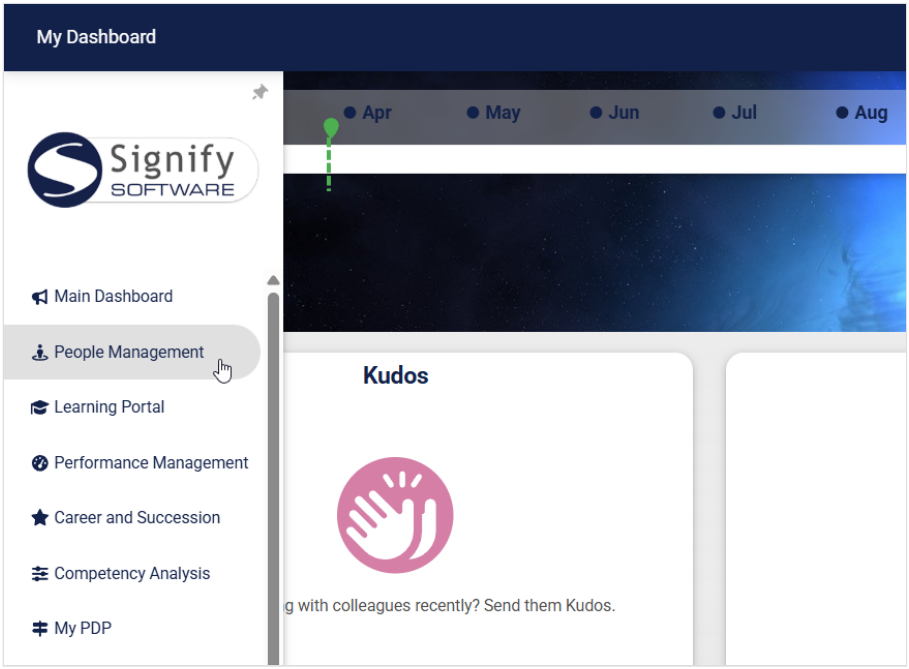
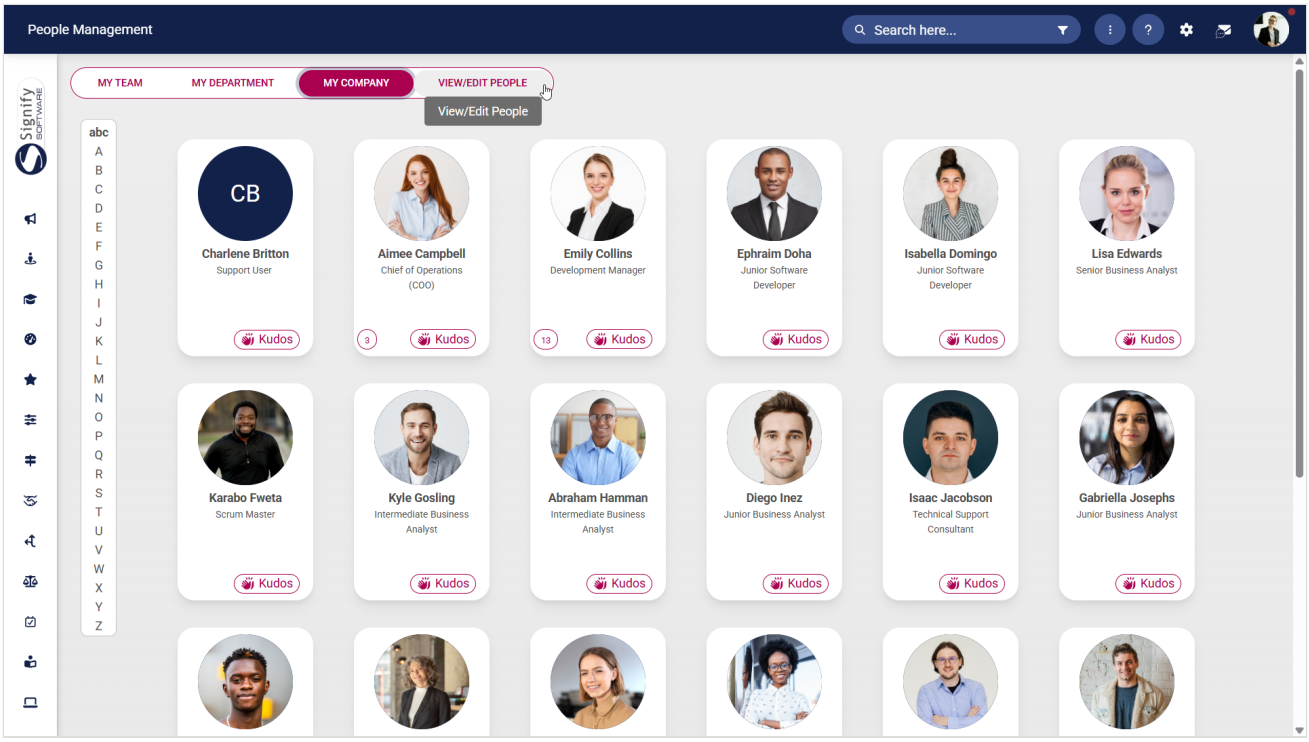
User and Access Management

Navigate to user and access management

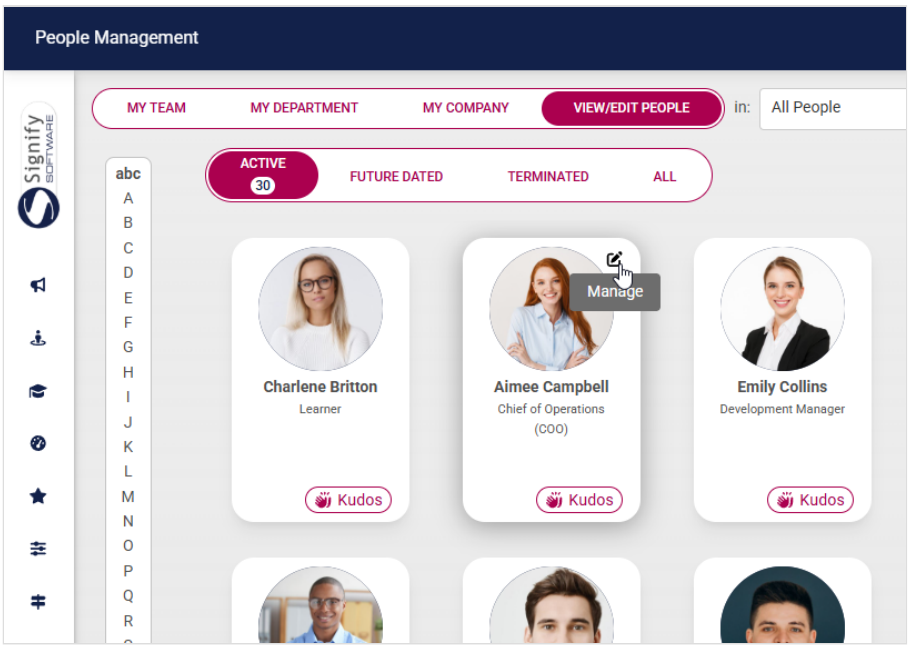
- Hover over the **sidebar menu** and click **People Management**.



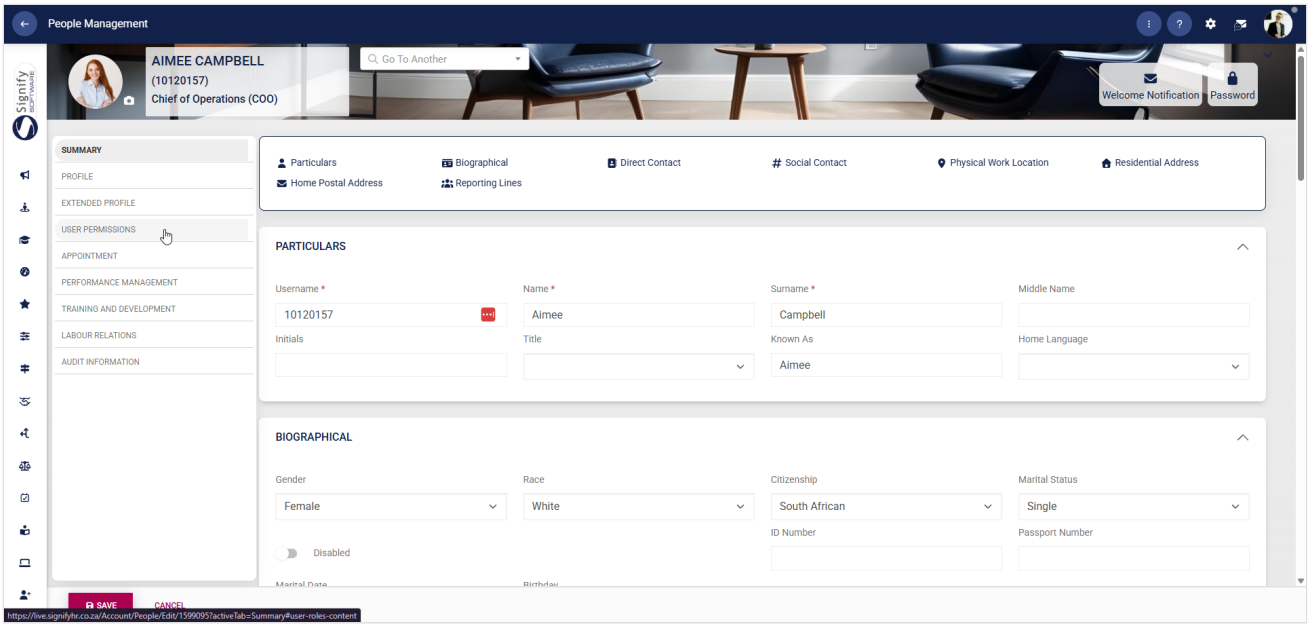
- Navigate to the **VIEW/EDIT PEOPLE** tab.



- Hover over the card of the person you would like to transfer, then click the **pencil icon** to manage their profile.



- On the **left-hand menu** on the person's profile, click on **USER PERMISSIONS**.

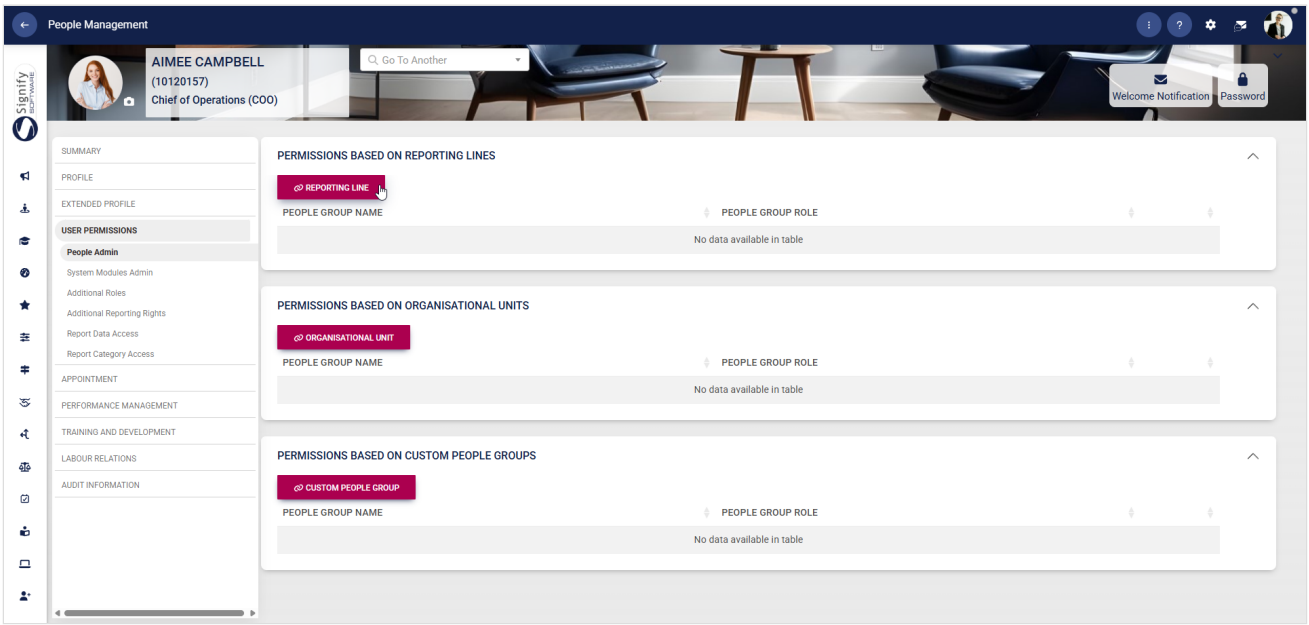


People Admin

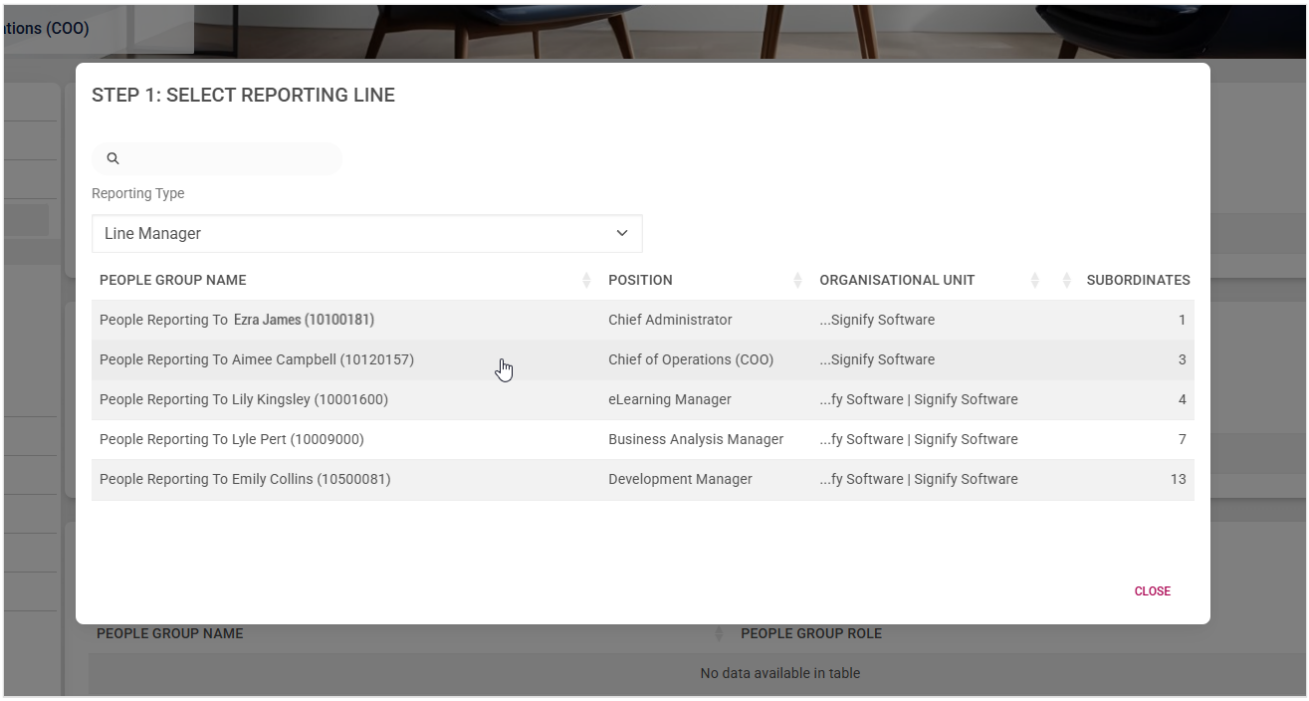
Permissions specify which users can view or edit the profile information of the person whose profile you are viewing.

Reporting Lines

- Click **REPORTING LINE**.



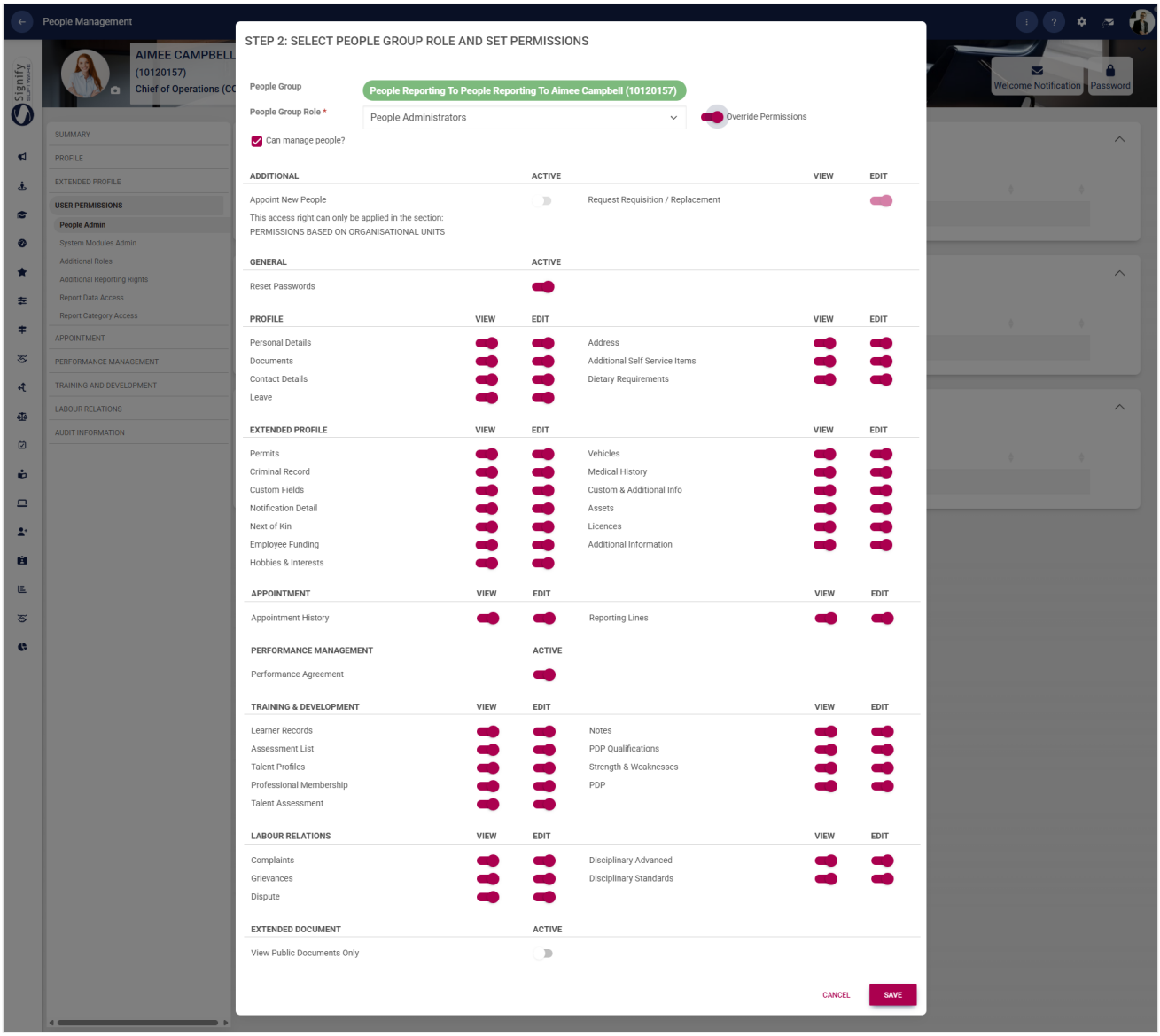
- Select the **Reporting Type** from the drop-down menu, then click on the correct reporting line. In our example, we have chosen the Line Manager reporting line.



- Select **People Administrators** from the drop-down menu, and toggle to override permissions.

Please note that for the user to appoint new people, the user must be granted access at the organisational unit level (see the next section for more information).

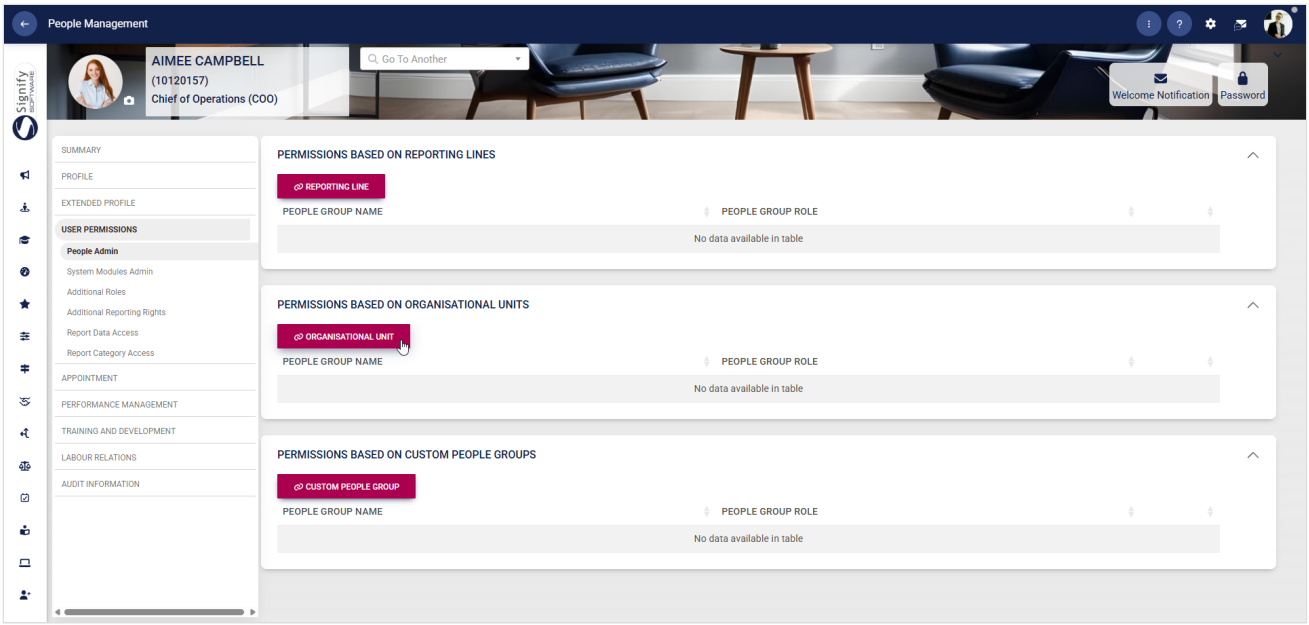
- Select which fields in the **People Management** module the user may view or edit. Choose whether they may reset passwords, access users' performance agreements, or view documents. Click **SAVE** when you are finished or **CANCEL** to discard your changes.



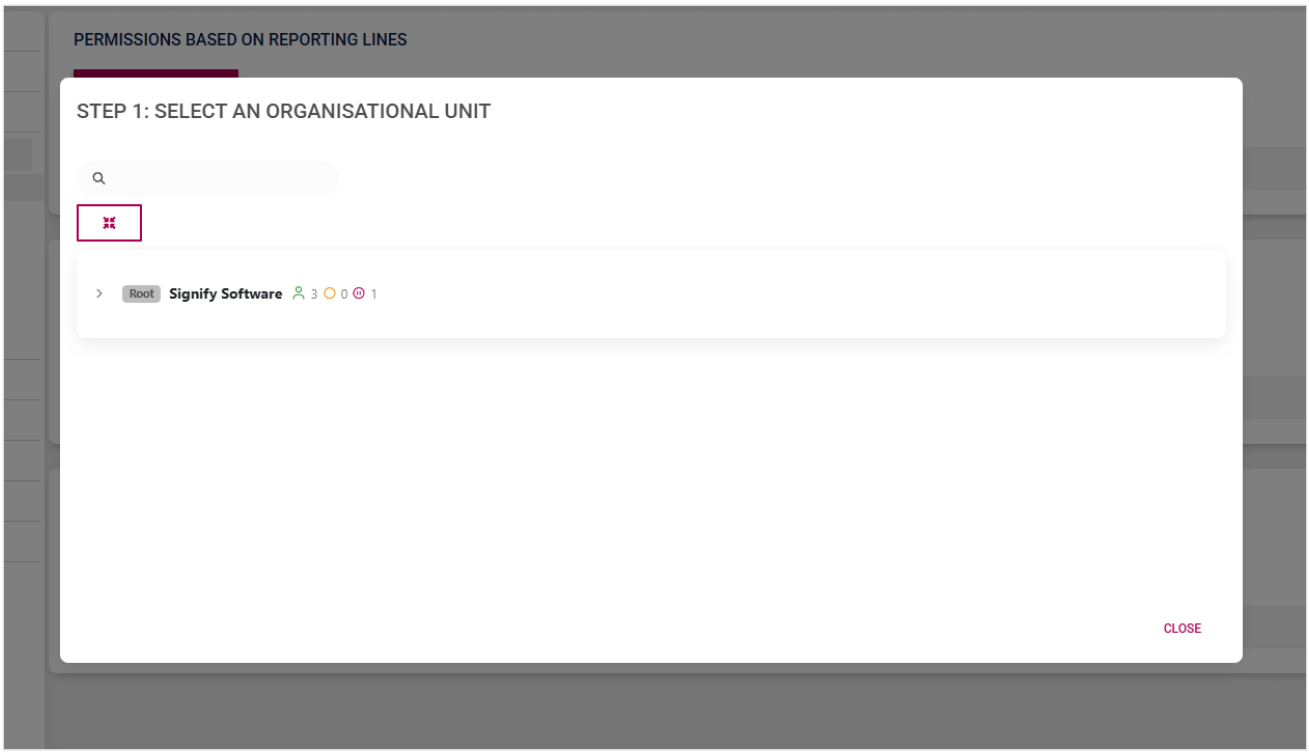
- You have successfully assigned people admin permissions based on a reporting line.

Organisational Unit

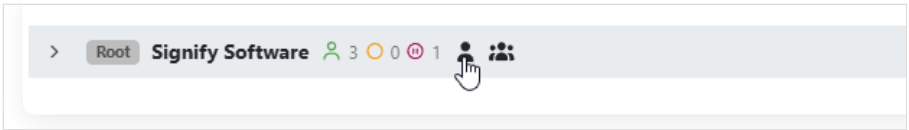
- Click **ORGANISATIONAL UNIT**.



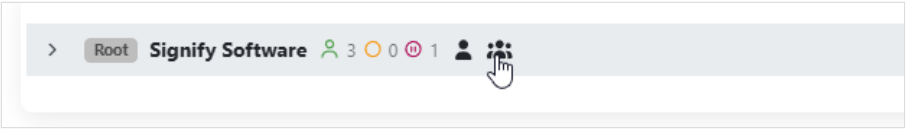
- Expand the organisational structure to find the correct organisational unit.



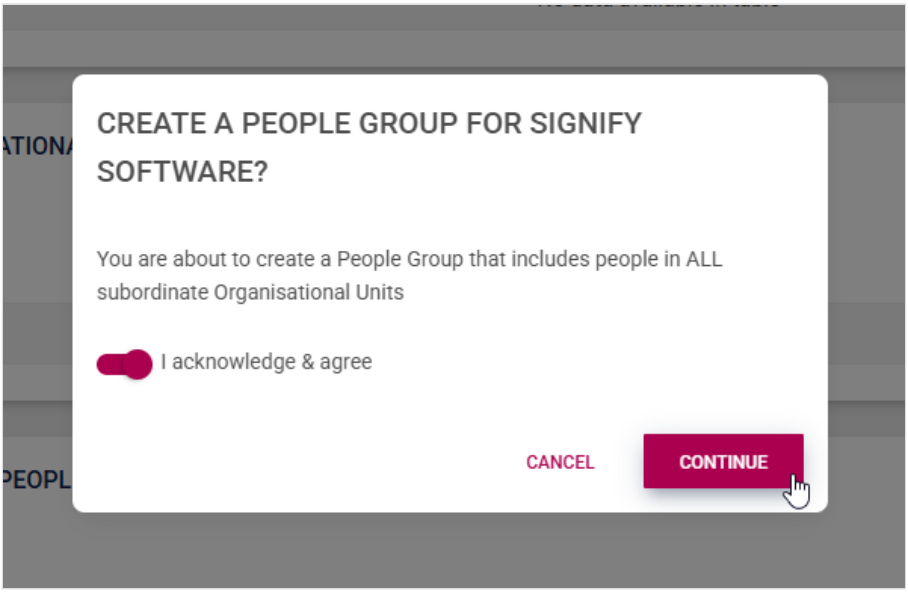
- Click the icon of an individual person to grant the user permission to access the data for users within that organisational unit only.



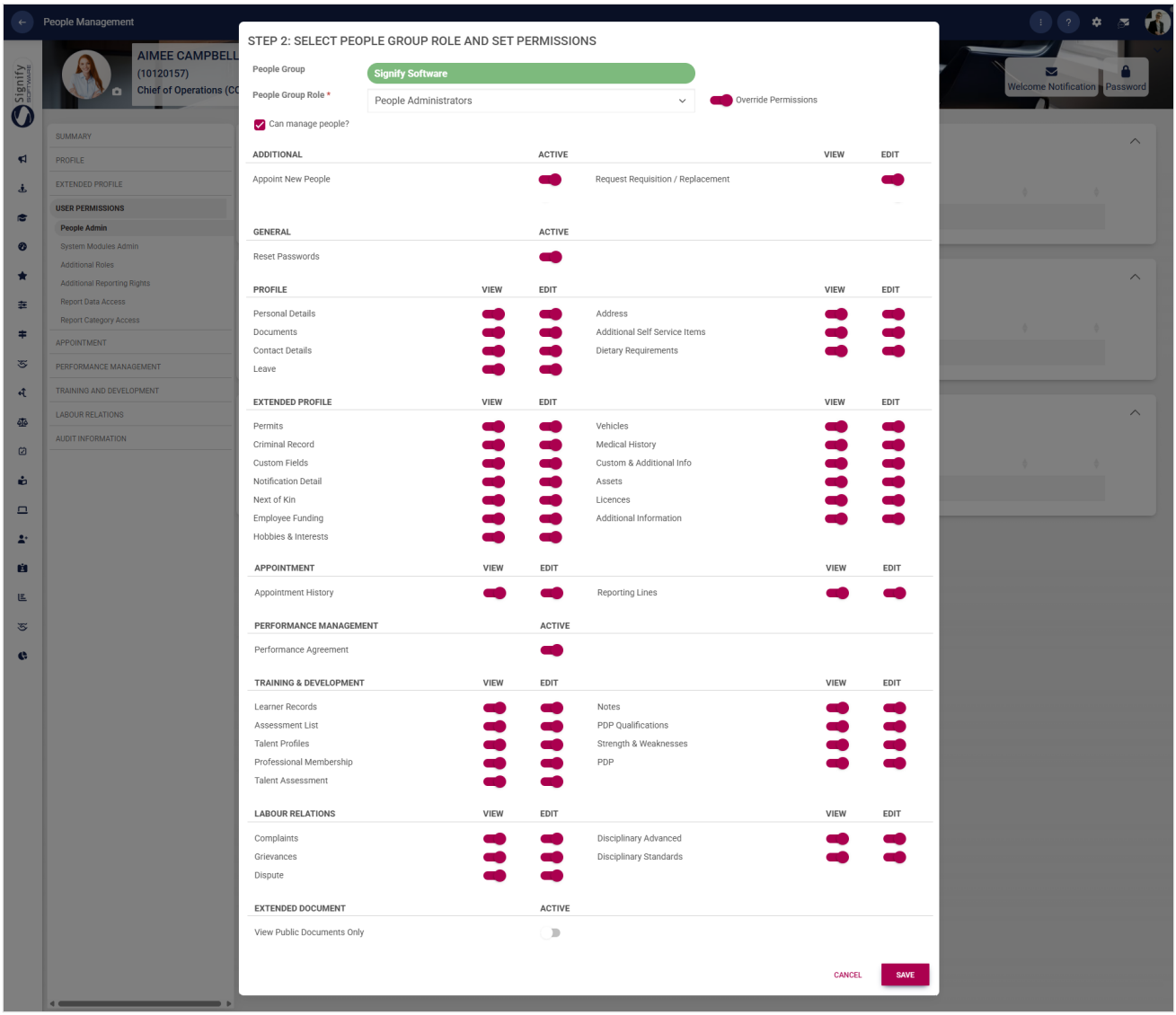
- Click the icon of a group of people to grant the user permission to access the data of users within that organisational unit and any subordinate units.



- Confirm whether you would like to create the people group, then click **CONTINUE**.



- Select **People Administrators** from the drop-down menu, and toggle to override permissions. Choose whether this user may appoint new people. Select which fields in the **People Management** module the user may view or edit. Choose whether they may reset passwords, access users' performance agreements, or view documents. Click **SAVE** when you are finished or **CANCEL** to discard your changes.

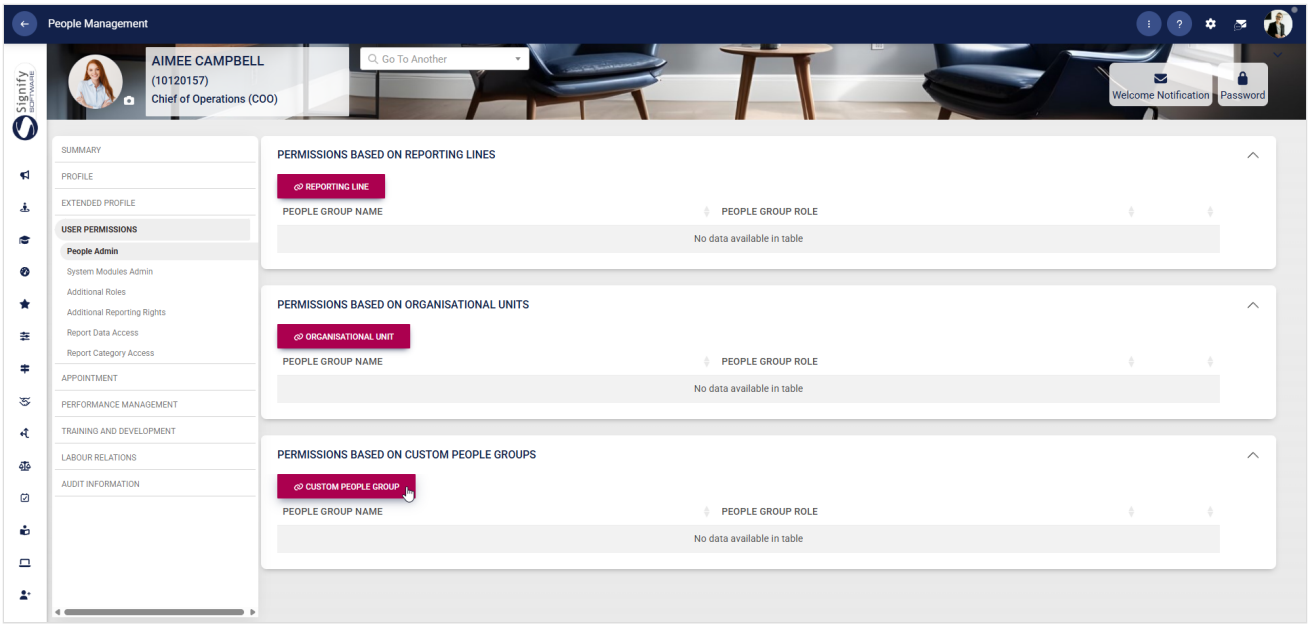


- You have successfully assigned people admin permissions based on an organisational unit.

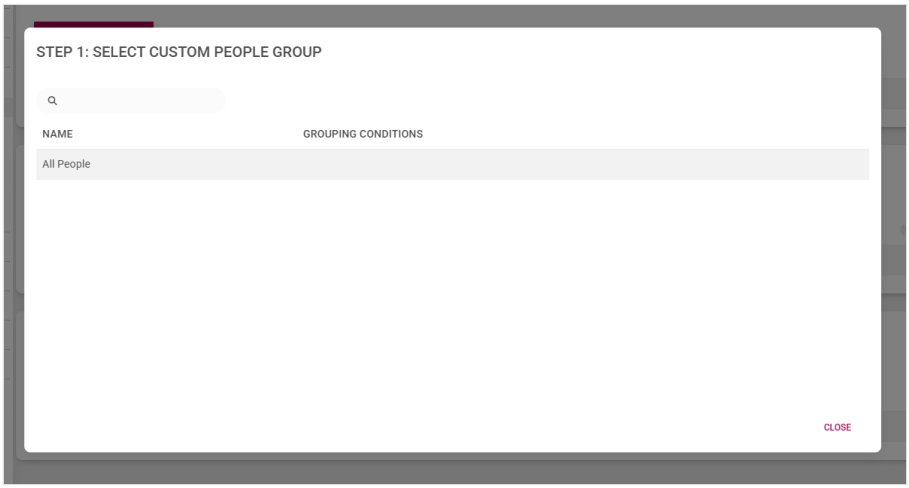
Custom People Groups

This method is ideal for managing access that doesn't align with traditional org structures or reporting lines. If an administrator should have access to all employees in the system, assign them to the "All People" group.

- Click **CUSTOM PEOPLE GROUP**.



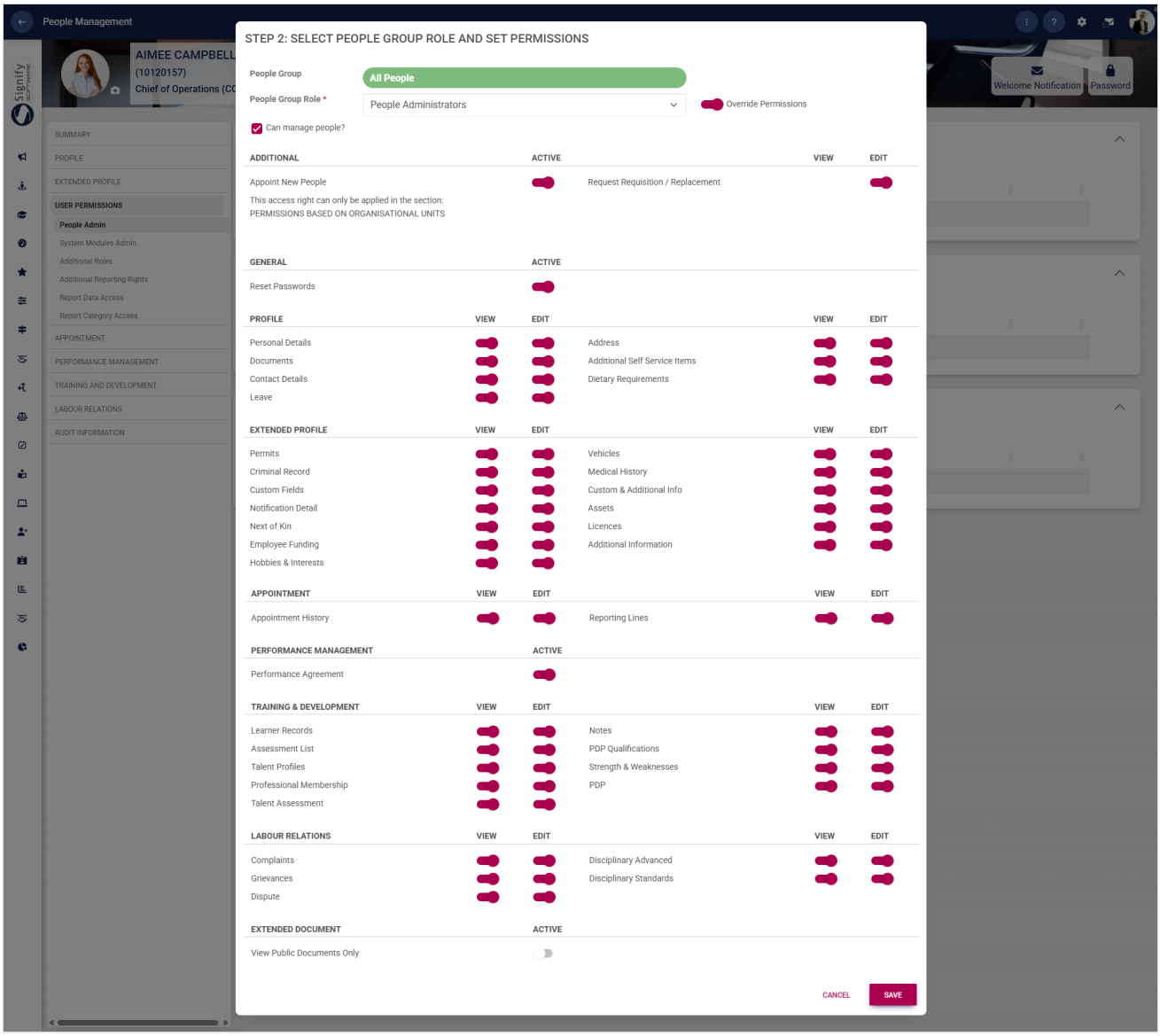
- Select the people group from the list. For more information on creating people groups, please visit Create People Groups.



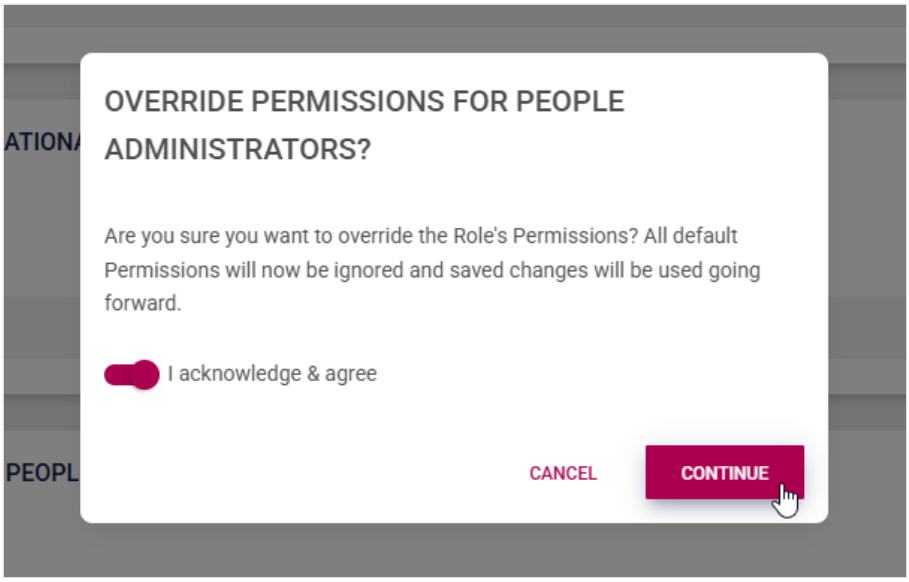
- Select **People Administrators** from the drop-down menu, and toggle to override permissions.

Please note that for the user to appoint new people, the user must be granted access at the organisational unit level (see the previous section for more information).

- Select which fields in the **People Management** module the user may view or edit. Choose whether they may reset passwords, access users' performance agreements, or view documents. Click **SAVE** when you are finished or **CANCEL** to discard your changes.



- Confirm whether you would like to override the permissions for people administrators, then click **CONTINUE**.



- You have successfully assigned people admin permissions based on a custom people group.

System Modules Admin

These permissions grant users administrative rights for the following modules linked to Version 9 of Signify Software:

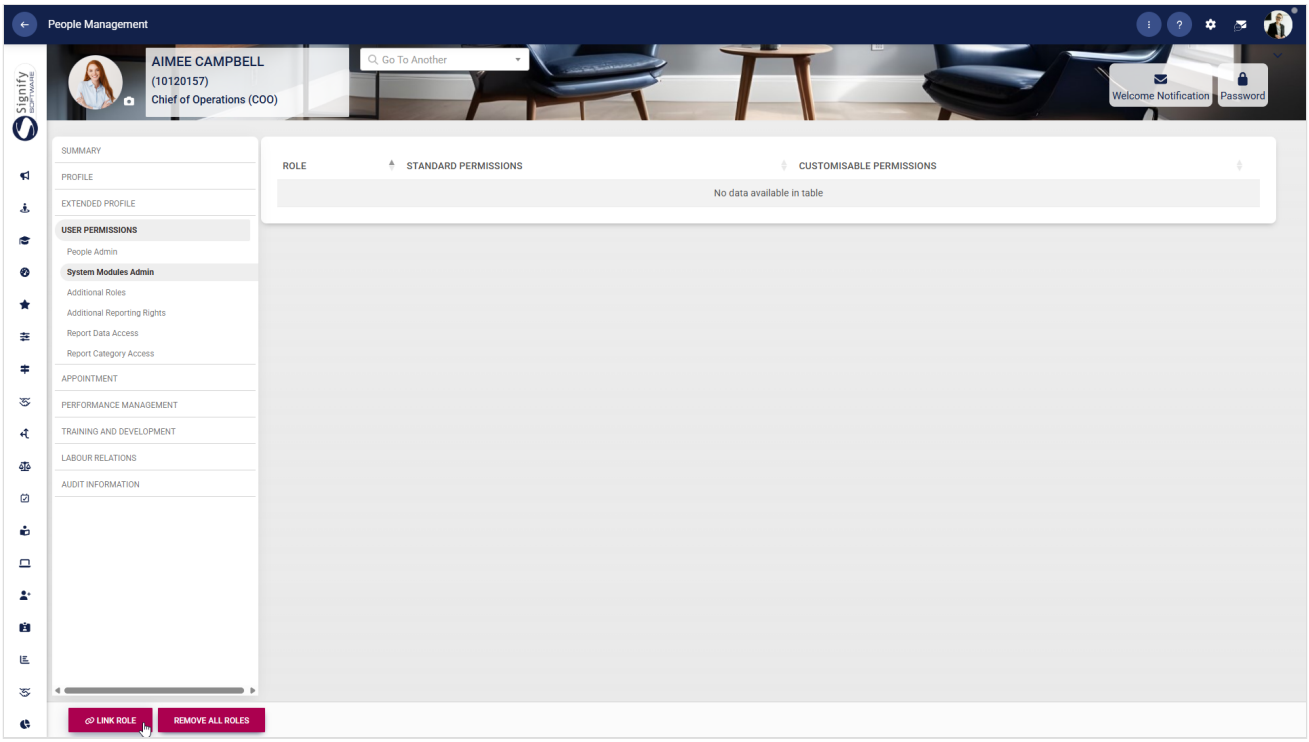
- **Event Scheduling**
- **Job Management**
- **Translations**
- **Learning Management**
- **Organisational Structure**
- **People Management**
- **Performance Management**
- **Report Builder**
- **Ruleset Management**
- **Tenant Management**

When users are assigned permissions for these modules, they can:

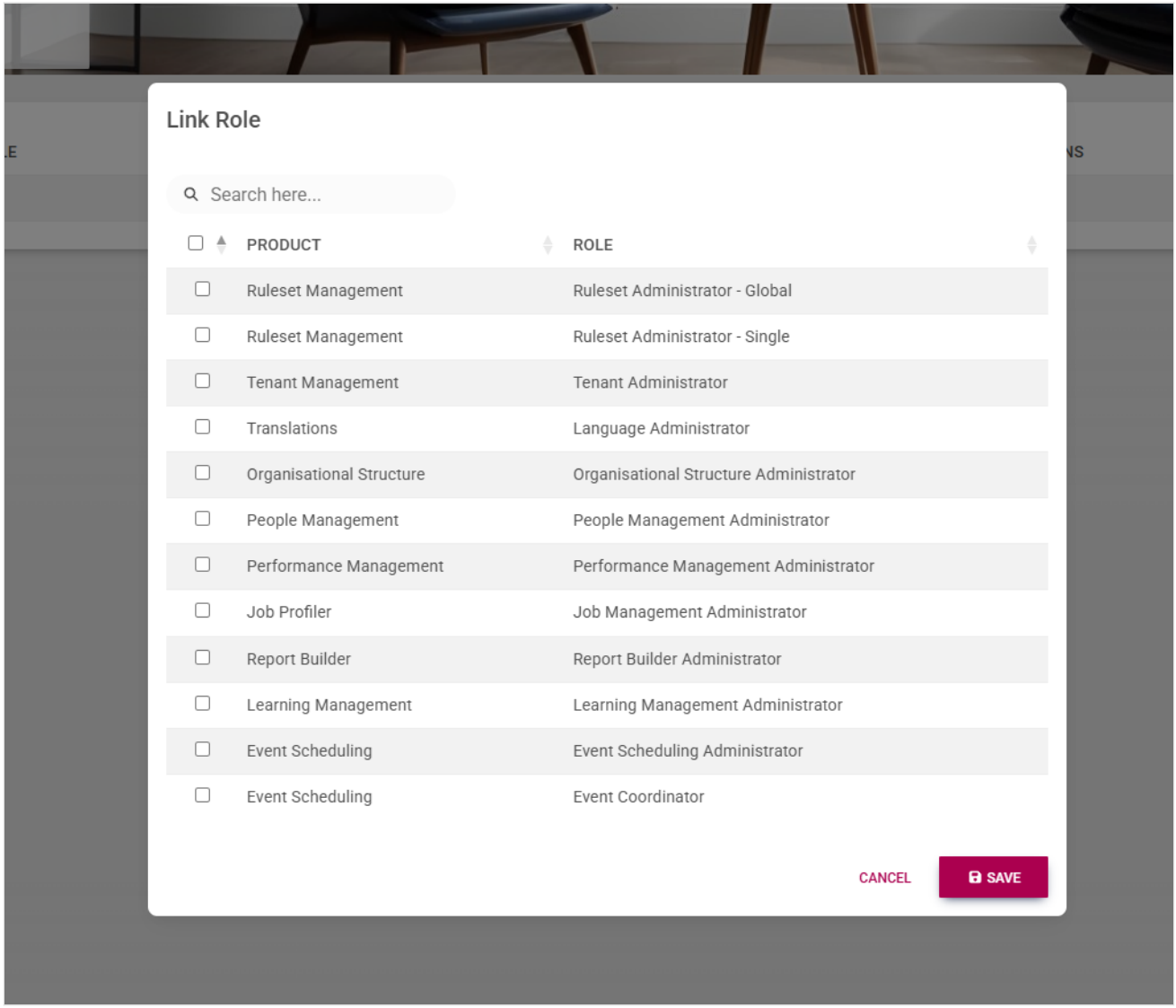
- Configure settings and features within each module,
- Manage module-specific content, and
- Carry out administrative actions.

This guide will detail the features available to administrators of each of these modules.

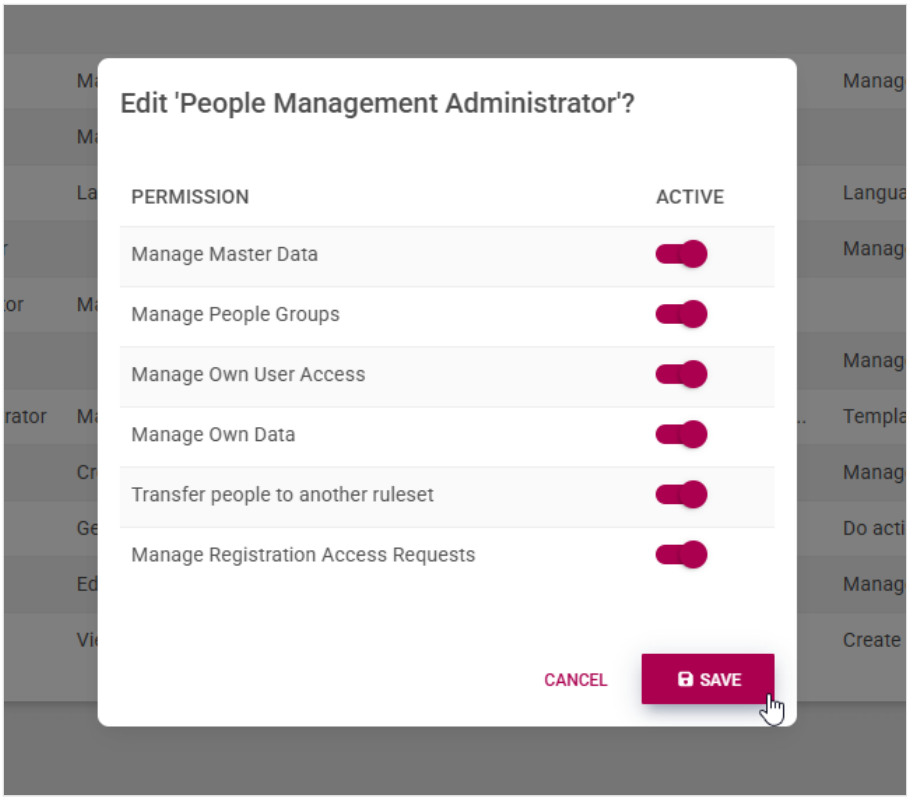
- On the **left-hand menu**, navigate to **System Modules Admin** and click **LINK ROLE**.



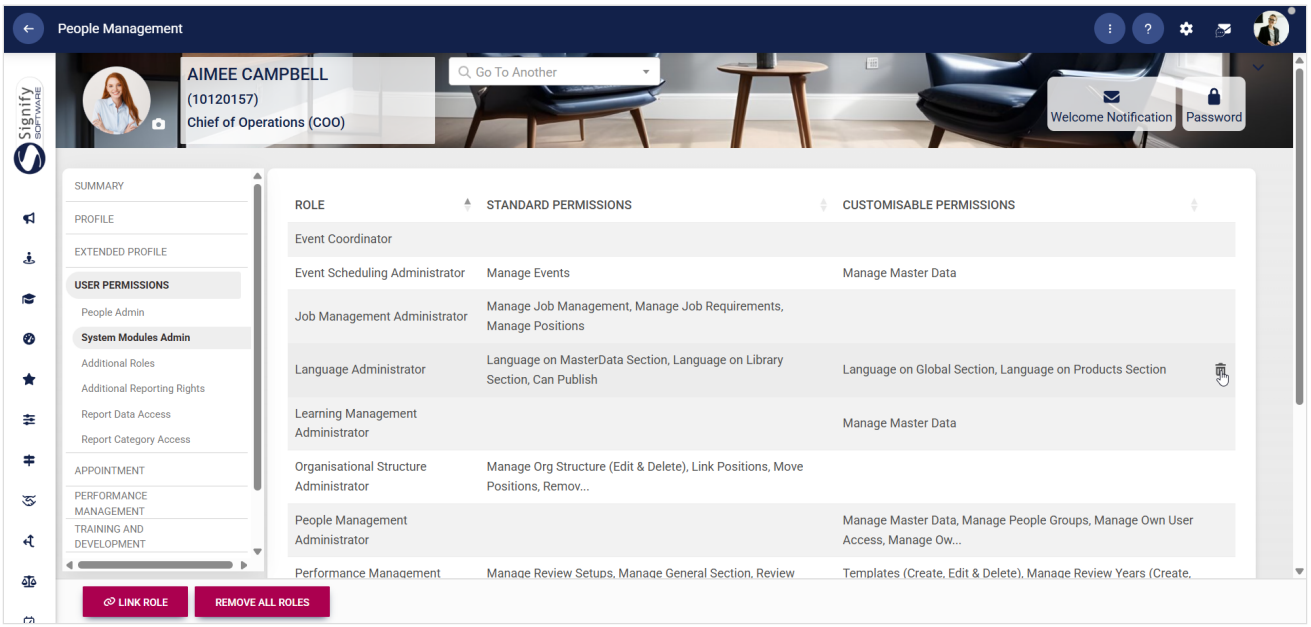
- Select which modules you would like to grant the user administrative rights to. The module names are listed on the left, and the associated roles are listed on the right. Click **SAVE** when you are finished or **CANCEL** to discard your changes.



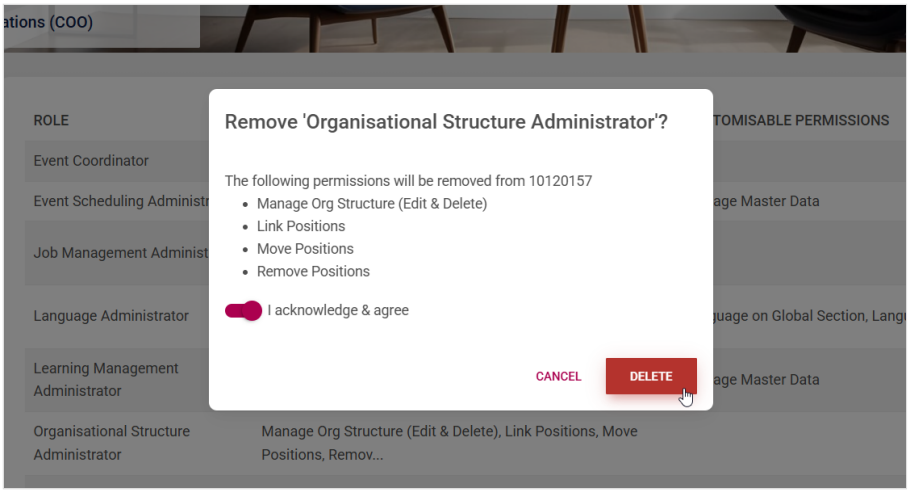
- When linking a role, note that some roles have specific responsibilities that can be toggled on and off. For example, see the tasks linked to a **Performance Management Administrator**.



- Linked Roles can be deleted by clicking on the **dustbin icon**.



- Confirm that you would like to revoke the user's permissions, then click **DELETE**. Click **CANCEL** to discard your changes.



- The roles and their associated responsibilities are described below.

Ruleset Management

- A **Ruleset Administrator – Global** can do the following:
  - Do actions on the **Product** tab, excluding product setup
  - Perform general management of all rulesets
  - Create rulesets
  - Edit all tabs
  - Manage notifications
- A **Ruleset Administrator – Single** can do the following:
  - Do actions on the **Product** tab, excluding product setup
  - Manage master data
  - Edit all tabs
  - Manage notifications

Tenant Management

- A **Tenant Administrator** can do the following:
  - Create new tenants
  - Update tenant details
  - Update subscriptions for products and licences
  - Update the expiry date for subscriptions
  - Delete tenants
  - View the tenant list
  - View details of tenants and their subscriptions

Translations

- A **Language Administrator** can do the following:
  - Manage languages in the Global section
  - Manage languages in the Products section
  - Manage languages in the Master Data section
  - Manage languages in the Library section

        - Can publish languages, thereby making them available on the system

Organisational Structure

- An **Organisational Structure Administrator** can do the following:
    - Manage the organisational structure
        - Edit organisational levels
        - Delete organisational levels
    - Link positions to organisational levels
    - Move positions
    - Delete positions

People Management

- A **People Management Administrator** can do the following:
    - Manage master data
    - Manage people groups
    - Manage their own user access
    - Manage their own user data
    - Transfer people to another ruleset
    - Manage **Registration Access** requests

Performance Management

- A **Performance Management Administrator** can do the following:
    - Create, edit, and delete performance templates
    - Create, edit, and delete review years
    - Link review setups
    - Manage **Final Scores** for performance agreements
    - Perform bulk actions, such as:
        - Linking templates
        - Deleting agreements
    - Manage master data
    - Manage a person's performance agreement
    - Moderate agreements
    - Perform quality assurance on performance agreements
    - Manage review setups
    - Manage the **General** section
    - Manage review periods
    - Manage review sections

Job Profiler

- A **Job Management Administrator** can do the following:
    - Manage job management
    - Manage job requirements

    - Manage positions

Report Builder

- A **Report Builder Administrator** can do the following:
    - Manage all reports
    - Manage their own reports
    - Create new reports
    - Copy reports
    - Run reports to retrieve data
    - Manage the **Reporting Category** master data
- In order for **Report Builder** administrators to gain access to the **Report Builder** module, ensure you follow the steps listed below for **Report Data Access** and **Report Category Access**.

Learning Management

- A **Learning Management Administrator** can do the following:
    - Manage master data
    - Build and edit pathways
    - Build and edit assessments
    - Send email notifications from learning journeys
    - Edit the menu and image panel at the top of the LMS portal
    - Manage learning master data
    - Access submitted assignments
    - Configure gamification and rewards

Event Scheduling

- An **Event Scheduling Administrator** can do the following:
    - Manage master data
    - Manage events:
        - Perform setup tasks for events
        - Manage templates
        - Handle attendee tasks and requests
        - Manage notifications
        - Perform reporting on events
- An **Event Coordinator** can do the following:
    - Manage events:
        - Complete administrative tasks related to scheduling, attendance, and communication
- For more information, visit our book on the **Event Scheduling** module.

Additional Roles

These permissions grant users administrative rights for the following modules linked to Version 8 of Signify Software:

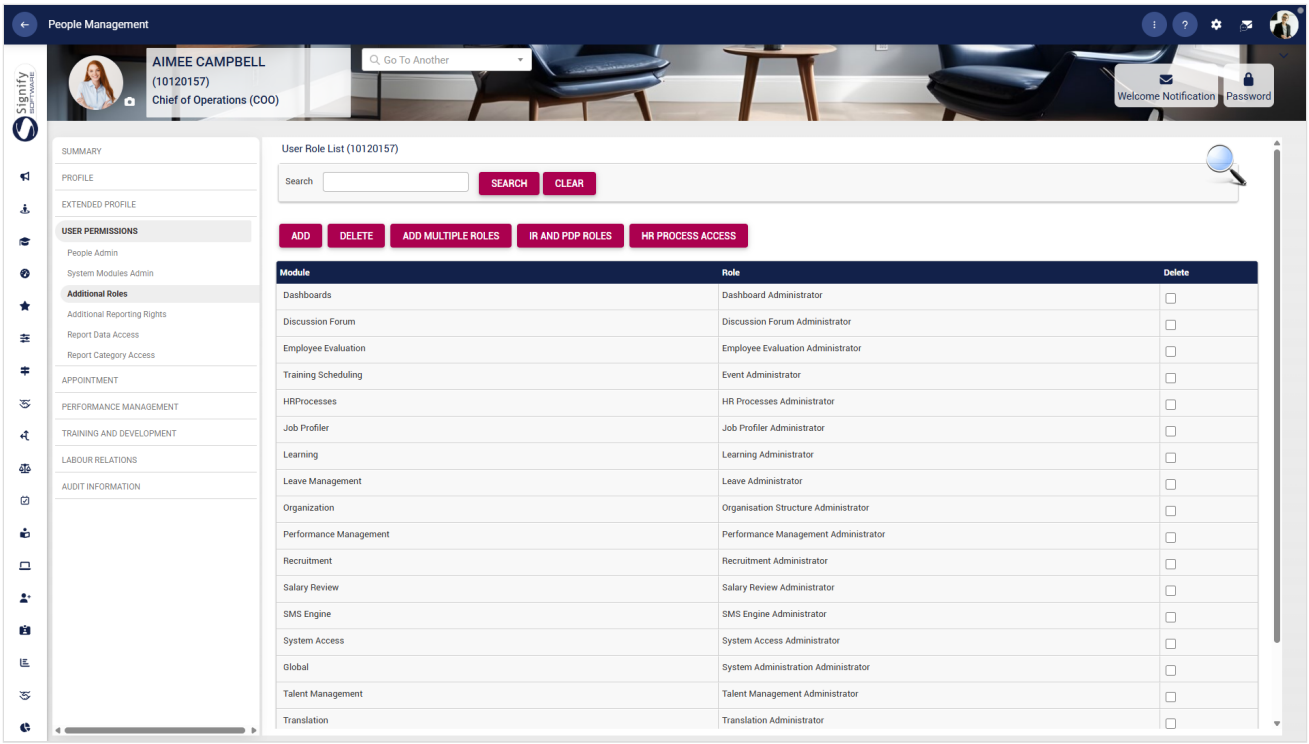
- **Dashboards**
- **Discussion Forums**
- **Employee Evaluations**
- **Training Scheduling**
- **HR Processes**
- **Job Profiler**
- **Learning Management**
- **Leave Management**
- **Organization**
- **Performance Management**
- **Recruitment**
- **Salary Review**
- **SMS Engine**
- **System Access**
- **Talent Management**
- **Translations**
- **Workflow**

When users are assigned permissions for these modules, they can:

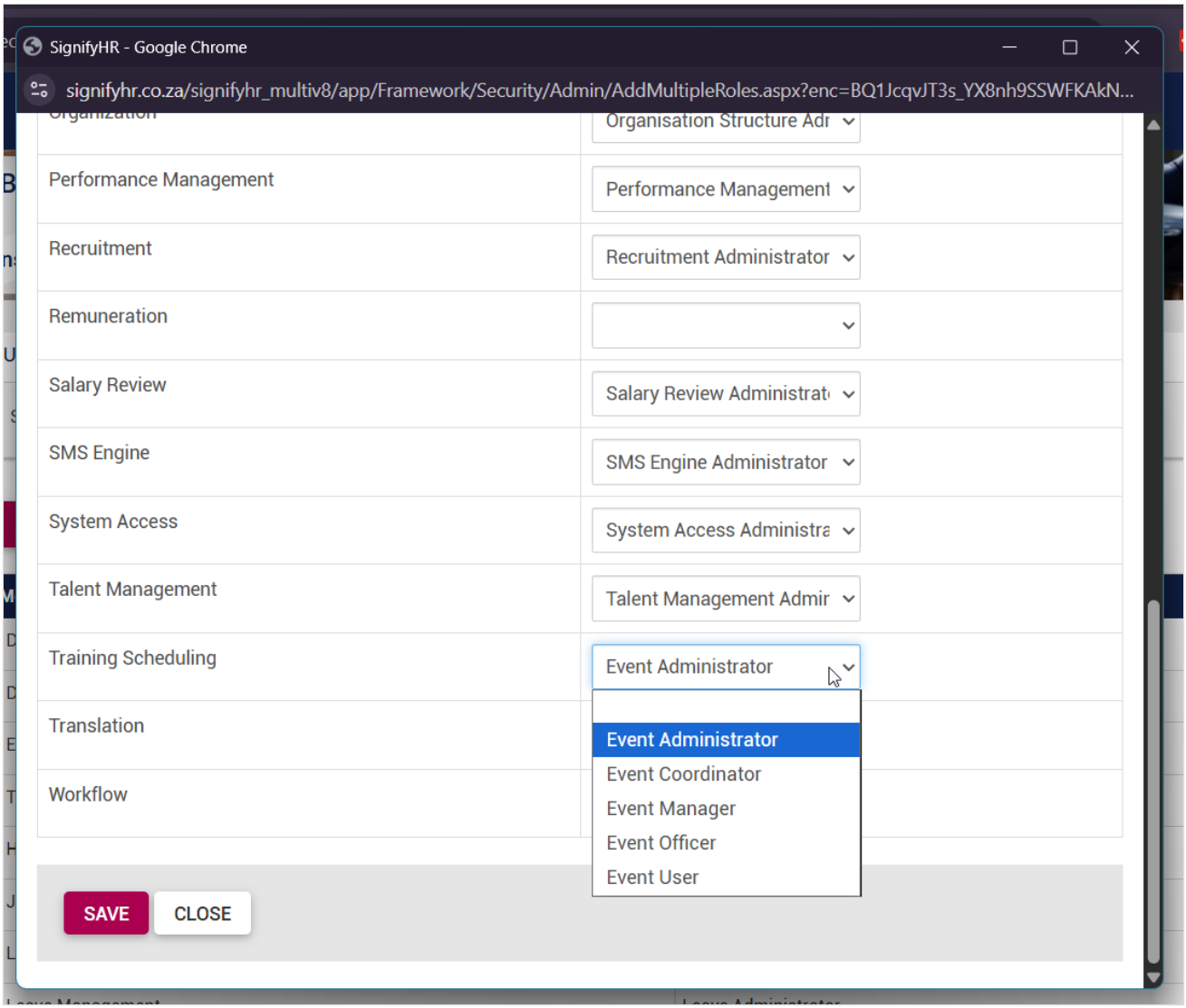
- Configure settings and features within each module,
- Manage module-specific content, and
- Carry out administrative actions.

This guide will detail the features available to administrators of each of these modules.

- On the **left-hand menu**, navigate to **Additional Roles** and click **ADD MULTIPLE ROLES** .



- In the pop-up window, select the roles you would like to assign to the user for each module. The module names are listed on the left, and the associated roles are listed on the right. Select the correct role from the drop-down menu. Click **SAVE** when you are finished or **CLOSE** to discard your changes.



- Different roles with varying levels of access can be assigned to Version 8 modules.
    - For instance, a **Learning Administrator** has full administrative rights for the module, while a **Knowledge Administrator** or a **Learning Manager** will have limited administrative rights, depending on the specific choices made.
    - The **Administrator** role will always have full administrative rights for each Version 8 module.

- The roles and their associated responsibilities are described below.

Dashboards

- Graphical insights and dashboards can be configured and customised to meet specific reporting and visualisation needs.

Employee Evaluations

- The administrator can create periods, categories, participant roles, and participant assessments, create evaluations, and add participants.

Training Scheduling

- This permission allows a user to fully configure and manage events within the system. It includes access to tools for event setup, templates, attendee tasks and requests, notifications, reporting, and event-related master data.
- Users can manage their own events and employees, as well as perform administrative actions related to scheduling, attendance, and communication.

HR Processes

- HR Processes permissions include the ability to configure workflows for processes submitted through **SigniBot**.
- This configuration is handled on the **People Management Product Setup**, under **HR Processes**.

Job Profiler

- Being a **Job Profiler Administrator** allows a user to manage job profiles, their associated requirements, and any linked jobs.

Learning

- A **Learning Management Administrator** can do the following:
  - Manage master data
  - Build and edit pathways
  - Build and edit assessments
  - Send email notifications from learning journeys
  - Edit the menu and image panel at the top of the LMS portal
  - Manage learning master data
  - Access submitted assignments
  - Configure gamification and rewards

Leave Management

- Being a **Leave Administrator** allows a user to configure the Leave Management module, including setting up public holidays, leave rules, leave groups, and leave types.
- The user can also link or update leave on a person’s profile, manage related master data, and view leave requests and history.

Organization

- This permission allows a user to manage organisational levels and units (including editing and deleting), as well as link, move, and remove positions within jobs.

Performance Management

- A **Performance Management Administrator** can do the following:
    - Create, edit, and delete performance templates
    - Create, edit, and delete review years
    - Link review setups
    - Manage **Final Scores** for performance agreements
    - Perform bulk actions, such as:
        - Linking templates
        - Deleting agreements
    - Manage master data
    - Manage a person's performance agreement
    - Moderate agreements
    - Perform quality assurance on performance agreements
    - Manage review setups
    - Manage the **General** section
    - Manage review periods
    - Manage review sections

Salary Review

- **Salary Review Administrators** can configure related master data and access employee reviews.

System Access

- This permission allows a user to manage registration access and fields, including related master data and the mandatory status of registration fields.

SMS Engine

- An administrator on the **SMS Engine** can configure the SMS setup and manage SMS templates.

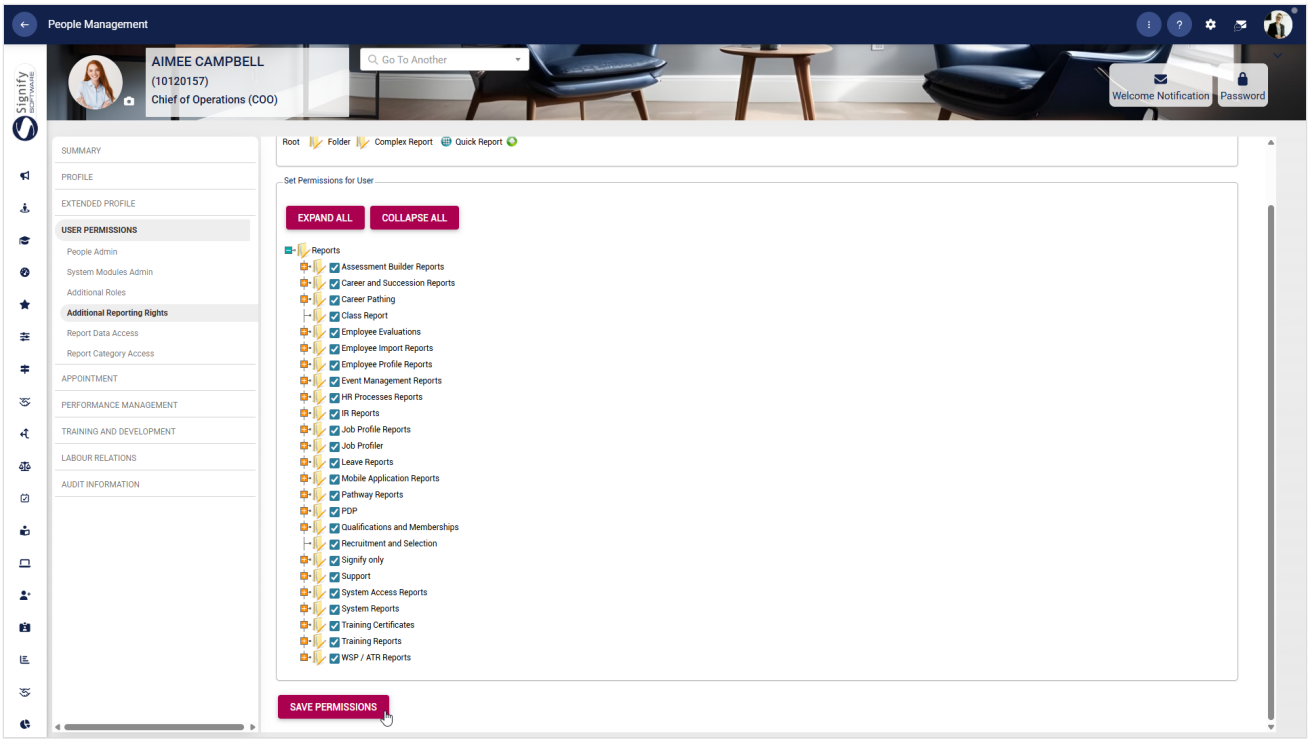
Global

- Similar to the **Tenant** and **Ruleset Administrator** administration permissions in Version 9, the **Global Administrator** role allows a user to manage master data, perform actions on the **Product** tab, access the **Module Product Setup**, and update and manage the tenant’s configuration settings.

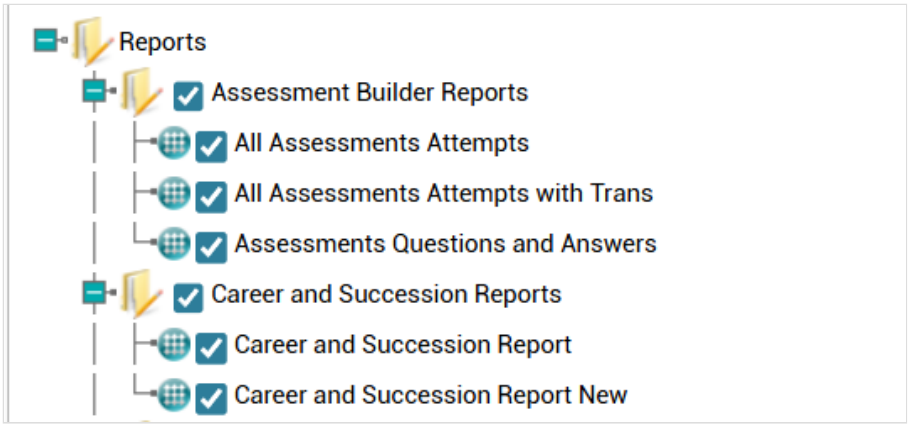
Additional Reporting Rights

Standard system reports are pre-configured, pre-deployed reports uploaded to the system that retrieve information from Version 8 modules.

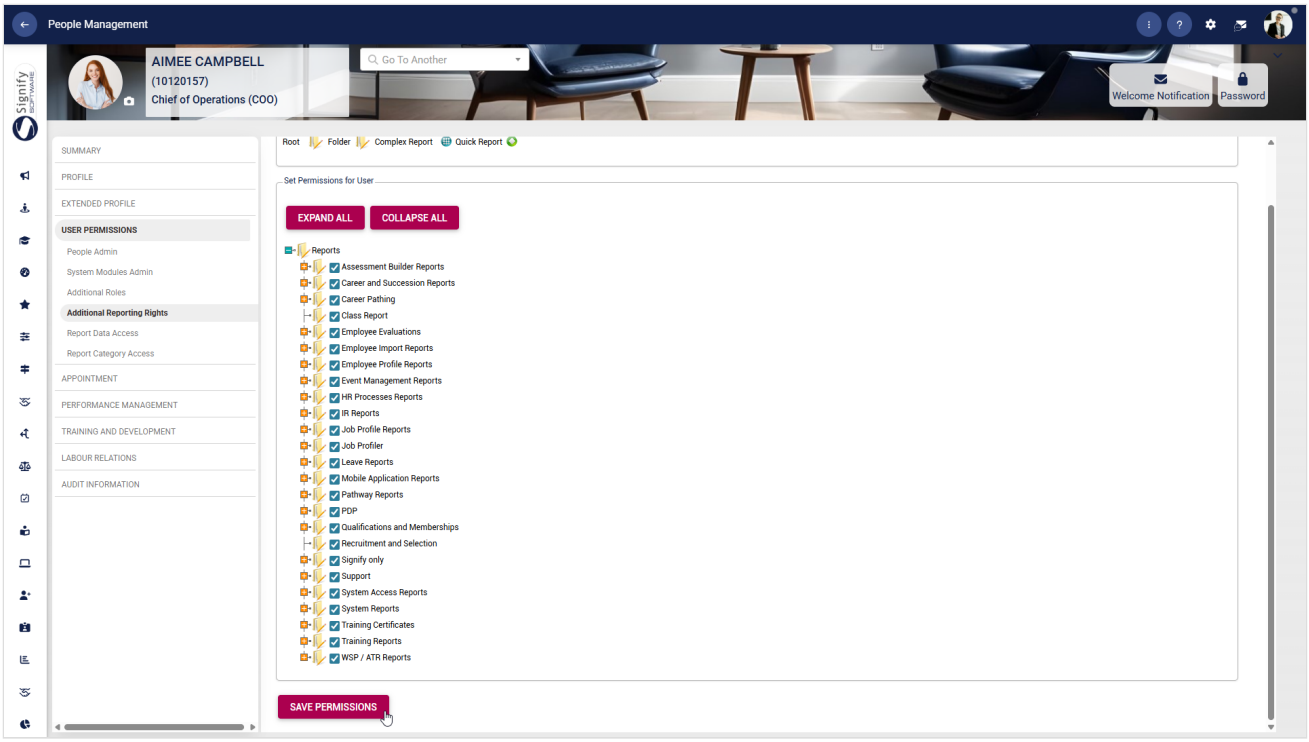
- Navigate to **Additional Reporting Rights**. Tick the report folders you would like to grant the user access to. Within each folder, complex reports and quick reports are stored.



- Expanding the cascading folders lets you grant the user access to specific reports by ticking the corresponding boxes.



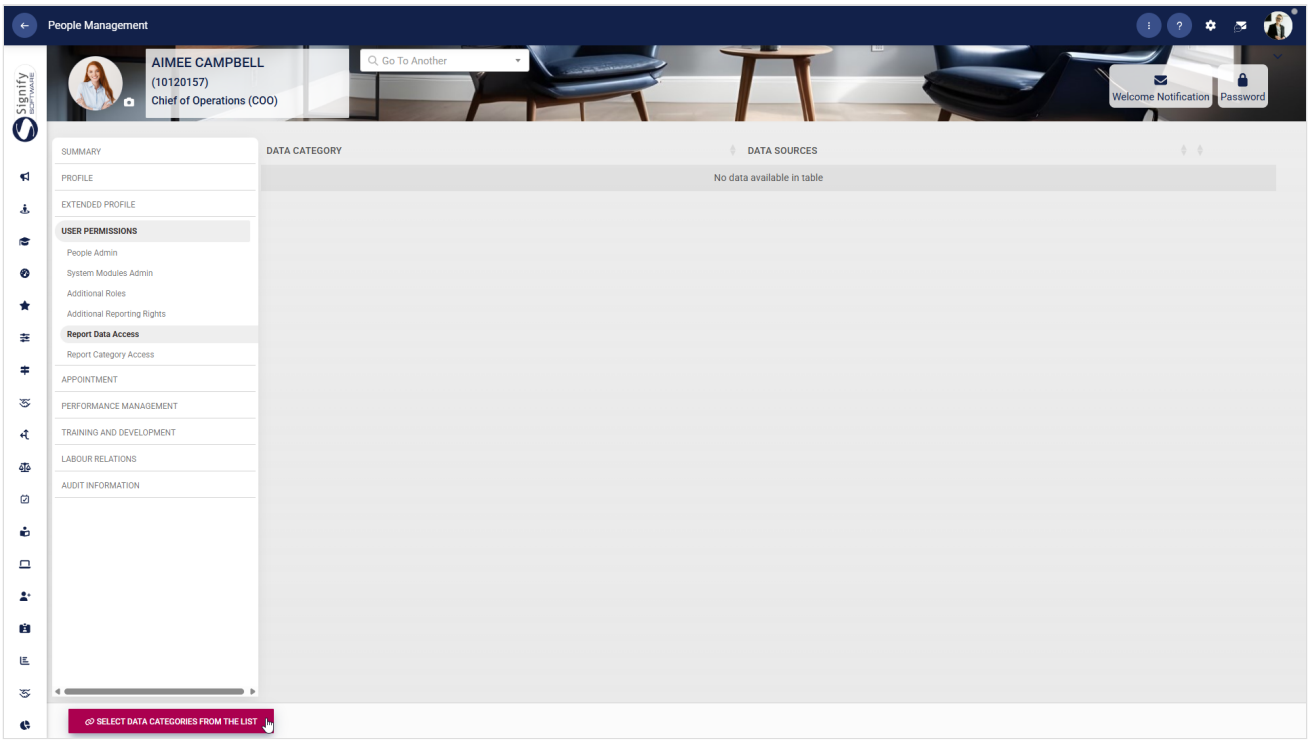
- After selecting all required reports, click **SAVE PERMISSIONS**.



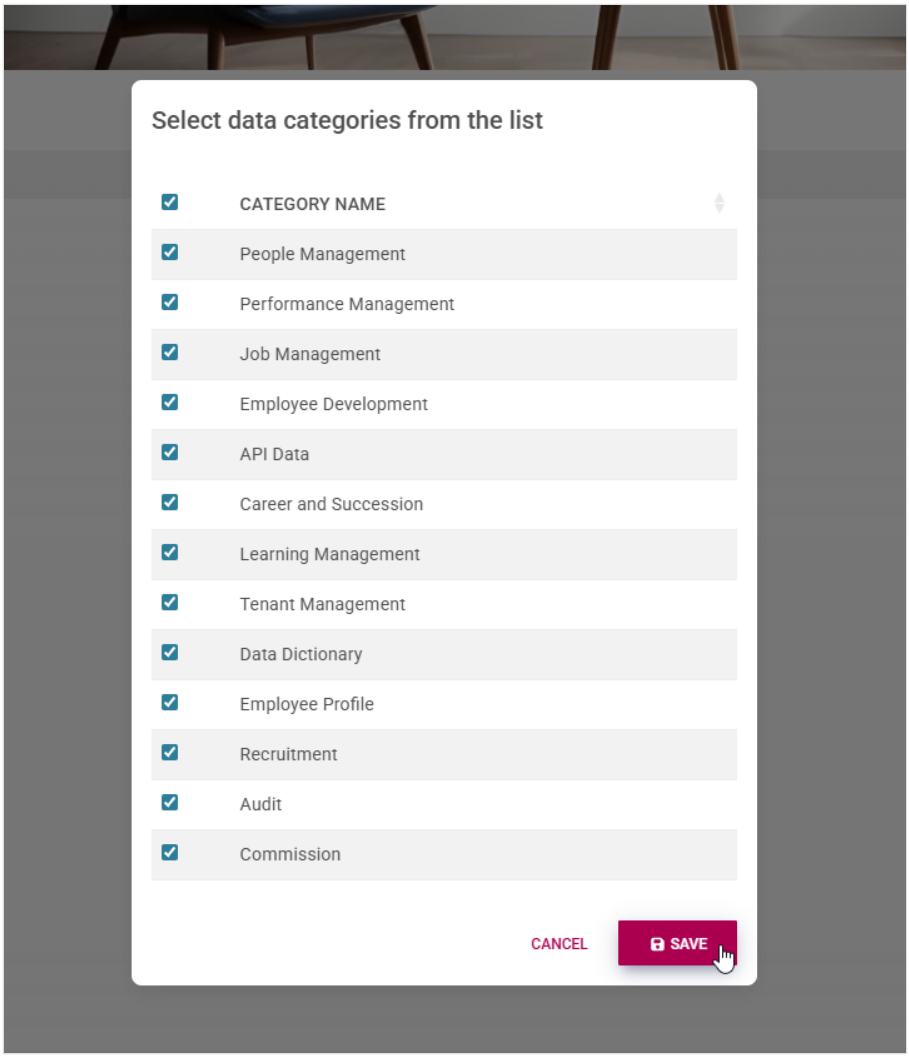
Report Data Access

In order for **Report Builder Administrators** to gain access to the **Report Builder** module, ensure you follow the steps listed below.

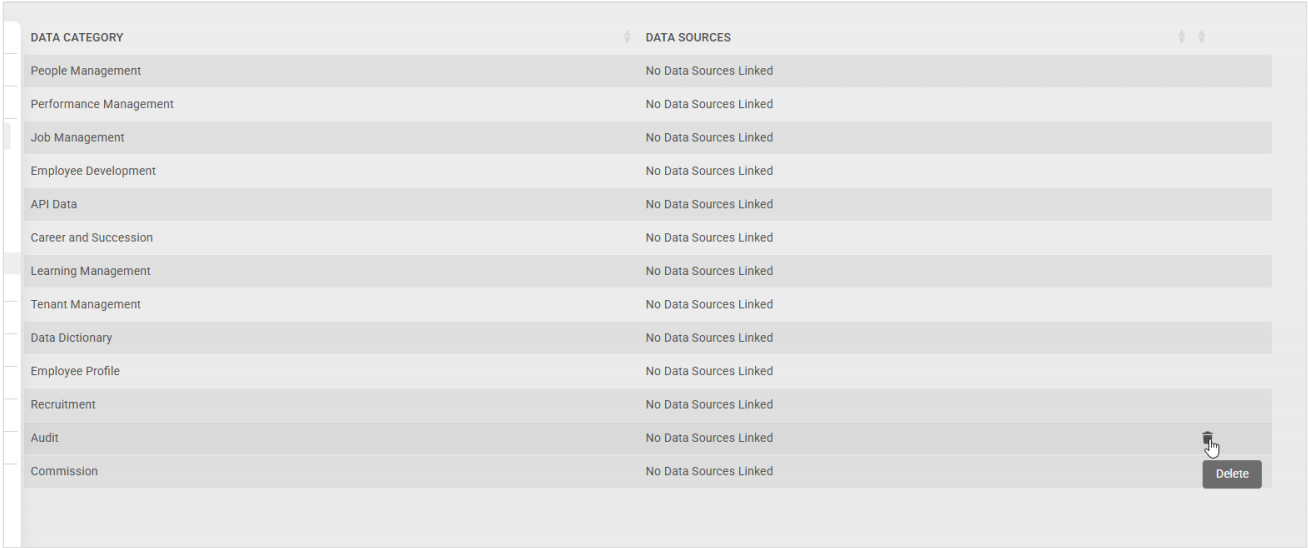
- On the **left-hand menu**, navigate to **Report Data Access** and click **SELECT DATA CATEGORIES FROM THE LIST**.



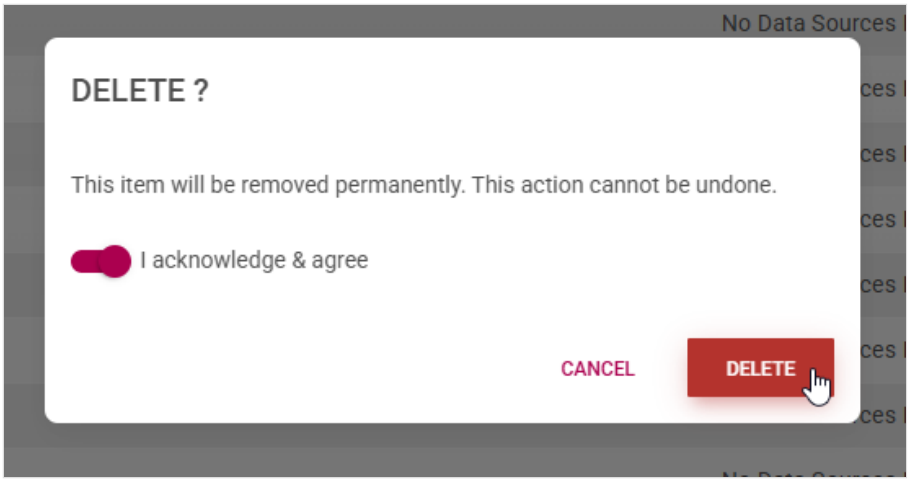
- Select which data categories you would like to grant the user access to. Click **SAVE** when you are finished or **CANCEL** to discard your changes.



- To revoke a user's access to a report data category, click on the **dustbin icon**.



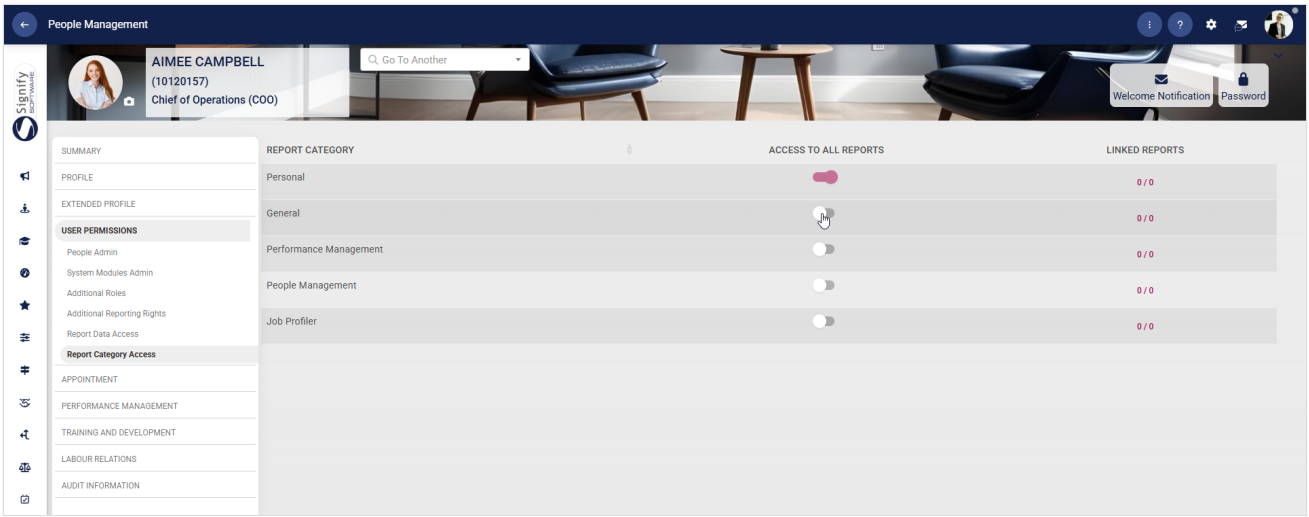
- Confirm that you would like to proceed with the deletion, then click **DELETE** to proceed, or **CLOSE** to discard your changes.



Report Category Access

In order for **Report Builder Administrators** to gain access to the **Report Builder** module, ensure you follow the steps listed below.

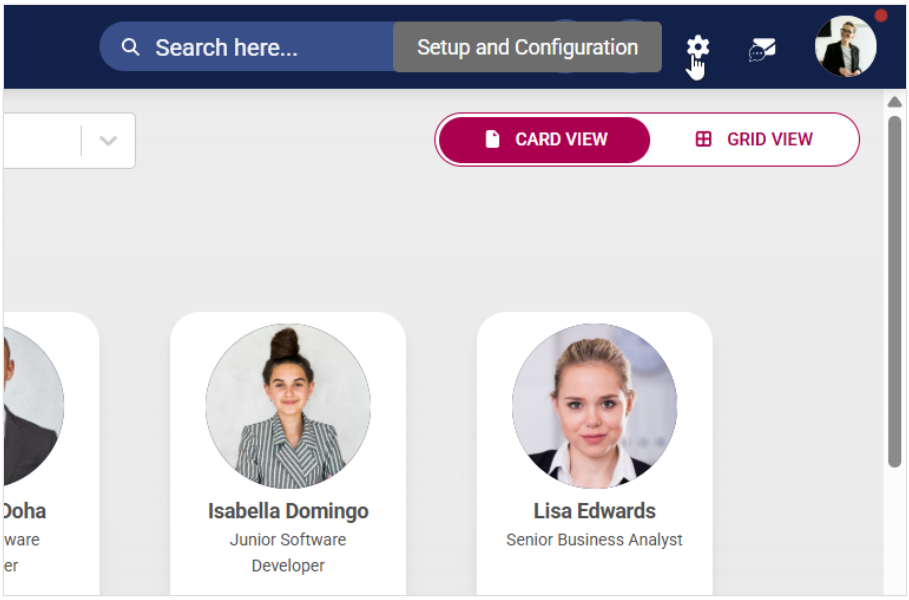
- On the **left-hand menu**, navigate to **Report Category Access**. Toggle the switches to grant users access to specific report categories.



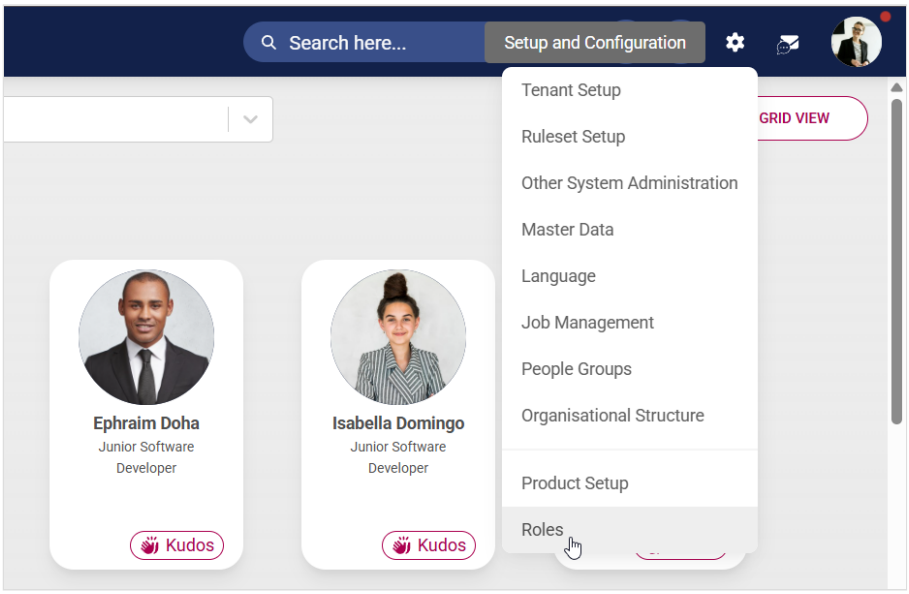
User Roles

To access a quick overview of the people linked to a specific role, use the **Product Roles and Permissions** feature of the **People Management** module.

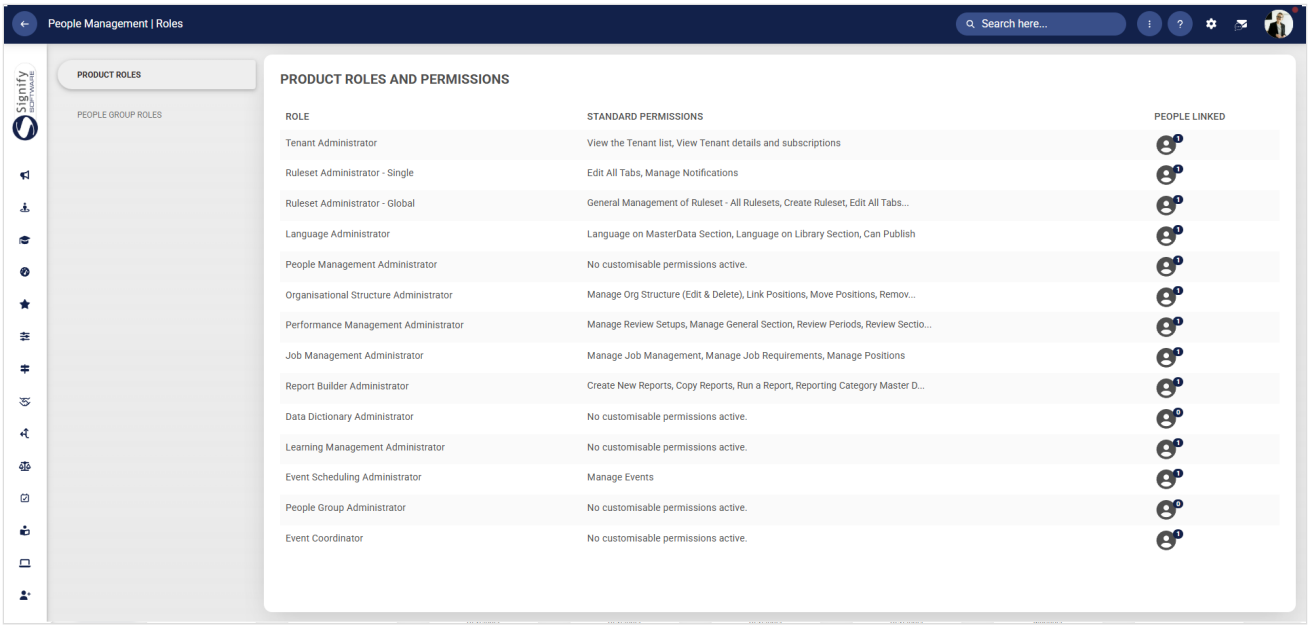
- Click the **gear icon** to access the **Setup and Configuration** menu.



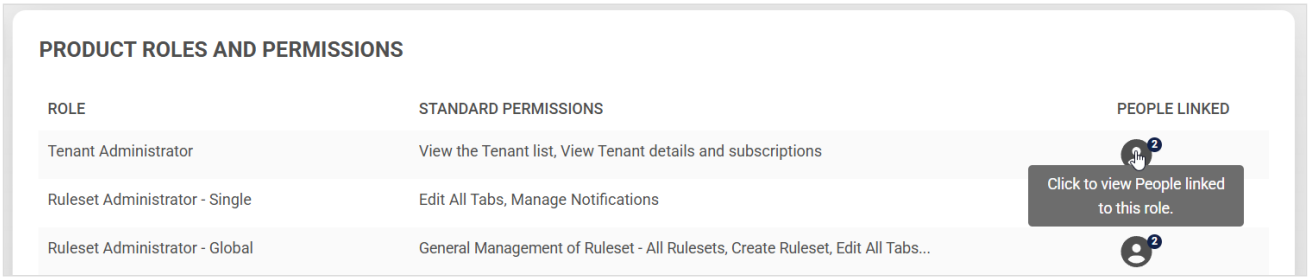
- Select **Roles** from the drop-down menu.



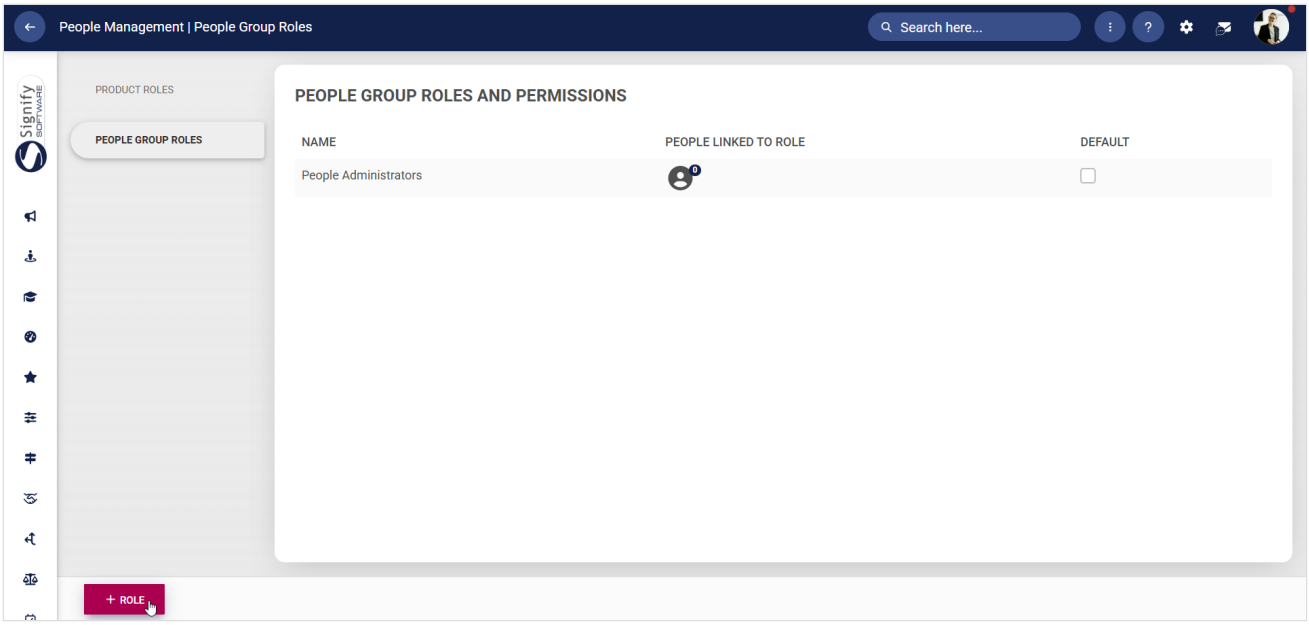
- The **Product Roles** screen will appear. The table displays the various roles in the system, the standard permissions for each role, and the number of people linked to each role.



- Click to view a summary of the people linked to a specific role.



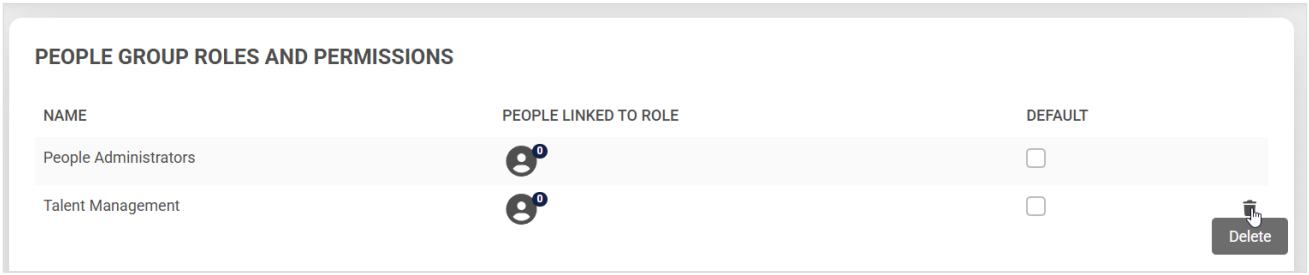
- To assign a specific role to specific people groups, navigate to **People Group Roles**. Click **+ROLE** to add a new role.



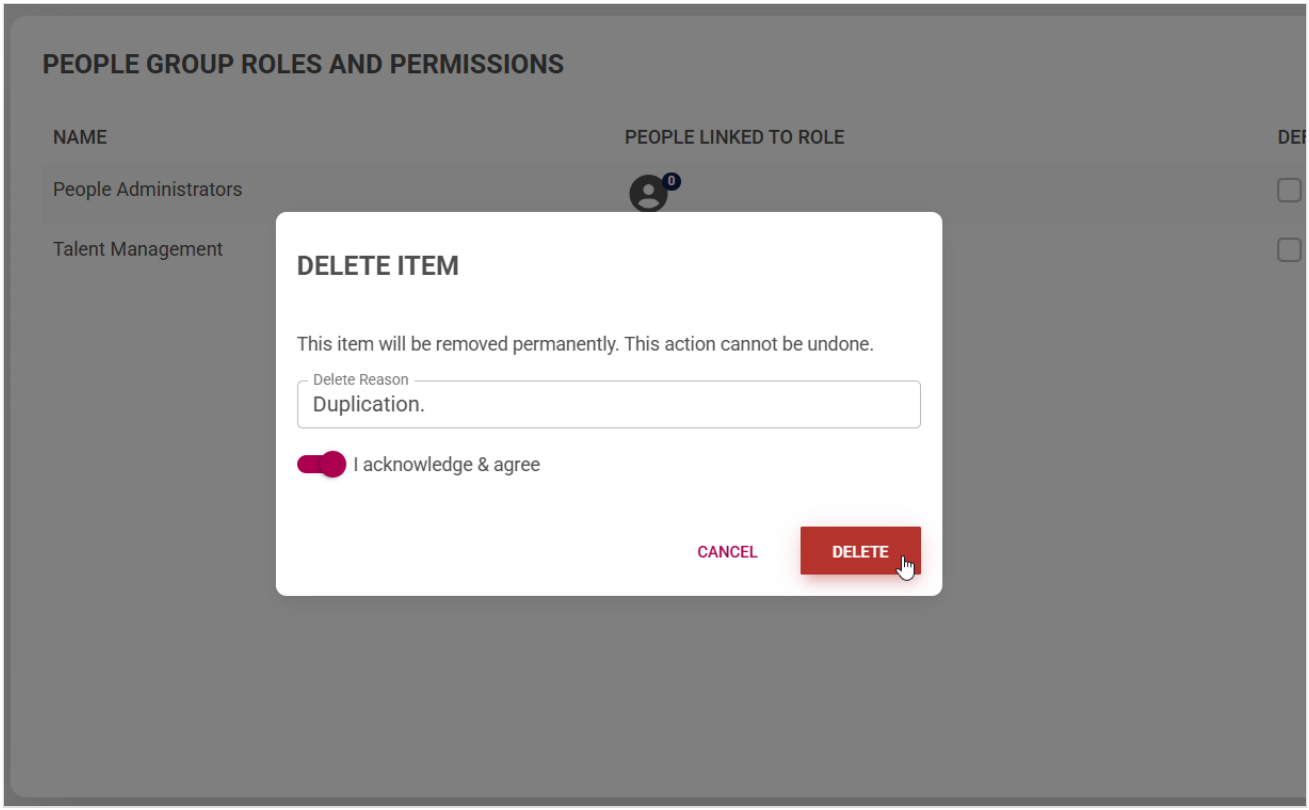
- Assign an appropriate name to this role. If the role requires managing people, tick the checkbox. Click **SAVE ADD NEW** to add another people group role, **SAVE** when finished, or **CANCEL** to discard any changes.



- To delete a people group role, hover over the name and click the **dustbin icon**.



- Confirm you would like to proceed with the deletion and provide a valid reason. Click **DELETE** to remove the people group role, or **CANCEL** to discard your changes.



Revision #3
Created 2025-02-03 14:50:12 UTC by Chanan Stenden
Updated 2026-04-24 15:39:48 UTC by Chanan Stenden