**Clinical Learning Australia** 

**Training Guide** 



The ePortfolio for prevocational doctors

# QUICK REFERENCE GUIDE FOR

## **CLA ADMINISTRATORS**

# **CREATING AND MANAGING USERS**

This quick reference guide provides information on how to create and manage users in Clinical Learning Australia (CLA). This guide will explain the process to follow for creating users and how to manage them once created.

## **Table of Contents**

1	CREATING USERS	. 3
1	1 CREATING USERS MANUALLY	.3
	Where to create users manually	.3
	Inputting user details	.3
	Role types	.6
	Custom properties	.7
	Adding a user to a group	.8
	Create user account	.8
1	2 CREATING USERS IN BULK	.8
2	MANAGING USERS	. 9
	Where to manage users	.9
	View User	.9
	Edit user	11
	Edit groups	13
	Send verification	14
	Deleting and Archiving	14
	Bulk actions	15
3	SUPPORT	17

# 1 Creating users

Medical Education Unit / Administrator users of CLA can create users either manually (one by one) or in bulk via a **user import spreadsheet**.

## 1.1 Creating users manually

#### Where to create users manually

- Navigate to the 'cog' icon on the left-hand menu bar and click 'Users'
- Click the 'Create user' button

					M	)	J
(i) Lisers							
Admin > Users							
Users							
Groups		Q Add filter			📲 Import users 🛛 🕒 Export users 🕞 Cre	ate user	
Organisations		Email Address 🗢	AHPRA Number 🗢	Role 🗢	Organisation 🗢		
Terms		tom+chsadmin@myknowledgemap.com		Medical Education Unit Administrator	Canberra Health Services		
Ferris .	in	tom+chhsadmin@myknowledgemap.com		Medical Education Unit Administrator	Cooma Hospital and Health Service		
Forms	1	tom+gbhadmin@myknowledgemap.com		Medical Education Unit Administrator	Goulburn Base Hospital		
PGY Instances	min	tom+moruyaadmin@myknowledgemap.com		Medical Education Unit Administrator	Moruya Hospital		_
Outcome Statements	n	⊘ tom+nchadmin@myknowledgemap.com		Medical Education Unit Administrator	North Canberra Hospital		
	Crows Statements	Crows Statements NCH Admin		Image: Constraint of the second se	Image: Series and minits and series	Import users         Admin > Users         Groups         Grapisations         Email Address \$         AHPRA Number \$         Role \$         Organisations         Terms         Import users         Import	Image: Constraint of the service of

A window will pop up to allow a user's details to be entered.

#### Inputting user details

- Complete the fields shown below, ensuring you enter data in all mandatory fields as a minimum.
- Anything with a (\*) is a mandatory field.
- Click **Create** when you have finished entering all the data.

ups.

### The table below explains each of the fields within the user creation window.

Field name	Description	Field Type
Organisation*	<ul> <li>Search and select the organisation to which the user will be attached. A minimum of 3 characters must be entered to populate results.</li> <li>Note: You can only select your organisational level and below (if there are organisations that sit underneath yours). The organisation to which the user is attached, alongside their role, will determine what users and information the user will be able to see.</li> </ul>	Mandatory
First Name and Last Name*	<ul> <li>Enter the user's first and last name.</li> <li>To include a middle name, populate this after the first name.</li> <li>To include a prefix, populate this before the first name.</li> <li>If the user does not have a first name enter '-' in the first name field.</li> </ul>	Mandatory
Email*	<ul> <li>Enter the email address for the user.</li> <li>There can only be one user profile with a unique email address.</li> </ul>	Mandatory

	<ul> <li>The welcome email will be sent to the email address specified here.</li> <li>It is strongly recommended to use a professional email address where this is available. If a professional email address has not yet been created, an alternative email address can be used in the interim and changed later.</li> <li>Email addresses can be updated after users have been created.</li> </ul>	
Other Emails	<ul> <li>Users can have multiple email addresses attached to their account however these are included for information only and only the main email address is used for notifications.</li> </ul>	Optional
Main Role*	<ul> <li>Select the system role to be assigned to the user. This will determine what they will be able to see in the system and what actions they will be able to perform.</li> <li>Please see the table below for details on user roles.</li> </ul>	Mandatory

By default, the **Send verification email** option will be ticked. This will send a welcome email to the user immediately after you create their account. If you do not wish to not send a welcome email straight away, please untick this box.

You can send the welcome email at a later time, once you're ready (see below).

Welcome emails allow new users to verify their account and set up a password.

## Role types

The following outlines the system roles and functions that can be assigned to users.

Role	Definition
Trainee	A Trainee is a prevocational doctor in their first or second year, also known as a PGY1 or PGY2 doctor. This role allows the user to access CLA as a trainee, complete self- assessment forms, view mid/end of term assessments, EPAs completed for themselves and email assessment forms to supervisors to complete later Trainees will have access to an ePortfolio when assigned to a group and instance – see the quick reference guides <b>Creating and managing groups</b> and <b>Creating and managing</b> <b>PGY instances.</b>
Supervisor (Term or Clinical)	This role is designed for Supervisors who are responsible for oversight of trainees during a particular term. It allows these users to complete mid and end of term assessments, EPAs, track and monitor progress of training for trainees they are assigned to. You should select this role for both Term and Clinical Supervisors. Within the Term Allocations process administrator users can assign these users a 'relationship' to a trainee. This will determine whether the user can perform the functions of a Term or Clinical Supervisor for each trainee that they are linked to. Term and Clinical Supervisors can perform the same functions except for the Term Supervisor having the additional system privilege of being able to sign off the mid and end of term assessment. See the quick reference guide for Creating and managing term allocations.
Director of Clinical Training / Executive Director of Medical Services	This role provides access to view all trainees where they are added to the same cohort group to track and monitor training progress and assessments. DCTs and EDMS' need to be added to the same Cohort Groups as their trainees to be able to access their ePortfolios. See the Create and manage groups and How to import users in bulk quick reference guides. In situations where a DCT or EDMS is also an MEU Administrator, go to the Groups and change their role within the Group to DCT or EDMS – this will enable them to have permissions as both an MEU Administrator (main role) and

	DCT/EDMS for any groups they're added to with the DCT/EDMS role.
Medical Education Unit Administrator	This role provides access to all administration functions for the organisation to which the user is assigned and any organisations below (where applicable). This includes the ability to create and manage user accounts, create and manage groups, create and manage PGY instances, create and manage term allocations, view and track training progress and assessments for trainees assigned to any organisations the administrator has access to. For situations where a user requires both the MEU Administrator role for an organisation and a DCT role in relation to a group of Trainees, set their Main role as MEU Administrator and add them to the trainee cohort group, assigning them the role of DCT within the group.
Medical Education Officer	This role can perform the same functions as a Medical Education Unit Administrator with the exception of creating and managing user accounts.
Statewide Administrator	This role can only be assigned by administrator users that already have statewide access. It provides access to view aggregate data across all organisations within a particular state or territory and run reports.

#### **Custom properties**

Once you have populated all the mandatory fields within the 'basic info' tab, a new tab called **Custom Properties** will appear.

The following fields are not mandatory and are only relevant if you wish to provide further information about users, e.g. states who manage admin users centrally may want a quick reference to the hospital, facility, health service they reside within.

- **Phone** A phone number for a user can be entered if necessary
- Jurisdiction This should be formatted as the state/territory abbreviation, e.g. NSW, WA
- Hospital and Health Service
- Facility / Organisation

Basic Info	Custom Properties	Integration	Add a new group
Phone			You have yet to assign any groups.
Jurisdiction			
Hospital and Health Service			
Facility / Organisat	lon		

The **Integration** tab is not relevant for CLA at this time and can be ignored.

#### Adding a user to a group

Trainee users will need to be added to a group and the group to an instance for them to have access to the relevant forms and assessments for their clinical year. The quick reference guides **Creating and managing groups** and **Creating and managing PGY instances** provide more information on this.

If you have already created groups, users can be assigned to those groups during the user creation process by searching for the relevant group in the **Add a new group** search bar.

**Note:** The group being added must have been created already before being able to add a user to the group. Be sure to include DCTs and EDMS' to the trainee Cohort groups and ensure that their assigned role in the Group is that of a DCT/EDMS.

#### **Create user account**

Once all fields have been completed, click Create.

The new user is now created and will be displayed in the user list.

### 1.2 Creating users in bulk

Creating users in bulk can be done via the completion and uploading of a spreadsheet. Please refer to the **How to Import Users in Bulk** quick reference guide for further information.

# 2 Managing users

#### Where to manage users

- Navigate to the 'cog' icon on the left-hand menu bar and click 'Users'
- Click the three dots (...) to the far right of the user's details

сца									X	۰
AS	Q Users Admin > Users									
C	Groups		Role: Medical Education Unit Administrator X V X Q Ad	AHPRA Number 🗘	Role 🕈	Organisation 🕈	import users	E Export user	rs 🖸 Create	user
8	Organisations		o tom+chsadmin@myknowledgemap.com		Medical Education Unit Administrator	Canberra Health Services	(泉1)	9 Sep 2024		
	Forms	in	tom+chhsadmin@myknowledgemap.com		Medical Education Unit Administrator	Cooma Hospital and Health Service	凤1	9 Sep 2024		
	PGY Instances	r	tom+gbhadmin@myknowledgemap.com		Medical Education Unit Administrator	Goulburn Base Hospital	凤1	9 Sep 2024		
	Outcome Statements	min	tom+moruyaadmin@myknowledgemap.com		Medical Education Unit Administrator	Moruya Hospital	<b>Q</b> 1	9 Sep 2024		
	NCH Adm	in	tom+nchadmin@myknowledgemap.com		Medical Education Unit Administrator	North Canberra Hospital	凤1	9 Sep 2024		
	🗌 💿 SERH Adm	nin	tom+serhadmin@myknowledgemap.com		Medical Education Unit Administrator	South East Regional Hospital	<i>,Ω</i> ,1	9 Sep 2024		

Clicking this will display a pop-up menu of options.



#### **View User**

Administrators can see an overview of the user's details here. You can also click anywhere on a user's row to see this overview.

DD Demo DCT DCT@example.gov	.au	
Overview	Groups (2)	Authentication (1)
ORGANISATION	EMAIL	ADDRESS
Canberra Health Services	DCT@	example.gov.au
ROLE	STATU	S
Director of Clinical Training		
AHPRA NUMBER	REFERI	ENCE
CREATED	UPDAT	ED
13 Sep 2024 16:09	3 Feb	2025 07:50
PHONE	JURISD	ICTION
HOSPITAL AND HEALTH SERVICE	FACILI	ΤY
		Cancel

Click on the **Groups** tab to view the groups the user is attached to and if they have been assigned roles.

DD	Demo DCT DCT@example	e.gov.au	
	Overview	Groups (2)	Authentication (1)
CJ2	Canberra January Cohort Group	25 Intake (Cohort)	
•	Clinical Learning A Group (Cohort)	Director of Clinical Training	
			Cancel

The Authentication tab provides details of previous log-in attempts from the user.

**Note:** If a user has not logged into the system previously, there will no information visible in this area.

DD Demo DCT DCT@examp	le.gov.au	
Overview	Groups (2)	Authentication (1)
DCT@example.gov.au Last login 11 minutes ago	(Username)	64 Logins
		Cancel

#### Edit user

Administrators can edit a user's **Basic Information** in the first tab.

Basic Info	Custom Properties	Integration	Add a	new group		
Organisation *	Services		CJ2	Canberra January 25 Int Cohort Group	ake (Cohort)	
First Name *	Last Name <sup>3</sup> DCT		QA	Clinical Learning Australia (PGY2) - Training Group (Cohort)	Director of Clinical Trair 🗸	
Email *						
DCT@example.go	ov.au					
Other Emails	Add other email					
Main Role *						
Director of Clinic	al Training	~				
Status						
None		~				
AHPRA Number						

The **Status** of the user can also be updated here.

**Note:** The **Status** is only relevant in the event of a Guest Assessor completing an EPA for a Trainee. The Guest Assessor will appear as Unapproved and can be changed to Approved by an Admin. No action is required in the status field for users manually added or added as part of a bulk upload.

None	
None	
Active	
Approved	
Unapproved	

**Custom Properties** that have been set up against the users can be viewed, entered and edited in the second tab.

**Note**: Check the Custom Properties tab and update as required when editing a user, in particular if changing their Organisation in Basic info to ensure that Phone, Jurisdiction, Hospital and Health Service and/or Facility/Organisation are still correct.

Basic Info	Custom Properties	Integration	Add	a new group		
Phone			CJ2	Canberra January 25 Int.	ake (Cohort)	•••
urisdiction			•	Clinical Learning Australia (PGY2) -	Director of Clinical Trair 🗸	
ACT Hospital and Healt	h Service			training Group (conort)		
ACT Health						
acility						
North Canberra	Hospital					
North Canberra	Hospital					

Administrators can also view the Groups the user is a member of.

Users can be added to a group from this view by searching and selecting the required group.

Users can be removed from a group directly in the Update User screen by clicking the **three dots (...)** of the group and clicking **remove**.

Basic Info	Custom Properties	Integration	Add a	a new group		
Phone 0123 456 789			C]2	Canberra January 25 Inta Cohort Group	ike (Cohort)	
urisdiction			•	Clinical Learning Australia (PGY2) -	Director of Clinical Trair 🗸	
ACT				Training Group (Cohort)	Remove Role	
Hospital and Heal	th Service				Remove	
ACT Health						
Facility						
North Canberra	Hospital					

The Integration tab is not being used at this time. This can be ignored.

Basic Info	Custom Properties	Integration	Add a new group		
Reference			Canberra January 2 Cohort Group	25 Intake (Cohort)	•••
Username			Clinical Learning Australia (PGY2) -	Director of Clinical Trair 🗸	•••
DCT@example.g	ov.au		Training Group (Col	hort)	

Once changes have been made, click **Update** to save changes and close.

#### Edit groups

Administrators can edit the groups that a user is assigned to from the search results screen by clicking the **three dots (...)** and clicking **Edit groups.** 

You will follow the same process for adding and removing as mentioned in the section above.

View user	•••
Edit user	•••
Edit groups	
Send verification	
Archive	•••
Delete	

Release 1.1 – 10 February 2025

#### Send verification

If you have either not sent a verification email during the user creation process or need to resend a verification email to a user, click the **three dots (...)** and **Send verification** to trigger the welcome email to be sent to that user. A confirmation window will appear prior to sending ensure you want to trigger this action.

View user	•••
Edit user	
Edit groups	•••
Send verification	
Archive	•••
Delete	

#### **Deleting and Archiving**

Administrators can delete a user account if the user has not yet logged in.

To delete a user, click the three dots (...) and click Delete.

Note: User accounts cannot be recovered if they have been deleted.

View user	•••
Edit user	•••
Edit groups	
Send verification	
Archive	•••
Delete	

Once users have logged into CLA, the option to delete will be greyed out. The user, however, can be archived to remove them from the users list.

To archive a user, click the three dots (...) and click Archive.

View user	•••
Edit user	•••
Edit groups	
Send verification	
Archive	•••
Delete	•••

Release 1.1 – 10 February 2025

Administrators can view archived users by clicking **Show archived** (located at the bottom of the Users page). Archived users will appear in the user list with a yellow tag, 'Archived.' To hide archived users from the list, click **Hide archived**.

Showing 1 to 10 of 213 > <u>Hide archived</u>	(1) 2 3 4 5 ) > 10 per page

#### **Bulk actions**

Administrators can apply actions to multiple users by first selecting the users that changes need to be applied to. To select multiple users, click the tick-box to the left of the **Name** column and click **Bulk actions** on the far-right side of the page.

СЦА								X	٩	ł
<ul> <li>•</li> <li>•</li> </ul>	있 I Admi	Users n ≻ <b>Users</b>								
C		tom+	्, Add filter	r			Clear selected	Bulk action	ns (1) 🗸	
8	0	Name 🔻	En	nail Address 🗢	AHPRA Number 🗢	Role 🕈	Organisation 🗢	Groups 🗢	C	
		🛛 🕢 CHS Admin	01	tom+chsadmin@myknowledgemap.com		Medical Education Unit Administrator	Canberra Health Services	风1	ç •••	
	(	CHHS Admin	01	tom+chhsadmin@myknowledgemap.com		Medical Education Unit Administrator	Cooma Hospital and Health Service	<b>Q</b> 1	ç •••	
	C	GBH Admin	01	tom+gbhadmin@myknowledgemap.com		Medical Education Unit Administrator	Goulburn Base Hospital	凤1	ç •••	
	C	Moruya Admi	n 📀 t	tom+moruyaadmin@myknowledgemap.com		Medical Education Unit Administrator	Moruya Hospital	风1	s •••	
	C	NCH Admin	01	tom+nchadmin@myknowledgemap.com		Medical Education Unit Administrator	North Canberra Hospital	<b>凤1</b>	s •••	
	C	SERH Admin	01	tom+serhadmin@myknowledgemap.com		Medical Education Unit Administrator	South East Regional Hospital	风1	<u> </u>	
	C	🗌 🌍 Doon Barton	01	tom+amcs5@myknowledgemap.com		Trainee	South East Regional Hospital	风1	1 •••	
	0	🙎 Peter Bogg	01	tom+term1@myknowledgemap.com	81723187389723	Term Supervisor	Clinical Learning Australia	凤1	1 •••	

Alternatively, you can select all users on the current page displayed by clicking the tick-box to the left of the **Name** column in the header row.

СĻА	000									$\bowtie$	<u>ب</u>
<u>محم</u> م	ي Ac	Q Us	ers > Users								
٣		tom	+	Q, Add filter					Clear selected	Bulk action	s (10) <del>•</del>
8		$\checkmark$	Name 🔻	Ema	il Address 🗢	AHPRA Number 🗘	Role 🕈	Organisation 🗢		Groups 🗢	c
			CHS Admin	🗢 to	m+chsadmin@myknowledgemap.com		Medical Education Unit Administrator	Canberra Health Se	rvices	<b>Q</b> 1	s •••
~			O CHHS Admin	🗢 to	m+chhsadmin@myknowledgemap.com		Medical Education Unit Administrator	Cooma Hospital an	d Health Service	<b>Q</b> 1	<u>c</u>
			GBH Admin	🗢 to	m+gbhadmin@myknowledgemap.com		Medical Education Unit Administrator	Goulburn Base Hos	pital	风1	ç •••
			😡 Moruya Admin	🗢 to	m+moruyaadmin@myknowledgemap.com		Medical Education Unit Administrator	Moruya Hospital		<u>Q1</u>	<u> </u>
			NCH Admin	🗢 to	m+nchadmin@myknowledgemap.com		Medical Education Unit Administrator	North Canberra Ho	spital	风1	⊆ •••
			SERH Admin	🗢 to	m+serhadmin@myknowledgemap.com		Medical Education Unit Administrator	South East Regiona	l Hospital	<b>Q</b> 1	ç
			Doon Barton	🗢 to	m+amcs5@myknowledgemap.com		Trainee	South East Regiona	l Hospital	<b>凤1</b>	1 •••
			🙎 Peter Bogg	🗢 to	m+term1@myknowledgemap.com	81723187389723	Term Supervisor	Clinical Learning Au	Istralia	<u>Q</u> 1	1 •••

Once you have selected the required users, click on **Bulk action** on the far right-side of the page and choose from one of the following options:

СĻА		X 🖗 🗄
<u>مم</u> م	오 Users Admin > Users	
۲	tom+ Q, Add filter	ar selected Bulk actions (3) +
@	Name ▼     Email Address ♦     AHPRA Number ♦ Role ♦     Organisation ♦	Add groups
â	CHS Admin 🔹 tom+chsadmin@myknowledgemap.com Medical Education Unit Administrator Canberra Health Services	Archive/Unarchive
	CHHS Admin 🔹 tom+chhsadmin@myknowledgemap.com Medical Education Unit Administrator Cooma Hospital and Healt	h Service · · · · · ·
	🗹 📀 GBH Admin 🔹 tom+gbhadmin@myknowledgemap.com Medical Education Unit Administrator Goulburn Base Hospital	Q1 <u>•</u> •••
	🗌 💩 Moruya Admin 🔹 tom+moruyaadmin@myknowledgemap.com Medical Education Unit Administrator Moruya Hospital	Q1 c •••
	🗌 💿 NCH Admin 💿 tom+nchadmin@myknowledgemap.com Medical Education Unit Administrator North Canberra Hospital	Q1 g •••
	🗌 🥥 SERH Admin 🔹 tom+serhadmin@myknowledgemap.com Medical Education Unit Administrator South East Regional Hospit	tal 🔍 1 🤉 •••
	Doon Barton otom+amcs5@myknowledgemap.com Trainee South East Regional Hospir	tal 🔍 1 🚥
	Peter Bogg 💿 tom+term1@myknowledgemap.com 81723187389723 Term Supervisor Clinical Learning Australia	<b>Q1</b> 1 •••

Add groups - To add groups to the selection of users, click Add groups, search, and select groups and click Add.

**Archive/Unarchive** - To archive or unarchive the selected users, click **Archive/Unarchive**. A confirmation dialogue box will appear. Click **OK** to proceed.

**Send Verification** - To send verification emails to the selected users, click **Send Verification**. A confirmation dialogue box will appear. Click **OK** to proceed.

**Note:** You will see how many users have been selected in brackets **(NUMBER)** to the right of the **Bulk actions** button.



# 3 Support

If you require any support you can find contact details for the national CLA system administrator as well as relevant state based system administrators on the <u>CLA website</u>.