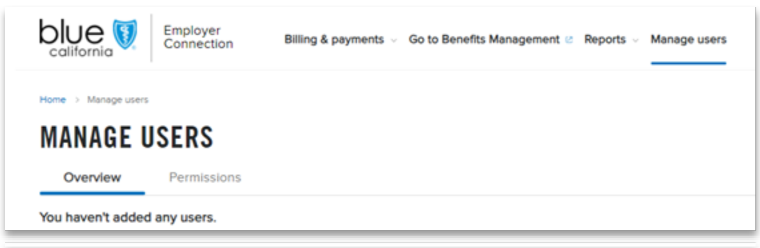
Manage users

Welcome to our guide for managing users. On the "Manage Users" page, Primary Contacts can seamlessly oversee Delegates within the system.

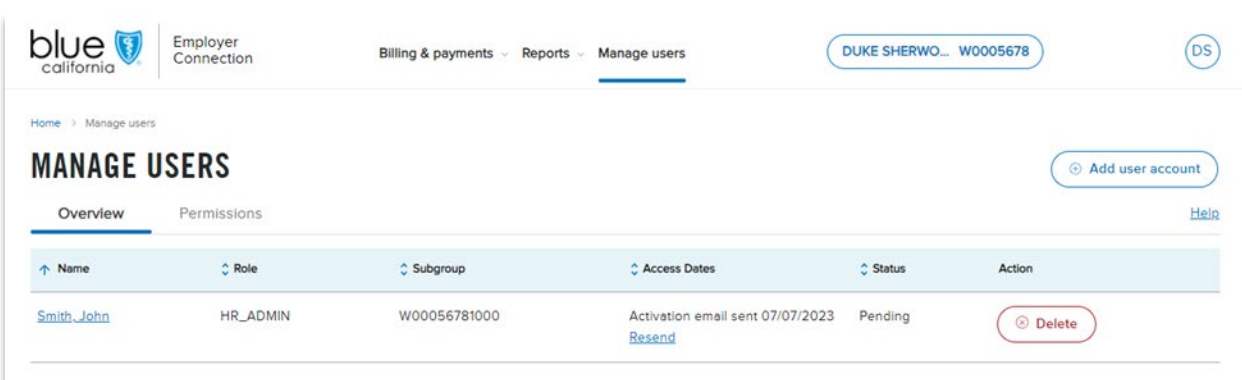


Delegate Visibility:

- Primary Contacts can access user management through the "Manage Users" section.
- There you can view a list of Delegate users. The list view becomes accessible when at least one delegate user is created.

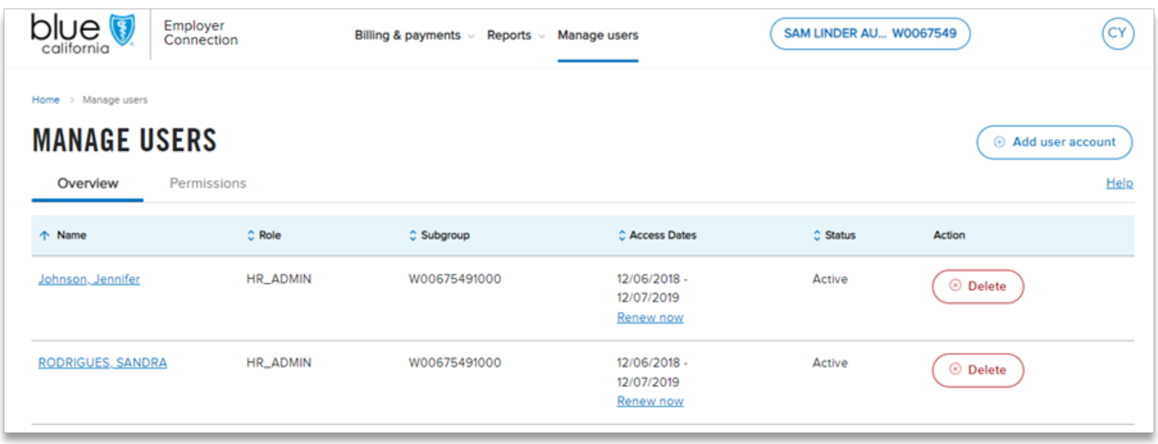
Streamlined Navigation:

- The "Manage Users" section provides sub-navigation options: "Overview" and "Permissions."
- Primary Contacts can add new users by clicking the "Add user account."



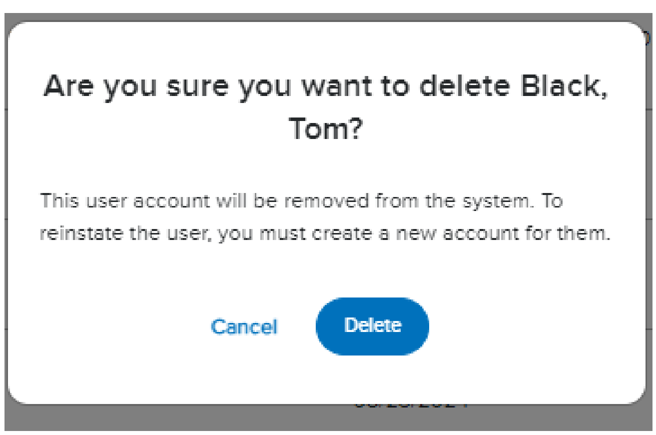
Comprehensive overview:

- The "Overview" tab displays users' roles, subgroup associations, access dates, status, and actions.
- The option to add user accounts and access the help window is conveniently located in the top right corner of the page.
- Sort fields like "Name," "Role," "Subgroup," "Access Dates," and "Status" for efficient organization.
- The "Action" field empowers Primary Contacts to delete users effectively.



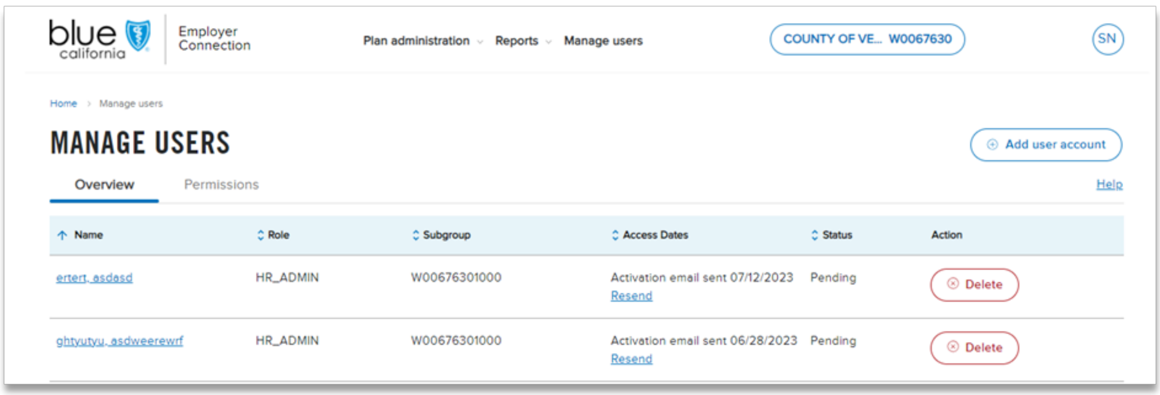
Deletion with confidence:

- Before the deletion of a user, a pop-up window will appear for final confirmation. If "Delete" is then selected, the user and their account access will be removed.



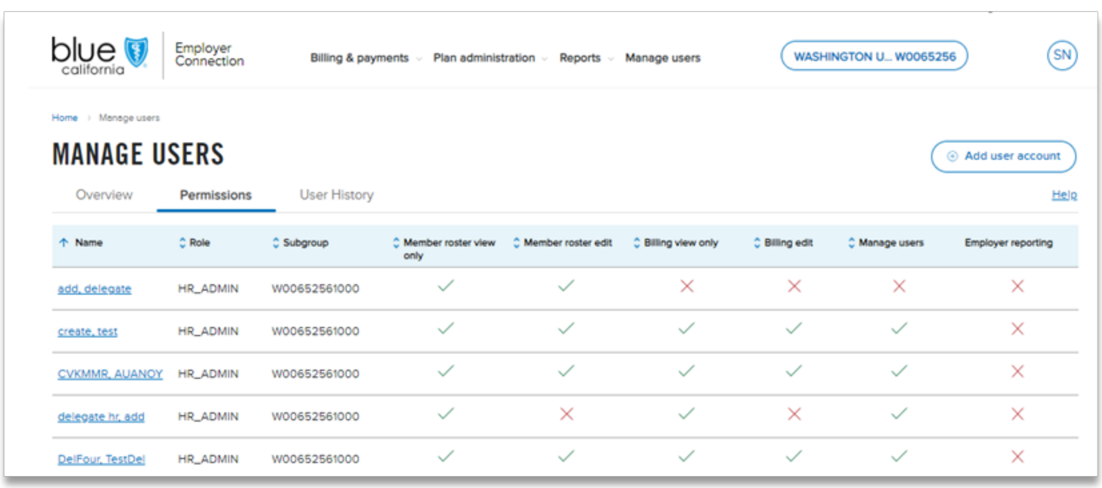
Efficient management features:

- Resend activation emails and facilitate renewal for expired access under the "Access Dates" header. When choosing to resend an activation email, a pop-up notification will confirm if the email was sent successfully.



In-depth permissions:

- The "Permissions" section lists users and their roles, subgroups, and access rights.



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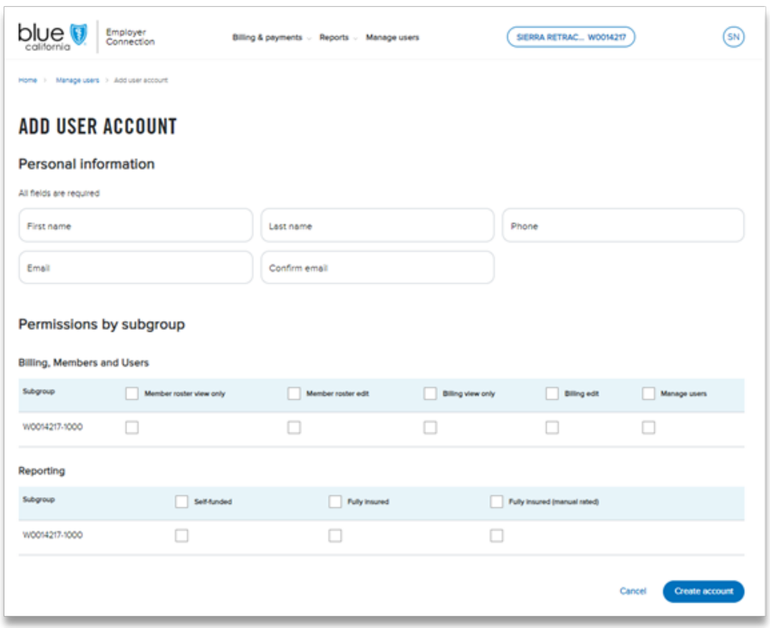
Adding new user accounts:

- Select "Add user account," input the necessary details. You can set permissions on a separate page.
- Customize permission sets based on subgroup requirements.
- Complete the check boxes and click "Create account" to generate login credentials.



We hope this guide will help you in all your reporting needs. If you have any questions, please refer to this guide or contact Employer Services for assistance.