

# Manage Users

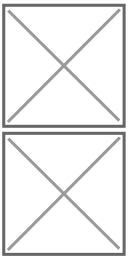
- [How To Reset a Users Password](#)
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- [How To Disable A User](#)

# 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

1

Schema  Category

Employee Number  Employee Name

Username

2

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.



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>
Schema Administrator <span>?</span>	<input type="checkbox"/>	Status Unlocked
System Administrator <span>?</span>	<input type="checkbox"/>	Current Attempt 0 / 3
User Name	Bangalore	Last Successful 2019/03/18
Employee	<input type="text" value="Bang Lore (Bangalore)"/>	Last Failed N/A

Reset User Password

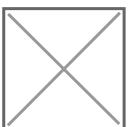
- 1  Send the user a link so that they can reset themselves
- 2  Reset user password and display it here
- 3  Reset user password, display it here and send them a notification
- 4

## By Using The Forgot Password Link

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



- Enter your Username (3).
- Then click on Reset Password (4).



- Enter your ID / Passport Number (5).

- Click on Reset Password (6).



- 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#.

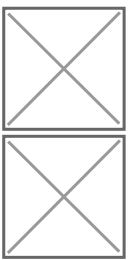


# How To Copy Administrator Rights To Another User

## 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).



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
<a href="#">Action</a> (6)	Captain Kurk	Captain Kurk	[4] Orange / Purple (4)				<input type="checkbox"/>

[View / Edit](#) (7)  
[Assign Subgroup Access](#)  
[Assign Reporting Rights](#)  
Close



# 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.




- 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
<a href="#">Action</a>	Caustic	Caustic	[1] Company (1)				<input type="checkbox"/>

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

Close

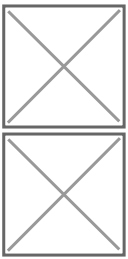
- Navigate to each of the relevant menus to ensure that the rights were copied (5).



# 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).



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
<b>6</b> <u>Action</u>	Captain Kurk	Captain Kurk	[1] Company (1)				<input type="checkbox"/>

**7** 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).

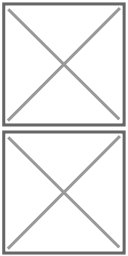
Note: if the user requires access to all the reports below a category then only the tick box on that category is required.



# 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).

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
<b>2</b> Action	Captain Kurk	Captain Kurk	[1] Company (1)				<input type="checkbox"/>

**3** View / Edit  
Assign Subgroup Access  
Assign Reporting Rights  
Close

- 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.