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How to Add a User

Archived

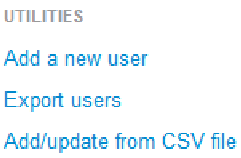
How to add a user

Introduction

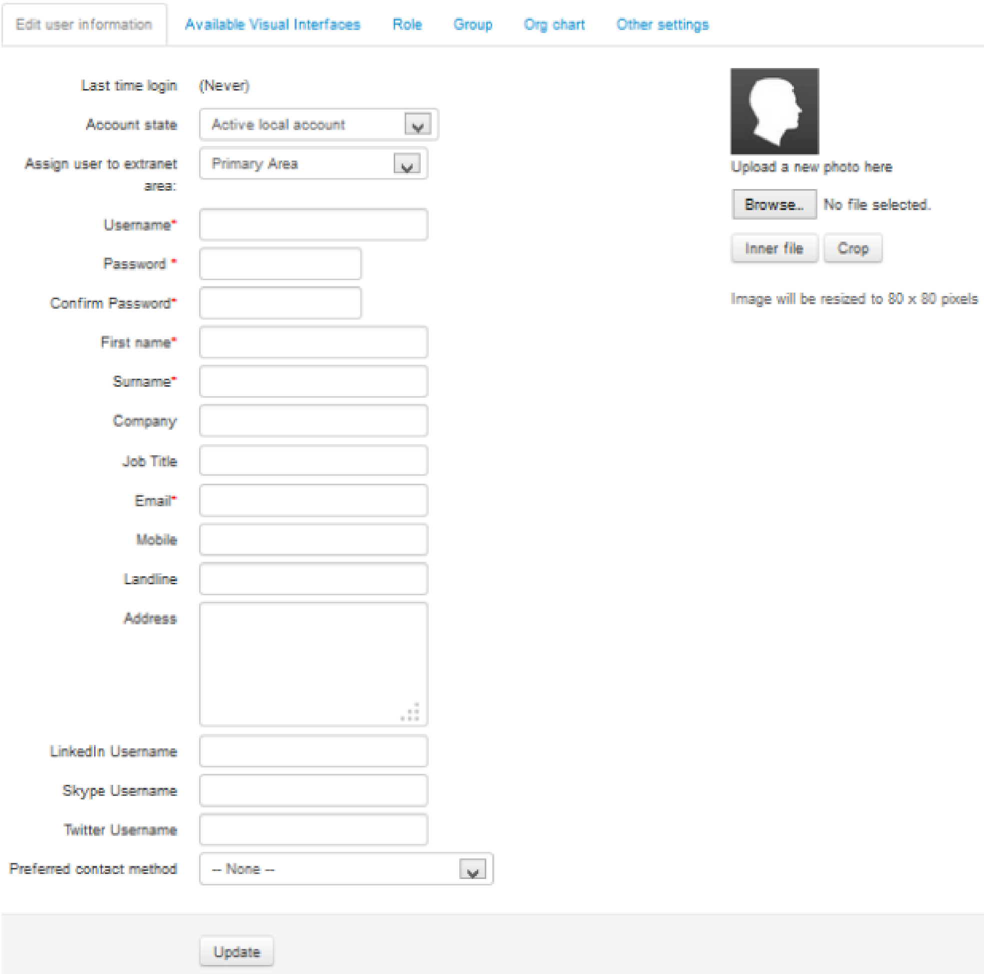
After creating some roles and groups, you can now start assigning users to them. This means that you can really control what users can access, and specify users’ permissions within certain applications.

Adding a user

Go to Applications > Admin > People. Click Add a New User under the Utilities menu on the right hand side of the page.



A page will now display which allows you to start creating your new user. The first tab, Edit User Information, is where you enter personal details about the user.

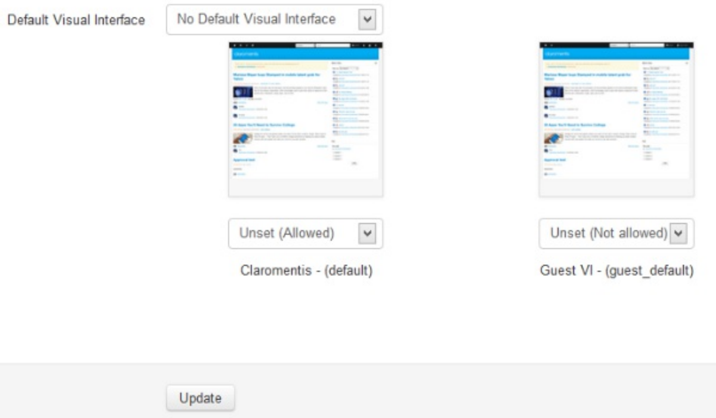


- The Account State field defines the status of the user's account, for example, by default this field displays Active Local Account, which means that the account is active and can be accessed by the user.

The other two options are Blocked Account, which can be unblocked by an Administrator, and Frozen/Locked, which means that user is temporarily suspended from their account due to entering their password incorrectly 3 times. By default a user is allowed 3 login attempts, but this number can be configured by going into the Password Policy tab in the People Control Panel.

There are 6 fields in the Edit User Area page which are mandatory, and you will not be able to set up a user without completing these. You must complete the Username, Password, Confirm Password, First Name, Surname and Email fields.

Once you have completed the relevant fields, you can select which visual interface (VI) is available to the user in the Available Visual Interfaces tab. This is where you can specify which VIs the user will have access to by selecting the appropriate option in the dropdown list.



You can set a default visual interface for the user in the Default Visual Interface dropdown, which will be displayed to the user when they first log in. If other interfaces are available to the user, they will be able to select these in the My Settings page in their account.

Once finished, click Update.

Whilst it is possible to set VIs at user level, this is not recommended. Best practice is to set VIs at either Extranet, Role, or Group level. To set a VI at Role or Group level, click on the Roles or Groups tab in the People Control Panel, and click on the relevent Role or Group to be taken to the edit page, where you can set VI in the Available Visual Interfaces tab. To set a VI at Extranet level, go to Applications > Admin > Extranets > click on the relevant Extranet, and you will be taken to the edit page, where you can set VI in the Available Visual Interfaces tab.

Last modified on 22 May 2019 by Mhairi Hutton

Created on 28 April 2014 by Kerensa Johnson
Tags: users, people