DATIM User Administration App Guide

**Background:**

Due to the global scope of PEPFAR, DATIM accounts are managed in a decentralized way through User Administrators.

New DATIM Account requests from register.datim.org are directly sent to Primary User Administrators (PUAs). For more information on Primary User Administration, please reference the *DATIM Primary User Administrator (PUA) Guide* on the DATIM Support Site here.

Administrator Responsibilities:

The main responsibilities for DATIM User Administrators are to:
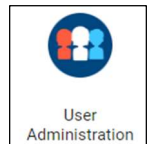
- Create new DATIM accounts
- Edit or update user accounts to add and/or remove access (i.e. to data streams) using the User Administration App.
  - o Please note, user accounts are not able to be edited to switch OUs or Partners. That kind of change would require a new DATIM account. This is especially important to keep in mind for the ER and HRH data streams.
- If applicable, re-enable user accounts.
- Correspond with the DATIM Support Team if they need assistance with user administration tasks they are unable to accomplish in DATIM.
- Update an end user's email.
- Disable any accounts, if applicable (i.e. they left your organization or program)

Okta Single Sign-On/Multi-Factor Authentication:

DATIM accounts, while still managed by User Administrators, are now only accessible via the Department of State's single sign-on solution, **Okta (state.okta.com).** If a DATIM user does not have an existing Okta account, one will need to be created too. Details on this process are in the below section.

- **Access DATIM through either link:**
  - o **https://state.okta.com**
  - o **https://www.datim.org**
- **Go to the GHSD Data Systems SSO and MFA Initiative Page** for Okta specific guidance and resources

Creating New Users Accounts

1) A DATIM user with access to the DATIM User Administration App needs to create a new account for someone.

2) Navigate to the DATIM User Administration App, then to the "Invite" page.

3) Start by entering their email address in the "E-mail address of Okta account" data entry field. The User Administration Application will then automatically check for an existing State Okta Account.

   a. If the **User has an existing Okta account,** then the User Administration application will auto-populate the user's first and last name from Okta, with this message:

   Name above has been retrieved from the user's Okta account ✕

   b. If **no Okta account exists**, the User Administration App will prompt:

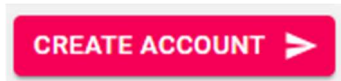   Please enter a first name and last name to create an Okta account for this user ✕

4) Continue entering information in the form:

*Data Stream and Data Action Screenshots are taken from OU Agency account creation. Options vary depending on DATIM account type.

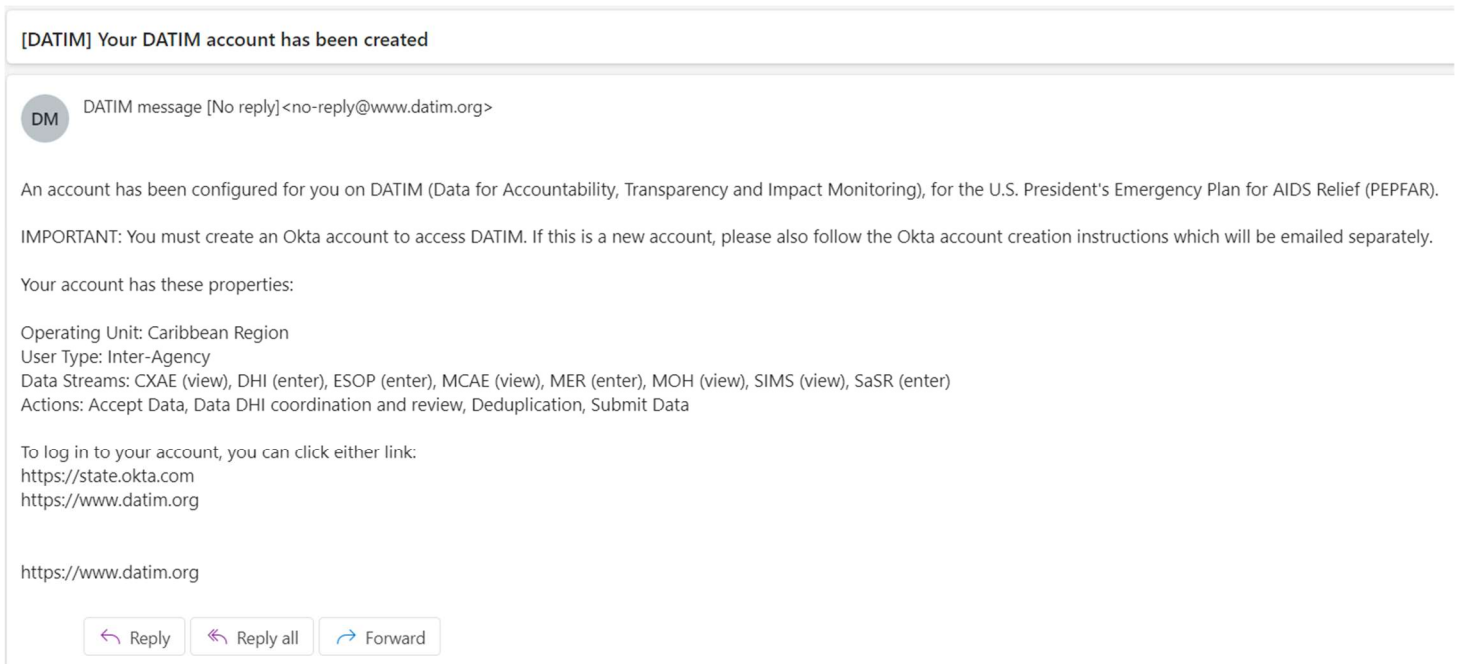5) Click Create account.

6) If the user **does not have an Okta account**, DATIM will prompt for your confirmation to *also* send an Okta account invitation email.
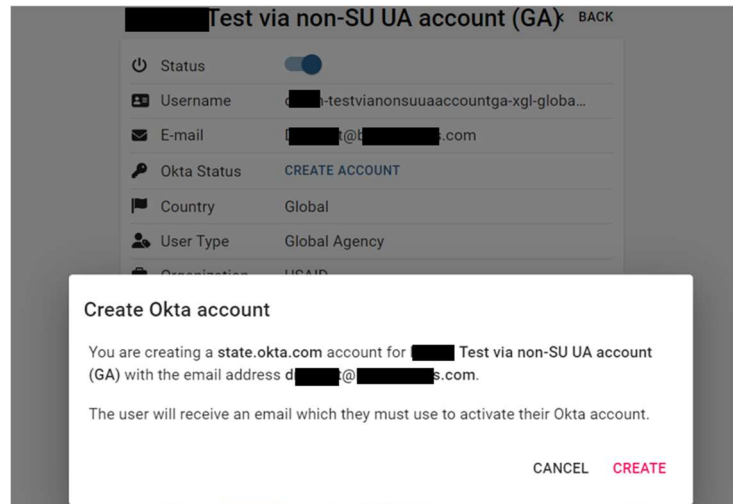
7) If the user **already has an Okta account**, then no Okta email will be generated.

8) DATIM will *also* send an email notification to that user with their new DATIM account details.

Administration for Existing Accounts:

User Administrators can re-enable existing user accounts, edit user data streams, edit user email addresses, and disable users that no longer require access to DATIM.

The ability to create /edit other DATIM user accounts depends on your own DATIM account

Inter-Agency user Administrators can only create:
► Inter-Agency UAs & Inter-Agency users

Partner user Administrators only create:
► Partner UAs & Partner users (*Only from the same partner organization*)

MOH user Administrators only create:
► MOH UAs & MOH users

Agency user Administrators can only reate:
► Agency UAs & Agency users (*Only from the same agency*)

Partner user Administrators only create:
► Partner UAs & Partner users (*Only from the same partner organization*)

Global user Administrators only create:
► Global UAs & Global users

Global Agency user Administrators only create:
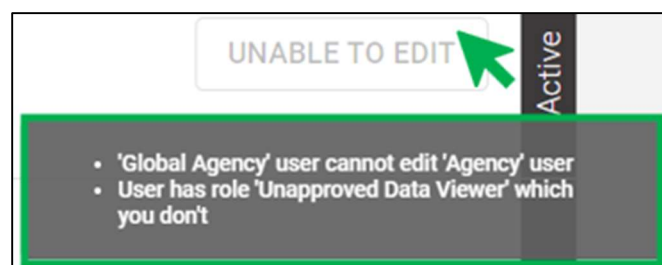► Global Agency UAs & Global Agency users (*Only from the same agency*)

Global Partner user Administrators only create:
► Global Partner UAs & Global Partner users (*Only from the same partner*)

Example: Inter-Agency User Administrators can only edit Inter-Agency users (with the same permissions), Partners and OU MoH accounts. They can't edit Global, Global Agency, Global Partner, or OU Agency level account types.

So, if you are "UNABLE TO EDIT" an account, you should delegate it to another DATIM User Administrator *or* contact the DATIM Support Team.

If you hover over the "UNABLE TO EDIT" button it will display the reason why in a pop-up window.

UNABLE TO EDIT   Active

• 'Global Agency' user cannot edit 'Agency' user
• User has role 'Unapproved Data Viewer' which you don't

DATIM User Administration App User Interface

1. Search – Use the search box and filter options to quickly find a user.
    a. ADD FILTER can be used multiple times to help narrow down defined search parameters.
2. Invite – use this button to create a new DATIM User Account
3. Users tabs – These tabs can be selected to filter all your viewable DATIM users, or to quickly view *only* active or *only* disabled accounts
4. Download CSV – This will let you download a csv file of the current user list on your screen. If you already entered search parameters, then only the filtered users will populate the file.
5. User Information – Once you enter search parameters or just clicked "SEARCH", this screen section lists four user information details:
    a. **Last Name, First Name** (not editable)
    b. ✉ User's email address (editable)
    c. 👤 User's DATIM username (not editable)
    d. 🗎 User's Notes (editable)
        i. A User Admin can type in "notes" when creating a new account or edit them later if needed.
        ii. If the DATIM account existed before the Okta migration (June 18, 2024), then this field was populated with their old/previous DATIM username

iii. If the DATIM account was created after the Okta migration (June 18, 2024), then this field auto-populates with the date it was created

6. Actions – These three buttons will let you perform the following actions
   a. ℹ️ This "i" (information) icon opens the "quick view" window on the right side (number 8 below)
   b. ✏️ Edit that DATIM User's Account profile
   c. 🔵 "Quick toggle" to enable or disable that specific DATIM account

7. Active or Disabled – Depending on which tab you have selected in number 3 above; this bar is a quick way to reference if a DATIM Account is disabled or active (enabled) in the "ALL USERS" tab view.

8. User Account "Quick View" – Clicking the "i" (6.a. above) will open a "quick view" window of the DATIM user account information on the right side of the app screen.

9. Edit – The quick view window has an edit button to also open that specific user profile.

User Profile & Edit Page

User Admins will be taken to a DATIM User Account profile page view to see even more detailed information and make edits.

1. Status (editable) – This toggle will let you enable or disable the account (if applicable)
2. Username (not editable) – post-okta migration (June 18, 2024), DATIM usernames are not needed or required for logging in. However, the DHIS2 platform DATIM is built upon still requires a uniquely assigned username, per account.
   a. Usernames are automatically generated after a User Admin creates a new account.
   b. Username format follows this naming convention:
      `[first name - last name – OU – account type – random four-digit number]`

c. In the number 2 above screenshot example, the username would be *example[first name]-test[last name]-xac[OU/Region code]-interagency[user account type]-2680[random four-digit number]*

3. E-mail (editable) – The DATIM user account email is used to authenticate and grant access between Okta and DATIM. Please be careful and precise when processing email updates.
4. Okta Status (not editable, but User Admin action *possible*) – See below:

Admin App: Okta Status	Okta Status Meaning
loading...	User Admin App is "talking" to Okta for status update check. This can take anywhere from 2 seconds to 20 seconds.
Active	This user's DATIM and Okta accounts are aligned and active.
CREATE ACCOUNT	This user's DATIM account is not associated with a state.okta.com account. Click to send them an Okta account request at the email address associated with their DATIM account.
Inoperative	This user's DATIM account has or had a state.okta.com account, but it is no longer active in Okta. Instruct user to submit a helpdesk ticket for assistance.
Account created	This user's Okta account has been created, but they have not finished setting it up. They should go to state.okta.com to complete the process.
Password expired	This user must update their Okta password to access DATIM (and other systems, if applicable)
Locked out	This user has been locked out of their Okta account. Instruct this user to submit a ticket for assistance if they are unable to click the "Unlock Account?" link on the state.okta.com website.
Pending user action	This user must finish setting up their Okta account or submit a ticket for assistance.
Not applicable	A rare status. Please reach out to DATIM Support for assistance administering that account.

5. User Description (editable) – A User Admin can edit this description.
   a. Please note, any user can edit this description in their [DATIM User Profile](), under the "interests" section.

> **Interests**
> This is a note about my DATIM account

   b. This is the <u>same</u> "Notes" field in the Switch Account App, which is helpful for any users that have multiple DATIM accounts to keep track. *The Switch Account App Guide can be found on DATIM Support [here]().*
6. User Administrator (editable) – A User Admin can click this box to grant User Administration permissions to another DATIM account. Deselect this box to remove User Admin access.

7. Data Streams (editable) – Depending on the DATIM User Type, User Administrators can update DATIM user account access for PEPFAR Data Streams to Enter Data, View Data (i.e. Read Only), or No Access.

8. Data Actions (editable) – User Administrators can also configure various data actions for users by checking or unchecking these boxes.
    a. Approval data actions are for access to the DATIM Approvals App to submit or accept data, depending on the data stream the user can access (MER, ER, and/or HRH)
    b. Deduplication is only for Inter-Agency users tasked with reviewing PEPFAR MER data for their associated country or region.

9. Extra Roles and Extra Groups (not editable) – some DATIM accounts might display roles or groups associated with the user account. Certain access and permissions can only be requested or granted by contacting the DATIM Support Team.
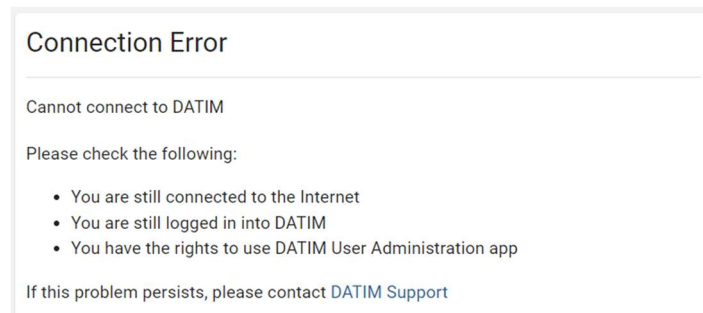
Frequently Asked Questions (FAQ)

A user replied that they are unable to access their DATIM account after I created it for them. What should I do?

- Ask the user if they have received and completed the Okta account activation email, as ALL users must have an active Okta account before they can access DATIM.
  - Click "edit" to find and see their "Okta status".
- In DATIM, navigate to the User Administration App, and choose to search by the user's email (if you can't find an account searching by email, please also try first or last name. It is important to make sure that their DATIM email matches their Okta email)
  - If the user already exists in DATIM, and their account is listed as "inactive", use the toggle in the edit screen to change their account status to "Active".
  - If the user still can't access DATIM, advise them to submit a help desk ticket

I navigated to the DATIM User Administration App, but I received an error:

> **Connection Error**
>
> Cannot connect to DATIM
>
> Please check the following:
>
> - You are still connected to the Internet
> - You are still logged in into DATIM
> - You have the rights to use DATIM User Administration app
>
> If this problem persists, please contact DATIM Support

- Try reloading/refreshing your web browser page, or clicking the User Admin App icon (upper right corner) of your DATIM screen to "reconnect" to the App.
  - Occasionally, system maintenance is being performed which may also cause this error. Try reloading the app. If after 5-10 minutes you still cannot access the User Admin app, please submit a helpdesk ticket.