DATIM Primary User Administrator Guide & FAQ

Primary User Administrators Determine Access to DATIM

Background:

Due to the global scope of PEPFAR, DATIM accounts are managed in a decentralized way through user administrators. Primary User Administrators (PUAs) are identified by the DATIM Systems Team, by contacting already existing DATIM PUAs and/or an Organization Units PEPFAR Program Manager (PPM), to receive new account requests. Requests are made via email and either come from automatically generated account requests or from the DATIM Support Team if a user submits a help desk ticket for a new account.

Responsibilities:

The main responsibilities for DATIM PUAs are to:

- Actively review new DATIM account request emails that are routed from register.datim.org or DATIM Support and complete the account setup process in the DATIM User Administration App.
- Edit user accounts to add and/or remove access (i.e. to data streams) using the user Administration App. Please note, user accounts are not able to be edited to switch OUs or Partners
    - This is especially important for the ER, and HRH data streams.
- Reenable user accounts
- Disable user accounts that are no longer valid.
- Edit user accounts using the user Admin App.
- Inform the DATIM Support Team if they or another PUA is no longer able to administrate DATIM users and help identify a replacement.

If a PUA does <u>not</u> have access to the DATIM User Administration App, they should contact another PUA or User Administrator to edit their account by checking the “User Administrator” box.

If that does not resolve the issue, please contact DATIM Support.

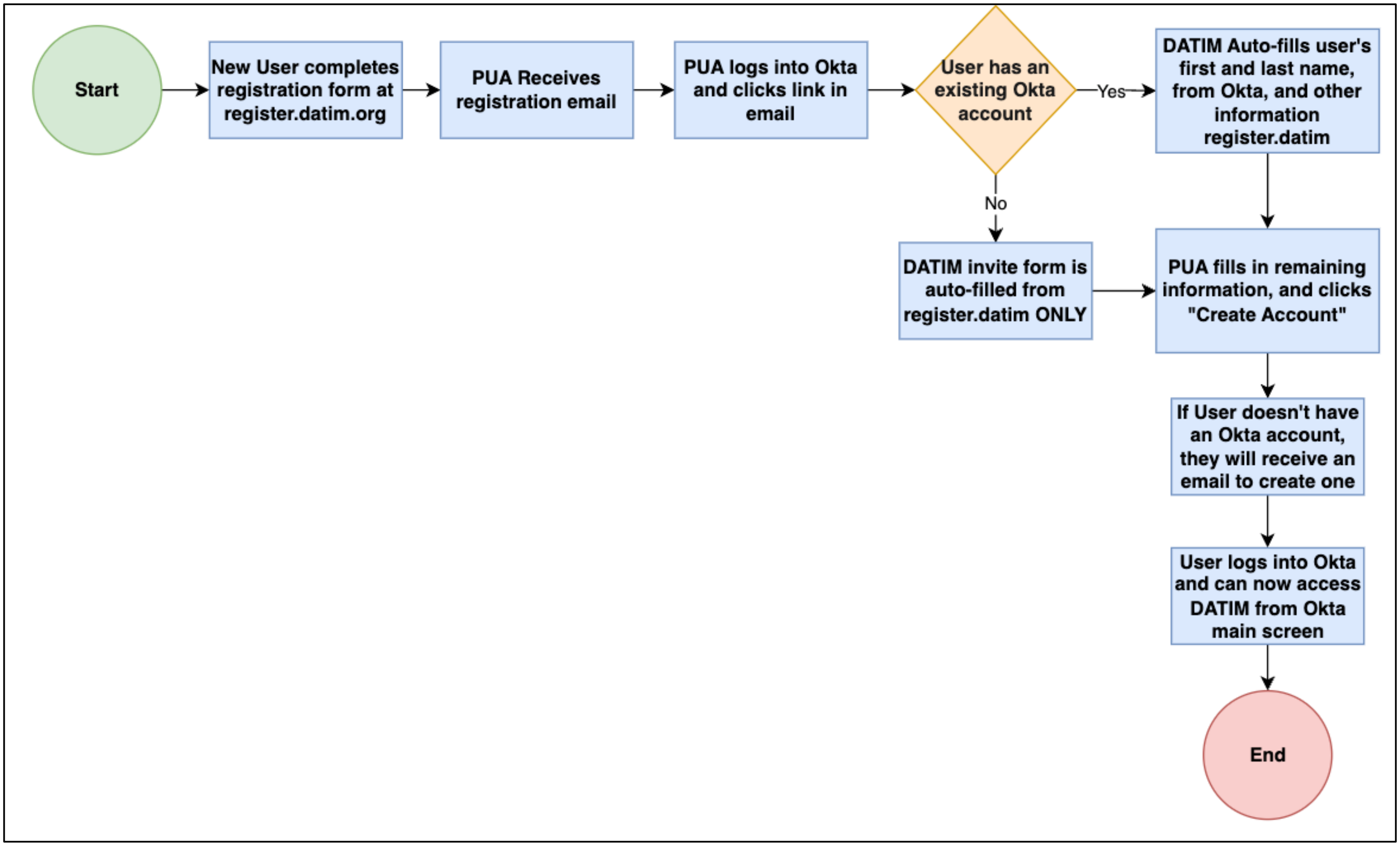
New Account Request Process:

There are two ways a new account can be requested and created in DATIM:

1. A user-initiated request, emailed to a PUA via register.datim.org.
2. or by manually entering and creating new user account in the DATIM User Administration App.

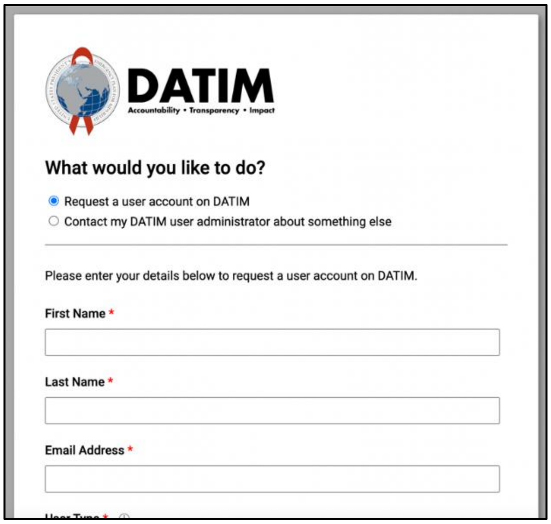
User Administration

1. User-Initiated Request Process:



Start
New User completes registration form at register.datim.org
PUA Receives registration email
PUA logs into Okta and clicks link in email
User has an existing Okta account
Yes
DATIM Auto-fills user's first and last name, from Okta, and other information register.datim
No
DATIM invite form is auto-filled from register.datim ONLY
PUA fills in remaining information, and clicks "Create Account"
If User doesn't have an Okta account, they will receive an email to create one
User logs into Okta and can now access DATIM from Okta main screen
End

1) A DATIM account request is made via the “New User Request” webform on register.datim.org.



DATIM
Accountability • Transparency • Impact

What would you like to do?

● Request a user account on DATIM
○ Contact my DATIM user administrator about something else

Please enter your details below to request a user account on DATIM.

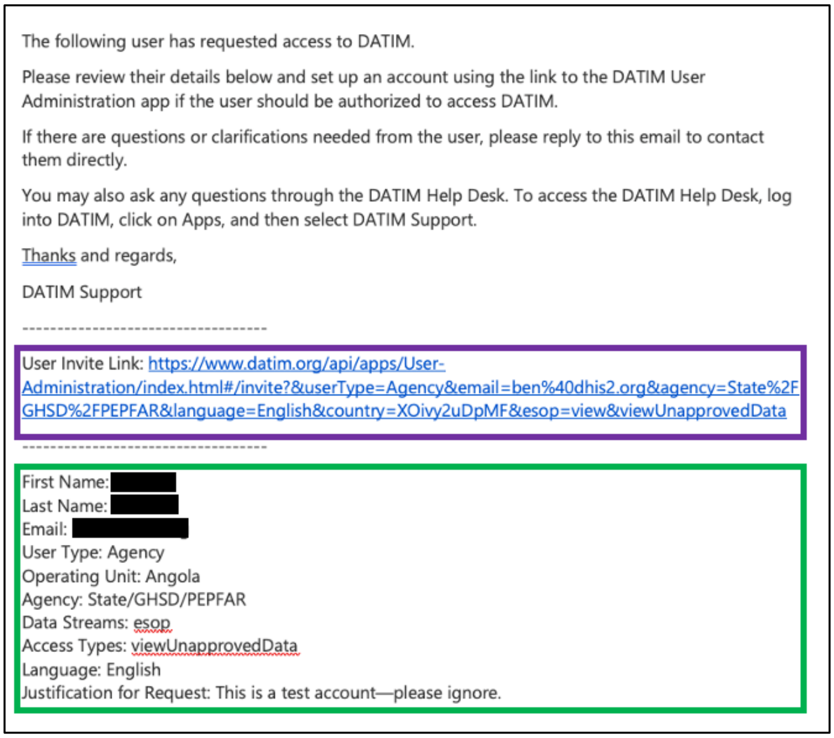
First Name *

Last Name *

Email Address *

User Type *

2) After the user completes the webform, an email is generated and routed to the designated Primary user Administrators (PUAs).
    a. Purple Box: The email link goes directly to the DATIM User Administration App
    b. Green box: These user details will auto-populate in the DATIM User Administration App.



The following user has requested access to DATIM.

Please review their details below and set up an account using the link to the DATIM User Administration app if the user should be authorized to access DATIM.

If there are questions or clarifications needed from the user, please reply to this email to contact them directly.

You may also ask any questions through the DATIM Help Desk. To access the DATIM Help Desk, log into DATIM, click on Apps, and then select DATIM Support.

Thanks and regards,

DATIM Support

User Invite Link: https://www.datim.org/api/apps/User-Administration/index.html#/invite?&userType=Agency&email=ben%40dhis2.org&agency=State%2FGHSD%2FPEPFAR&language=English&country=XOivy2uDpMF&esop=view&viewUnapprovedData

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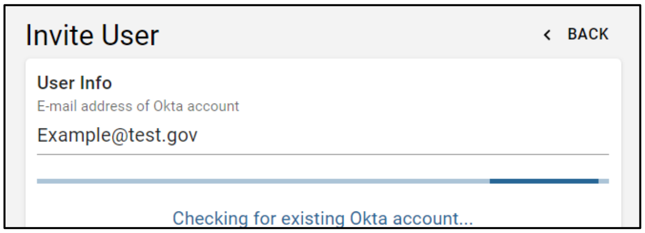
First Name: [redacted]
Last Name: [redacted]
Email: [redacted]
User Type: Agency
Operating Unit: Angola
Agency: State/GHSD/PEPFAR
Data Streams: esop
Access Types: viewUnapprovedData
Language: English
Justification for Request: This is a test account—please ignore.

okta

__IMPORTANT NOTE__: The DATIM Account Request Email link will only take you directly to the App and auto-populate ***after*** you have authenticated through Okta! Just click the email link again if you must enter Okta credentials to access DATIM.

3) Once the “E-mail address of Okta account” data entry field has been entered, the User Administration Application will verify whether the user has an Okta account associated with that same email.



Invite User

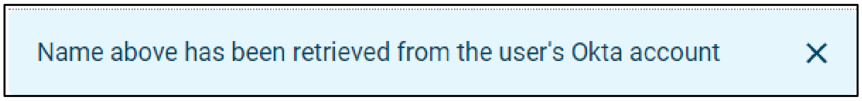
User Info

E-mail address of Okta account

Example@test.gov

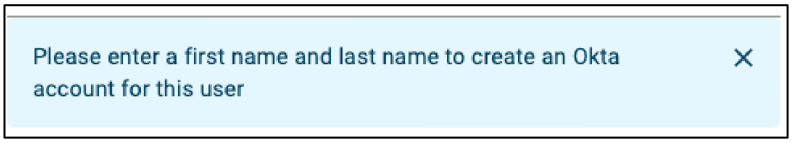
Checking for existing Okta account...

a. If the User has an existing Okta account, then the user Administration application will bring over the user’s first and last name from Okta with this message:



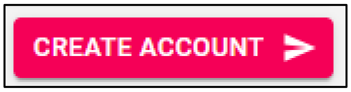
Name above has been retrieved from the user's Okta account

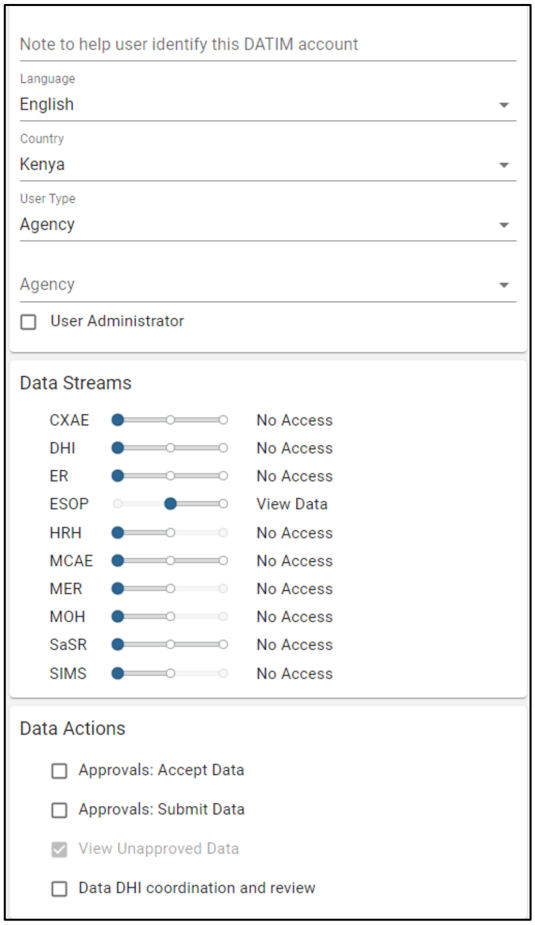
b. If no Okta account exists, the User Administration App will prompt:



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

4) The PUA verifies all information in the form, enters any missing information, then clicks Create account.





Note to help user identify this DATIM account

Language: English

Country: Kenya

User Type: Agency

Agency

□ User Administrator

Data Streams

CXAE	No Access
DHI	No Access
ER	No Access
ESOP	View Data
HRH	No Access
MCAE	No Access
MER	No Access
MOH	No Access
SaSR	No Access
SIMS	No Access

Data Actions

□ Approvals: Accept Data

□ Approvals: Submit Data

☑ View Unapproved Data

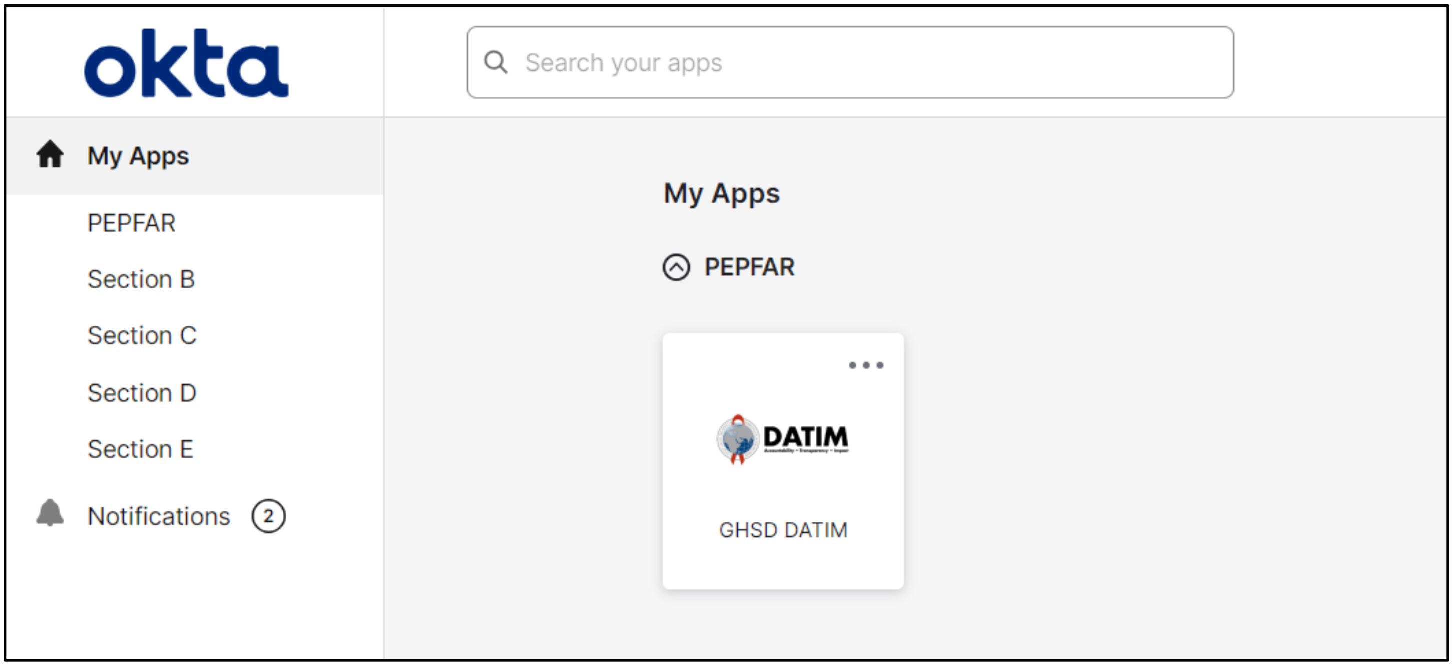
□ Data DHI coordination and review

5) If the user does not have an Okta account, an Okta activation email will be generated and sent to the user.

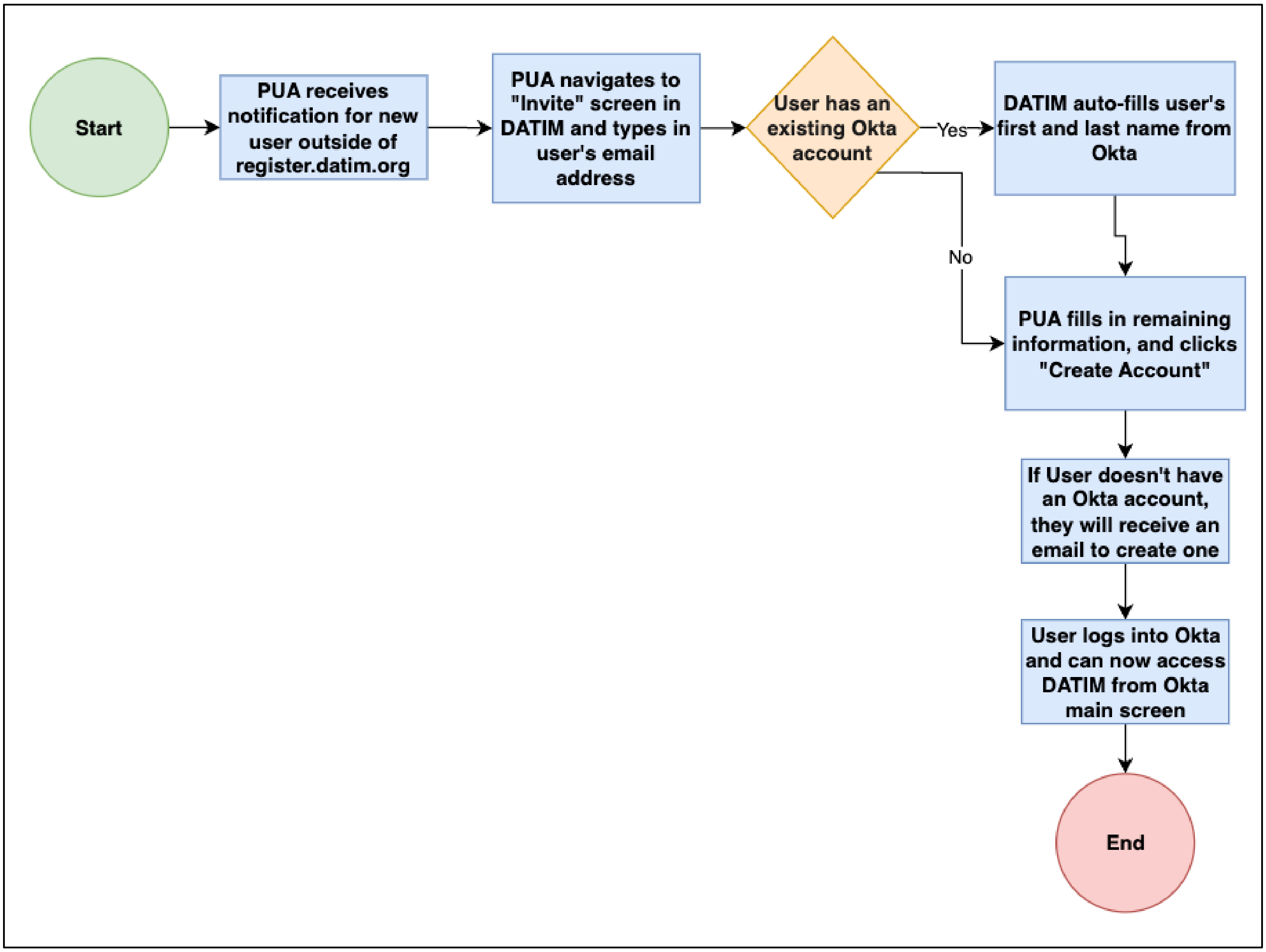
a. The user must activate their Okta account before they can access DATIM.

b. If the user already has an Okta account, then no Okta email will be generated.

6) After the user creates their Okta account (if needed), they can then access DATIM via the Okta landing screen

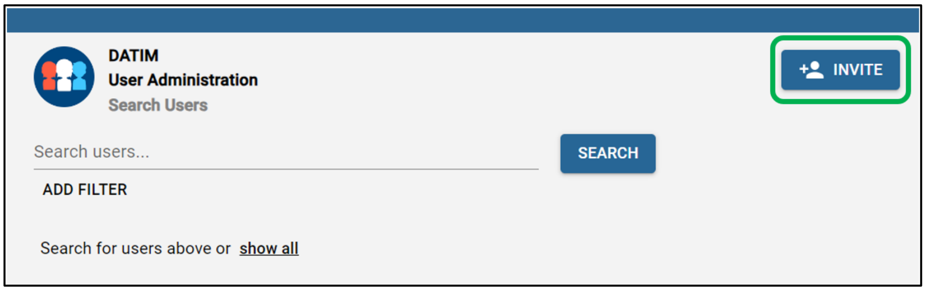


2. Manually Entering and Creating a New User Account Process:


Start
PUA receives notification for new user outside of register.datim.org
PUA navigates to "Invite" screen in DATIM and types in user's email address
User has an existing Okta account
Yes
DATIM auto-fills user's first and last name from Okta
No
PUA fills in remaining information, and clicks "Create Account"
If User doesn't have an Okta account, they will receive an email to create one
User logs into Okta and can now access DATIM from Okta main screen
End

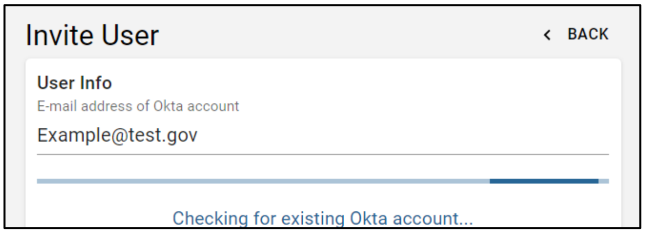
For an ad-hoc request, the PUA can use the following steps

1) A PUA receives a new account request from somewhere outside of the register.datim.org webform.
2) In DATIM, the PUA navigates to the DATIM user Administration App, then to the “Invite” page.



Search for users above or show all

3) Once the “E-mail address of Okta account” data entry field has been entered, the User Administration Application will verify whether the user has an Okta account associated with that same email.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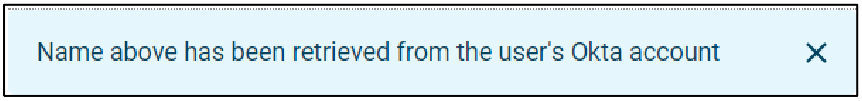
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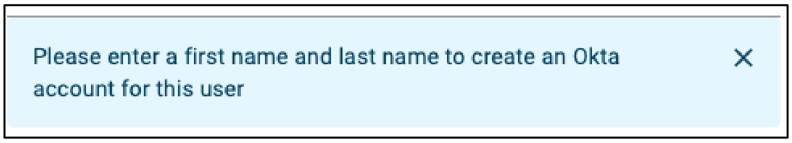
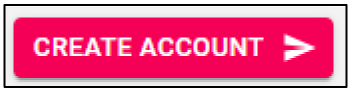
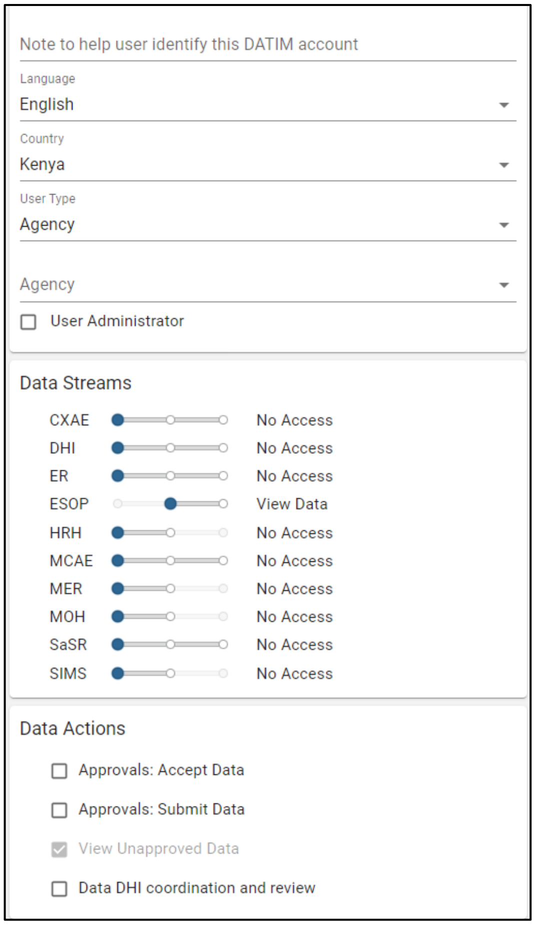
   b. If <u>no Okta account exists</u>, the User Administration App will prompt:


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

4) The PUA verifies all information in the form, enters any missing information, then clicks Create account.




Note to help user identify this DATIM account

Language: English

Country: Kenya

User Type: Agency

Agency

☐ User Administrator

Data Streams

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☐ Approvals: Submit Data

☑ View Unapproved Data

☐ Data DHI coordination and review

5) If the user does not have an Okta account, an Okta activation email will be generated and sent to the user.

   a. The user must activate their Okta account before they can access DATIM.

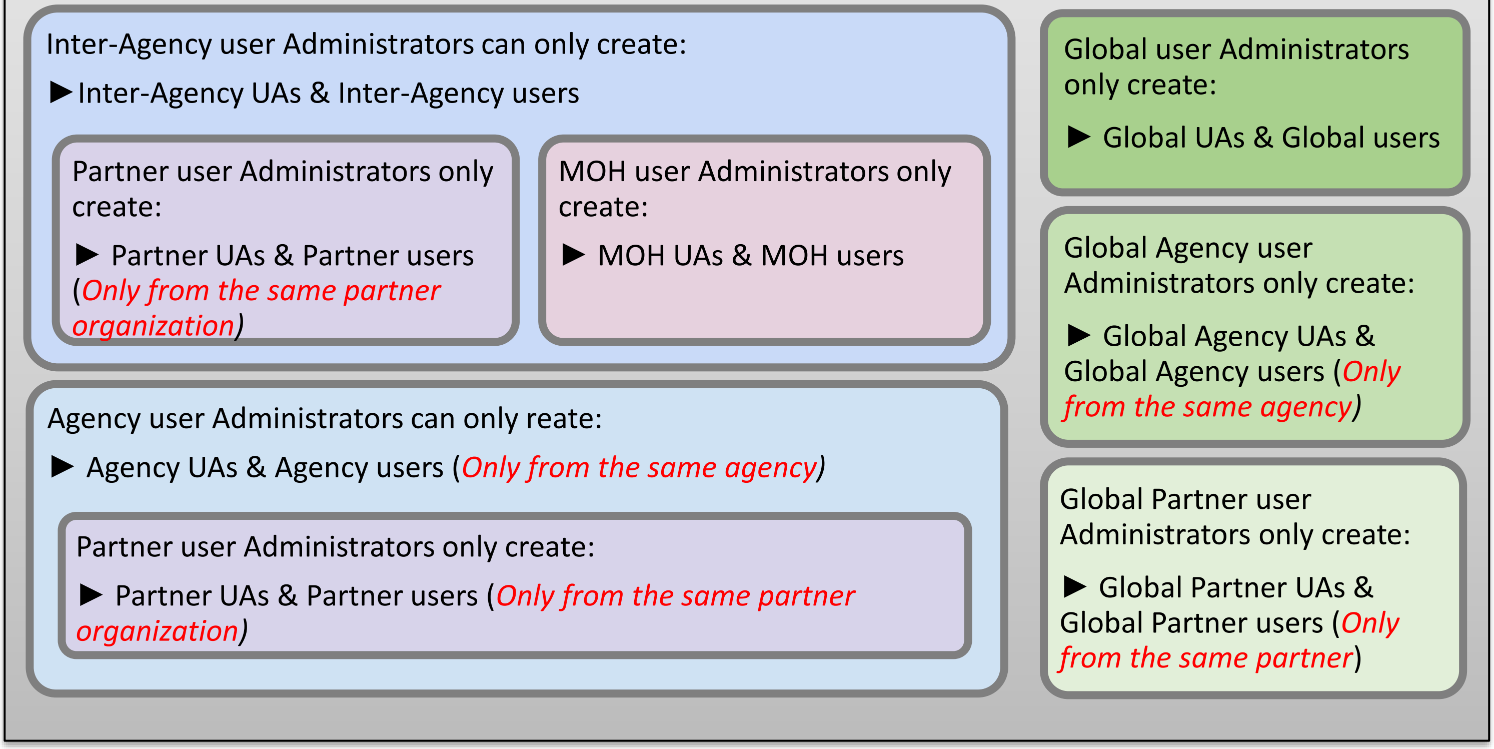
   b. If the user already has an Okta account, then no Okta email will be generated.

Administration for Existing Accounts:

Primary user Admins should have access to DATIM's user Administration application which allows them to re-enable existing user accounts, edit user data streams, and disable users that no longer require access to DATIM.

A PUA's ability to edit other DATIM user accounts depends on their own type of DATIM account

- You are also not able to edit and/or create an account that has a role you do not (e.g., a standard InterAgency level user Admin will not be able to edit an InterAgency level account that has the Site Admin role).
- If a user Admin sees the "unable to edit" button they can scroll over the button, and it will display a message as to why that user Admin cannot edit that 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:

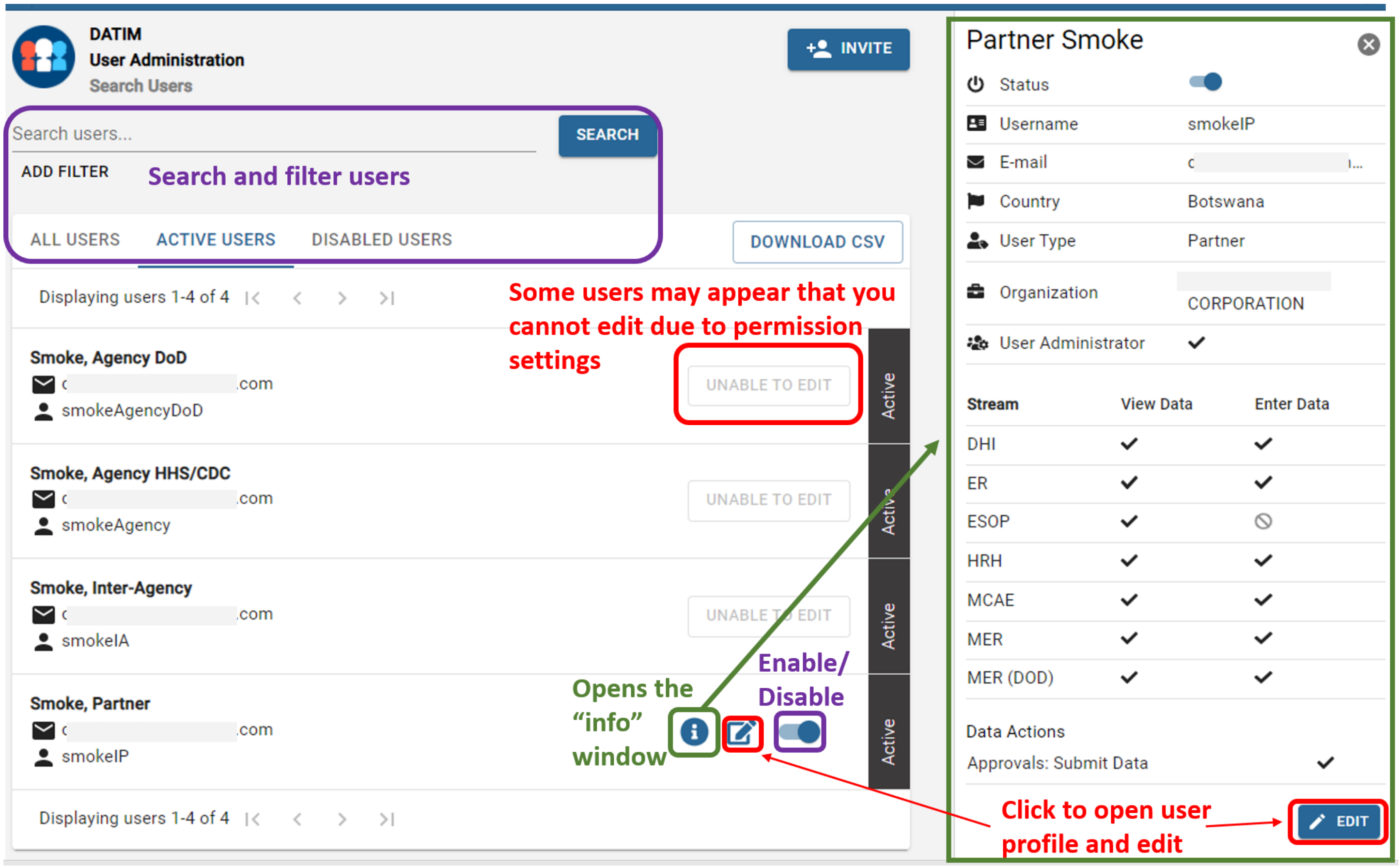
▶ Global Agency UAs & Global Agency users (*Only from the same agency*)

Global Partner user Administrators only create:

▶ Global Partner UAs & Global Partner users (*Only from the same partner*)

Examples of PUA user administration actions from the above table:

- Global PUAs are only able to create/edit other Global user accounts.
- PUA Agency level accounts are only able to create and/or edit other Agency accounts or Partner (IP) accounts associated with their agency.
- InterAgency level PUAs are not able to edit Global, Global Agency, Global Partner, or Agency level accounts. So, if an InterAgency PUA is blocked from editing a different account type, they should delegate to an Agency level DATIM user Administrator.



Search and filter users

Displaying users 1-4 of 4

Smoke, Agency DoD
c[redacted].com
smokeAgencyDoD

Smoke, Agency HHS/CDC
c[redacted].com
smokeAgency

Smoke, Inter-Agency
c[redacted].com
smokeIA

Smoke, Partner
c[redacted].com
smokeIP

Displaying users 1-4 of 4

Some users may appear that you cannot edit due to permission settings

Opens the “info” window

Enable/ Disable

Partner Smoke

Status	●
Username	smokeIP
E-mail	c[redacted]l...
Country	Botswana
User Type	Partner
Organization	[redacted] CORPORATION
User Administrator	✓

Stream	View Data	Enter Data
DHI	✓	✓
ER	✓	✓
ESOP	✓	⃠
HRH	✓	✓
MCAE	✓	✓
MER	✓	✓
MER (DOD)	✓	✓

Data Actions
Approvals: Submit Data ✓

Click to open user profile and edit

From the DATIM User Administration App (pictured above), Primary User Admins can:

- Edit data access rights and permissions for existing users as needed.
  - The DATIM Systems Team will send notifications if/when a new data stream is added so PUAs can administer them as appropriate.
- Enable accounts for existing users.
- Disable a user’s account if:
  - A user is no longer supporting the PEPFAR program or is now supporting another country or agency.
  - The user has been found in violation of DATIM policies and system access should be terminated.

*For more information on the DATIM User Admin App, please reference the **User Administration Application Reference Guide** on the DATIM Support Site here.

Frequently Asked Questions (FAQ)

Who are PUAs?

- Ideally 1-3 PUAs, per Organization Unit or HQ Agency that are identified by PEPFAR Program Managers (PPM) and/or other PUAs
- They receive the register.datim.org DATIM account request emails from people seeking access to DATIM.
- They are considered the DATIM user Administrator Points of Contact for their OUs, Implementing Partners, or U.S. Agency by the DATIM Systems support team.

Why are PUAs Important?

- Primary user Admins are one of the most important roles a DATIM user can have. The DATIM user community is so large that the DATIM Team is unable to actively maintain or manage users – especially since different users may or may not need access to a variety of Data Streams
- PUAs help administer new data streams to their users if/when needed

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
- In DATIM, navigate to the user Administration App choose to search by the user's 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