# Quick Guide
# **User creation and administration**

HR MANAGER
TALENT SOLUTIONS

# Overview

Users need an account with the correct role and access before they can log in and use the system.

In this guide, these steps will be explained as well as a few tips:

- **Create new project**
- **Project Details**
- **Project leader and participants**
- **Create and add project participant**
- **The user name already exists**
- **Available Application Language**
- **Notes and Attachments**
- **Other options**

- **Notifications**
- **Modifying notifications**
- **Communication**
- **Application form**
- **Questionnaire**
- **Advertisement**
- **Confirmation**

# Information about User creation

When creating new users, there are two things to pay special attention to:

- **Assigned department**

This will be crucial  for which projects, the user can be added to. A user who is created in a sub department, can not be added to a project, which is located in an overhead department. The department assigned to the user will therefore have to be adapted to the user or the project.

- **User roles**

The user shall be assigned rightful user roles. One should therefore assess whether the user needs administrator rights (the unlimited role with access to the entire system). There are rights for project creation (usually a project leader role) or even rights where the user is only given access to the projects they are added to (usually a project participant role).

Please note that your company may have created several unique roles. Questions regarding which roles to use should be referred to the administrator.

# Creating users directly on a project

It is possible to create and add new users while creating a project.

Simply click on 'Create and add'.

# User creation – Account details

**User Account:** Add user name which is email address and a password for the user to log in with (this can be changed by the user).

**Name:** Add name and optional details if required.
**NB:** Some of these variables are used on i.e. advertisement or communication templates, so make sure it is correct data.

**Date format and language:** These will on creation be 'Default', but you can change it if required.

# User creation – Account options
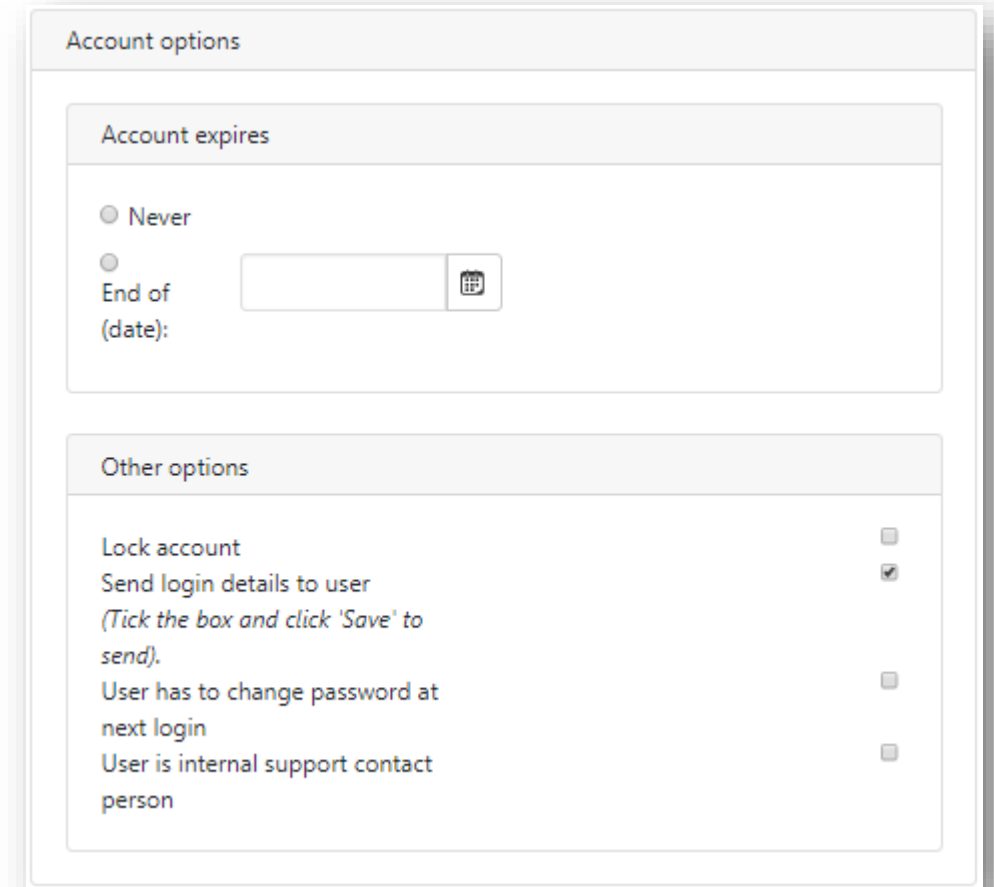
Additional options are available for the account:

If the account is temporary, you have the option to set an expiry date. If not simply select 'Never' to create an indefinite account.

The box 'Send login details to user' is ticked by default. This enables the system to send an email to the user with information about the users login link, username and password.

(A preview of the email will be displayed prior to sending the email.)

Furthermore you can define whether the user needs to change the password at first login and if user is internal support contact person.

# User creation – Access level

When assigning the access level, enter the Access name then click 'Select' to select the department to be assigned to the account.

By selecting the top department (in this example 'HRMTS') the user can be used in the whole organization.

By selecting 'Marketing' in this example, the user can exclusively be used in that department.

# Profile image

Furthermore you have the option to add a profile picture, which can be shown in your advertisements. This requires that the advertisement template is enabled for that function.

Contact Support for further information.

# The user already exists

If you see the following message when creating a new user, it means that the user is already created.

Following reasons could be the cause for not being able to add the user on a particular project.

- The user does not have access to the department the project in created in
- The account has expired, is deleted or locked
- The user does not have the necessary rights

An administrator in your organization should be able to locate the account in the 'User administration'.

**Error**                                              ✕
Assign at least one access level

# Finish creating the user

Once the applicable fields are filled out, the user account can be completed.

After saving, a preview of the email being sent to the user, will be displayed. If you need to edit the content of the email click 'Edit'.

Click 'Send email' to send email.

The user is now created and added to the project.

# The user can not access the project

If the department the user belongs to have been modified after user has been added to a project in another department, a red exclamation mark will show beside the user on the project.

You will therefore have to adjust the users account in the 'User Manager', located under 'Administration'; in the main menu to the left.

Project participants:

Create and add  |  Add

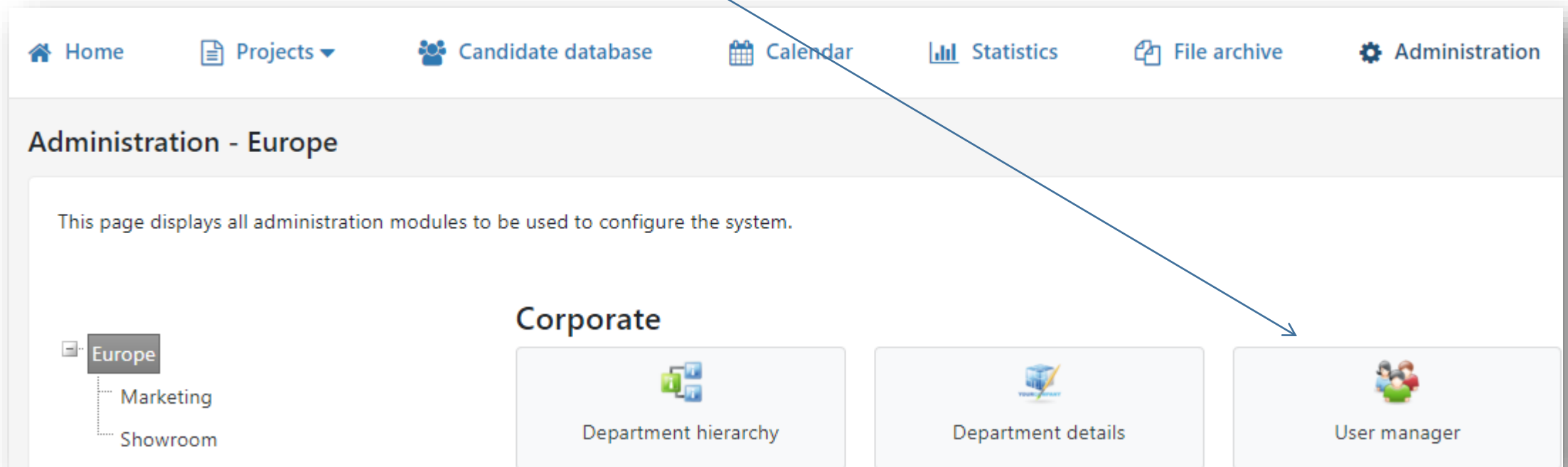| Last name | First name | Contact Person * | |
|-----------|-----------|-----------|-----------|
| Eriksen | Henning | ☐ | Remove |

# User Manager

In the 'User Manager' you can create new users, as well as modify existing users.

Whether it being modification of department, adjustment of user role, closing an account or adding any other relevant information.

# Access users in the organization

Should you have access to the 'User Manager', you will only have access to the users, who are created in your own department and any sub department.

If you are created in a sub department, you will not have any access to users in any overhead department.
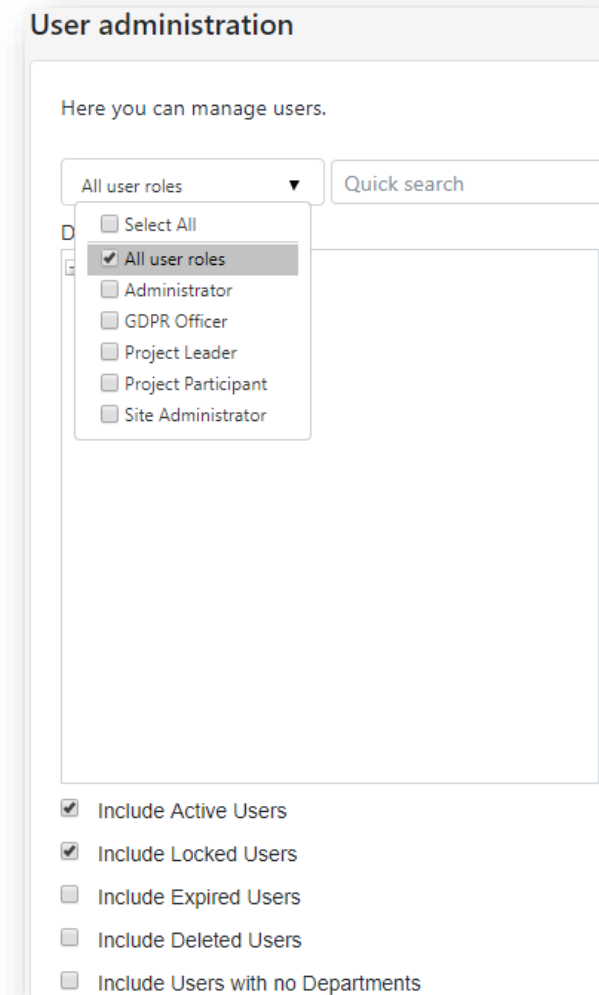
# Search users

In the top box 'Departments', you can select to see users from a specific department. By default, all departments are included in the search.

If one single department is selected, the search result will only include users from that particular department.

There is also an option to search for users with a specific role. For example, to get a list of users with the role 'Administrator', highlight the role and click 'Search'.

Furthermore, you can choose to filter the search based on the validity of the account, such as active, locked, expired and deleted. By default, all of them are selected

Finally, to search for a particular user either by name or email address, simply use the 'Quick search'.

**User administration**

Here you can manage users.

All user roles ▼          Quick search

☐ Select All
☑ All user roles
☐ Administrator
☐ GDPR Officer
☐ Project Leader
☐ Project Participant
☐ Site Administrator

☑ Include Active Users
☑ Include Locked Users
☐ Include Expired Users
☐ Include Deleted Users
☐ Include Users with no Departments

# User list

Edit or delete users from the user list.

Please note, that a user can not be deleted completely, as there can be important registrations or changes linked to the user, which must remain.

Click 'Edit' to modify the user account.

| | 43497 | Eriksen | Henning | HEdandemo@hrmts.cool | | Europe | Edit\|Delete |

# Edit user

By clicking 'Edit', the users profile will be accessed and the required modifications can be made.

Please remember to change the users password in case the user needs to have the login details sent again. The reason being that the password will not be visible in the email due to security reasons.

Click 'Save' to finish.

# Now you can create and manage users

Please contact Support for any further information ☺

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Chat with us

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