

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 is a breadcrumb 'Admin / People Control Panel' and a search bar. Below the search bar are navigation tabs: 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. The 'Users' tab is active. A table lists users with columns for Photo, Full name, Role, Group, Dummy User Account, Assigned, and Spare. The table contains six rows of user data. To the right of the table is a 'Utilities' sidebar with options: 'Add a new user', 'Export users', and 'Add/update from CSV file'. Below the utilities is a 'Configuration' sidebar with 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.

The screenshot shows the 'Admin / People Control Panel' interface. At the top, there are navigation tabs for 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. Below these is a search bar with a magnifying glass icon. An 'Advanced search' panel is open, featuring several filters. The 'Account state' filter is highlighted with a red box and is set to 'Blocked account'. Other filters include 'Keywords', 'Group', 'First name', 'Surname', 'Job Title', and 'Company'. To the right of the search panel, a table of users is visible. The table has columns for 'First name, Surname', 'Assigned', and 'Spare'. One user, 'Jimmy User Account', is listed with 'Assigned' set to 'Yes' and 'Spare' set to 'No'. Another user, 'Robert Reith', is listed with 'Assigned' set to 'No' and 'Spare' set to 'No'. At the bottom of the search panel, there is a 'Search' button and a dropdown menu showing '24' results.

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.

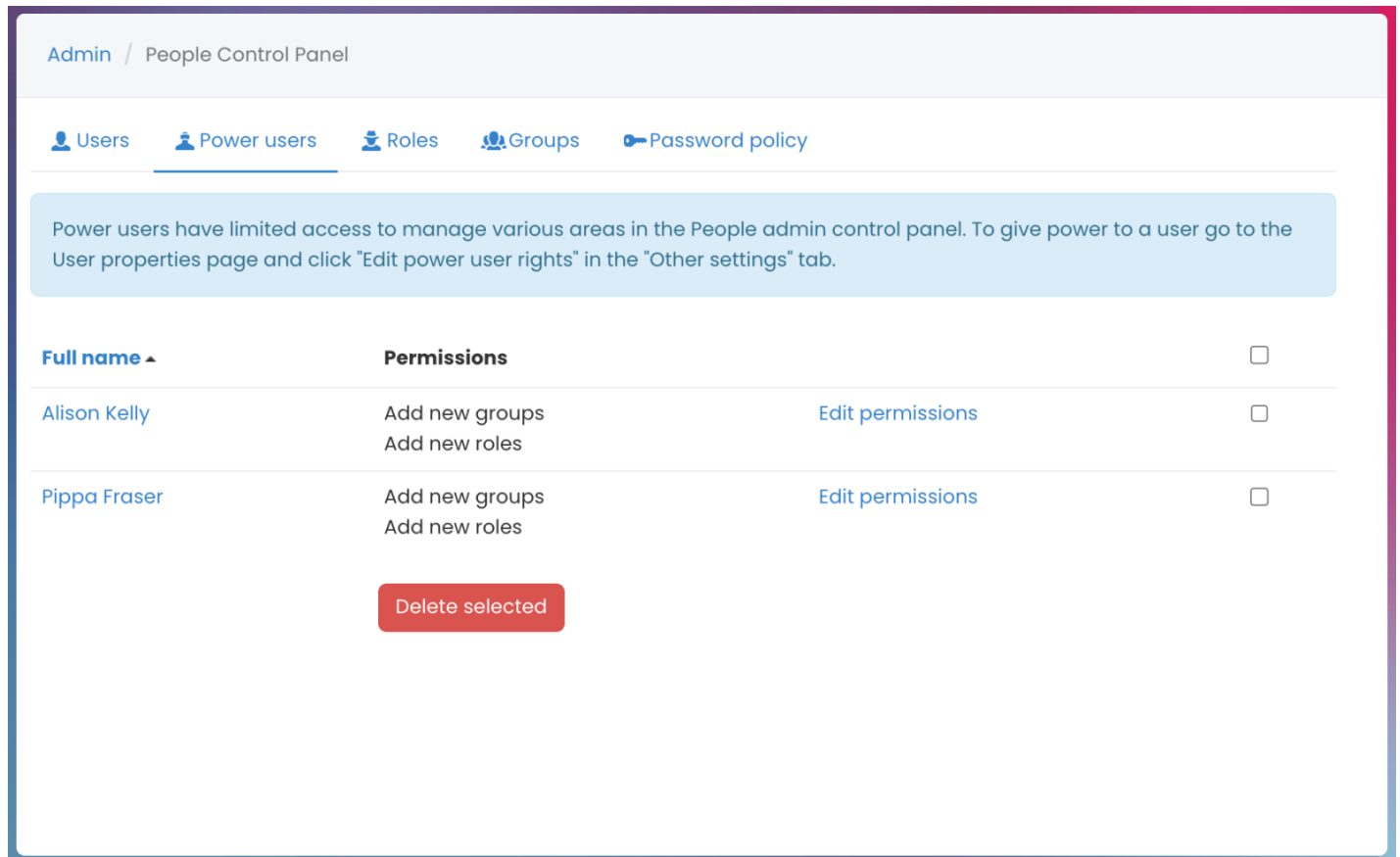
The screenshot shows the 'Admin / People Control Panel / Edit user info' page. At the top, there are navigation tabs for 'Edit user information', 'Role', 'Group', 'Org chart', and 'Other settings'. The 'Edit user information' tab is active. The page contains several form fields for user details. On the left side, the fields are: 'User code' (empty), 'Last time login' (Never), 'Account state' (radio buttons for 'Enabled' and 'Disabled', with 'Enabled' selected), 'Assign user to extranet area' (dropdown menu set to 'Primary Area'), 'Username*' (text field with 'charles'), 'Password' (text field with a 'Generate random password' checkbox), 'Confirm Password' (text field), 'First name*' (text field with 'Charles'), and 'Surname*' (text field with 'Johnston'). On the right side, there is a profile picture of a man with a 'Change image' button and a 'Delete image' checkbox. Below the profile picture, there is a checkbox for '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.



The screenshot shows the 'People Control Panel' interface. At the top, there is a breadcrumb 'Admin / People Control Panel' and a navigation bar with tabs for 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. The 'Power users' tab is selected. Below the navigation bar, a light blue informational box states: '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.' Below this is a table with columns for 'Full name', 'Permissions', and an action column. Two users are listed: Alison Kelly and Pippa Fraser. Alison Kelly has permissions for 'Add new groups' and 'Add new roles', with an 'Edit permissions' link. Pippa Fraser also has permissions for 'Add new groups' and 'Add new roles', with an 'Edit permissions' link. A red 'Delete selected' button is located below the table.

Full name	Permissions	
Alison Kelly	Add new groups Add new roles	Edit permissions <input type="checkbox"/>
Pippa Fraser	Add new groups Add new roles	Edit permissions <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 you 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 ✓

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[+ 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

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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 ✓

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[+ 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](#)

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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](#)
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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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