

## Deleting files in Storage

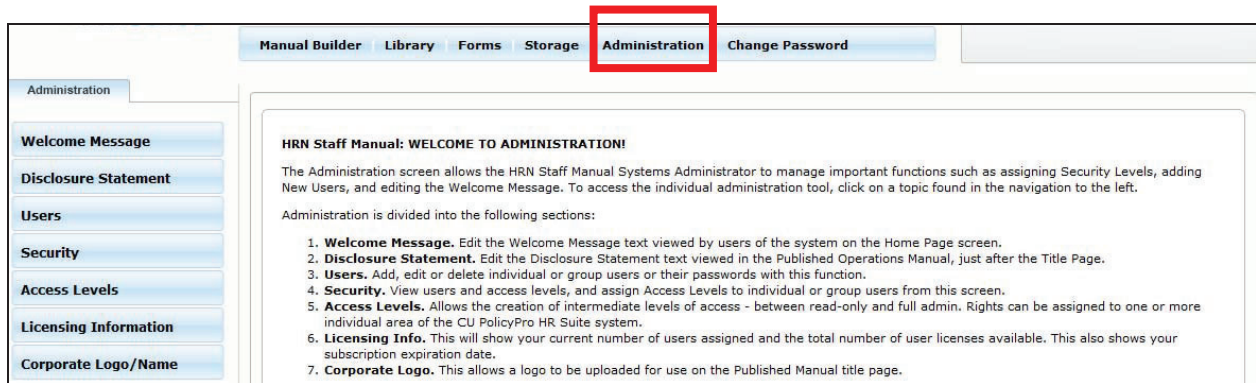
1. To delete a document from the Storage area, click the “Delete” icon to the far right of the file name.



2. This will permanently delete the document from the Storage area. If this document is deleted from the “Employee Resources” or the “Manager Resources” folders, it will no longer appear on the Home Page.

## Administration

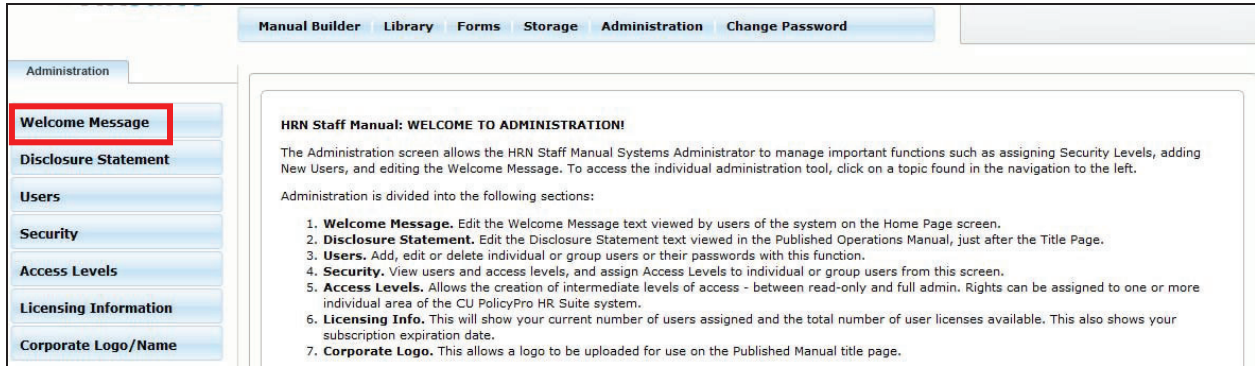
Click on “Administration” in the top navigation.



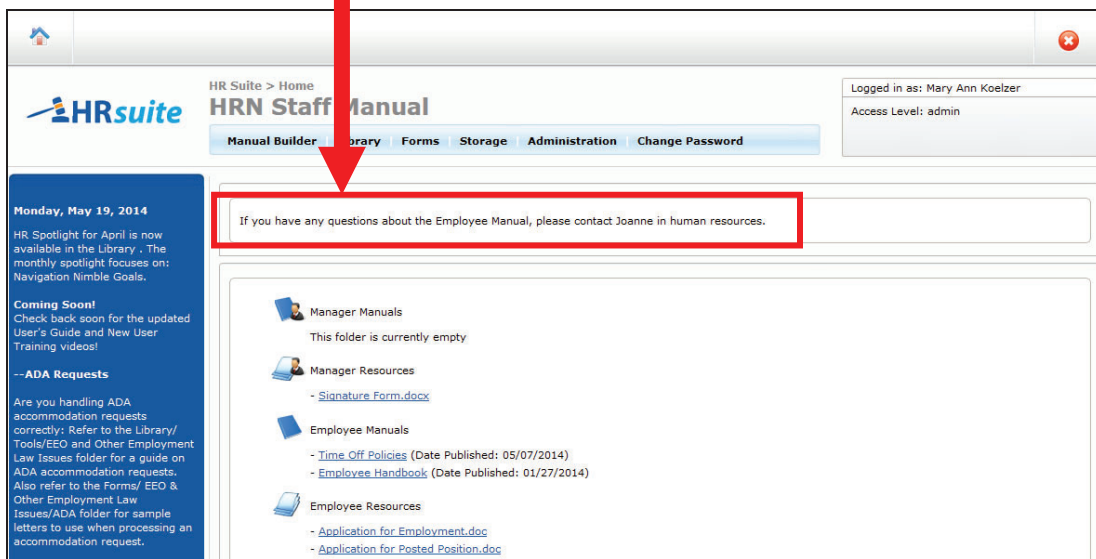
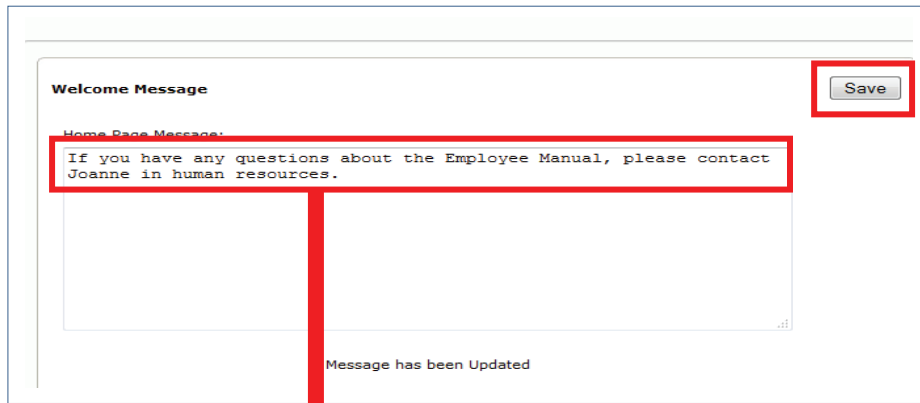
The Administration Area allows you to manage several functions, including the managing users, adding a Welcome Message to the Home Page, adding a disclosure to your published manual, uploading your logo, and viewing your license and subscription information.

# Administration: Adding a Welcome Message to the Home Page

1. Click on the “Welcome Message” button on the left navigation.



2. Type in the “Welcome Message” field any message you want to appear on the Home Page. Click “Save” when done.



# Administration: Adding a Disclosure to the Published Manual

1. Click on the “Disclosure Statement” button on the left navigation.
2. Type in the “Disclosure Statement” field the Disclosure you want to appear on the Published Manual. Click “Save” when done.
3. This message will now appear in the Published Manual, on a separate page between the Title Page and the Table of Contents.

**Note:** Some organizations choose to use the “Additional text on Title Page” field to keep disclosure information on the Title Page. See page 37 for more information on publishing options and the “Additional text on Title Page” field.

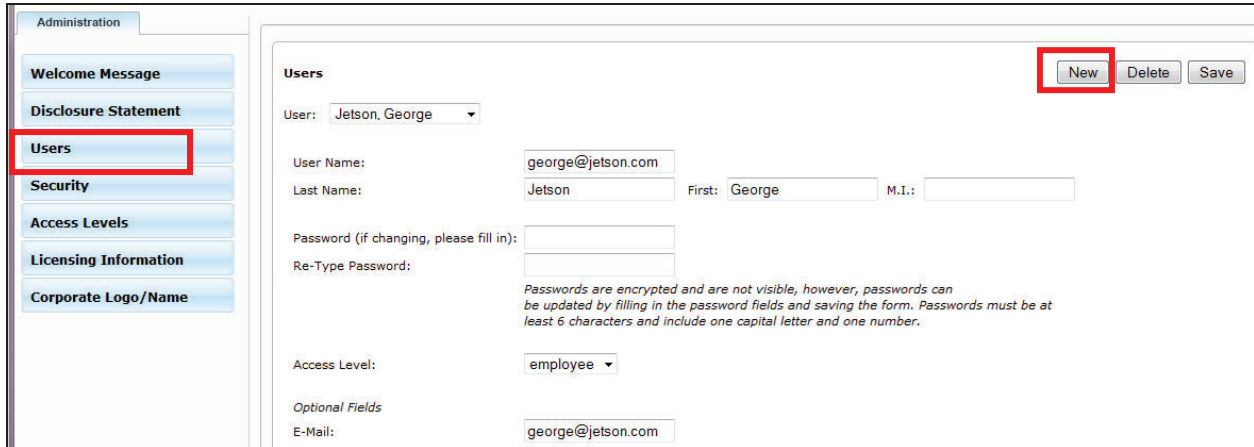
The screenshot shows a web interface with a left-hand navigation menu and a main content area. The navigation menu includes buttons for "Welcome Message", "Disclosure Statement", "Users", "Security", "Access Levels", "Licensing Information", and "Corporate Logo/Name". The "Disclosure Statement" button is highlighted with a red box. The main content area is titled "Disclosure Statement" and contains a text input field with the following text: "Published Manual Disclosure Statement: This manual is the property of ABC Credit Union and may not be copied or distributed without the written permission of the ABC Credit Union Board of Directors." A "Save" button is located in the top right corner of the main content area, also highlighted with a red box.

The screenshot shows a printed page from the "Employee Handbook" titled "HRN Staff Manual". The page contains a "Print" button in the top left corner. The main title is "Employee Handbook" followed by "HRN Staff Manual". Below the title is a red-bordered box containing the disclosure statement: "This manual is the property of ABC Credit Union and may not be copied or distributed without the written permission of the ABC Credit Union Board of Directors." Below the box is the "Table of Contents" section, which lists several sections and policies:

- [Section 1000: Introduction and Employee Acknowledgement](#)
  - [Policy 1030: Mission Statement](#)
  - [Policy 1040: Overview of the Company](#)
- [Section 2000: General Management Practices](#)
- [Section 3000: Employment Status And Human Resource Records](#)
  - [Policy 3010: Employee Classification](#)
  - [Policy 3020: Initial Employment Period](#)
  - [Policy 3030: Human Resources Files and Records](#)
  - [Policy 3040: Reference Requests](#)

## 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.

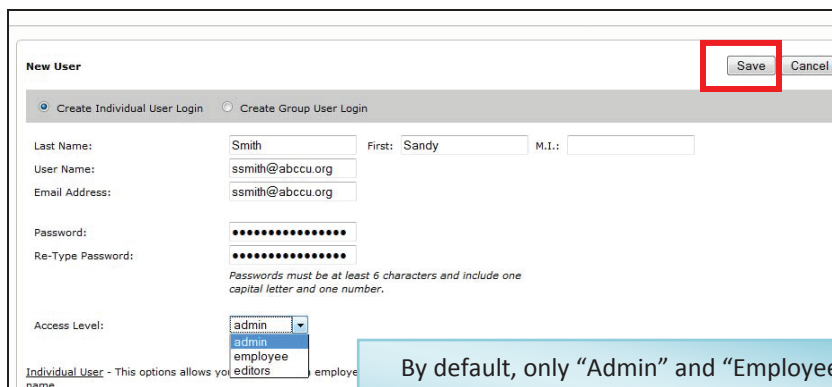


The screenshot shows the 'Administration' interface. On the left is a navigation menu with buttons for 'Welcome Message', 'Disclosure Statement', 'Users', 'Security', 'Access Levels', 'Licensing Information', and 'Corporate Logo/Name'. The 'Users' button is highlighted with a red box. The main content area is titled 'Users' and features a dropdown menu for 'User' set to 'Jetson, George'. At the top right of this area are three buttons: 'New', 'Delete', and 'Save'. The 'New' button is highlighted with a red box. Below these are input fields for 'User Name' (george@jetson.com), 'Last Name' (Jetson), 'First' (George), and 'M.I.'. There are also fields for 'Password' and 'Re-Type Password' with a note: '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' (george@jetson.com).

3. The “New User” form will appear (see below).
4. Two types of users can be created: Individual or Group Users.

An 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.

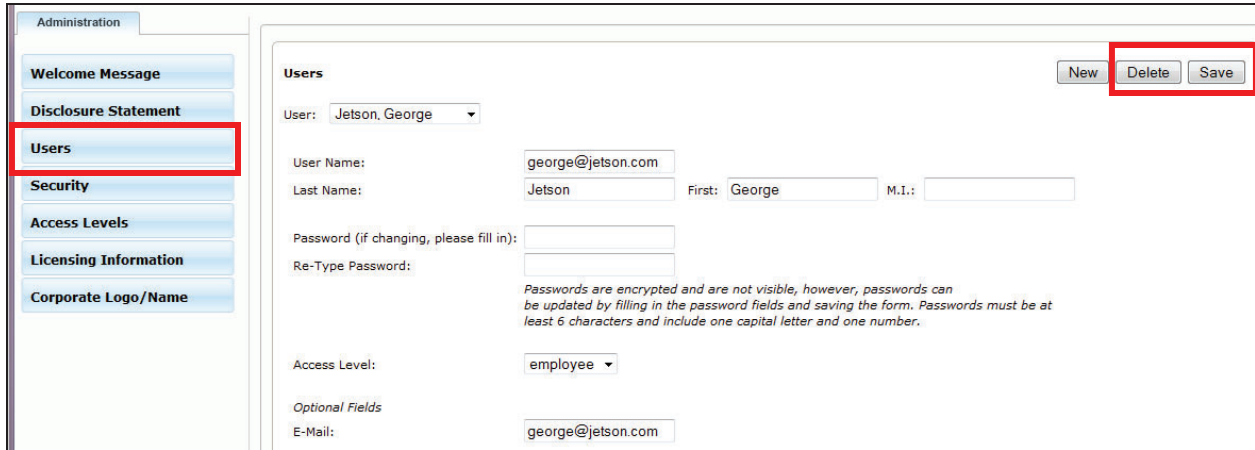


The screenshot shows the 'New User' form. At the top right are 'Save' and 'Cancel' buttons, with 'Save' highlighted in red. Below are two radio buttons: 'Create Individual User Login' (selected) and 'Create Group User Login'. The form includes fields for 'Last Name' (Smith), 'User Name' (ssmith@abccu.org), 'Email Address' (ssmith@abccu.org), 'First' (Sandy), and 'M.I.'. There are also fields for 'Password' and 'Re-Type Password' with a note: '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 note at the bottom left reads: '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. After 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 with a left-hand navigation menu. The 'Users' option is highlighted with a red box. The main content area is titled 'Users' and features a 'New', 'Delete', and 'Save' button bar at the top right, with the 'Delete' button also highlighted in red. Below this, there is a dropdown menu for 'User' set to 'Jetson, George'. The form includes fields for 'User Name' (george@jetson.com), 'Last Name' (Jetson), 'First' (George), and 'M.I.'. There are also fields for 'Password' and 'Re-Type Password', with a note stating: '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' and there is an 'Optional Fields' section with an 'E-Mail' field containing george@jetson.com.

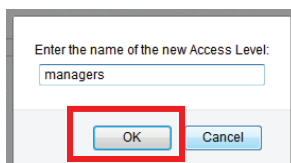
## Administration: Creating Additional User Access Levels

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:'. The input field contains the text 'managers'. At the bottom of the dialog, there 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 resources found in the Library.
- **Forms** allows the user access to the forms found in the Forms area.
- **Storage** allows the user full access to the Storage area, including uploading files and posting them to the “Employee Resources” 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 everything 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.

## Administration: Viewing/Editing Multiple Users at Once

1. Use the “Security” tab to quickly view all user levels and user IDs, and to quickly change the user access level for multiple users at one time.
2. Click on the “Security” button on the left navigation.
3. Clicking on the various access levels will show all users with that level of access in the left side box. All users with any other level of access will appear on the right side.



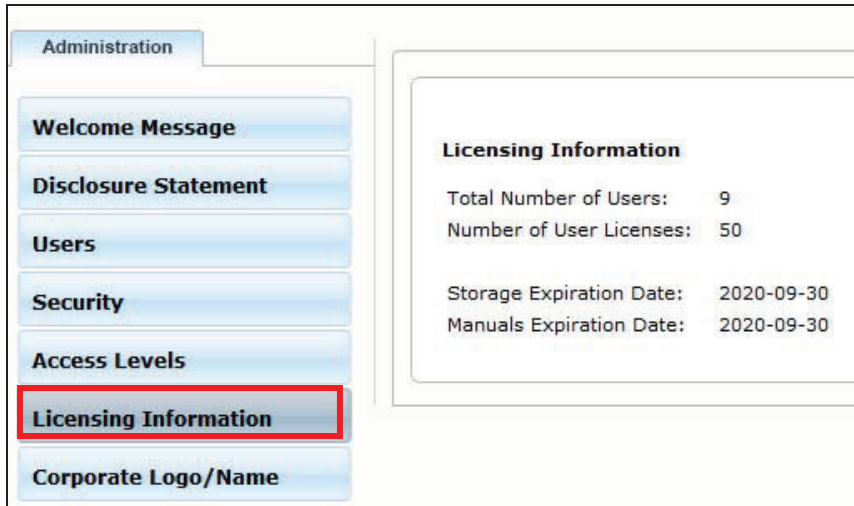
4. Click on a user and use the “<Add>” or “Remove>” buttons to move users in or out of any access level. This can also be done by individual user in the Users tab.



**Tip:** You will not see your own User Name. This prevents you from inadvertently removing yourself as an admin.

## Administration: Viewing License and Subscription Information

1. To view your license and subscription information, click on the “Licensing Information ” button on the left navigation.
2. This will display the number of users you currently have set up, and the total number available. By default, each organization receives 50 user licenses.
3. This will also display your subscription expiration date.



## Administration: Updating Corporate Logo and Organization Name

1. A logo can be uploaded in the Administration area to be used on the title page of any published manual.
2. Click on the “Corporate Logo/Name” button on the left navigation.
3. Use the “Browse” button to upload your logo. Your current logo will show below the “Browse” field.  
**Note:** Depending on the internet browser you are using, this button may be titled something other than “Browse.”
4. To replace a current logo, simply use the “Browse” button to upload the updated logo, which will replace any logo currently in the system.

