

Manage Users

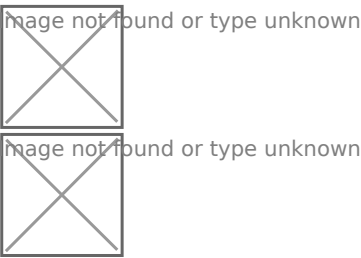
- [How To Reset a Users Password](#)
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How To Reset a Users Password

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
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

☐

Schema Administrator

☐

System Administrator



☐

User Name

Bangalore

Employee

Bang Lore (Bangalore)



Login Attempts

Status	Unlocked
Current Attempt	0 / 3
Last Successful	2019/03/18
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 Reset User Password

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

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

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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 (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.

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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



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).

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- 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
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).

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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
Action	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.

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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).

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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, Category, Employee Number (containing 'Captain Kurk'), Employee Name, and Username. 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.