



Editing user information

Within Claromentis, we promote a blended approach to managing user data, in that People administrators can update fields from the admin side of the application, and the user themselves can be allowed to update certain fields for their own profile.

On top of this, special permissions can be set on fields to fit use cases where only a few users need to view or edit a field.

If a sync is in use

Intranet fields can be mapped to external attributes so they are updated by the sync. These fields cannot be edited locally and instead are controlled by the sync.

For any changes to mapped fields, please contact the team responsible for the sync on your site, as they need to update the field in the chosen external repository first e.g Azure, Okta etc before this will appear in the Intranet.

Any fields not mapped to the sync are subsequently managed locally, so the following advice in this guide applies to them.

How to edit user profile fields

- People administrators

People administrators can edit user profile fields [en masse using a CSV](#) or directly on user profiles from Admin > People.

(Fields that appear as editable to administrators are those added to the ["Edit profile" page in the admin area](#), which they can freely update themselves)

So, over time administrators have complete control over user data and can edit any field at any time from the admin side.

- Users

Users can edit the fields in the 'edit my profile' area.

The fields that appear here are controlled by People administrators, so they can update this list over time to control what users can change.

e.g. it may be appropriate for users to be able to update their mobile number but not their employee ID or email address, so these fields should not be included for them to edit.

Special permissions

Special view and edit permissions can be applied to fields.

This is for fields that don't fit the standard model of only being updated by an administrator or the user as outlined above.

People administrators will still be able to see and edit all fields regardless of these permissions; the below simply refers to giving additional rights to other

users who are not People administrators to view or edit information.

e.g. I want to ensure a 'portfolio' field can be updated by those in a 'manager' role

Admin

Staff list

UTILITIES

CONFIGURATION

Admin > People Control Panel > Configure user profile fields > Permissions for editing fields

Permissions for editing fields

| Field | Belongs to | Who can edit | Delete |
|--------------------------|------------|----------------|--------|
| Portfolio ([m]portfolio) | Everyone | Role: Managers | |

CHANGE FIELD LIST AND ORDER FOR

Main users list

"View profile" page

"Edit My profile" page

Advanced search form

Users list for people admin

"Edit profile" page in admin area

PERMISSIONS

Permissions for viewing fields

Permissions for editing fields

When viewing a user profile, those in the manager role will see a pencil icon allowing them to edit this field.

Make sure any fields you want to set special edit permissions on are 'visible even if no value' checkbox selected in [their configuration](#), otherwise they may not appear to those with rights to edit when empty.

People > Profile

Alan Metcalfe

Sales Assistant

alan@claromentis.net

Profile

Thanks (1)

Address

Towerpoint

44 North Road

Brighton

East Sussex

BN1 1YR

Company car model

Portfolio

Badges

Endorsements

Presentations

Demos

1st Line Support

Manager

James Terry

North America Senior Sales

Direct Reports

Pippa Fraser

Human Resources Manager

Special view rights work in the same way, and certain fields can be hidden, e.g. only visible by those in a certain role or the user themselves (owner)

Admin

Staff list

UTILITIES

CONFIGURATION

Admin > People Control Panel > Configure user profile fields > Permissions for viewing fields

Permissions for viewing fields

| Field | Belongs to | Who can view | Delete |
|-------------------------|------------|--------------|--------|
| Landline ([m]usr_phone) | Everyone | Owner | |

CHANGE FIELD LIST AND ORDER FOR

Main users list

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PERMISSIONS

Permissions for viewing fields

Permissions for editing fields

