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.
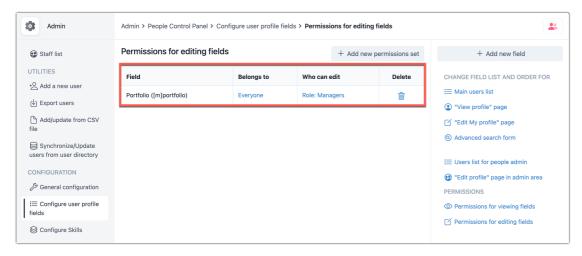
Special permissions

Special view and edit permissions can be applied to fields.

This is for fields that dont 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
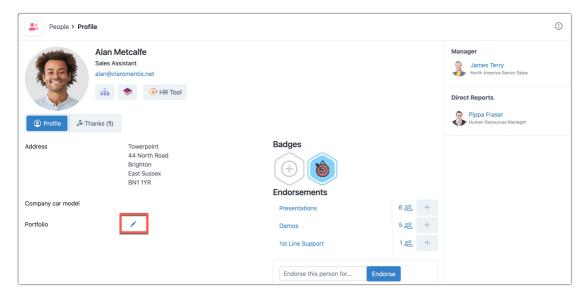
users who are not People administrators to view or edit information.

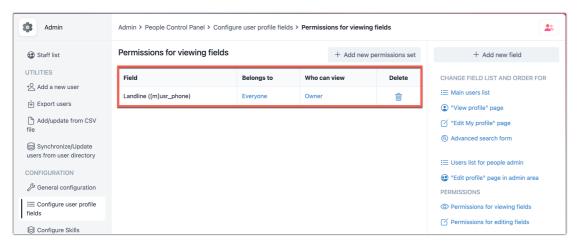e.g. I want to ensure a 'portfolio' field can be updated by those in a 'manager' role

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.

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)

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