

# Administering User Rights

This User Guide covers:

- How to access the list of users associated with your account
- How to edit an existing user
- How to create a new user
- An explanation of the User Roles you can assign against user accounts

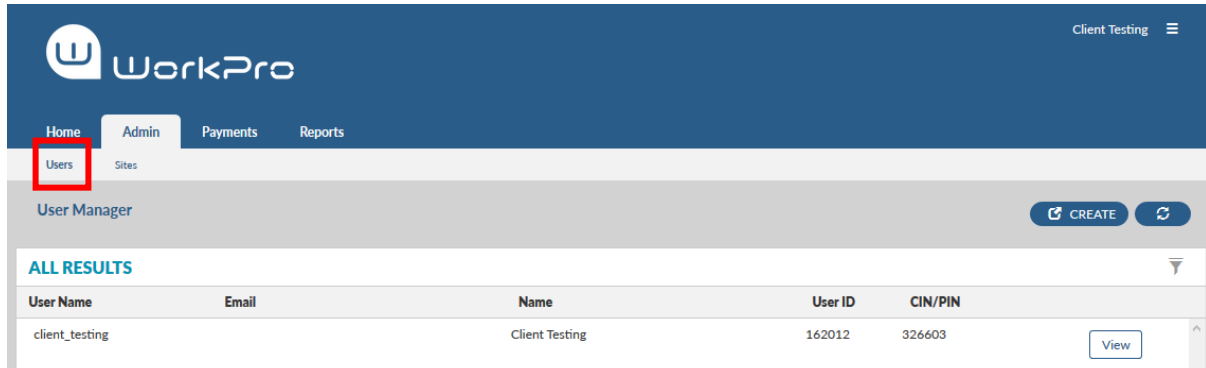
## Accessing the list of Users associated with your account

Step 1: Once logged into the WorkPro platform, select the **Admin** tab



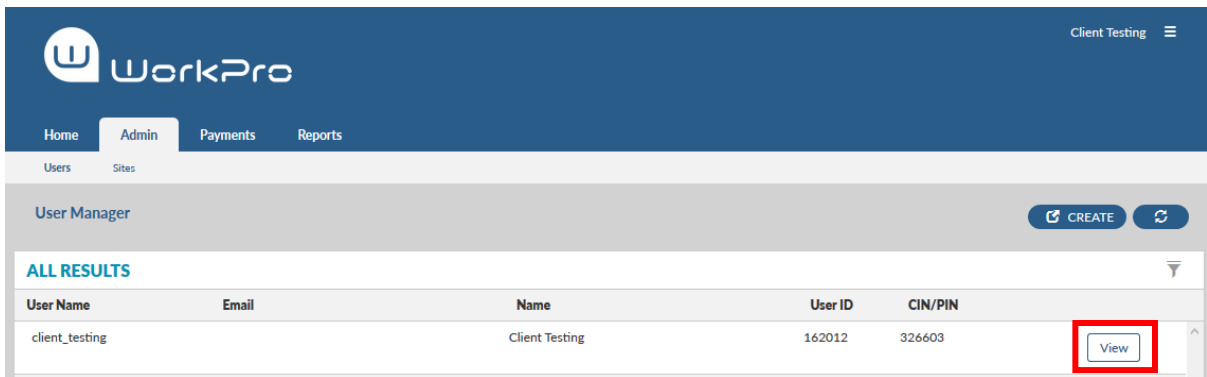
Step 2: Select **Users** tab to display a list of your company's user accounts.

From this screen you can edit an existing user or create a new user.



## To edit an existing user:

Step 1: Select the **View** button next to the user account you wish to edit



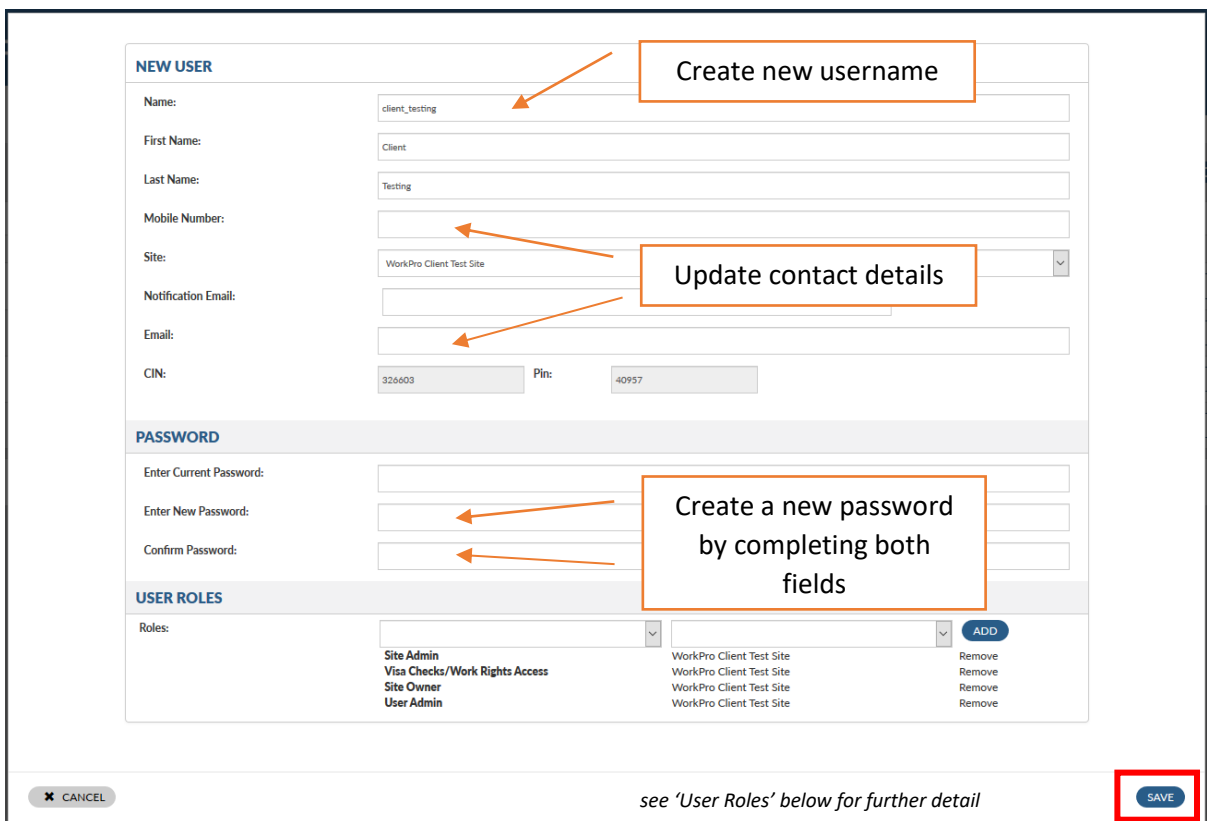
The screenshot shows the WorkPro User Manager interface. At the top, there is a navigation bar with 'Home', 'Admin', 'Payments', and 'Reports'. Below this, there are tabs for 'Users' and 'Sites'. The main content area is titled 'User Manager' and contains a table with the following data:

User Name	Email	Name	User ID	CIN/PIN	
client_testing		Client Testing	162012	326603	<a href="#">View</a>

The 'View' button for the 'client\_testing' user is highlighted with a red box.

Step 2: The **New User** pop-up box allows you to edit user account fields as per below. Ensure to select the **Save** button once you have made the required changes.

Note: Please ensure the 'Notification' Email field remains blank



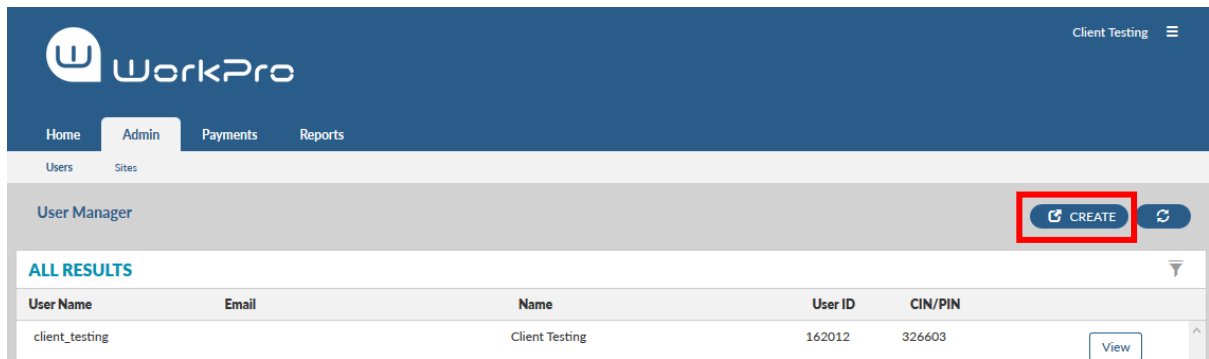
The screenshot shows the 'NEW USER' pop-up form. It is divided into several sections:

- NEW USER:** Contains fields for Name (client\_testing), First Name (Client), Last Name (Testing), Mobile Number, Site (WorkPro Client Test Site), Notification Email, Email, CIN (326603), and Pin (40957). Annotations include 'Create new username' pointing to the Name field and 'Update contact details' pointing to the Site and Email fields.
- PASSWORD:** Contains fields for Enter Current Password, Enter New Password, and Confirm Password. An annotation 'Create a new password by completing both fields' points to the Enter New Password and Confirm Password fields.
- USER ROLES:** Contains a dropdown menu for Roles, a list of roles (Site Admin, Visa Checks/Work Rights Access, Site Owner, User Admin), and a list of sites (WorkPro Client Test Site) with 'Remove' buttons. An 'ADD' button is also present.

At the bottom of the form, there is a 'CANCEL' button, a note 'see 'User Roles' below for further detail', and a 'SAVE' button highlighted with a red box.

## To create a new user:

Step 1: Select the **Create** button



The screenshot shows the WorkPro User Manager interface. The top navigation bar includes 'Home', 'Admin', 'Payments', and 'Reports'. The 'Admin' tab is active, and the 'Users' sub-tab is selected. The 'User Manager' section has a 'CREATE' button highlighted with a red box. Below the navigation is a table with the following data:

User Name	Email	Name	User ID	CIN/PIN
client_testing		Client Testing	162012	326603

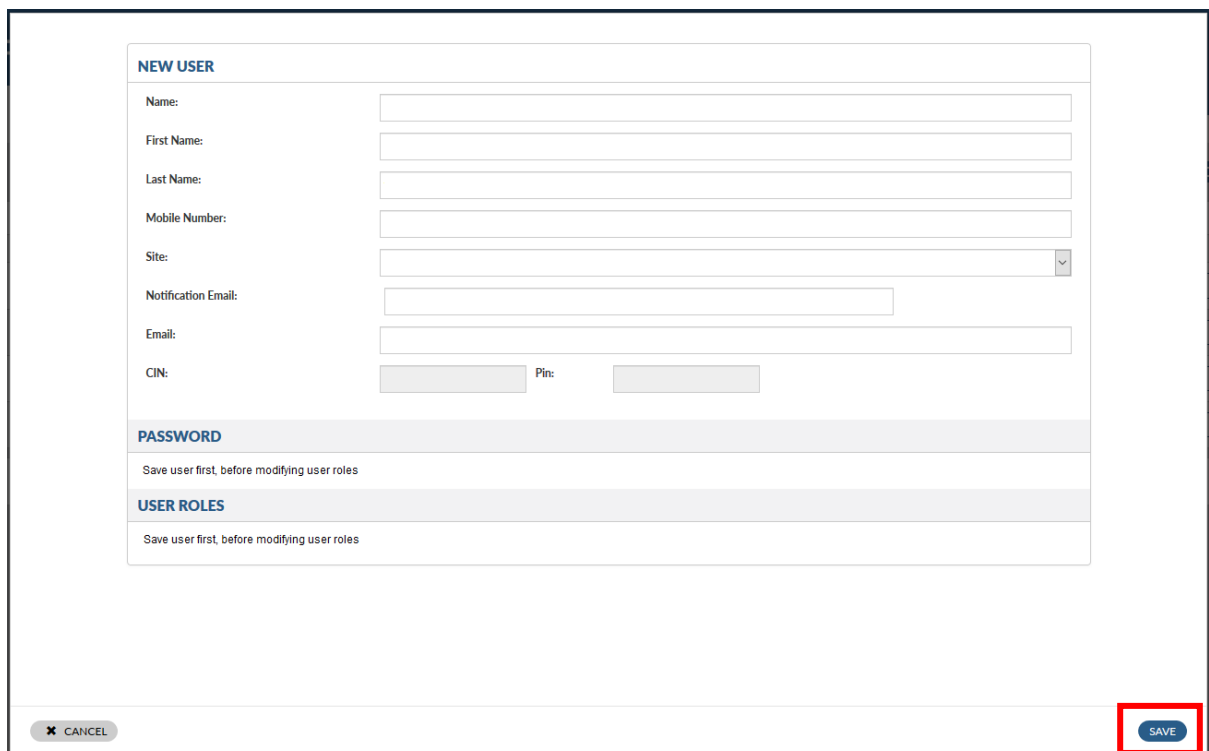
A 'View' button is located at the bottom right of the table.

Step 2: Complete user details within the **New User** pop-up box. The following fields are required to be completed:

- Name (username)
- First Name
- Last Name
- Mobile Number
- Site (where the user is based)
- Email (this is the email address where all alerts are sent)

Note: Please ensure the 'Notification' Email field remains blank

Ensure to select the **Save** button once you have made the required changes. The CIN & Pin fields are automatically populated and 'Password' and 'User Roles' functions become available when you select save.



The screenshot shows the 'NEW USER' pop-up form. The form contains the following fields:

- Name: [Text Input]
- First Name: [Text Input]
- Last Name: [Text Input]
- Mobile Number: [Text Input]
- Site: [Dropdown Menu]
- Notification Email: [Text Input]
- Email: [Text Input]
- CIN: [Text Input] Pin: [Text Input]

Below the form are three sections:

- PASSWORD**: Save user first, before modifying user roles
- USER ROLES**: Save user first, before modifying user roles

The 'SAVE' button is highlighted with a red box.

Step 3: Create a password by completing both 'Enter New Password' and 'Confirm Password' fields; disregard the 'Enter current Password' field. Assign the user their required roles against each site they require access using the dropdown menus and selecting add (See 'User Roles' below for further detail).

The screenshot shows a form with two main sections: 'PASSWORD' and 'USER ROLES'. The 'PASSWORD' section contains three input fields: 'Enter Current Password:', 'Enter New Password:', and 'Confirm Password:'. The 'Enter New Password:' and 'Confirm Password:' fields are highlighted with a red rectangular box. The 'USER ROLES' section contains a 'Roles:' label, a dropdown menu, a site selection dropdown menu, and an 'ADD' button. The 'ADD' button is also highlighted with a red rectangular box. Below the form, two orange boxes with arrows point to the 'Roles:' dropdown and the site selection dropdown. The first box is labeled 'Roles dropdown menu' and the second is labeled 'Site dropdown menu'.

Ensure to select the **Save** button once you have made the required changes

## User Roles

**Candidate:** Restricts the user created to a candidate account. No administrative access where this role has been assigned.

**Site Admin:** Has access to all functionalities on the site. This includes billing, reporting, user management, and training package management. Assigning users this access allows for configuration policies against the client account that can ensure they are the only ones able to view police check certificates.

**User Admin:** AKA "Candidate Admin", has all the functions to request and perform actions on candidates. Cannot modify packages.

**Site Owner:** Designation of who owns the site. Cannot be allocated to a user that is not also a 'site admin'.

**Verification View:** Allows the user to view the verifications (modules) and training packages of another site. Does not grant access to view police checks.