

# Partner Portal – Authorised Administrator

## Functionality Guide

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# 1.Process User Access Requests

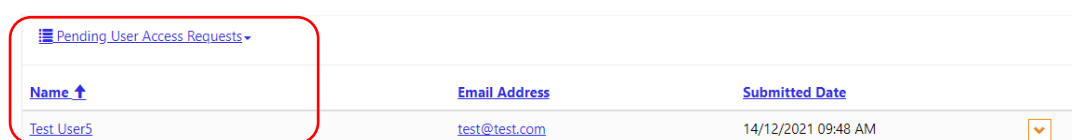
## Pre-requisite:

You should be logged in to the Partner Portal ([www.portal.desbt.qld.gov.au](http://www.portal.desbt.qld.gov.au)) as the Administrator for the Organisation.

1. Go to **User Management** under the **Administration** menu in the header.



2. View the **Pending User Access Request** list. You can use filters to locate the user you want to manage.



3. Click on the *User's Name* to review the access request details.

A screenshot of the Manage User form. The form is divided into several sections: General, Organisation, Applications, Businesses, Training Downloads Report Access, and Notification Preferences. The General section includes fields for Firstname, Lastname, Position, Email Address, and Daytime Phone. The Organisation section includes fields for Legal Name, ABN, and Business Name. The Applications section includes checkboxes for AVETMISS Training Activity, Apprentice Info Self Service, Training Downloads, and TRACC RTO Summary. The Businesses section includes a checkbox for 91533 - STEP INTO TRAINING SERVICES. The Training Downloads Report Access section includes a checkbox for Training Contracts - Australian Apprenticeships Centre data. The Notification Preferences section includes a checkbox for ATA Email Notification - include error reports. The form also includes a Status field, a Make Administrator checkbox, an Approval Decision dropdown, and a Save button. Red boxes highlight specific areas: 'e.' for the Position field, 'a.' for the Applications checkboxes, 'b.' for the Businesses checkbox, 'd.' for the Training Downloads Report Access checkbox, 'f.' for the Make Administrator checkbox, and 'c.' for the Notification Preferences checkbox.

4. Review the user details.
  - a. Assign access to Applications that the user should have access to.
  - b. Assign access to Business Entities that the user has access to (if your Organisation has multiple Business Entities i.e. RTOs).
  - c. If the ATA application is chosen, then assign Notification Preferences to indicate whether the user is to receive email notifications with the **Error reports file attached** for submissions via ATA. (These can be quite large files, and can be accessed directly from the portal instead)

- d. If Training Downloads is chosen, then assign the Training Downloads Report/s the user is permitted access to
  - e. If needed, update the Position, Email Address and Daytime Phone for a user.
  - f. If needed, make the user an Administrator. Its recommended there is more than one administrator per organisation.
5. Select the **Approval Decision** to **Approve/Reject** the access and click **Save**. You will get a pop up to confirm.  
**NOTE:** The user is notified via email of the outcome of the access request.

**Approval Decision**

▼

Approve

Reject

Approving this user will grant them access to the Partner Portal for this organisation and any chosen applications. If this is not intended, please click Cancel. Otherwise, click OK to proceed.

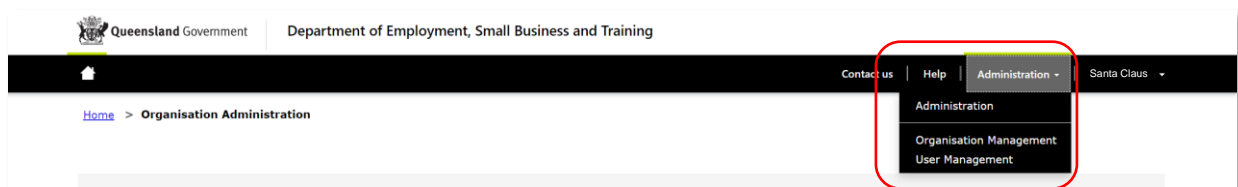
OK Cancel

## 2. Manage Users

### Pre-requisite:

You should be logged in to the Partner Portal ([www.portal.desbt.qld.gov.au](http://www.portal.desbt.qld.gov.au)) as the Administrator for the Organisation.

6. Go to **User Management** under the **Administration** menu in the header.



2. Select the relevant user's list or you can use the filters to locate the user you want to manage.

Home > Organisation Administration > User Management

### User Management

Filter by Access Status

Filter by Administrator

Filter by Business Entity

Filter by User's Name

Filter by Application

Apply

All Users

Pending User Access Requests

Approved Users





Rejected Users

All Users

Name	Email Address	Access Status	Submitted Date	Status Set Date
GovID19@test.gov.au	GovID19@test.gov.au	Approved	02/06/2022 08:26 AM	02/06/2022 09:07 AM
GovID22@test.gov.au	GovID22@test.gov.au	Approved	02/06/2022 10:29 AM	02/06/2022 01:13 PM

3. Click on the orange **V** of the user to see the edit option.

#### User Management

Filter by Access Status	<a href="#">All Users</a>				
Filter by Administrator					
Filter by Business Entity					
Filter by User's Name					
Name	Email Address	Access Status	Submitted Date	Status Set Date	
Alf Michael	a.michael@test.gov.au	Rejected	11/01/2022 01:50 PM	03/06/2022 04:53 PM	
Kimberli Duvoont	test1@test1.com	Approved	14/12/2021 08:53 AM	20/12/2021 11:57 AM	
Sarah Clowth	tester5@tester.com	Approved	21/01/2022 11:08 AM	14/06/2022 04:02 PM	
Test User25	trainee1@trainee1.com	Approved	13/12/2021 03:20 PM	24/05/2022 10:52 AM	

4. If needed, you can:

- a. Update the Position, Email Address and Daytime Phone for a user.
- b. Amend access to Applications that the user has access to.
- c. Amend access to Business Entities that the user has access to (if your Organisation has multiple Business Entities i.e. RTOs).
- d. If the ATA application is chosen, then assign Notification Preferences to indicate whether the user is to receive email notifications with the **Error reports file attached** for submissions via ATA. (These can be quite large files and can be accessed directly from the portal instead).
- e. If Training Downloads is chosen, then assign the Training Downloads Report/s the user is permitted access to
- f. Make the user an Administrator or remove them as an administrator.
- g. Inactivate an Active User by clicking on **Inactivate**.  
OR  
Activate an Inactive User by clicking on **Reactivate**. You will be prompted to confirm you want to do this.

#### Manage User

#### General

##### User Details

Firstname

Test

Lastname

User5

Position \*

Tester

Email Address \*

test@test.com

Daytime Phone \*

0040000

#### Applications \*

☒ AVETMISS Training Activity
 ☒ Apprentice Info Self Service
 ☐ Training Downloads
 ☐ TRACC RTO Summary

#### Businesses \*

☒ 91533 - STEP INTO TRAINING SERVICES

#### Training Downloads Report Access

☒ Training Contracts – Australian Apprenticeships Centre data

Inactivate

#### Organisation

Legal Name \*

Advanced Hearing Care Pty Limited

ABN

15 153 630 481

Business Name \*

ADVANCED HEARING CARE

#### Status

Approved

#### Make Administrator

☒ No
 ☐ Yes

#### Notification Preferences

ATA Email Notification – include error reports

☐ No
 ☒ Yes

Save

Run workflow

If you proceed, this user will be unable to access the Partner Portal. Are you sure you wish to make this user inactive?

Proceed

Cancel

5. Click **Save**.

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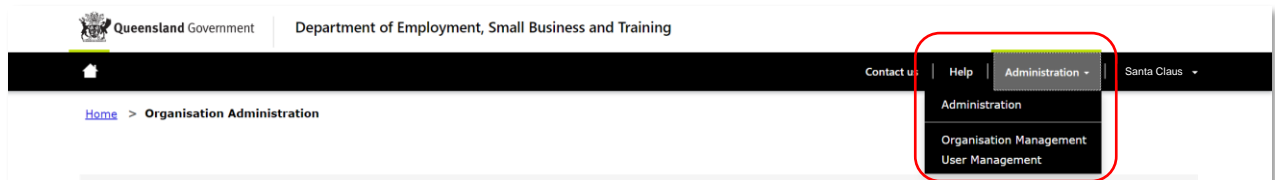
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## 3. Applying for Application Access

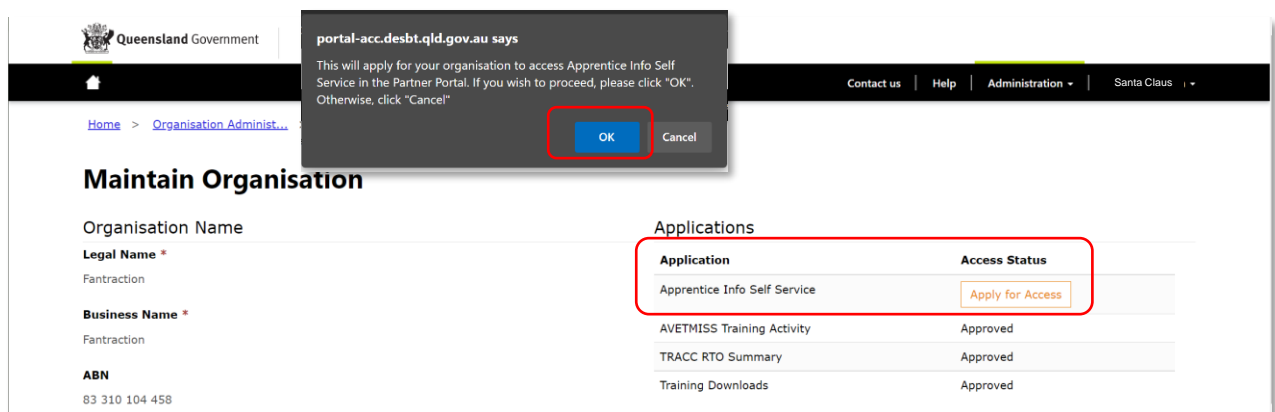
### Pre-requisite:

You should be logged in to the Partner Portal ([www.portal.desbt.qld.gov.au](http://www.portal.desbt.qld.gov.au)) as the Administrator for the Organisation.

1. Go to **Organisation Management** under the **Administration** menu in the header.



2. Click on **Apply for Access** against the application that your organisation wishes to request access for. Click **OK** to confirm



### Post Submission Instructions:

1. The Department will review your Organisation's application access request in the Portal.
2. You will be notified via email of the outcome of the request. If approved, all Administrators for your Organisation will have access to the application. You will need to provide access to the new application for users individually.

## Further assistance

myGovID registrations and enquiries: [myGovID](#)

RAMs registrations and Enquiries: [Relationship Authorisation Manager](#)

Partner Portal registration and Application Enquiries: <https://portal.desbt.qld.gov.au/contact-us/>