

Administration Module

Admin Module: Users

Delta features a versatile **Administration Module** which includes extensive access control capabilities, which affords fine-grained control of users' access to data. The module is split into five functions: **Users**, **Customized Rights**, **Audit Trail**, **Deleted Items**, and **Security**. In this context, users can be anyone with access, regardless of whether they are actors in a project. **NOTE:** only superusers (administrators) have access to this module and see its icon in the left navigation.

Users are created at the **Portfolio** level. The Admin Module icon will be grayed out at the Project level.

The screenshot shows the Delta Administration Module interface. At the top, there's a header with the Delta logo, 'PROJECTS PORTFOLIO', and user profile icons. The main navigation bar on the left includes Home, Settings, Proj. Mgmt, Log frame, Data Collect, Dashboards, Learning, and Admin. The 'Administration' section is active, showing tabs for Users, Customized rights, Audit Trail, Deleted Items, and Security. The 'Users' tab is selected, displaying a list of users with filters for User Groups, User Profiles, and Implementing Agency. A search bar is available. The user list includes TRAORE Mariam Evelyne (SUPERVISEUR), DARAUULT SERGE, Danon Michel, Guinko François, FANE OUMAR, TRAORE Marie Jeanne, and SISSAO Mamadou. Each user entry has a List/Tile toggle icon and an Add button. At the bottom, it shows 'Currently Connected: 5 Users' and a copyright notice for Delta Monitoring & Evaluation.

You can filter by user groups, user profiles, or agency, and search for names and email addresses. You can also toggle the view between List and Tile by clicking the **List/Tile** icon at upper right.

Click the **+Add** button to create a new user. In the List view, the new user screen will appear inline on top of the list. In the Tile view, the new user screen will appear by itself. The first tab is **User Details**.

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The screenshot shows the 'Administration' section of the Delta Monitoring & Evaluation system. The 'Users' tab is active, and the 'User Details' sub-tab is selected. The form contains the following fields and options:

- Email:** A mandatory text field with a red asterisk.
- First Name:** A mandatory text field with a red asterisk.
- Last Name:** A text field.
- Sex:** Radio buttons for 'Male' (selected) and 'Female'.
- Function:** A text field.
- Implementing Agency:** A dropdown menu with the option 'Select an implementing agency'.
- Password:** A mandatory text field with a red asterisk.
- Confirm Password:** A mandatory text field with a red asterisk.
- Expiry Date:** A date field set to '12/02/2021'.
- Options:** Checkboxes for 'Superuser', 'Display dashboard', and 'Display map'.
- Change photo:** A button next to a user profile picture.
- OK:** A green button at the bottom left of the form.

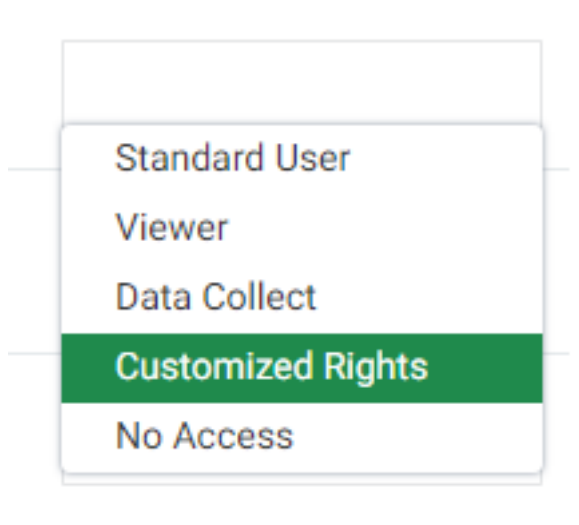
At the bottom of the page, it says 'Currently Connected: 2 Users' and 'Copyright DELTA Monitoring & Evaluation ©'.

The email, first name, and passwords fields are mandatory. The email in particular must be correct, since it serves as a user's login credential along with their password. They will also receive system notifications at that address. The other fields are optional. It is suggested as a best practice to enter as much information as is available.

Checking the Superuser box grants system-wide access to a user. This will allow a user to access all the system areas as well as all the data contained in the system. This is usually reserved to system administrators. Superusers are the only ones with permissions to create other users. Superusers are also the only users who will see the Admin module icon at the bottom of the left-hand navigation. **NOTE:** once the Superuser box is checked, the User Profile tab of the Users screen will disappear.

Checking the Display Dashboard and Display Map will grant access to the Portfolio dashboards and map, respectively. These checkboxes will disappear once the Superuser box is checked.

The **User Profile** tab is used for 'regular', i.e. non-superuser accounts. This screen contains a current list of the projects in the portfolio, and allows administrators to easily grant portfolio and project access permissions to users.



The default selection is Customized Rights. The other options are:

- **Standard User:** allows access to the entire project or portfolio, including Create, Edit, and

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Delete

- **Viewer:** allows view-only access
- **Data Collect:** allows access to the Data Collection module only, for data collection, verification, and validation
- **No Access:** locks the user out of the project

Selecting **Customized Rights** allows the administrator to further refine the permissions to the project. It is the default selection because in and of itself, selecting Customized Rights grants no access to a project until and unless a user is added to a User Group and User Profile in the Customized Rights tab. This also facilitates the work of an administrator, by not having to set permissions for each and every project in the portfolio.

Select Male or Female to indicate the gender of the user. If there is no photo available for the user, a generic icon will appear in the first spot of the Main Toolbar at top right. Selecting the proper gender will ensure the proper generic icon will appear.

Select the user's agency from the Agency pick list, and the user's role/staff post from the Staff/Stakeholder pick list. These are optional fields. If the correct agency or staff/stakeholder information does not appear in their respective pick lists, set them up in Delta's Settings module. **NOTE:** Agencies can only be created at the Portfolio level, either in the Portfolio's Settings module, or when creating a new project.

Enter a password for the user, then enter it again in the Confirm Password field. Passwords are **case-sensitive**. Strong passwords should include a mix of uppercase and lowercase characters as well as numbers. Special characters are also allowed **except for** @, #, and \$.

You can set an expiration date for a password. By default, passwords expire one year after the creation of the user in the system. Click the Expiry Date field calendar icon to select another date if appropriate.

Click the Change Photo button to add/change a user's photo.

When you're done, click OK to save your work and return to the previous screen. The user you just created appears in the List and Tile views.

Each user entry has its own toolbar in **List** view. To edit a user in List view, click that user's Edit icon, make the necessary changes, and click OK to save your changes and return to the list.



To temporarily suspend an account without deleting it, click the list item's Lock icon. Click the icon again to unsuspend the account. The lock's appearance toggles between open and closed to reflect its current state. To delete an account in List view, click its Delete icon, then confirm the deletion.

To manage accounts in **Tile** view, click the account you want to edit to open it. Make the necessary changes, and click OK to save your work and return to the Tile view. To suspend an account, click its tile, then click its lock icon, and click OK. To delete the account, click on its tile, and click its Delete icon, then confirm the deletion.

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