ADMIRALTY
Maritime Data Solutions

User Guide

Customer Service Portal-
User management (for Admin Users)

V4.0

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UK Hydrographic Office

Contents

User Management

The User Management area of the Portal is only available to Admin users. It shows all of the people associated with your company and allows you to manage existing users as well as create new users when needed.

User View

Click "User Management" from the navigation bar.

Users are displayed in the table and sorted alphabetically by the last name of the user.

User details can be accessed by clicking the first name of a user or the edit option.
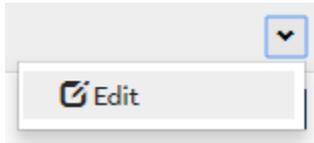
Basic searching

The user search box will allow you to search against any of the columns in the view. Results will be returned where the search term is at the beginning of a field.

Advanced searching

An asterisk (*) can be used to extend searches. Adding a * to the beginning of a search term will return results where that term is anywhere within the field.

This might be useful if you want to view users with a particular email address domain. For example, searching "*@domain.com" would return all users that have that type of email address.

Creating a user

New users can be added with just a few clicks. To avoid duplication, a unique email is required, so please search the list of existing users before adding a new user.

Add user

Click the "Add User" button (to the right of the search box) to enter the new user screen.

This screen is made up of 3 sections.

User Details

This section captures standard user information such as first name, last name and email.

The email address entered here will be the one used during logging in and is where invitation and password reset links will be sent.

Portal Options

This section allows you to configure certain Portal functionality.

Send Invitation
This required field allows you to send an invitation link via email. To do this, select "Yes". If you don't want to send an invitation email, select "No". A new user will not be able to use the Portal without an invitation.

Portal Admin
This option allows you to give the user admin permission (access to the User Management page). Select "Yes" to give admin permission. If you would like to remove admin permissions, select "No" (this is the default value).

Email Notification

Select whether the user should receive an email notification when an update is made to a case. By default this is set to "My Cases" which will only send notifications for cases raised by that user. "Organisation Cases" will send a notification when any case created within your company is updated. "None" does not send any notifications.

Channel Communications

This section allows you to sign the user up to particular communications from the UKHO.

If "Text Alert" is selected as "Yes", please ensure the "Mobile Phone" field is completed within the User Details section.

Submit details

When you have finished entering all of the information and selected whether an invitation email should be sent, click the Submit button at the bottom of the page.

This will take you back to the "User Management". The user will now be added to the list of users and can be searched for and updated as required.

Updating user details

Any user within your list can be updated, locked/unlocked or deactivated. If they are not already a Portal user, an invitation email can be generated.

Changing information

User details can be accessed by clicking the first name of a user or the edit option. Click the "Submit" button at the bottom of the screen to save any changes.

The information captured at creation is displayed and can be added to or changed.

If the user is not already a Portal user, set "Send Invitation" to "Yes" and an invitation email will be sent when you click "Submit"

Please note, if the email address is changed, this will become the address that is used for logging in and password reset emails.

Portal Admin User

This option allows you to give the user admin permission (access to the User Management page). Select "Yes" to give admin permission. If you would like to remove admin permissions, select "No" (this is the default value).

Locked User

This option allows you to lock or unlock the user. Select "Yes" to lock the user and prevent them from logging in. Select "No" to unlock the user and allow them to log in (this is the default value).

The lock or unlock process may take a few minutes to complete, so please allow some time before trying again.

Deactivate User

This option allows you to remove the user from the user list (if they have left the company for example). Select "Yes" to remove them. This will also lock the user.

Please note this action cannot be undone from the User Management screens.

Please contact Customer Services if you accidentally deactivate a new user. If you try to create a new user using the same details you will receive an error.

About us

The United Kingdom Hydrographic Office is
a leading provider of global marine geospatial data.

We help to inform maritime decision-making for
navigation, infrastructure development and the
management of marine resources.

Serving users worldwide

Our world-leading location based information is
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to users worldwide.

For more information, contact our global network of ADMIRALTY
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