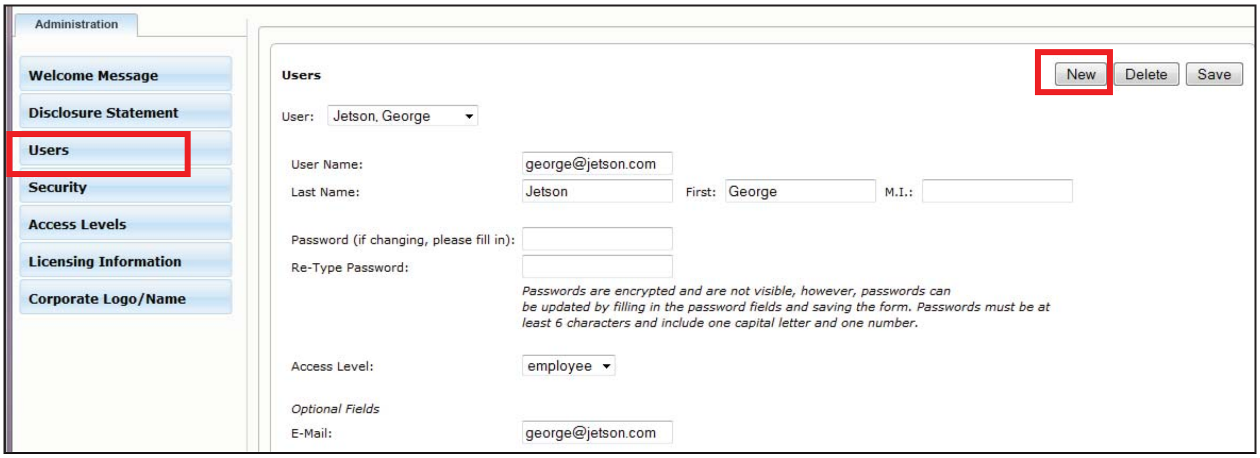
Administration: Adding New Users

1. Click on the “Users” button on the left navigation.

2. A list of current users will appear. Click the “New” button on the far right side of the screen.



3. The “New User” form will appear (see below).

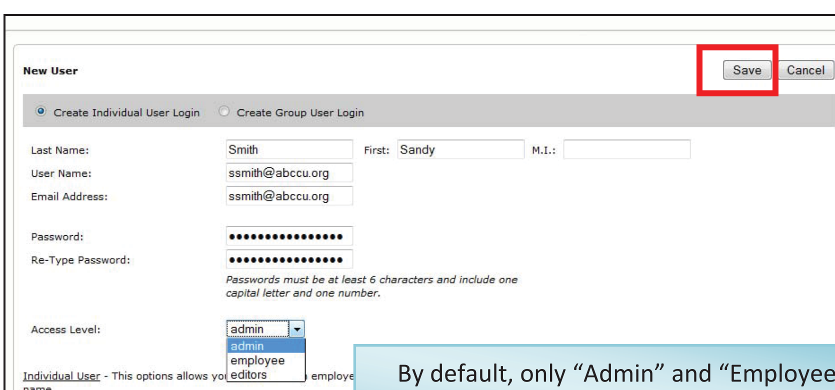
4. Two types of users can be created: Individual or Group Users.

   Individual User is a distinct User Name and Password for a specific individual. A Group User is a User Name and Password that is shared among a group who all have the same access level (i.e. Board of Directors or Employees with read-only access). **Tip: An email address must be entered in order for the user to utilize the “Forgotten Password” function from the login screen. Group users will not have an email address option.**

5. For an Individual, type in the First and Last Name, the User Name, Email address, and Password. (Passwords are encrypted and must be entered in twice for security reasons). Group Users will have a Group Name (instead of First/Last) and will not have an option for email address.

6. From the dropdown list, choose the Access Level for this user.

7. When you’re finished, click the “Save” button.



By default, only “Admin” and “Employee” access levels are available. To add additional access levels as seen here, see page 60

Administration: Editing or Deleting Users

1. Click on the “Users” button on the left navigation.

2. This will bring up the list of current users. Use the dropdown list to view individual user information.

3. For any user, you can update the user’s first or last name, user name, password or access level. When any changes are made, click the “Save” button.

4. To delete a user, click the “Delete” button. This will permanently delete this user.

Administration: Creating Additional User Access Levels

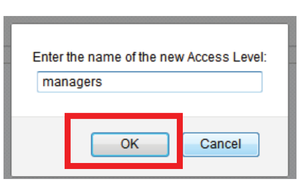
By default, there are only two access levels: *Admin* and *Employee*.

Admin level access gives the user full access to perform any function in the system. Admin is the only level of access that allows a user to access the Administration area. *Employee* level access is read-only. A user with Employee access can login and will only see items posted in the “Employee Manuals” and “Employee Resources” folders on the Home Page. No navigation (other than Change Password) will be available to an Employee level user.

You may find it useful to have access levels between Admin and Employee. Follow the steps below to create and define custom levels of access.

1. Click on the “Access Levels” button on the left navigation.

2. Click “New” to create a new access level. You will be asked to name the access level. Name the access level then click OK.



Administration: Creating Additional User Access Levels (continued)

3. A blank "Access Levels" form will appear. Use the checkboxes to determine what areas this access level can access.

- **Manual Builder** allows this user to access the Manual Builder area, and the user will have full rights to edit the Working Manual, including publishing, archiving, etc.
- **Library** allows the user to access the resource found in the Library.
- **Forms** allow the user access to the forms found in the Forms area.
- **Storage** allows the user to full access to the Storage area, including uploading files and posting them to the "Employee" and "Managers Resources" folders.
- **Manager Resources** will allow this user to see the documents posted in the "Manager Resources" folder, as well as manuals posted to the "Manager Manuals" folder.

  Note: if all options are checked, this user can do anything except go into the ADMINISTRATION area.

4. Once your options are selected for this user level, click Save.

5. You can also delete or rename existing access levels, using the buttons on the far right of the screen.