Administering User Rights

This User Guide covers:

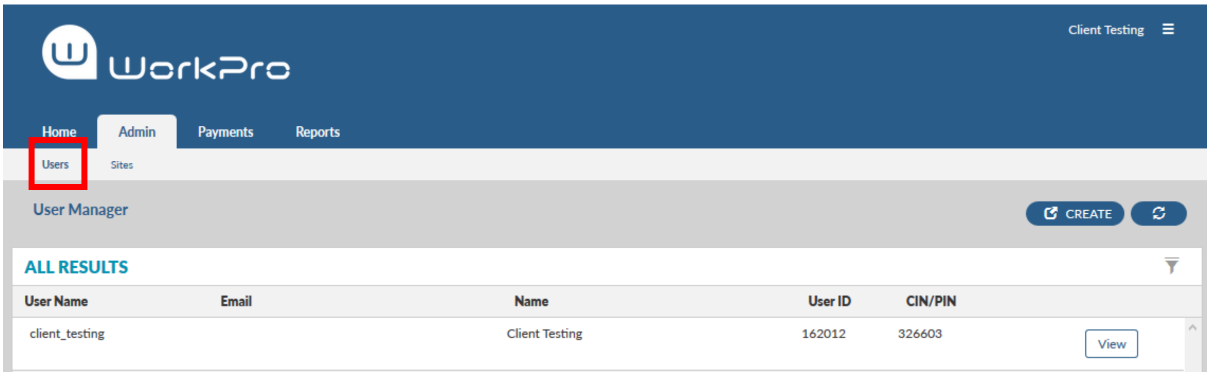
- How to access the list of users associated with your account
- How to edit an existing user
- How to create a new user
- An explanation of the User Roles you can assign against user accounts

Accessing the list of Users associated with your account

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

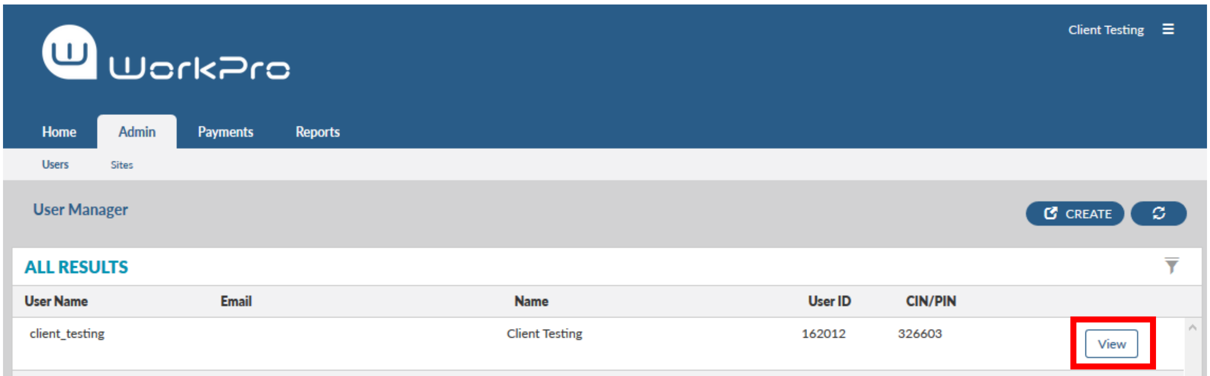
Step 2: Select **Users** tab to display a list of your company's user accounts.

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



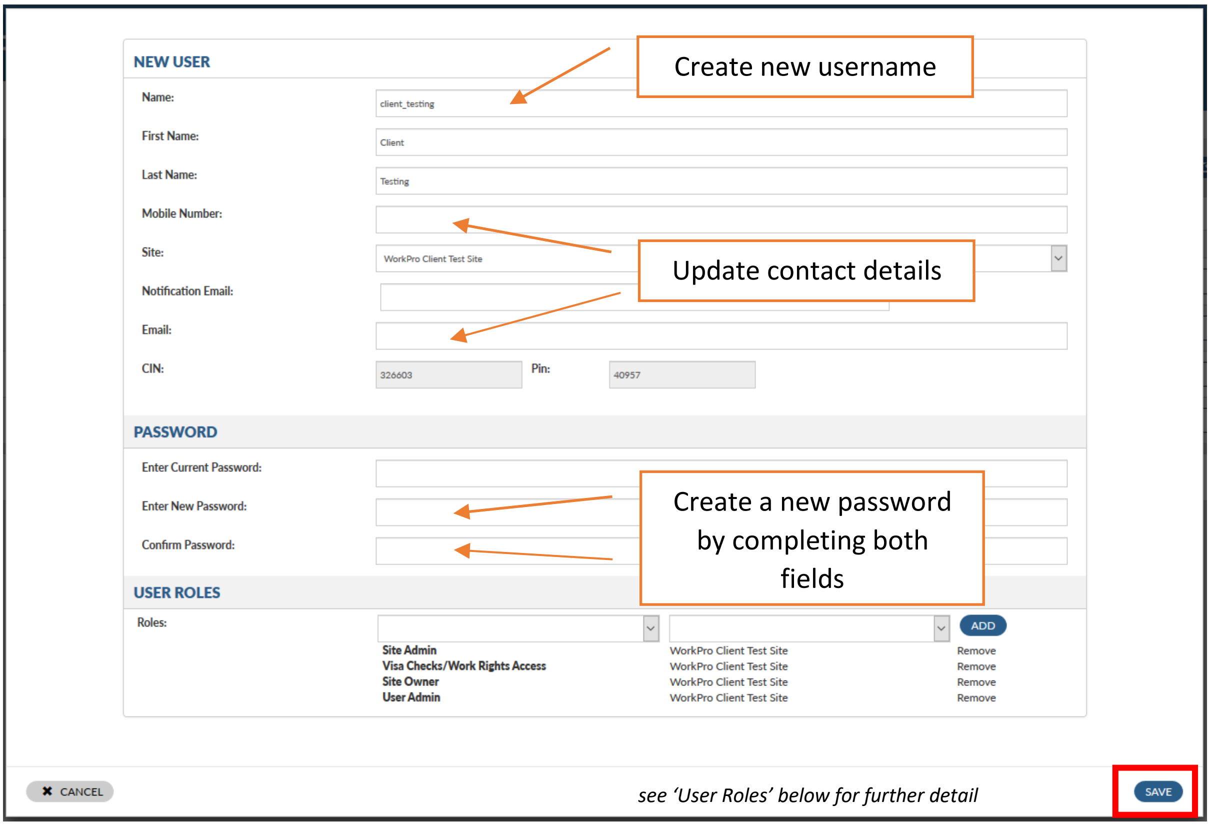
To edit an existing user:

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



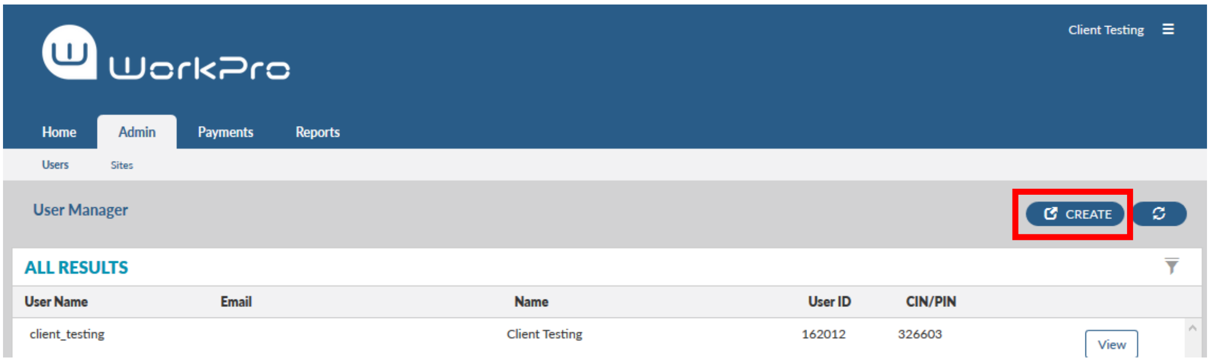
Step 2: The **New User** pop-up box allows you to edit user account fields as per below. Ensure to select the **Save** button once you have made the required changes.

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



To create a new user:

Step 1: Select the **Create** button

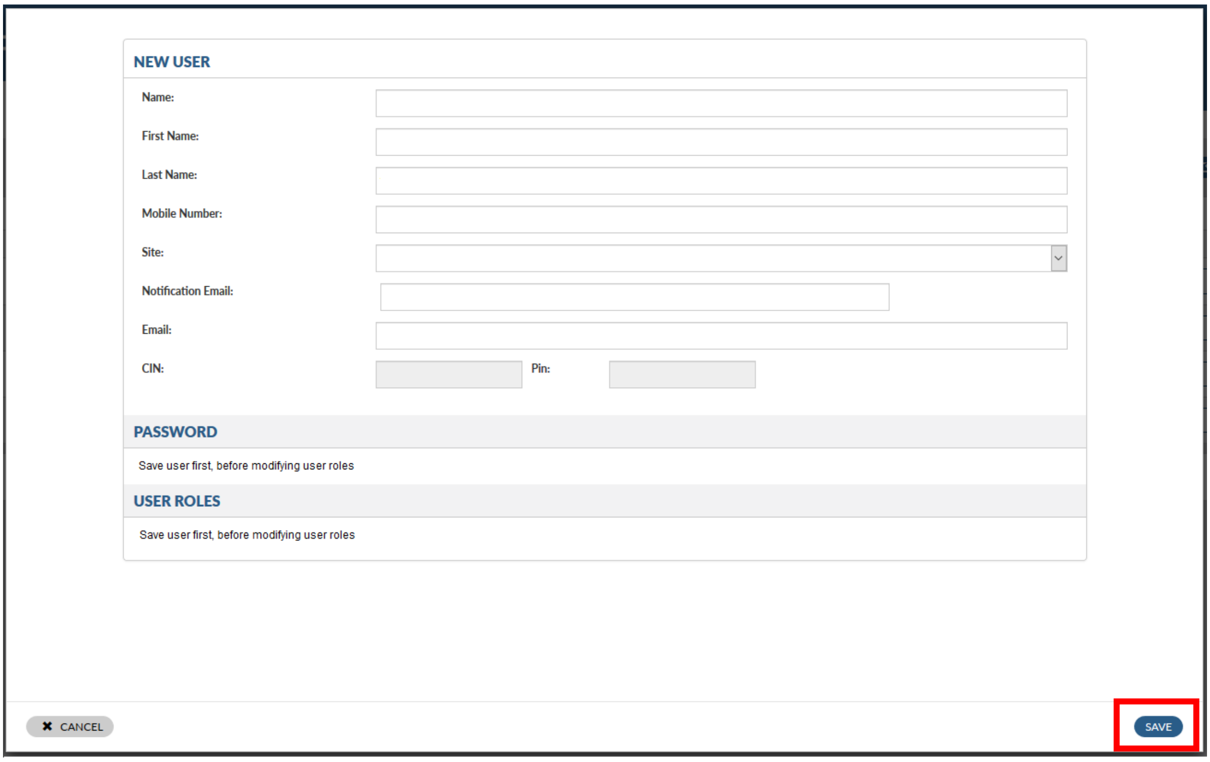


Step 2: Complete user details within the **New User** pop-up box. The following fields are required to be completed:

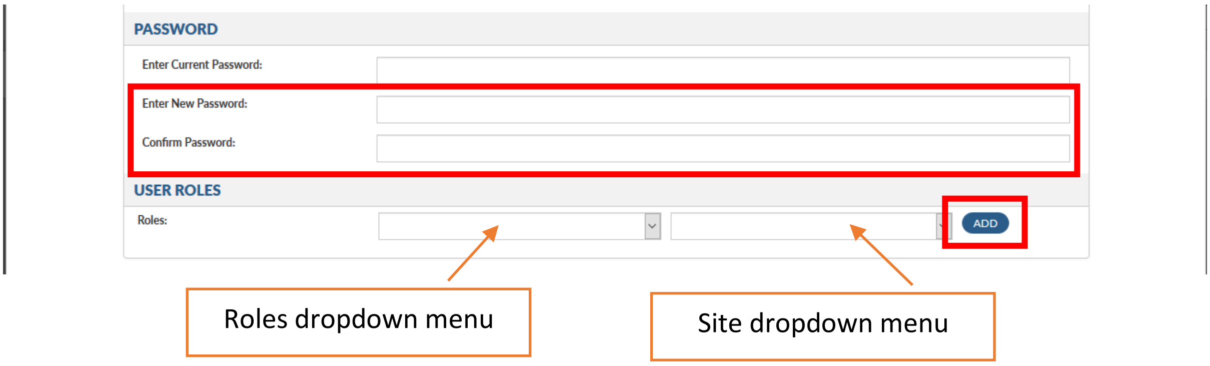
- Name (username)
- First Name
- Last Name
- Mobile Number
- Site (where the user is based)
- Email (this is the email address where all alerts are sent)

<u>Note:</u> 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.



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).



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.