account and returns you to the user account list on the **Users** tab.

User password considerations

User passwords:

- must be at least 6 characters long
- can include upper and lower case letters
- can include numbers 1 through 9
- cannot contain spaces, punctuation, or special characters
- are case-sensitive

Change the user's password

1. Access the user account list from one of two places in the Map Display Administrative Application Administrative Application:
 - In the **Summary** tab, select the user's job title. The **Users** tab appears with the user account list pre-filtered by the selected job title.
 - Select the **Users** tab. The **Users** tab displays all user accounts sorted so that the user account with the oldest date registered appears first.
2. If necessary, sort the list of user accounts.
3. Select the hyperlinked user's name in the **Name** column. The **Details for <user name>** page appears, showing the user's account information.
4. Change the user's password information using the password text fields.
 - **Password:** Type the user's password in the text field (either the password selected by the user or a default password selected by you that can be changed by the user in the Map of Medicine user profile).
This is a **required** field that is used to authenticate a user when logging in to the Map of Medicine. Provide the password to the user in the password change confirmation email.
 - **Confirm Password:** Retype the same password you typed in the **Password** text field to confirm the spelling.
This is a **required** field.
5. Click **Save changes**.

The Map Display Administrative Application Administrative Application updates the user account and returns you to the user account list on the **Users** tab.

Managing users for Map Display and MMS

Remember that there are separate Administrative Applications for Map Display and MMS, so if you act as your local view's **Release Manager** for both applications, make sure you are logged in to the correct Administrative Application to manage user accounts. Users may have an account for both applications, depending on their responsibilities in your view.