

Manage Users

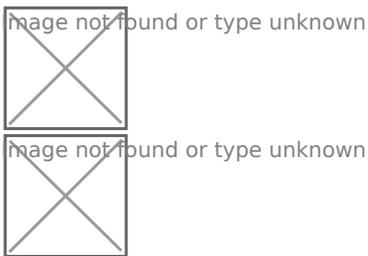
- [How To Reset a Users Password](#)
- [How To Copy Administrator Rights To Another User](#)
- [How To Assign Reporting Rights](#)
- [How To Disable A User](#)

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

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	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.

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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

Disable User	<input type="checkbox"/>	Login Attempts <table border="1"><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	<input type="text" value="Bang Lore (Bangalore)"/>	<input type="button" value="↻"/> <input type="button" value="⊖"/>								

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).

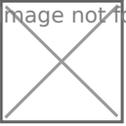
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- Enter your Username (3).

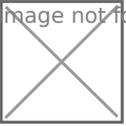
- Then click on Reset Password (4).

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

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- 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#.

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How To Copy Administrator Rights To Another User

How to get there?

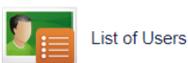
Click on System Administration (1), then with your cursor hover over System Administration (2) | Users (3) | Manage Users (4).

- 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).

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List of Users

Switch Schema

Search

Schema Category

Employee Number Employee Name

Username

Actions	Username	Name	Schema	Disabled	Locked	Category	Delete
<input type="button" value="Action"/>	Captain Kurk	Captain Kurk	[4] Orange / Purple (4)				<input type="checkbox"/>

[Assign Subgroup Access](#)

[Assign Reporting Rights](#)

Close

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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 (Caustic)



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.

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

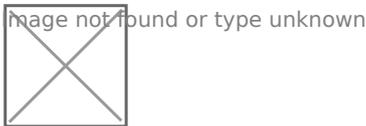
From User 

To User 

Copy User Rights

Verify that the administrator rights were copied

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



- 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).

Switch Schema

Search

Schema Category

Employee Number Employee Name

Username

Actions	Username	Name	Schema	Disabled	Locked	Category	Delete
Action	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).

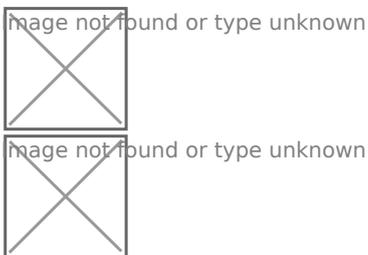
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How To Assign Reporting Rights

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).



The screenshot shows the 'List of Users' interface. At the top, there is a 'Switch Schema' button. Below it is a search section with the following fields:

- Schema: [Dropdown menu]
- Category: [Dropdown menu]
- Employee Number: [Text input containing 'Captain Kurk']
- Employee Name: [Text input]
- Username: [Text input]

Below the search fields are buttons for 'Search', 'Clear', 'Add New User', 'Delete', and 'Send Welcome Notification to New Users'. A red box highlights the search criteria fields, labeled with a circled '5'.

Below the search section is a table with the following columns: Actions, Username, Name, Schema, Disabled, Locked, Category, and Delete. The table contains one row for 'Captain Kurk' under the 'Captain Kurk' schema. A circled '6' highlights the 'Action' button in the first column of this row.

A context menu is open over the 'Action' button, showing the following options: 'View / Edit', 'Assign Subgroup Access', and 'Assign Reporting Rights'. A circled '7' highlights the 'Assign Reporting Rights' option.

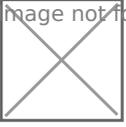
What to do?

- 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.

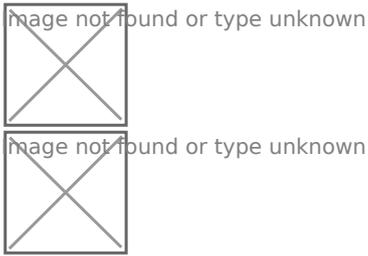
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How To Disable A User

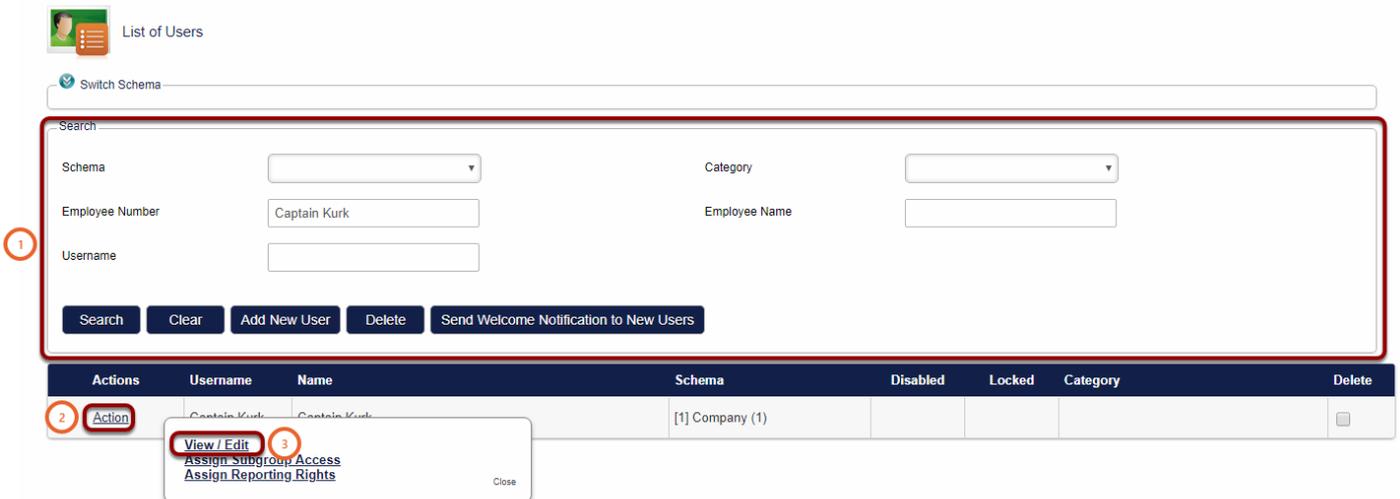
How to get there?

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



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 with a red border and a circled '1'. The search section contains four input fields: 'Schema' (a dropdown menu), 'Employee Number' (text input with 'Captain Kurk'), 'Category' (a dropdown menu), and 'Employee Name' (text input). Below these fields are five buttons: '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 of the table has 'Action' in the 'Actions' column, 'Captain Kurk' in 'Username' and 'Name' columns, and '[1] Company (1)' in the 'Schema' column. A circled '2' is next to the 'Action' button. A context menu is open over the 'Action' button, with 'View / Edit' circled in red and a circled '3' next to it. The context menu options are 'View / Edit', 'Assign Subgroup Access', and 'Assign Reporting Rights', with a 'Close' button at the bottom.

- 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



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.