Manage Users - How to Manage Users

This section assists the System Administrator in managing users in the Signify HR system. The following topics will be discussed:

1. Create, edit and remove a user account
2. Send Welcome Notification to New users
3. Define a User Account's Profile
4. Assign subgroup access
5. Grant reporting rights
6. Role Assignment

How to Access Manage Users

To access the System Administration Users functionality navigation from the Home page:

- ***System Administration | System Administration | Users| Manage Users*** to open the List of Users screen.

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User Information

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List of Users Screen

A list of existing users is displayed. The following functionality is available:

- Search criteria
- Add New user
- Delete
- Send Welcome Notification to New users

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Add New User

There are two ways to create a user account:

1. The quickest way to create a user account is to make use of the link that becomes active when a new employee record is saved for the first time. This method was discussed in [Create a User Account for the Employee.]
2. Another way to create a user account for an employee is via the System Administration menu which will be discussed next.

Click on **Add New User** below, to open the **User Information** screen.

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Populate the page with the user’s information and click **Submit** to create the user account.

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Editing a User Account

Click on **View/Edit** in the **Action** dropdown list to edit an existing user's information.

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Resetting a User's Password

The following steps are needed when a user requests the resetting of his user account password:

- Locate the **Reset User Password** section on the User Information screen.
- Three options are available and they include combinations of the following.
    - Display the new password on screen e.g. if the administrator needs to send or even read the password to the user.
    - Send the user a link which they have to:
        - Click in order to reset the password themselves.
        - Change the password when logging in the first time.

In all these cases, the user will be forced to change his/her password when logging into the system again.

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Opening a Locked User Account

The following steps are needed when a user requests the opening of his user account. A user account is normally locked if the password is incorrectly typed in three times.

Use the steps for resetting a user's password (discussed above) to unlock a locked user account.

Removing a User Account

The predominant reasons for removing a user account are to either prevent the user from accessing the system or because the account is no longer being used.

Two methods are available for achieving this goal:

1. Disabling a User Account
2. Deleting a User Account

How to Disable a User Account

Disabling a user account is a temporary way of rescinding system access to a user and one that should preferably be used instead of deleting the account.

- Open the List of Users screen and select the user to be disabled.
- On the **User Information** screen, tick the **Disable User** checkbox and click **Submit**.

- The account is now disabled and the user will no longer be able to login.
- The account can at any stage be enabled again by removing the tick.

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How to Delete a User Account

Deleting a user account is a permanent way of cancelling system access to a user. If the account was deleted in error, it will have to be recreated and all its authorisations manually re-entered. Rather disable the account as discussed in the previous section.

To delete a user account, follow these steps:

- Open the List of Users screen and select the user to be deleted.
- Select the delete check box and click **Delete** for the user account to be deleted.
- When you confirmed the delete action, the record will be permanently removed.
- The employee logging in with this account will no longer be able to login.
- **Note**: The employee record attached to the user account is NOT deleted only the system account by which the employee gains access to the system is removed.

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Defining a User Account's Profile

Besides the general information that makes up a user account, the following attributes can also be specified to even further define a user’s rights and access levels. For EVERY new user consider ALL the items below, even if they do not necessarily apply.

- Whether the user should be made a full system administrator or a schema administrator.
- To which subgroups the user should get access
  - The level to which the user is to have access on a subgroup
- Which roles (e.g. leave administrator) the user is expected to play
- Which reports a user should have access to
- Which HR requests are to be routed to the user if applicable
- What the user’s default schema should be (if applicable)

Giving a User Full System Administration Rights

Giving full system administration rights to a user should only be given under very controlled circumstances since sensitive information could become visible. Signing a confidentiality agreement is also advised. A System Administrator will be able to do the following:

- Create, edit and delete a user
- Grant subgroup access
- Grant reporting rights
- Grant roles (Role Assignment)
- Grant HR Process access
- Activate a subgroup

A user can be given System Administrator rights or Schema Administrator rights. The main difference between the two is that the Schema Administrator can only manage users on his own Schema.

- Open the applicable user’s account.
- On the *User Information* screen tick the *Administrator* checkbox.
- Click **Submit** to save the change.

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Send Welcome Notifications to New Users

Click on **Send Welcome Notification to New Users** on the List of Users screen below.

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How do the welcome notifications work?

By following the **three step workflow** below an email will be sent to users created or imported after the specified date. Users affected will be

- All users that have been imported and haven't received a welcome notification
- And users that were created manually and haven't received a welcome notification

You can untick the **Ignore users created / imported before this date** checkbox if you want to send welcome notifications to all users, regardless of when they were created on the system.

Choose one of the following three options:

1. Send the welcome message to all users
2. Select the welcome message only to users that I have selected
3. Send the welcome message to all users, but exclude users that I have selected

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Subgroup Access

In this section a user is given access to specific subgroups. By default a user has no access to all subgroups unless he is explicitly setup to have access to one or more. Refer to the Subgroups section for more information on how to manage a subgroup.

- Open the List of Users screen and select the user to assign subgroup access for.
- Select **Subgroup Access** from the side menu bar to display the list of subgroups a user currently has access to.

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- The **Subgroup List screen** allows for the following functionality when managing Subgroup Access:
    - **Add Subgroup:** A new subgroup can be created
    - **Refresh Subgroups:** All the applicable system tables for all the modules are refreshed.
    - **Set Preferred Subgroup**: Use this setting to setup the default subgroup for a user.
    - **Clear Preferred Subgroup:** Remove the preferred subgroup.
    - **Delete:** Remove subgroup access.

NOTE: The Refresh Subgroup action is very important after subgroups access were amended.

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How to Define Permissions on a Subgroup

Click on the **View/Edit Permissions** link in the **Action** dropdown of the selected subgroup in the Subgroup List.

There are more than one area that specific permissions can be set up for. These are:

- Employee Records (includes the Manage Employees module)
- Query Builder
- Profiles (includes the Job profiler module)
- Switch to another user's profile

Setting up Permissions for Employee Records

To set up permissions for the employee records, tick the **Access to Employee Records** checkbox. This will open the following sections where detailed access can be specified per section. Go through the sections and indicate to which the user should have view and/or edit rights. Click **Save Subgroup Rights** to save the changes.

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Setting up Permissions for Query Builder

To allow full permission on the *Query Builder* module, tick the appropriate check box as shown below.

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Setting up Permissions for Profiles

To allow full permission on *Profiles*, tick the appropriate check box as shown below.

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Allow an Administrator user to Switch to Another User's Profile

- The system allows administrator users or users in suitably responsible positions to support other users by physically logging in as them. In this way the administrator user can see and do what the user is seeing and doing, thus giving practical and topical assistance.
- Be careful when assigning this right to any user since the administrator can see and do anything the user is able to see and do.
- All actions performed by the administrator are logged against the name of the administrator.

To allow full permission on *Switch to another user's Profile*, tick the appropriate check box as shown below.

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Switching to Another User's Profile

When an administrator user, who was given Switch User rights, logs into the system he will have access to the **Switch user** functionality from the system portal as shown below.

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- Ensure that the appropriate subgroup is activated, search for the user to be supported and click to display all employees matching the search criteria.
- Locate the applicable user and click the "**Switch to ...**" button in the **Action** column.

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Acknowledge the conditions of the switch action.

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- The session is changed to that of the selected user and from now on all actions are logged against the administrator not against the user.
- To return to the administrator’s own profile, click the **Switch user** functionality from the system portal.
- Acknowledge the switch back to your own profile.

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