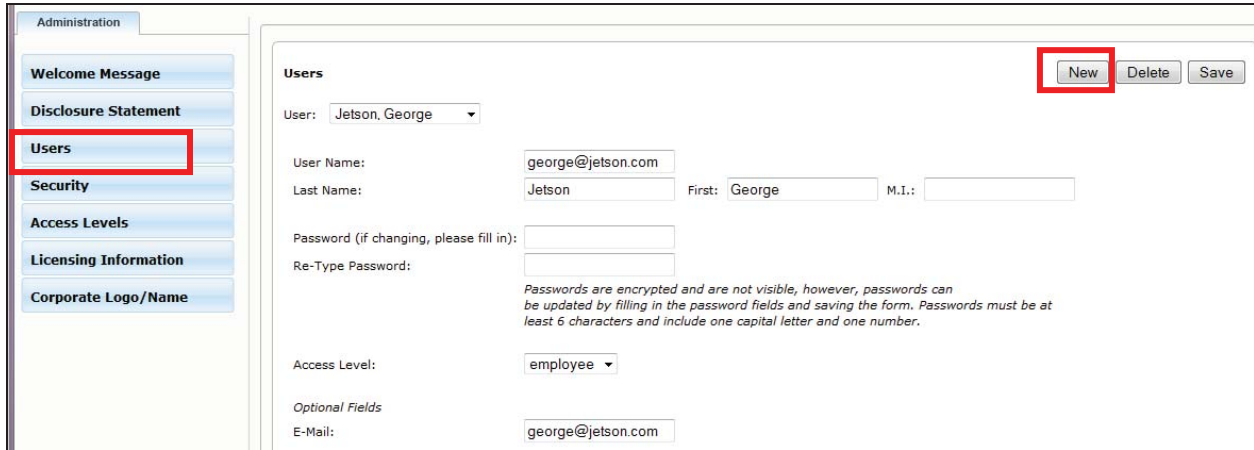


## Administration: Adding New Users

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.

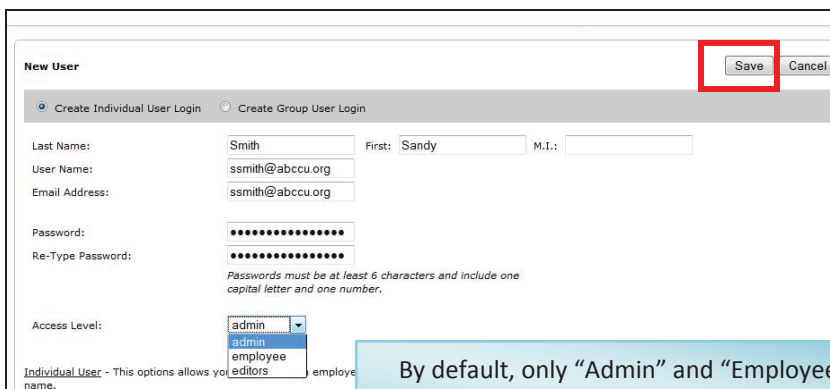


The screenshot shows the 'Administration' interface. On the left is a navigation menu with buttons for 'Welcome Message', 'Disclosure Statement', 'Users', 'Security', 'Access Levels', 'Licensing Information', and 'Corporate Logo/Name'. The 'Users' button is highlighted with a red box. The main content area is titled 'Users' and features a dropdown menu for 'User' (currently showing 'Jetson, George'). To the right of this dropdown are three buttons: 'New', 'Delete', and 'Save'. The 'New' button is highlighted with a red box. Below the dropdown are input fields for 'User Name' (filled with 'george@jetson.com'), 'Last Name' (filled with 'Jetson'), 'First' (filled with 'George'), and 'M.I.'. There are also fields for 'Password' and 'Re-Type Password'. A note states: 'Passwords are encrypted and are not visible, however, passwords can be updated by filling in the password fields and saving the form. Passwords must be at least 6 characters and include one capital letter and one number.' An 'Access Level' dropdown is set to 'employee'. At the bottom, there are 'Optional Fields' including 'E-Mail' (filled with 'george@jetson.com').

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.

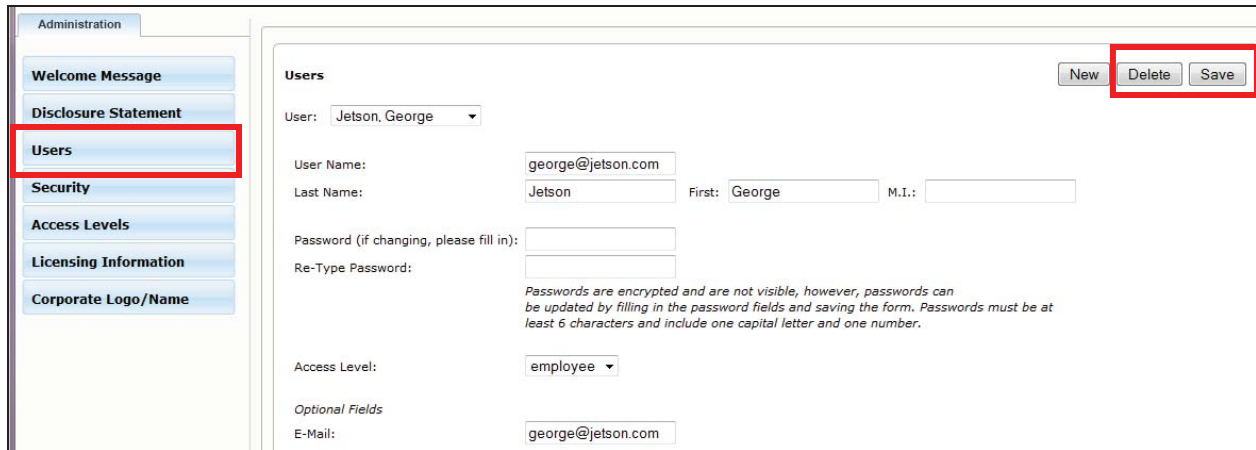


The screenshot shows the 'New User' form. At the top right are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted in red. Below are two radio buttons: 'Create Individual User Login' (selected) and 'Create Group User Login'. The form includes fields for 'Last Name' (filled with 'Smith'), 'User Name' (filled with 'ssmith@abccu.org'), 'Email Address' (filled with 'ssmith@abccu.org'), 'First' (filled with 'Sandy'), and 'M.I.'. There are also fields for 'Password' and 'Re-Type Password'. A note states: 'Passwords must be at least 6 characters and include one capital letter and one number.' An 'Access Level' dropdown is open, showing options: 'admin', 'admin', 'employee', and 'editors'. A small text box at the bottom left says: 'Individual User - This options allows you to enter a name.' A blue callout box is overlaid on the bottom right of the form.

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.



The screenshot shows the 'Administration' interface. On the left is a navigation menu with buttons for 'Welcome Message', 'Disclosure Statement', 'Users', 'Security', 'Access Levels', 'Licensing Information', and 'Corporate Logo/Name'. The 'Users' button is highlighted with a red box. The main content area is titled 'Users' and shows a dropdown menu for 'User: Jetson, George'. Below this are input fields for 'User Name: george@jetson.com', 'Last Name: Jetson', 'First: George', and 'M.I.'. There are also fields for 'Password (if changing, please fill in):' and 'Re-Type Password:'. A note states: 'Passwords are encrypted and are not visible, however, passwords can be updated by filling in the password fields and saving the form. Passwords must be at least 6 characters and include one capital letter and one number.' The 'Access Level:' is set to 'employee'. At the bottom, there is an 'Optional Fields' section with 'E-Mail: george@jetson.com'. In the top right corner, there are three buttons: 'New', 'Delete', and 'Save'. The 'Delete' and 'Save' buttons are highlighted with a red box.

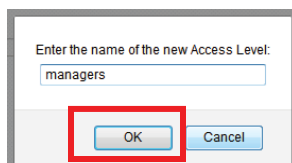
## Administration: Creating Additional User Access Levels

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.



The screenshot shows a dialog box titled 'Enter the name of the new Access Level:'. It contains a text input field with the word 'managers' entered. Below the input field are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red box.

## 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.



**Access Levels** New Rename Delete Save

Access Level:

HR Suite

- Manual Builder
- Forms
- Library
- Storage
- Manager Resources

- **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.