

# People: Admin overview

## Requirements

This user guide is for anyone on Claromentis 8.2+

## Introduction

In this article, you will be given an overview of the admin area of the People application where you will be able to manage/edit users within your intranet.

The information below is outlined in the video.

## The admin side & people permissions

Head to **Admin > People**.

The first area you will enter upon accessing the back end of the People application is the **People Control Panel**. From here, you will be presented with various tabs found at the top of the page.

## Users

**Users** is the area you will be able to view a list of all current (active) users.

The screenshot displays the 'People Control Panel' interface. At the top, there's a breadcrumb 'Admin / People Control Panel' and a green checkmark icon. Below this is a navigation bar with tabs: 'Users' (selected), 'Power users', 'Roles', 'Groups', and 'Password policy'. A search bar with a magnifying glass icon is positioned below the tabs. Under the search bar is an alphabetical index from 'A' to 'Z' and a label 'First name, Surname'. The main content area is a table of users with columns: 'Photo', 'Full name', 'Role', 'Group', 'Dummy User Account', 'Assigned', 'Spare', and a checkbox. The table lists six users: Abigail Clark, Alan Metcalfe, Alison Kelly, Amelia Jackson, Anne Wilkins, and Austin Glover. To the right of the table is a 'Utilities' section with three options: 'Add a new user', 'Export users', and 'Add/update from CSV file'. Below the utilities is a 'Configuration' section with three options: 'General configuration', 'Configure user profile fields', and 'Configure Skills'.

Photo	Full name	Role	Group	Dummy User Account	Assigned	Spare	
	Abigail Clark	none	Company, Human Resources, Learning and Development	Yes		Yes	<input type="checkbox"/>
	Alan Metcalfe	none	Company, Sales	Yes		No	<input type="checkbox"/>
	Alison Kelly	none	Company, Human Resources	Yes		Yes	<input type="checkbox"/>
	Amelia Jackson	none	Company, Human Resources	Yes		Yes	<input type="checkbox"/>
	Anne Wilkins	Administrators, Managers	Company, Leadership Team, Professional Services	Yes		No	<input type="checkbox"/>
	Austin Glover	none	Company, Marketing	Yes	Robert Reith	No	<input type="checkbox"/>

As an admin, you will have additional filtering options including to also search for **Account state** (i.e. Blocked or Frozen status). This will be a useful tool if you are having to find users who are not visible from the front-end or if you

are having to reinstate Blocked users to Active status.

Admin / People Control Panel

Users

Power users

Roles

Groups

Password policy

Advanced search

Keywords

Any

Account state

Blocked account

Group

Any

☐ With subgroups

First name

Surname

Job Title

Company

Search

24

Y

Z

First name, Surname

Jimmy User Account

Assigned

Spare

Yes

No

Yes

Yes

No

Robert Reith

No

**Reminder:** Blocked users do not count toward your license limit.

When selecting a user from the list, you will be taken to an edit field where you can make changes to the user's profile.

Admin / People Control Panel / Edit user info

Edit user information

Role

Group

Org chart

Other settings

User code

Last time login

(Never)

Account state

☒ Enabled ☐ Disabled

Assign user to extranet area

Primary Area

Username\*

charles

Password

☐ Generate random password

(if you want to change it)


Confirm Password

First name\*

Charles

Surname\*

Johnston



Change image

Delete image

☐ Email log-in details

For more information on editing a user's profile, click here.

## Power Users

**Power Users** is a feature that will give certain users access to the People Admin Panel but on a more restrictive level. Power users have limited access to manage various areas in the People admin control panel.

Admin / People Control Panel

Users

Power users

Roles

Groups

Password policy

Power users have limited access to manage various areas in the People admin control panel. To give power to a user go to the User properties page and click "Edit power user rights" in the "Other settings" tab.

Full name ▲	Permissions		
Alison Kelly	Add new groups Add new roles	<a href="#">Edit permissions</a>	<input type="checkbox"/>
Pippa Fraser	Add new groups Add new roles	<a href="#">Edit permissions</a>	<input type="checkbox"/>

Delete selected

For more information on power users and how to assign power users, [click here](#).

## Roles

The **Roles** section is where can see the roles that currently exist. From here you can add and delete Roles, as well as, view the number of users within that Role.

Admin / People Control Panel

Users

Power users

Roles

Groups

Password policy

+ Add a new role

Role	Description	Extranet area	Users number	Delete
Administrators			5	<input type="checkbox"/>
Claromentis			8	<input type="checkbox"/>
Extranet users (Partner)			6	<input type="checkbox"/>
Managers			5	<input type="checkbox"/>

Delete selected

Utilities

Add a new user

Export users

Add/update from CSV file

Configuration

General configuration

Configure user profile fields

Configure Skills

## Groups

Similarly to Roles, **Groups** will provide the group structure placed in your system.

You can also add and delete roles, as well as, view the number of users within that group.

Admin / People Control Panel

Users

Power users

Roles

Groups

Password policy

+ Add a new group

Title	Description	Extranet area	Users number	Delete
Company			47	<input type="checkbox"/>
Development			3	<input type="checkbox"/>
Testing			3	<input type="checkbox"/>
Finance			3	<input type="checkbox"/>
Health & Safety			3	<input type="checkbox"/>
Human Resources			8	<input type="checkbox"/>
Learning and Development			2	<input type="checkbox"/>
Marketing			9	<input type="checkbox"/>
Professional Services			3	<input type="checkbox"/>

Delete selected

Utilities

Add a new user

Export users

Add/update from CSV file

Configuration

General configuration

Configure user profile fields

Configure Skills

For more information on Roles & Groups, click [here](#).

## Password Policy

The **Password Policy** area is where you can set (default) password settings for all users.

[Admin](#) / [People Control Panel](#)

[Users](#) [Power users](#) [Roles](#) [Groups](#) [Password policy](#)

### Default password policy options

Minimum password length:

☒ Require strong password

☒ Maximum password age:  days

Notify user  days before expiration.

### Accounts lockout

How many attempts the user is allowed until account is locked

How long they are locked out for (minutes)

☒ Send notification to People Administrators when an account is locked out

[Save](#)

### Utilities

[Add a new user](#)

[Export users](#)

[Add/update from CSV file](#)

### Configuration

[General configuration](#)

[Configure user profile fields](#)

[Configure Skills](#)

You have the following default password policy options:

- **Minimum password length:** Set the least number of characters that will be accepted as a password
- **Require strong password:** A checkbox option where users will have to make a password that meets complexity requirements to lower the overall risk of a security breach
- **Maximum password age:** A checkbox option to set the maximum password age meaning the number of days the password is valid
- **Notify user X days before expiration:** Set the number of days for users to get a notification before the password expires

You are also able to configure the following when accounts have been locked:

- Set the number of attempts users have until their account is locked.
- How long (in minutes) users will be kicked out of their accounts after being locked out.
- A checkbox option to send a notification to People admin when an account is locked out.

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