

CBIMS.Net Administrator Guidelines

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2 PURPOSE

These guidelines are intended for CBIMS.Net administrators responsible for managing their organisation's database, including approving users, setting up operational areas, and allocating the appropriate services.

3 ADMINISTRATOR RESPONSIBILITIES

3.1 USER MANAGEMENT

- Administrators are responsible for verifying the details of new user registration requests before granting or denying access to CBIMS.Net.
- Users that have left the organisation or no longer require access to CBIMS.Net should be deleted promptly.

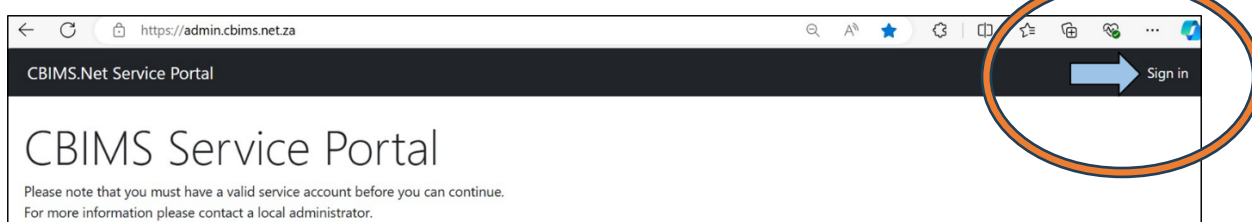
3.2 OPERATIONAL AREAS AND SERVICES/REFERRALS

- The Operational Areas where the organisation provides services should also be managed by the approved CBIMS.Net administrator. Only areas where the organisation offers services or referrals should be configured for data entry.
- Only the appropriate services and referrals should be added for selection on CBIMS.Net. For example, organisation administrators should not add services for which they do not have targets.

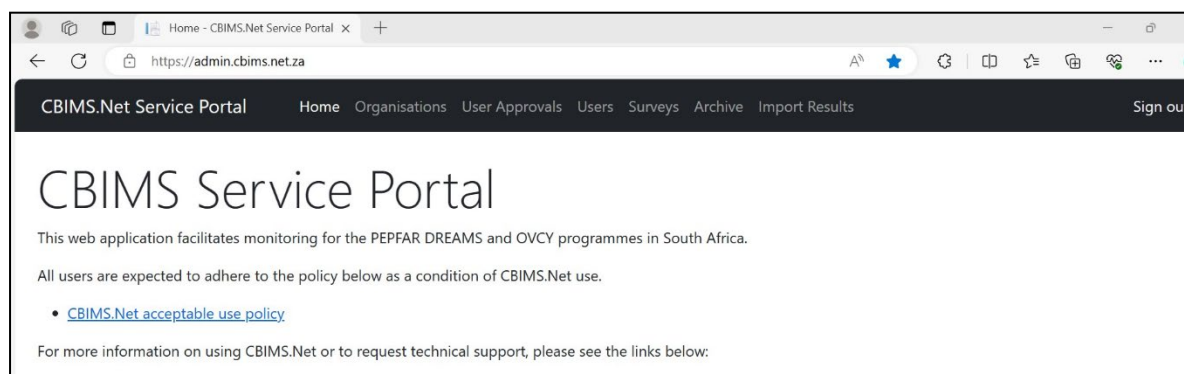
4 CBIMS.NET SERVICE PORTAL

4.1 HOW TO ACCESS THE CBIMS.NET SERVICE PORTAL

- Go to the service administrator portal using this web address: <https://admin.cbims.net.za/>
- Click the **Sign in** button below after completing the log-on information.



- The main screen of the service portal will be seen in the screenshot below.



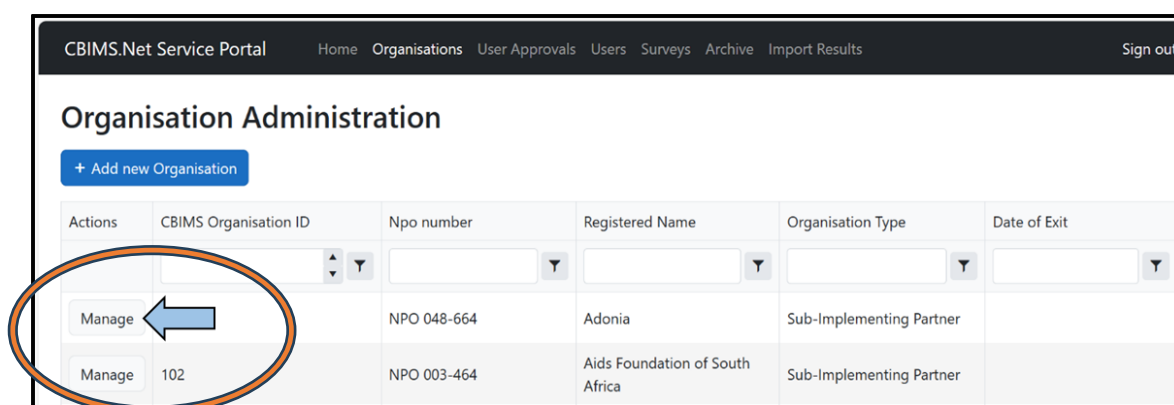
5 ORGANISATIONS

5.1 ADD NEW ORGANISATION

Organisation administrators cannot add new organisations themselves. An email request with all the organisation details may be submitted to cbims.support@tulane.edu for addition. Organisational details include the registered name of the organisation, the NPO number, organisation type and planned areas of implementation. Tulane may request additional information as needed.

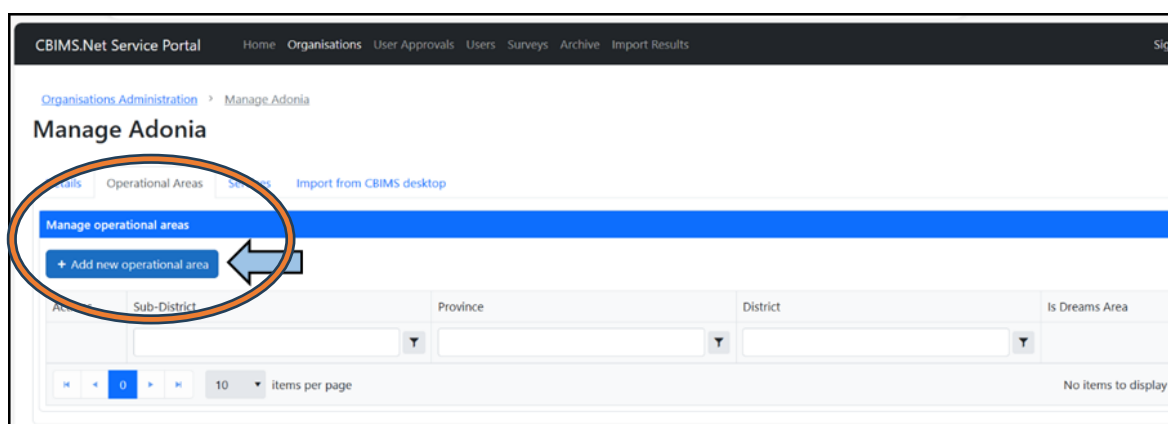
5.2 MANAGE ORGANISATIONS

To manage organisations, click on the Organisations tab, search for the organisation, and then click on the **Manage** button.



5.2.1 Add new operational area

- Select the Operational Areas tab and click the **Add new operational area** button. Operational Areas are the specific Sub-Districts where your organisation provides the services or referrals.



- Select the Province, District and Sub-district from the drop-down menus before clicking the Submit button to save. Continue to add all operational areas supported by repeating this process.

Add operational area to Adonia [X]

Province:
Select a province ...

District:
Select a district ...

Sub-District:
Select a sub-district ...

Submit **Cancel**

5.2.2 Delete operational area

Important Note: Deleting operational areas in the Service Portal does not delete data in the database, it merely limits the choices available to the data capturer when capturing a location.

- a) Under the Operational Areas tab, click the **Delete** icon for the operational area you want to remove.

CBIMS.Net Service Portal | Home | Organisations | User Approvals | Users | Surveys | Archive | Import Results | Sign out

Organisations Administration > Manage Dummy - Sub-Implementing Partner

Manage Dummy - Sub-Implementing Partner

Details | Operational Areas | Services | Import from CBIMS desktop

Manage operational areas

+ Add new operational area

Actions	Sub-District	Province	District	Is Dreams Area
	Matatiele LM	Eastern Cape	ec Matatiele Health sub-District	Yes
	Ngwathe LM	Free State	fs Ngwathe Local Municipality	No

- b) Clicking **Yes** on the confirmation window below will delete the selected operational area from the implementing organisation.

Remove operational area from Organisation [X]

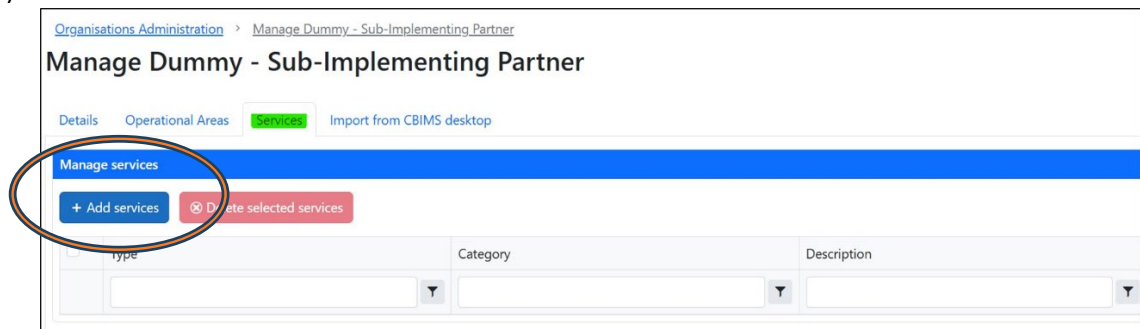
Do you want remove the operational area from this organisation?

Yes **No**

5.2.3 Add services

Important Note: To improve data quality, Administrators should carefully select appropriate services and referrals for capture in CBIMS.Net. Do not include services for which your organisation does not have funding or targets. Verify that the services configured align with the corresponding Programme Type (OVC Comprehensive, OVC Preventive, OVC DREAMS Family Strengthening or DREAMS).

- a) Select the Services tab and click the **+ Add services** button.



Organisations Administration > Manage Dummy - Sub-Implementing Partner

Manage Dummy - Sub-Implementing Partner

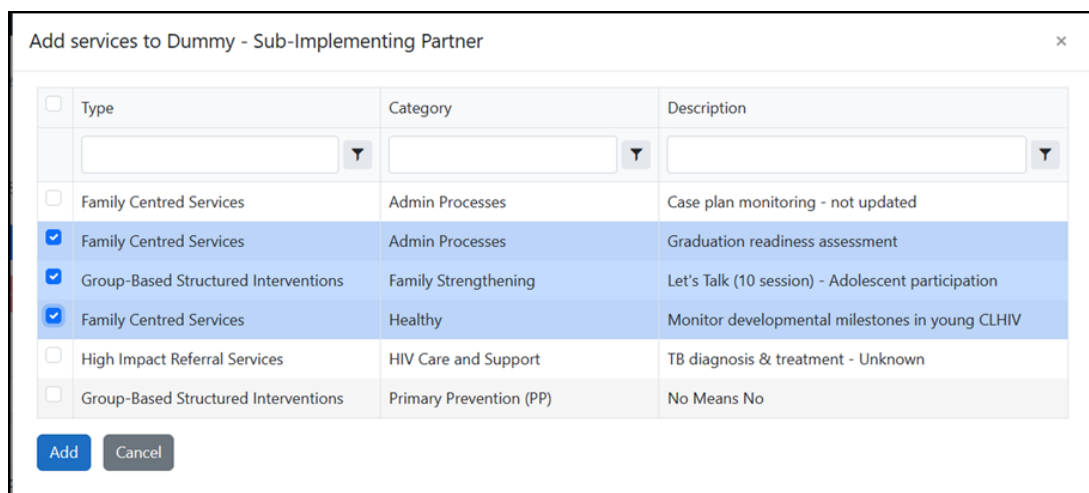
Details Operational Areas **Services** Import from CBIMS desktop

Manage services

+ Add services Delete selected services

Type Category Description

- b) Select the tick boxes for the relevant services that need to be added and click the **Add** button.



Add services to Dummy - Sub-Implementing Partner

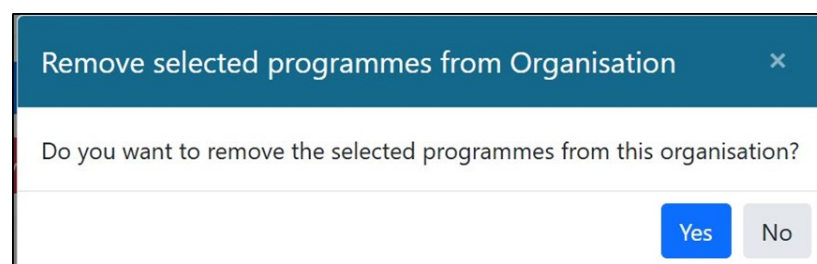
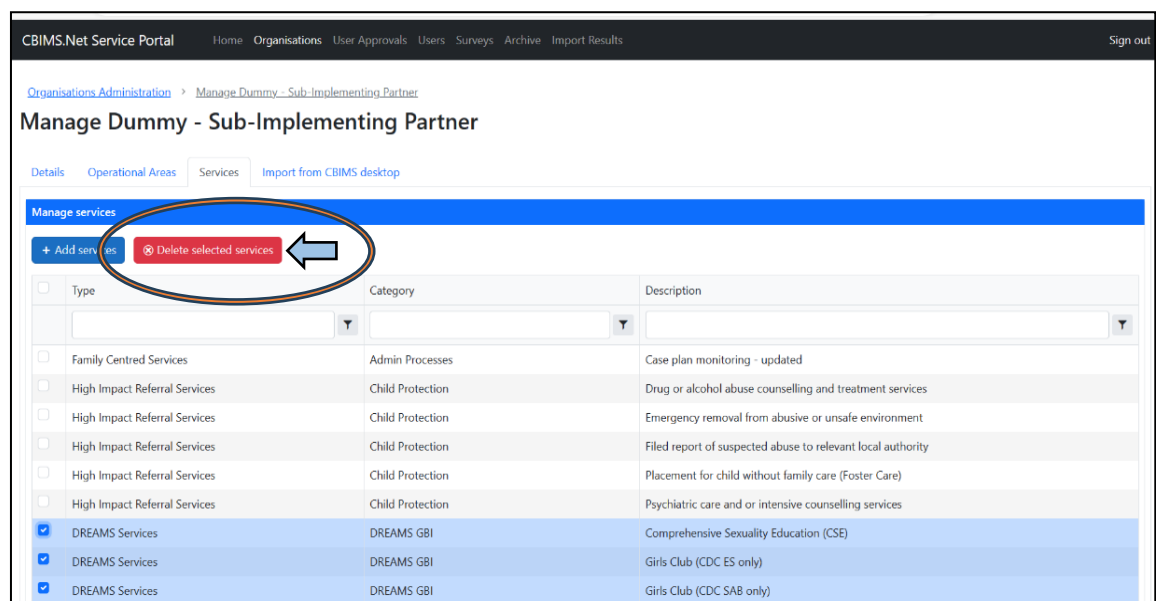
Type	Category	Description
☐		
☐	Admin Processes	Case plan monitoring - not updated
☒	Admin Processes	Graduation readiness assessment
☒	Family Strengthening	Let's Talk (10 session) - Adolescent participation
☒	Healthy	Monitor developmental milestones in young CLHIV
☐	HIV Care and Support	TB diagnosis & treatment - Unknown
☐	Primary Prevention (PP)	No Means No

Add Cancel

5.2.4 Delete services

Important Note: Deleting services in the Service Portal does not delete data in the database. It merely limits the choices available to the data capturer when capturing interventions.

- Select the Services tab and click on the corresponding services/referrals that need to be deleted, as shown below.
- Click the **Delete selected services** button and select **Yes** on the confirmation screen to remove these from the organisation.



5.2.5 Import from CBIMS Desktop

Tulane will manage all database imports from CBIMS Desktop to CBIMS.Net. This feature is used to transition implementing partner data from CBIMS Desktop to CBIMS.Net or to fulfil any other importing requirements to update existing partner data. Organisation administrators should not use this feature. Please contact Tulane at cbims.support@tulane.edu if any CBIMS Desktop or other related imports are required.

6 USER APPROVALS

Administrators of CBIMS.Net can use their existing CBIMS.Net accounts to oversee registration approval requests. Each organisation should have at least two CBIMS.Net administrators to ensure someone is always available to manage access to the database.

6.1 CBIMS.NET USER ROLE DEFINITIONS

User Roles: Assign each user a role. The role definitions are as follows:

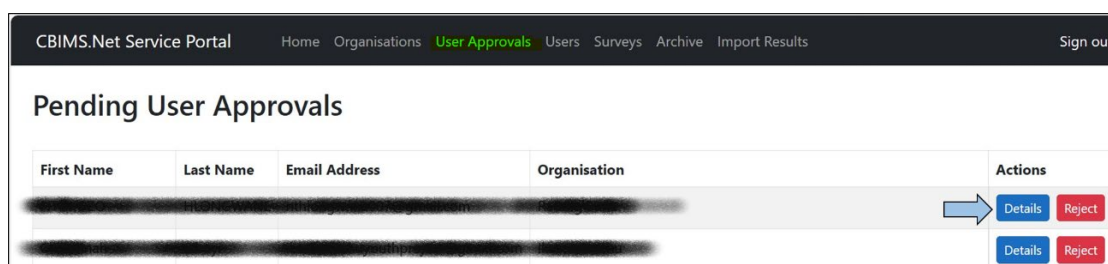
- **User:** The User role can capture and edit data directly within CBIMS.Net and generate organisational case management and de-identified summary reports. Intended users are Data Capturers, Data Clerks, Data Support Officers, and Data Quality Officers in organisations that use CBIMS.Net as their primary database.
- **Manager:** The Manager role has comprehensive functionality and is intended for senior Monitoring and Evaluation (M&E) staff, such as Monitoring, Evaluation, and Reporting (MER) Officers, Strategic Information (SI) Officers, Managers, Specialists, Coordinators, Leads, and Directors.
- **Importer:** The Importer role can import bulk data into the system using CSV files and run de-identified summary reports. This role is intended for organisations that do not use CBIMS.Net as their primary database but need to share individual-level data to measure service layering for the PEPFAR DREAMS programme (i.e., AGYW_PREV).

The table below illustrates which tabs/options are available for each type of user.

Tab	Manager	User	Importer
Homepage	✓	✓	✓
Organisations	✓	✓	
Implementation	✓	✓	
Import	✓		✓
Reports	✓	✓	✓
Sync Data	✓	✓	
POPIA	✓	✓	

6.2 HOW TO APPROVE OR REJECT PENDING USER APPROVALS

- Go to the **User Approvals** tab. If there are any pending user approvals, the user's First Name, Last Name, Email Address, and Organisation will be visible.
- To approve a user, click on the Details button for the user, verify all details and choose the correct user role before selecting the **Accept** button.



CBIMS.Net Service Portal Home Organisations **User Approvals** Users Surveys Archive Import Results

[User Approvals](#) > Pending User [REDACTED]

Pending User [REDACTED]

First Name [REDACTED]	Last Name [REDACTED]
Email Address [REDACTED]	Phone Number [REDACTED]
ID Type SA ID Number	ID/Passport Number [REDACTED]
Organisation [REDACTED]	User Role * User

☐ Administrator
When this box is ticked, this user will be able to sign in into the CBIMS.Net Service Portal and will be able to approve registration requests for the organisation t operational areas, fund, program and targets.

[Accept](#) [Reject](#) [Cancel](#)

Administrator:

When this checkbox is selected, the user will gain access to sign in to the CBIMS Service Portal. Consequently, they will be empowered to approve registration requests for users within their organisation. Please be cautious about granting Administrator rights, we recommend having only two Administrators per organisation. Note that the user must have a manager role before becoming an administrator.

- c) To reject a pending user approval, click the **Reject** button next to the relevant user.

CBIMS.Net Service Portal Home Organisations **User Approvals** Users Surveys Archive Import Results Sign out

Pending User Approvals

First Name	Last Name	Email Address	Organisation	Actions
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Details Reject
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Details Reject

7 USERS

7.1 USER ADMINISTRATION

To perform user administration tasks, go to the **Users** tab, search for the user, and click on the corresponding **Manage** button.

CBIMS.Net Service Portal

Home

Organisations

User Approvals

Users

Surveys

Archive

Import Results

Sign out

User Administration

Actions	Firstname	Lastname	Email	Organisation	Role	Isadministrator
Manage	Roshan					is true ☐ is false ☐
	Roshan	Silochan	roshan.silochan@gmail.com	Dummy - Sub-Implementing Partner	Manager	false

7.2 RESET PASSWORD

Clicking on the **Reset Password** button will trigger an email for the user, prompting them to change their password.

CBIMS.Net Service Portal														
Home Organisations User Approvals Users Surveys Archive Import Results														
User Administration > Manage User														
Manage User - Roshan Silochan														
User Information														
User ID:														
10														
Name:														
Roshan														
Surname:														
Silochan														
Email address:														
rsilochan@tulane.edu														
Identity Provider ID:														
auth0 633e70ddd2c75a128858302b														
Reset Password														

7.3 GRANT SERVICE PORTAL ACCESS

Click on the **Grant Service Portal access** button to make a selected user an Administrator (meaning they will perform the administrative tasks outlined in this manual). Note that the user must have a manager role before becoming an administrator.

CBIMS.Net Service Portal Home Organisations User Approvals **Users** Surveys Archive Import Results

[User Administration](#) > [Manage User](#)

Manage User - Roshan Silochan

User Information

User ID:

1376

Name:

Roshan

Surname:

Silochan

Email address:

roshan.silochan@gmail.com

Identity Provider ID:

auth0|64cce48c65cd51ea00a9a923

Reset Password

Grant Service Portal access

7.4 ADD USER TO ORGANISATION

Click the **Add User to Organisation** button and select the Organisation and User Role from the drop-down list before clicking the **Submit** button.

CBIMS.Net Service Portal Home Organisations User Approvals **Users** Surveys Archive Import Results

[User Administration](#) > [Manage User](#)

Manage User - Roshan Silochan

User Information

User ID:

1376

Name:

Roshan

Surname:

Silochan

Email address:

roshan.silochan@gmail.com

Identity Provider ID:

auth0|64cce48c65cd51ea00a9a923

Reset Password

Grant Service Portal access

Organisations and Roles

Add user to organisation

Organisations	Organisation Type	Role
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CBIMS.Net Service Portal Home Organisations User Approvals **Users** Surveys

[User Administration](#) > [Manage User](#) > [Add User to Organisation](#)

Add User to Organisation - Roshan Silochan

Organisation: *

Select an organisation ...

User Role: *

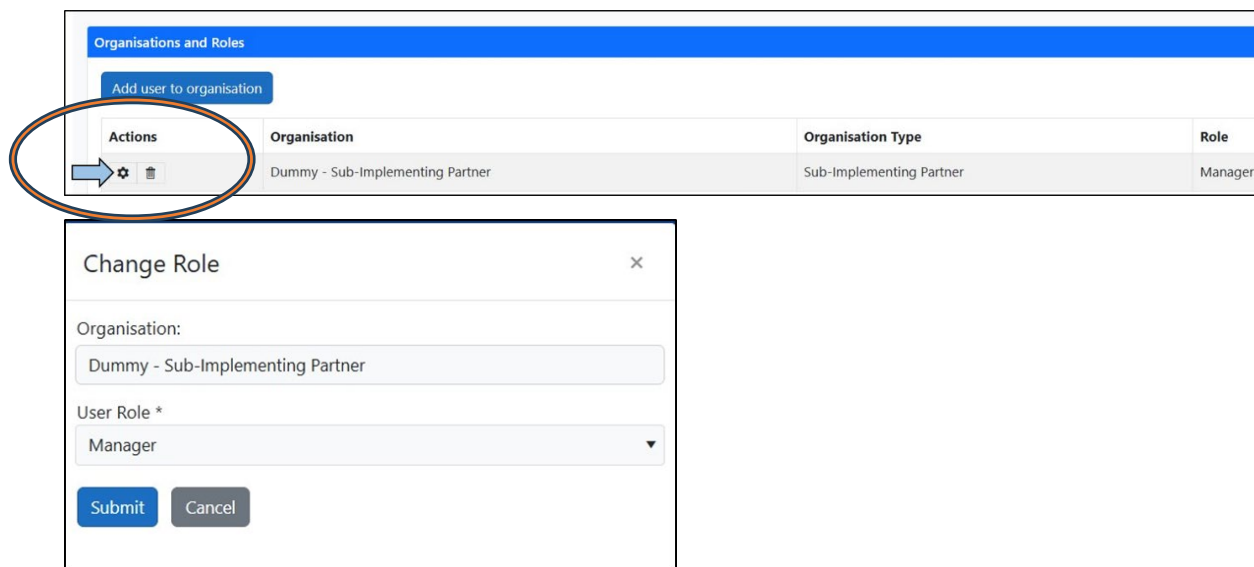
Select a role ...

Submit

Cancel

7.5 EDIT USER ROLE

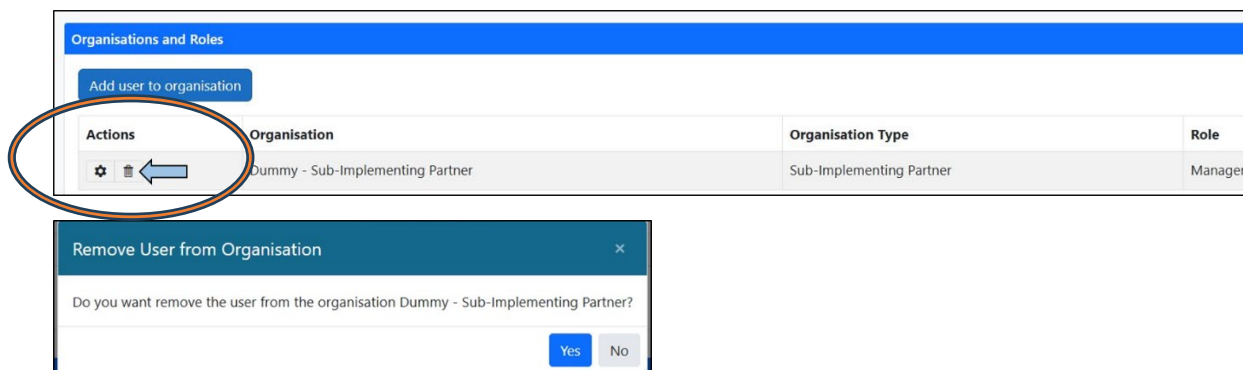
To modify the user's role, click the change role button below. Then, choose the appropriate user role from the drop-down menu and click **Submit**.



The screenshot shows the 'Organisations and Roles' interface. At the top is a blue header bar with the text 'Organisations and Roles'. Below it is a button labeled 'Add user to organisation'. A table follows with columns: 'Actions', 'Organisation', 'Organisation Type', and 'Role'. The table contains one row with the following data: 'Dummy - Sub-Implementing Partner' for Organisation, 'Sub-Implementing Partner' for Organisation Type, and 'Manager' for Role. The 'Actions' column for this row contains three icons: a blue arrow pointing right, a gear icon, and a trash can icon. The gear icon is circled in orange. Below the table is a 'Change Role' modal window. It has a title bar with a close button (X). The modal contains a label 'Organisation:' followed by a text input field containing 'Dummy - Sub-Implementing Partner'. Below that is a label 'User Role *' followed by a dropdown menu currently showing 'Manager'. At the bottom of the modal are two buttons: 'Submit' (blue) and 'Cancel' (grey).

7.6 DELETE THE USER FROM THE ORGANISATION

To delete a user from an organisation, click on the **Delete** button indicated below and click **Yes** on the confirmation window. If a user is no longer active, for example, due to resignation, ensure that all organisations associated with the user are also removed from their profile.

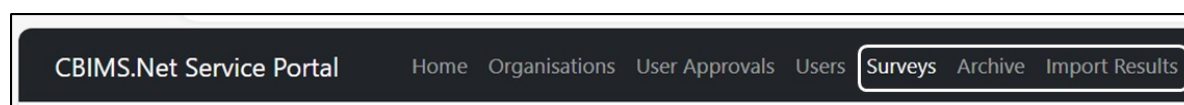


The screenshot shows the 'Organisations and Roles' interface. At the top is a blue header bar with the text 'Organisations and Roles'. Below it is a button labeled 'Add user to organisation'. A table follows with columns: 'Actions', 'Organisation', 'Organisation Type', and 'Role'. The table contains one row with the following data: 'Dummy - Sub-Implementing Partner' for Organisation, 'Sub-Implementing Partner' for Organisation Type, and 'Manager' for Role. The 'Actions' column for this row contains three icons: a blue arrow pointing right, a gear icon, and a trash can icon. The trash can icon is circled in orange. Below the table is a 'Remove User from Organisation' modal window. It has a title bar with a close button (X). The modal contains a question: 'Do you want remove the user from the organisation Dummy - Sub-Implementing Partner?'. At the bottom of the modal are two buttons: 'Yes' (blue) and 'No' (grey).

Please note that if a user is deleted from an organisation, and a new staff member is subsequently allocated the same email address, it will be necessary to contact Tulane at cbims.support@tulane.edu to complete the registration process of the new staff member.

8 SURVEYS, ARCHIVE AND IMPORT RESULTS

Tulane will manage all tasks under the Surveys, Archive, and Import Results tabs. Organisation Administrators will not use these features.



The screenshot shows the navigation bar of the 'CBIMS.Net Service Portal'. It has a dark grey background. On the left is the text 'CBIMS.Net Service Portal'. To its right are several links: 'Home', 'Organisations', 'User Approvals', 'Users', 'Surveys', 'Archive', and 'Import Results'. The 'Surveys' link is highlighted with a white border and a light blue background.