Configuring Users and Groups

User Management Overview

Verifield offers features for managing users that simplify the maintenance process. However, depending on the size of your organization, and considering the amount of turnover, internal transfers, and promotions that occur, managing users can be a daily task of a system administrator at the corporate level, or a system customizer or manager at the location or department level.

The following sections give a brief overview of some of the important concepts which are important to manage user accounts properly.

Login Status

There are two types of persons who can be registered in Verifield. The first type is users. Generally, those are employees of your organization who can actually log into the system and work with it. The other type is persons. Those can be employees of your organization that do not need to log into the system or those can be contacts which represent various people with whom you do business. Persons cannot log into Verifield, but it is essential to have them registered in order to keep their contact information for various purposes.

Users and persons are distinguished by their login status. Login status determines user’s ability to log into the application. There are three login statuses in Verifield: “Active”, “Inactive” and “Inactive - Locked”.

Active login status

A person with an “Active” login status can log into the application. The name of this person will show up on the people controls in the legal register entitlement, in the item permissions and in the groups. Also, this person will show up on Assigned to and Owner controls on items’ pages.

If the login status of a user is changed from “Inactive” to “Active”, the user will receive an email with a link to a web page which will allow them to set a new password and then log into Verifield.

Inactive login status

A person with an “Inactive” login status cannot log into the application. The name of this person will not show up on the people controls in the legal register entitlement, in the item permissions and in the groups. Also, this person will not show up on Assigned to and Owner controls on item page.

If the login status is set to “Inactive” from “Active”, the user will not be able to log into the application anymore. Additionally, they will no longer receive any communication or information from the application.

Inactive login status does not prevent a person record from having an active profile in the application.

Inactive - Locked

This status is displayed when the Login Status for a Person is set to "Inactive" automatically by the system and the account is locked due to failed login attempts as a security measure. A person with an "Inactive - Locked" Login Status cannot log into the application. An entitled administrator must manually unlock the person's login account.

Profile Status

Profile status determines whether the person can be specified as an employee and/or member of your organization when filling out information in the application. Profile status can be either “Active” or “Inactive”.

Active profile status

The name of a user with “Active” profile status can show up on the people control on an item page and on an org profile page. An active profile does not give this person the ability to log into this application.
Inactive profile status
A person with “Inactive” profile status can no longer be selected as an employee and/or member of your organization. An inactive profile does not prevent this person for having the ability to log into the application.

User Profile
In order to create a new person with inactive login status, you need to provide only the first and the last name of that person. To create a person with active login status, you need to additionally specify their email address and username. More detailed information about a person is entered using custom user profiles. A user profile gives you the access to a set of custom fields which allow you to enter specific details about the user, both business-related and personal. Verifield allows you to associate any number of user profiles with a person record.

As an administrator, you are free to edit existing user profiles or create new ones to meet the needs of your organization.

Group Membership
A group is a team of users who share and collaborate on work projects. Advantage of using groups is that information can be shared or access to resources granted more quickly with a group of users instead of individually sharing the information without granting access to each member of the group.

A user can be a member of any number of groups. Users can be added to a group in either of two ways:

- From the “Members” tab in the group’s form.
- From an individual person’s record where you can specify each of the groups of which that user is a member.

This section describes how to add a user to a group from their individual user record. “Configuring groups” section of this chapter describes how to add users to a group from the group’s form.

User Permissions
Each user has certain permissions which define what actions this user can perform in the system. Those include individual permissions provided to the user individually, and group permissions which apply to the individual user as a member of a group. The net result is that administrators are provided with precise control over every action each user can perform in the system.

Adding, modifying and deleting people records
To add new, modify, delete or view people records, on the main menu, click Administration, and then click Manage People. The “Manage People” screen will appear.

![Screenshot: “Manage People” screen]
The page shows a list of person records available in the system filtered by default or according to user selected options in the Show and the Filter widgets. The list provides the following information about each person’s record:

<table>
<thead>
<tr>
<th>Person</th>
<th>Displays the name of the person. Also, there is a context menu associated to each person’s record. To open the menu, click the icon in the “Person” column.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profiles</td>
<td>When only one profile is associated to a person record, this column displays the name of that profile. When more than one profile is associated to a person, a count of the number of associated profiles will be shown. You will be able to see the list profile names in a custom tooltip.</td>
</tr>
<tr>
<td>Profile Status</td>
<td>Displays the current profile status for a person.</td>
</tr>
<tr>
<td>Username</td>
<td>Displays the username for a person. When a person has no associated username, a “--” is displayed instead.</td>
</tr>
<tr>
<td>Email Address</td>
<td>Displays the email address for a person. When an email address is not available for a person, displays a “--” instead.</td>
</tr>
<tr>
<td>Login Status</td>
<td>Displays the current login status for a person.</td>
</tr>
<tr>
<td>Last Updated</td>
<td>Displays the date and time of the last update to a person record.</td>
</tr>
</tbody>
</table>

All those columns are sortable. The default sort order is ascending [0-9, Aa-Zz]. Clicking on any of the column headers again will sort the grid in descending order [zZ-aA, 9-0].

Filtering People Records

Verifield allows you to quickly find a record you need by applying filter tools which can be found above the list of person records.

![Screenshot: Filters](image)

You can filter person records according to their profile and login statuses using the Show lists:

| Profile Statuses list | Use this list to display person records according to their profile status. |
| Login Statuses list   | Use this list to display person records according to their login status. |

You can also filter person records using custom filter values by applying them to specific columns in the grid. To do this:

1. In the Filter list, select a column you need.

   **Note** If you select All from the Filter Criteria list, the entered filter value will be applied to all the columns in the grid. In this case, the record will be displayed if the entered filter value will be found in any of the grid cells.

2. Enter the filter value in the textbox located next to the Filter list.
3. Click the Go button.

Adding a Single Person

To add a single person

1. Click the Add New Person button. “Add New Person” screen will appear.
2. Set the profile status to **Active** or **Inactive**.
3. Set the login status to **Active** or **Inactive**.
4. In the **First Name** textbox, enter the first name of the person.
5. In the **Last Name** textbox, enter the last name of the person.
6. (optional) In the **Id** textbox, enter the unique identifier of the person.

**Note** If you leave this field blank, the unique identifier for the person will be generated by the system automatically when you save the record.

7. In case when the login status of the person was set to **Active**:
   - In the **Username** textbox, enter the username of the person.
   - In the **Email Address** textbox, enter the email of the person.
   - In the **Preferred Language** list, enter the preferred language of the person.

8. Click the **Save** button.

After you click the **Save** button, the following events will happen:

- If the login status of the person was selected to be **Active**, the person will receive an email on the address, which was provided in the **Email Address** textbox. The email will contain a link to the web page which will allow the person to set their password and then enter Verifield for the first time. The language of the email message will be the one specified in the **Preferred Language** list.
- The “Edit Person” screen will appear.

**Screenshot: “Edit Person” screen**

This screen will allow you to view the person’s information that you’ve entered previously and then proceed with the person registration process. In particular, you will be able to:

- Add one or more user profiles to the person’s record;
- Add one or more groups to the person;
- View current permissions of the person.
Adding user profiles
You can add as many user profiles to a person’s record as you need.

To add a user profile
1. In the person’s record, select the “Profiles” tab.
2. In the Choose Profile list, select a required profile.
   
   **Note** If you don’t have the right profile, you can always create the one. See the “Managing user profiles” section for details.

3. Click the Add button. Below the Choose Profile list, a new content panel will appear containing form fields for the selected profile.
4. Fill in the form fields.
5. To add another profile, repeat steps 2-4 above. To delete a profile, click the Remove Profile button.

Adding a group to a user
You can add one or more groups to a user.

To add a group to a user
1. Select the “Member of” tab.
2. In the Add Group control, click the icon.
3. In the dropdown list, select required groups, and then click the Add button.

Viewing user’s permissions
To view the current permissions of the user, switch to the “Permissions” tab.

**Note** Permissions of a newly created user are completely defined by permissions of the groups to which that user belongs. For this reason, you cannot modify user’s permissions in the “Permissions” tab. Instead, add a user to appropriate groups which provide them with appropriate permissions.

Activating and deactivating login status
Verifield allows you to deactivate an active login status or activate inactive login status.

Deactivating login status
Deactivate login status of a user if you want to prevent this user from accessing Verifield without deleting their personal record.

To deactivate login status, set it to Inactive, and then click the Save button.

*Screenshot: Inactive login status*

Activating login status
Activate login status to enable the user to access Verifield.

To activate login status, set it to Active, and then click the Save button.
Once you activate login status of a user, that user will get an email message with their username in the application and a link to a Verifield page to change their password.

### Deleting person records

You can delete a person’s record from the system in one of two ways.

**Method 1.**

1. In the user’s record, click the **Delete User** button.
2. In the “Please Confirm” dialog window, click the **Yes, Continue** button.

**Method 2.**

1. In the “Manage People” screen, in the list of users, find the record of a required user.
2. In the “Person” cell of the record, click the icon to access the context menu of the record.
3. In the context menu, click **Delete**, and then click **Delete** again.