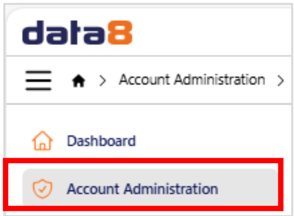
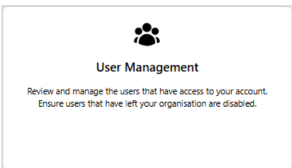
How To.... Manage Users

This document serves as a guide to Account Administration and User Management, specifically focusing on key processes for managing user access and roles. Good user management is vital for ensuring secure, organised, and effective system use. This guide will cover three important aspects of user management:

1. Adding a New User: Understand the process for creating and onboarding new users to the system, ensuring they have the appropriate access levels.
2. Deactivating a User: Learn how to deactivate user accounts securely when access is no longer required, preventing unauthorised access.
3. Assigning Administrative Rights: Discover how to amend a user's role to an administrator, ensuring they have the necessary permissions to manage other users and system settings.

By following this guide, system administrators will be able to maintain control over user access, ensuring security, compliance, and a well organised user environment.





In this section, we will go through the steps to add a new user to your account. N.B. only system administrators have the required permissions to create a new user.

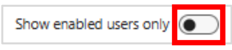
To begin, click **Account Administration** from the main menu on the left-hand side of the screen. See screenshot left.

The *Account Management* screen will be displayed.

Click the *User Management* button, which is the second option available on the top row. See screenshot left.

The *User Management* screen will be displayed.

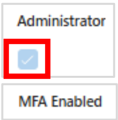
The top section of the screen provides detailed information about each user from your organisation.



In the top left, there is a toggle button that enables you to select whether to view only active users or all users.

To the right of this there is a search bar, making it easy to find specific colleagues within your business.

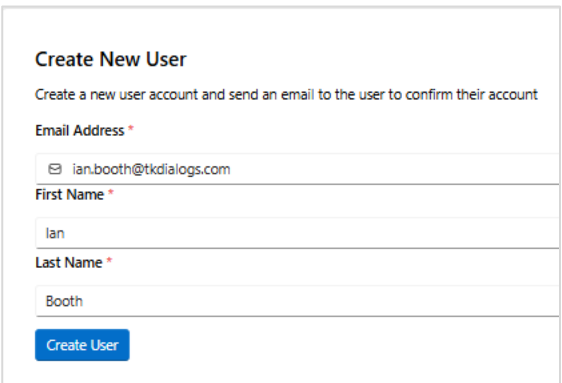
Below, there are five headers:



1. *Name*: Displays the full names of all colleagues from your organisation with system access. To the right of *Name* is a sorting arrow that enables you to sort names alphabetically in ascending or descending order.
2. *Administrator*: A checkmark indicates that the user is an administrator within the system.
3. *MFA Enabled*: A checkmark indicates that Multi-Factor Authentication (MFA) is enabled for that user.
4. *API User*: A checkmark indicates that the user has access to utilise API's (Application Programming Interfaces) within the solution.
5. *Actions*: This option enables administrators to manage other users within their organisation. Admins can approve or reject user requests, as well as enable or disable user accounts.

The bottom left of the top section; the total number of users is displayed.

On the right-hand side, the total number of pages is displayed, and if there are multiple pages, navigation arrows will enable you to move through the information.

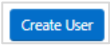


The *Create New User* widget is displayed at the bottom of the *User Management* screen. This widget allows you to create a new user account, triggering an email to be sent to the user to confirm their account, (see screenshot left).

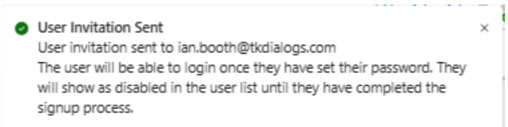
To create a new user, ensure the following information is provided:

1. Email Address
2. First Name
3. Last Name

All fields in the widget are mandatory, as indicated by the * next to each field.

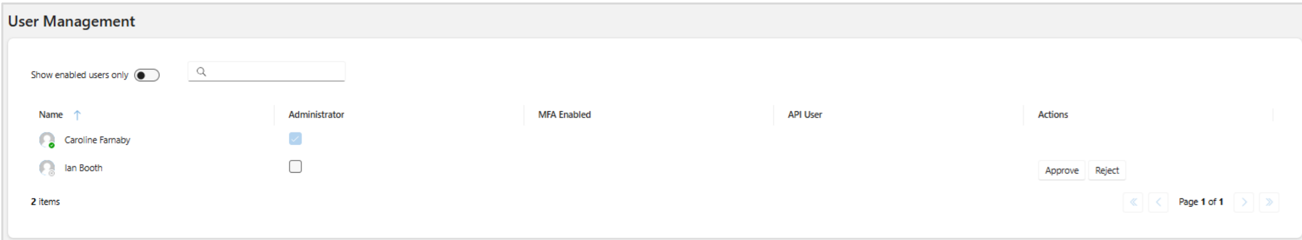


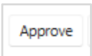
Click the **Create User** button.



A notification will be displayed at the top right of your screen to confirm that an email has been sent to the new user and their email address. See screenshot left.

The user is now displayed in the list of users but will not be able to use the system until they have completed the signup process, and you have approved their access. See screenshot below.





To activate their account, click the *Approve* button. The user now has access to your organisations account.

This concludes the process of creating a new user.

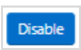
In this section, we will go through the steps to deactivate a user from your account. N.B. only system administrators have the required permissions to deactivate a user.

To begin, click **Account Administration** from the main menu on the left-hand side of the screen.

The *Account Management* screen will be displayed.

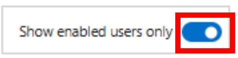
Click the *User Management* button, which is the second option available on the top row.

The *User Management* screen will be displayed which provides a full list of all users within your organisation.



To deactivate a user, click the **Disable** button which is displayed under the *Actions* field at the far right of the screen. See screenshot left.

This button will now change to *Enable* so you could reactivate their account at any time.



To remove any deactivated users from the list you can click the *Show enabled users only* toggle button so only active users are shown in the list.

This concludes the process of deactivating a user.

The final section of this guide explains how to assign administrative rights to an individual user within your organisation. N.B. only system administrators have the required permissions to grant administrator privileges.

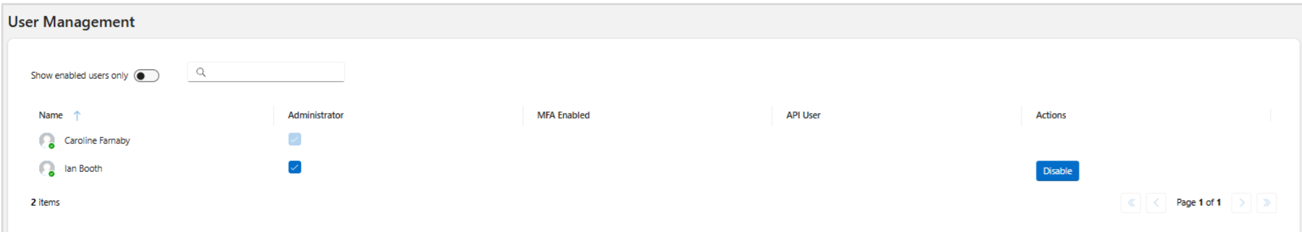
To begin, click **Account Administration** from the main menu on the left-hand side of the screen. See screenshot left.

The *Account Management* screen will be displayed.

Click the *User Management* button, which is the second option available on the top row.

The *User Management* screen will be displayed.

To grant a user administrator rights, check the *Administrator* box next to their name. This will provide the user full system administration privileges. See screenshot below.



This concludes the process of assigning administration rights to a user within your organisation.