

# Manage Users

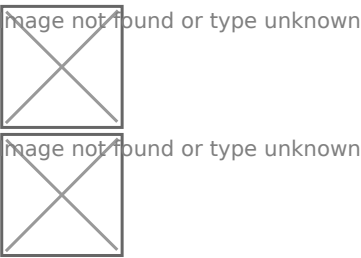
- [How To Reset a Users Password](#)
- [How To Copy Administrator Rights To Another User](#)
- [How To Assign Reporting Rights](#)
- [How To Disable A User](#)

# How To Reset a Users Password

## From System Administration

### How to get there?

Click on System Administration (1). Then with your cursor hover over System Administration (2) then Users (3) then click on Manage Users (4).



### What to do?

- Search for your employee by inserting the employee's details using the search box (1).
- Click on Search (2).

Search

Schema

Category

1

Employee Number

Bangalore

Employee Name

Username

2

Search

Clear

Add New User

Delete

Send Welcome Notification to New Users

| Actions                | Username  | Name      | Schema          | Disabled | Locked | Category | Delete                   |
|------------------------|-----------|-----------|-----------------|----------|--------|----------|--------------------------|
| <a href="#">Action</a> | Bangalore | Bang Lore | [1] Company (1) |          |        |          | <input type="checkbox"/> |

- Click on Action (3). A small windows will open.
- Click on View / Edit (4). You will be navigated to a new screen.

image not found or type unknown



Select one of the three options:

- Send the user a link so that they can reset themselves (1).
- Reset user password and display it here (2).
  - When this option is selected the new password will display on your screen.
- Reset user password, display it here and send them a notification (3).
  - When this option is selected the new password will be displayed on your screen and the employee will receive an email about the password reset.
- Once you have selected your option you can now click on Reset User Password (4).

User Details

|  |                          |  |        |          |                 |       |                 |            |             |     |
|--|--------------------------|--|--------|----------|-----------------|-------|-----------------|------------|-------------|-----|
| <b>Disable User</b> <input type="checkbox"/> |                          | <b>Login Attempts</b> <table><tr><td>Status</td><td>Unlocked</td></tr><tr><td>Current Attempt</td><td>0 / 3</td></tr><tr><td>Last Successful</td><td>2019/03/18</td></tr><tr><td>Last Failed</td><td>N/A</td></tr></table> | Status | Unlocked | Current Attempt | 0 / 3 | Last Successful | 2019/03/18 | Last Failed | N/A |
| Status                                       | Unlocked                 |  |        |          |                 |       |                 |            |             |     |
| Current Attempt                              | 0 / 3                    |  |        |          |                 |       |                 |            |             |     |
| Last Successful                              | 2019/03/18               |  |        |          |                 |       |                 |            |             |     |
| Last Failed                                  | N/A                      |  |        |          |                 |       |                 |            |             |     |
| Schema Administrator                         | <input type="checkbox"/> |  |        |          |                 |       |                 |            |             |     |
| System Administrator                         | <input type="checkbox"/> |  |        |          |                 |       |                 |            |             |     |
| User Name                                    | Bangalore                |  |        |          |                 |       |                 |            |             |     |
| Employee                                     | Bang Lore (Bangalore)    |  |        |          |                 |       |                 |            |             |     |

Reset User Password

- 1 ☒ Send the user a link so that they can reset themselves
- 2 ☐ Reset user password and display it here
- 3 ☐ Reset user password, display it here and send them a notification
- 4

## By Using The Forgot Password Link

- Navigate to the Sign In screen (1).
- Click on Forgot your password button (2).

image not found or type unknown



- Enter your Username (3).

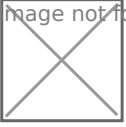
- Then click on Reset Password (4).

image not found or type unknown



- Enter your ID / Passport Number (5).
- Click on Reset Password (6).

image not found or type unknown



- You will be able to enter your New Password (7).
- Confirm your New Password (8).
- Click on Update Password (9).

Please Note: We recommend having characters in a combination of upper and lower case letters, numbers and special characters. For example: P@ssw0rd12#.

image not found or type unknown



# How To Copy Administrator Rights To Another User

## How to get there?

Click on System Administration (1), then with your cursor hover over System Administration (2) | Users (3) | Manage Users (4).

- Using the search dialogue boxes search for a user who has administrator rights and that you would like to copy (5).
- Click on the action button (6).
- A small window will open.
- Select View / Edit (7).
- Navigate to and click on Copy User Rights (8).

Image not found or type unknown



Image not found or type unknown



List of Users

Switch Schema

Search

Schema

Category

Employee Number

Employee Name

Username

Search

Clear

Add New User

Delete

Send Welcome Notification to New Users

Actions

Username

Name

Schema

Disabled

Locked

Category

Delete

Action

Captain Kurk

Captain Kurk

[4] Orange / Purple (4)

[View / Edit](#)

[Assign Subgroup Access](#)

[Assign Reporting Rights](#)

Close

image not found or type unknown



# What to do?

- Select the From User (1) the user with the administration rights to be copied.
- Select To User (2) the user that will receive the administration rights.
- Then click on Copy User Rights (3).



## Copy User Rights

**i** User rights are copied from one user to another. The user receiving the rights WILL LOSE all previously assigned rights and receive ONLY the rights being copied.

The following rights are copied

- Subgroup Access
- Reporting Rights
- Role Assignment
- HR Processes Access

From User

Captain Kurk (Captain Kurk)



1

To User

Caustic (Caus stic)



2

3

Copy User Rights

Please note: The user receiving the rights WILL LOSE all previously assigned rights and receive ONLY the rights being copied. (4)

- Click on OK (5) when you have read the warning.

image not found or type unknown



- Ensure that the Successfully Saved (6) message displays.
- The rights are now copied please verify that the user has received all the copied rights



## Copy User Rights

6

[Successfully Saved - 09:35:15 AM]

**i** User rights are copied from one user to another. The user receiving the rights WILL LOSE all previously assigned rights and receive ONLY the rights being copied.

The following rights are copied:

- Subgroup Access
- Reporting Rights
- Role Assignment
- HR Processes Access

From User

Captain Kurk (Captain Kurk)



To User

Caustic (Caus stic)



Copy User Rights

# Verify that the administrator rights were copied

- Navigate back to the users search menu by clicking on Users (1).

Image not found or type unknown



- Using the search dialogue boxes search for the user who received the administrator rights (2).
- Click on Action (3).
- A small window will open.
- Click on View / Edit (4).



## List of Users

Switch Schema

Search

Schema

Employee Number

Username

Category

Employee Name

[Search](#) [Clear](#) [Add New User](#) [Delete](#) [Send Welcome Notification to New Users](#)

| Actions                | Username | Name    | Schema          | Disabled | Locked | Category | Delete                   |
|------------------------|----------|---------|-----------------|----------|--------|----------|--------------------------|
| <a href="#">Action</a> | Caustic  | Caustic | [1] Company (1) |          |        |          | <input type="checkbox"/> |

[View / Edit](#)  
[Assign Subgroup Access](#)  
[Assign Reporting Rights](#)

Close

- Navigate to each of the relevant menus to ensure that the rights were copied (5).

Image not found or type unknown





# How To Assign Reporting Rights

## How to get there?

Click on System Administration (1), then with your cursor hover over System Administration (2) | Users (3) Manage Users (4). Use the search criteria (5) to locate the user in question, then click on the Action (6) button. A small window will open, then click on Assign Reporting Rights (7).

Image not found or type unknown

Image not found or type unknown

List of Users

Switch Schema

Search

Schema  Category

Employee Number  Employee Name

Username

| Actions                | Username     | Name         | Schema          | Disabled | Locked | Category | Delete                   |
|------------------------|--------------|--------------|-----------------|----------|--------|----------|--------------------------|
| <a href="#">Action</a> | Captain Kurk | Captain Kurk | [1] Company (1) |          |        |          | <input type="checkbox"/> |

[View / Edit](#)  
[Assign Subgroup Access](#)  
[Assign Reporting Rights](#)

Close

## What to do?

- Click on the plus button (1) on the category where the report is located and tick the box.
- Then tick the boxes at each report that is required (2) (3) (4) (5).

- Click on Save Permissions (6).

Note: if the user requires access to all the reports below a category then only the tick box on that category is required.

image not found or type unknown



# How To Disable A User

## How to get there?

Click on System Administration (1), then with your cursor hover over System Administration (2) | User (3) | Manage Users (4).

image not found or type unknown



image not found or type unknown



## What to do?

- Use the search criteria (1) to search for a user.
- Click on Action (2) on the relevant user.
- Then click on View / Edit (3).

The screenshot shows the 'List of Users' interface. At the top, there is a 'Switch Schema' button. Below it is a search section (1) with fields for Schema, Employee Number (containing 'Captain Kurk'), Username, and Category. There are buttons for Search, Clear, Add New User, Delete, and Send Welcome Notification to New Users. Below the search section is a table with columns: Actions, Username, Name, Schema, Disabled, Locked, Category, and Delete. The first row shows a user named 'Captain Kurk' with the schema '[1] Company (1)'. The 'Actions' column has a button (2) labeled 'Action'. A dropdown menu is open for the 'Action' button, showing options: 'View / Edit' (3), 'Assign Subgroup Access', and 'Assign Reporting Rights'. There is a 'Close' button at the bottom of the dropdown.

- Select the tick box Disable User (4).
- Then Scroll to the bottom of the page and click on Submit (5).



## User Information

### User Details

4

**Disable User** ☒

Schema Administrator

☐

System Administrator

☐

User Name

Captain Kurk

Employee

Captain Kurk (Captain Kurk)



### Login Attempts

|                 |            |
|-----------------|------------|
| Status          | Unlocked   |
| Current Attempt | 0 / 3      |
| Last Successful | 2019/05/21 |
| Last Failed     | 2019/04/23 |

|                          |                          |                  |
|--------------------------|--------------------------|------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Programmes       |
| <input type="checkbox"/> | <input type="checkbox"/> | Learnerships     |
| <input type="checkbox"/> | <input type="checkbox"/> | Code of Conducts |
| <input type="checkbox"/> | <input type="checkbox"/> | FAIS Licenses    |

Submit

5

Note: When a user is disabled they will not be able to log in.