Chainformation Admin User Guide

(Colleagues/Users)

Last Updated: December 23, 2023

Welcome to the **Chainformation** user guide. In this manual, we will learn how to manage the **Colleagues** section on the **Our organisation** page.

*NOTE to SUPER ADMIN: You must first make the proper settings for **Local**, **Central** and **Global** levels of the **Our organisation** function in your **system setup** to control which **Roles** in your organisation are allowed to add new users and manage existing user accounts. See the User Guide for **Roles Administration***

Here is a list of all the features of the **Colleagues** module that we will discuss in this manual.

- Add a New User

- View Your Colleagues

- Review a User Profile

- Edit a User Profile
    - o Update Username (Sign in Email) of a Colleague
    - o Deactivate/Activate a User Account
    - o Send the Password Reset Link to a User
   - o Change Date Format of a User

- Delete a User Account

Add a New User

Once you have logged in to the **Chainformation** platform, then follow these navigation steps to **add** a **new user** to your **organisation.**

1. Click the **Our organisation** button in the left-side menu to open the **Our organisation** page.
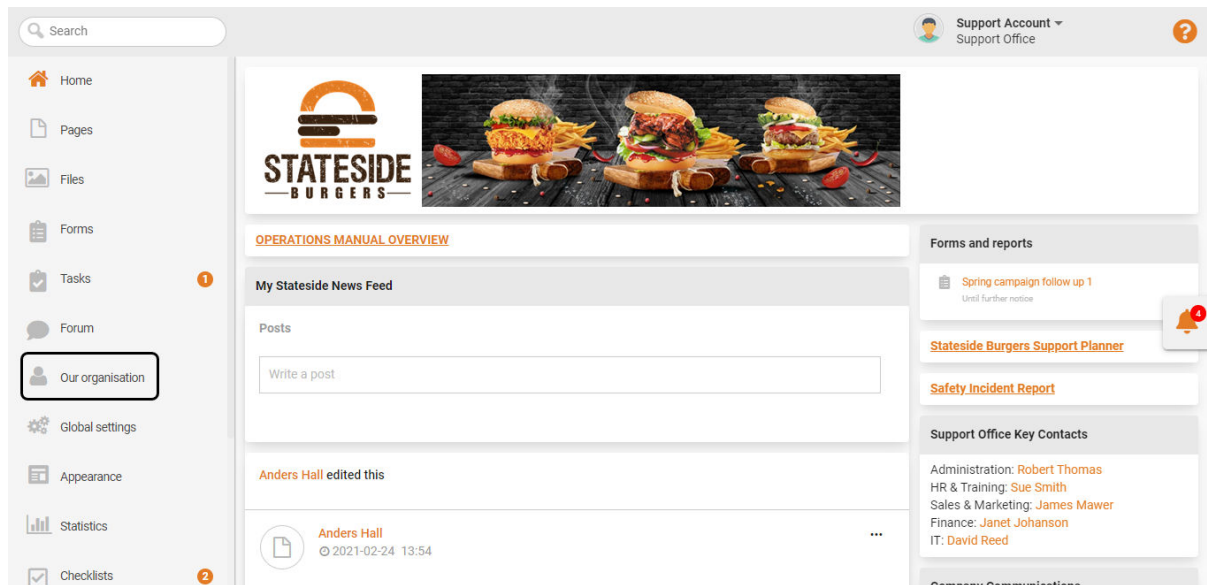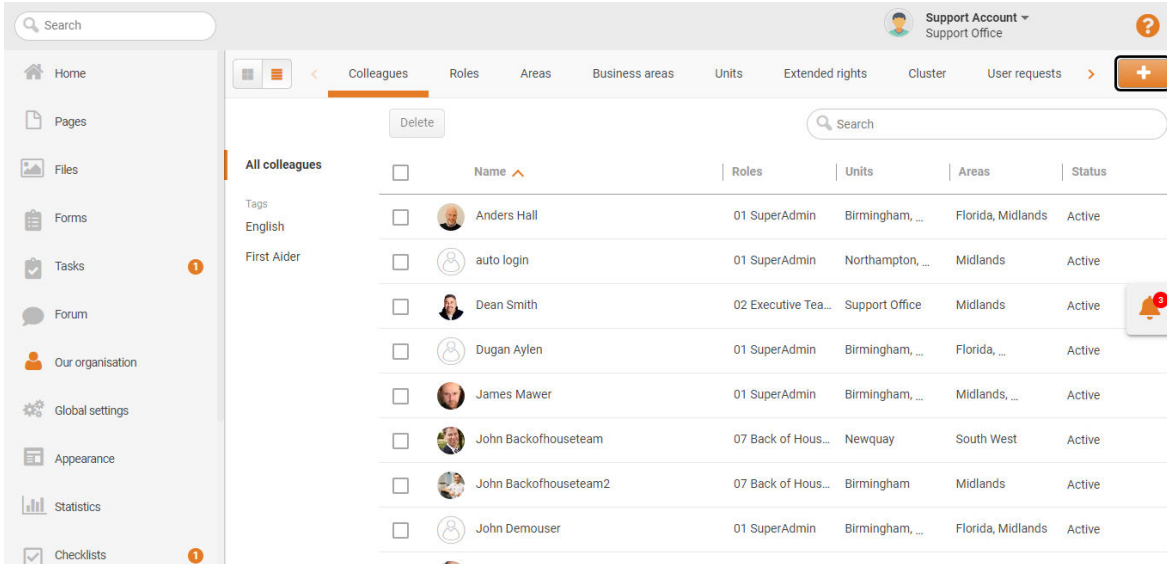

If you are accessing the platform from the **Chainformation** mobile app, you can open your profile menu by clicking the **hamburger** icon in the top-left corner of your mobile screen.
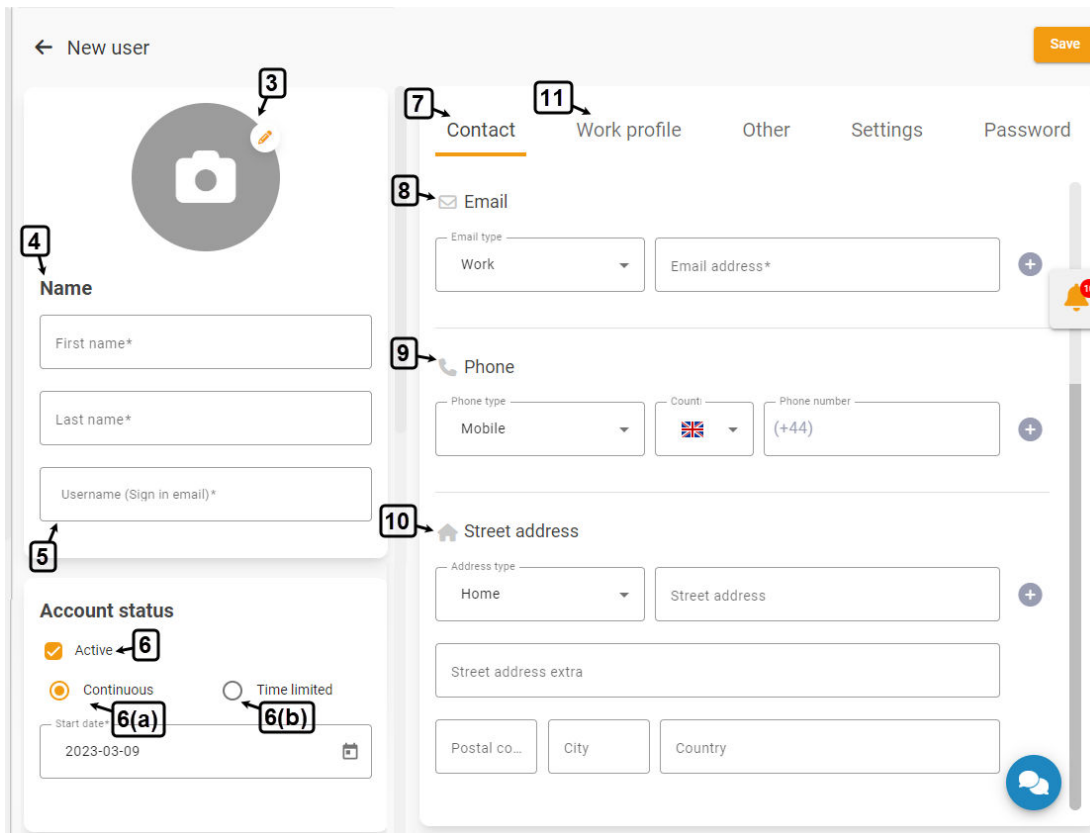

https://chainformation.com/userguides
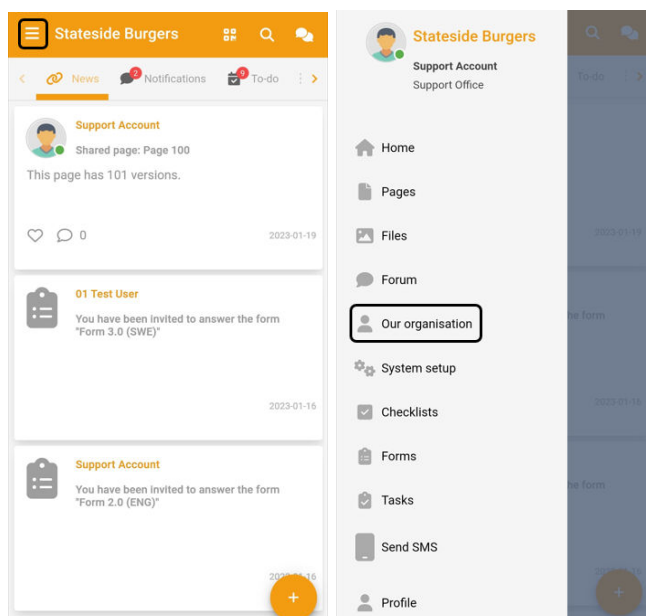
By default, you will be redirected to the **Colleagues** tab.

2. Click the **(+)** icon in the top-right corner of the **Colleagues** page to add a new user.

This will open the **New user** page.

3. On the **New user** page, upload a profile image of the new user from your device or **Chainformation File Manager**. See the User Guide for **Files**

4. Under the **Name** heading, enter the first and last name of the new user.

5. Enter a **username** for the new user.

Note: The username will serve as the sign in email of the new user. So, you should enter a valid and unique email address in the username (sign in email) field.

The system will not accept an email address as the username of the new user if it's associated with any other user account in your organisation.

6. Under the **Account status** heading, choose what will be the current account status of the new user.

Make sure you keep the **Active** checkbox enabled, otherwise, the user account will be deactivated and they will not be able to login to their **Chainformation** account until you reactivate their account.

6(a). Select the **Continuous** option and set a **Start date** if you want to keep the new user account active for an indefinite period.

6(b). Select the **Time limited** option and set a valid **Start/End date** if you want to activate the new user account for a definite period.

Note: The user account will be deactivated if you set the **End date** in the past.

7. Now, go to the **Contact** tab to add contact information of the new user.

8. Enter the **email address** of the new user.

Note: The username (sign in email) of the new user will automatically be saved as their primary contact email address.
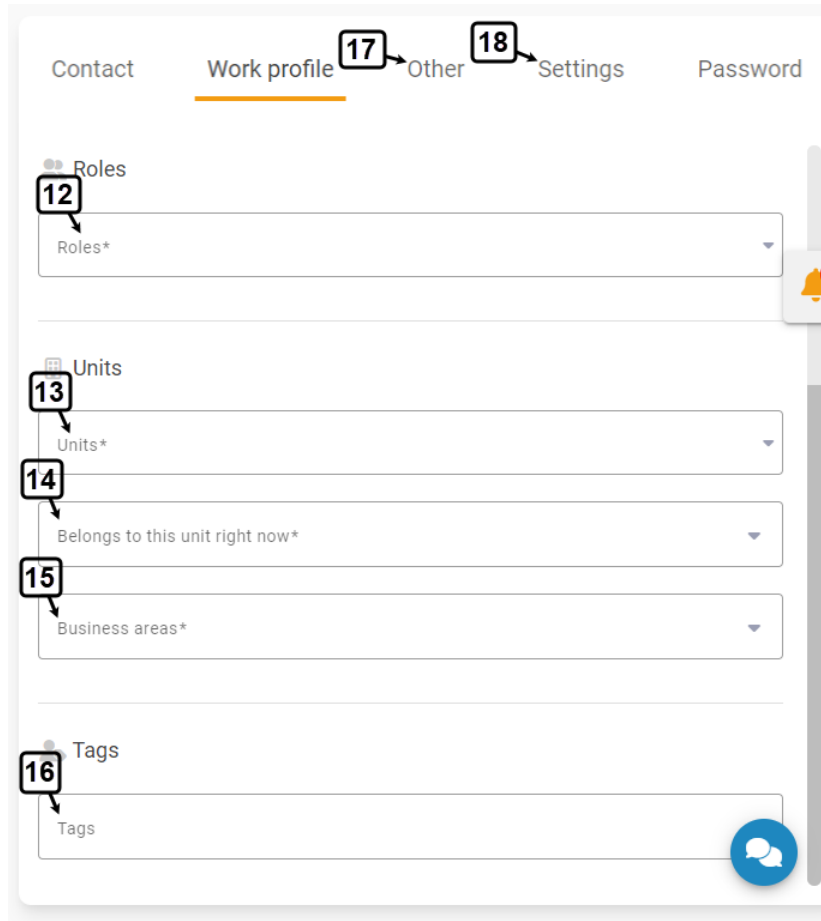
You can update the username (sign in email) of a colleague to a different email address later, if they have added at least two unique email addresses in their contact emails list. See the User Guide for **Update Username (Sign in Email) of a Colleague**

9. Enter the **phone number** of the new user (if applicable).

10. Enter the **Street address** of the new user (if applicable).

Note: You can add more than one email address, phone number, and/or street address by pressing the **Add (+)** icon next to the respective fields.

11. Now, go to the **Work profile** tab to complete the work profile of the new user.

12. Under the **Roles** heading, select one or more **roles** you want to assign to the new user. See the User Guide for **Roles**

13. Under the **Units** heading, Select one or more **units** to which the new user belongs. See the User Guide for **Units**

14. Select the current unit of the new user in the **Belongs to this unit right now** field.

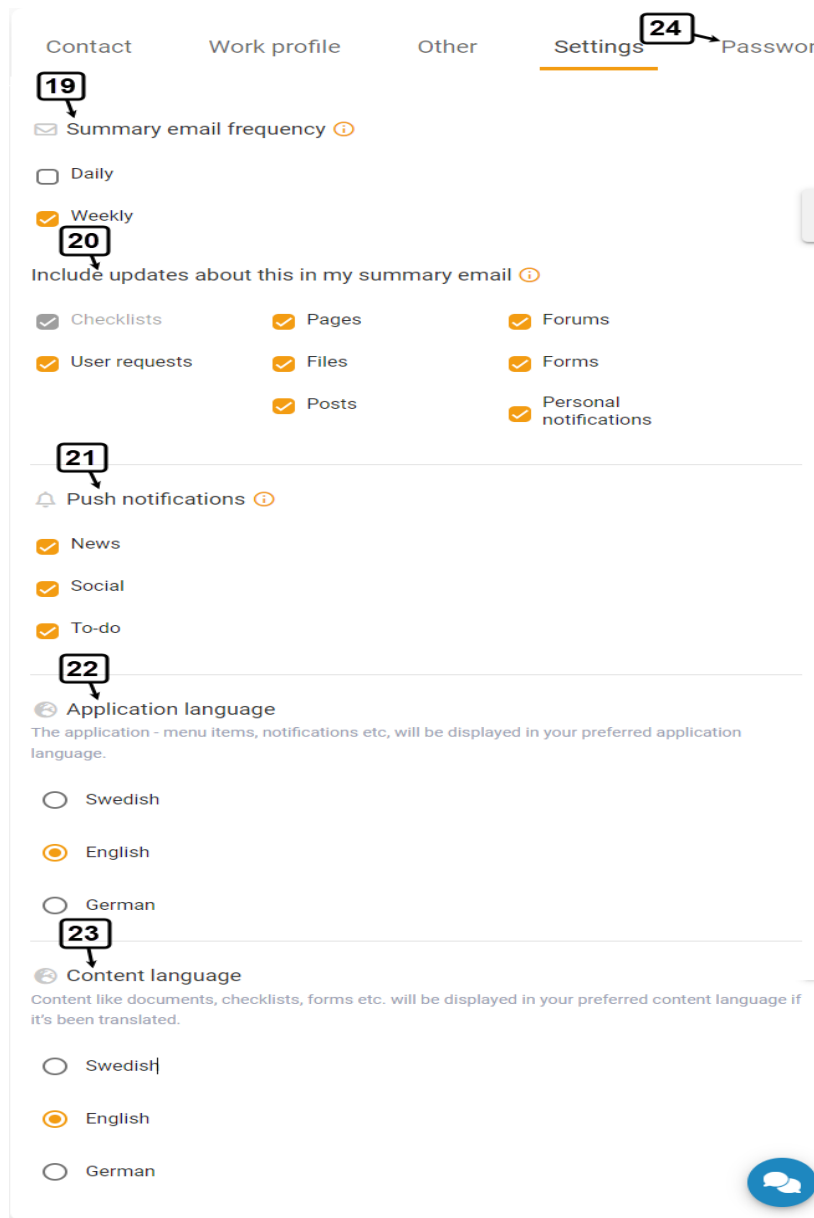15. Review the business areas of all the new units in the **Business areas** field.

Note: You cannot associate individual users to a business area on the **New/Edit** user page. Instead, a user is automatically associated with all the business areas of the units to which this user belongs. See the User Guide for **Units** and **Business Areas**

16. Under the **Tags** heading, select the tags (if applicable) you want to associate with the new user profile. See the User Guide for **Tags**

17. Now, go to the **Other** tab and enter the required data for the colleague custom fields (if applicable).

Note: The **Other** tab will be hidden if you have added no colleague custom fields in your system settings. See the User Guide for **Custom Fields (Other settings)**

18. Now, go to the **Settings** tab to review and update (if required) notification and language settings of the new user account.

19. Under the **Summary email frequency** heading, select the frequency of the summary email the new user will receive.

20. Under the **Include updates about this in my summary email**, select what information will be included in the new user's summary email.

21. Under the **Push notifications** heading, select the types of information for which the new user will receive push notifications from the Chainformation mobile app.

22. Select the **Application language** of the new user account.

This is the language in which application text including menu items, page headers, notifications, etc. will be shown on the user profile.
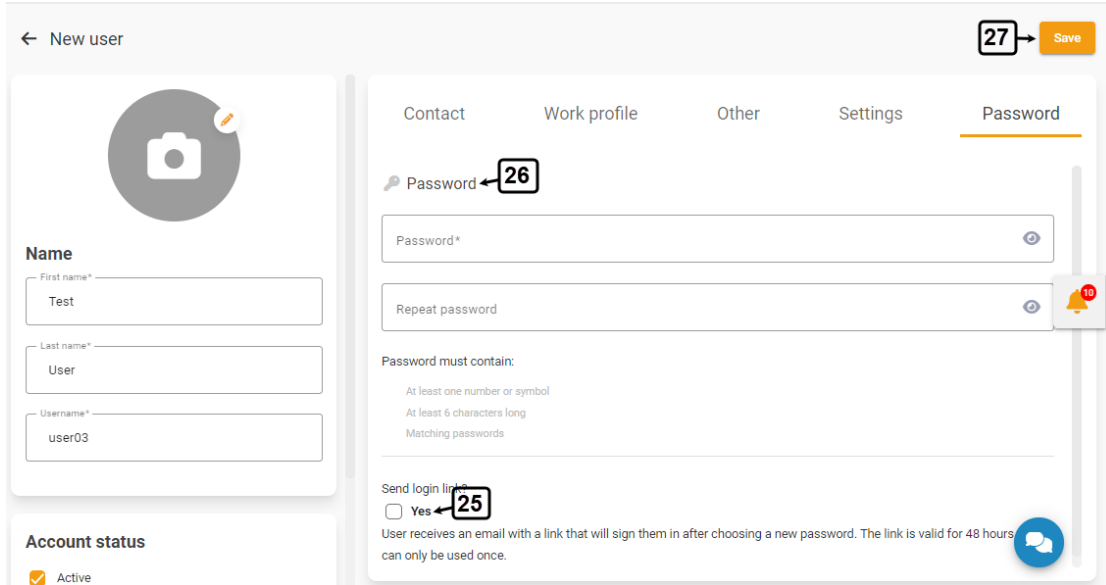
23. Select the **Content language** of the new user account.

The content language is the default language in which the user will see blog posts, forms, checklists and other content on the **Chainformation** platform.

A user can switch to the available translations in other languages anytime by selecting a language from the options available on a specific page.
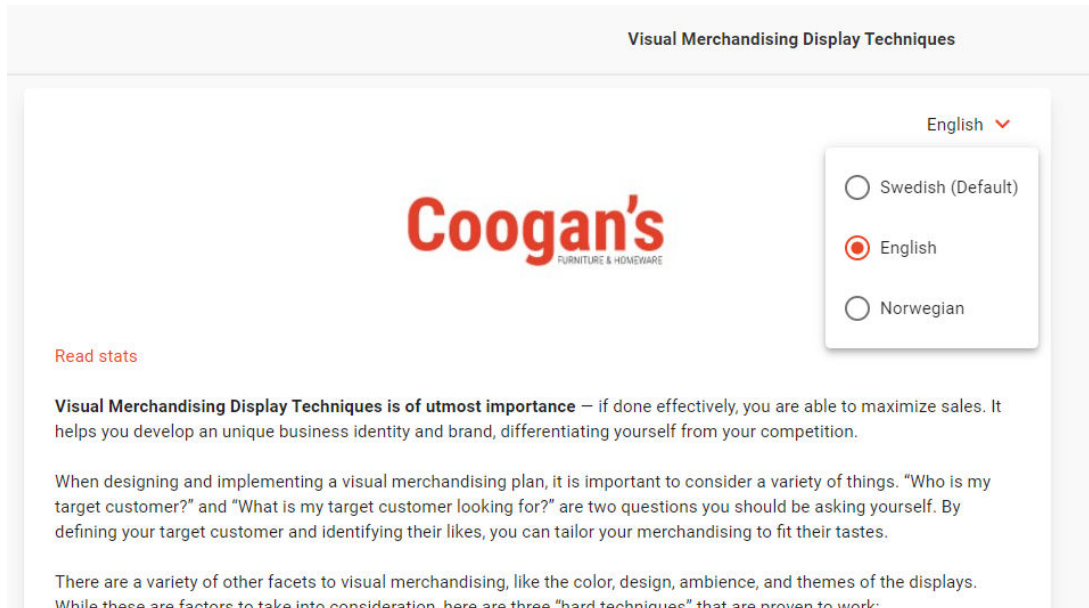
24. Now, go to the **Password** tab to set a password for the new user account.

25. You can send a login link to the new user by selecting the **Yes** checkbox under the **Send login link?** option.

The user will receive an email with a link on their primary email address once you have completed their profile. They will choose a new password and sign in to the Chainformation platform using the link.

Remember, the link will be valid for 48 hours and a user can use it only once. However, you can send the link again if the user has expired the link without signing in to the platform.

26. You can also set the password manually by deselecting the **Yes** checkbox under the **Send login link?** option.

Once you have entered all the user details, carefully review all the information you've entered on different tabs of the **New user** page.

Note: All fields with the **Asterisk** (*) sign are mandatory and you cannot save the user profile if you have left any one of the mandatory fields empty.

27. Click the **Save** button in the top-right corner of the page to activate the new user account.

Now, the new user can login to their Chainformation account by using the login link or their username and password.
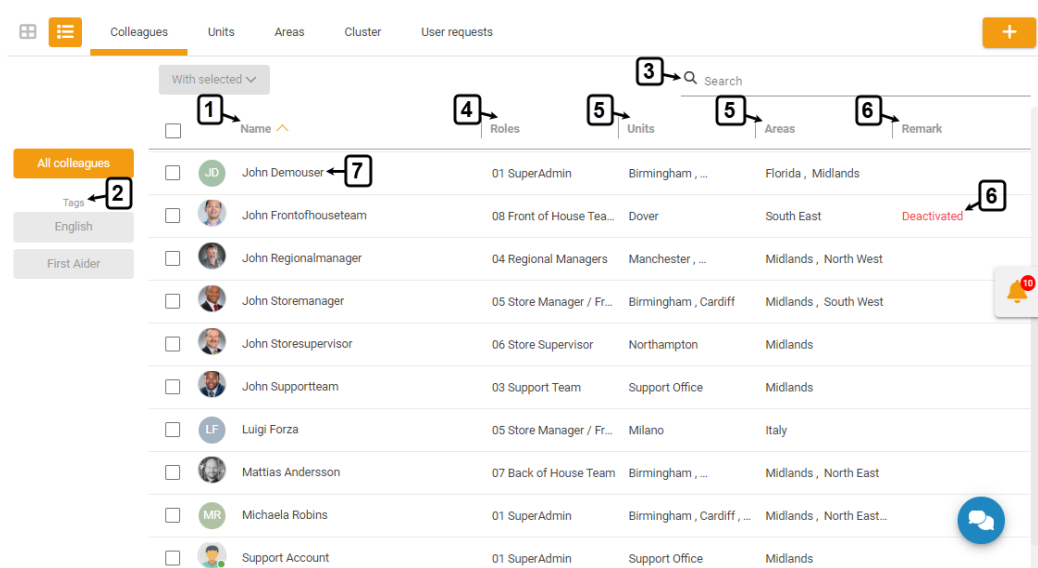
View Your Colleagues

Once you have opened the **Our organisation** page as demonstrated in the previous section, you can view the names of your colleagues and their corresponding details on the **Colleagues** tab.

Note: The users you see in the list of your colleagues depend on the rights your role has been assigned for different levels of the Our organisation module.

For example, you can't see users from units in other geographical areas if the Global level of the Our organisation module is disabled for your role.

Similarly, you can see users from your unit(s) and cluster(s) only, if both Central and Global levels are disabled for your role. See the User Guide for **Roles Administration**

On the **Colleagues** page, you can review the details of your listed colleagues as follows.

1. Under the **Names** heading, you can see the names and profile images (if any) of all the users listed on the page.

2. You can see your colleagues associated with a certain tag by clicking it under the **Tags** heading. See the User Guide for **Tags**

3. You can also use the **Search** field to find a colleague based on any of the available data/information. See the User Guide for **Search**

4. Under the **Roles** heading, you can see the current role(s) of each listed user in your organisation.

5. Under the **Units** and **Areas** headings, you can see the local unit(s) to which a listed user belongs and geographical area(s) of these units.

6. Under the **Remarks** heading, you can see the **Deactivated** label for the users whose account is currently deactivated.

7. You can review the work profile, contact and other available details of a colleague by clicking their name on the **Colleagues** page.

This will open the User profile dialogue where you can review their profile details as follows.

Review a User Profile
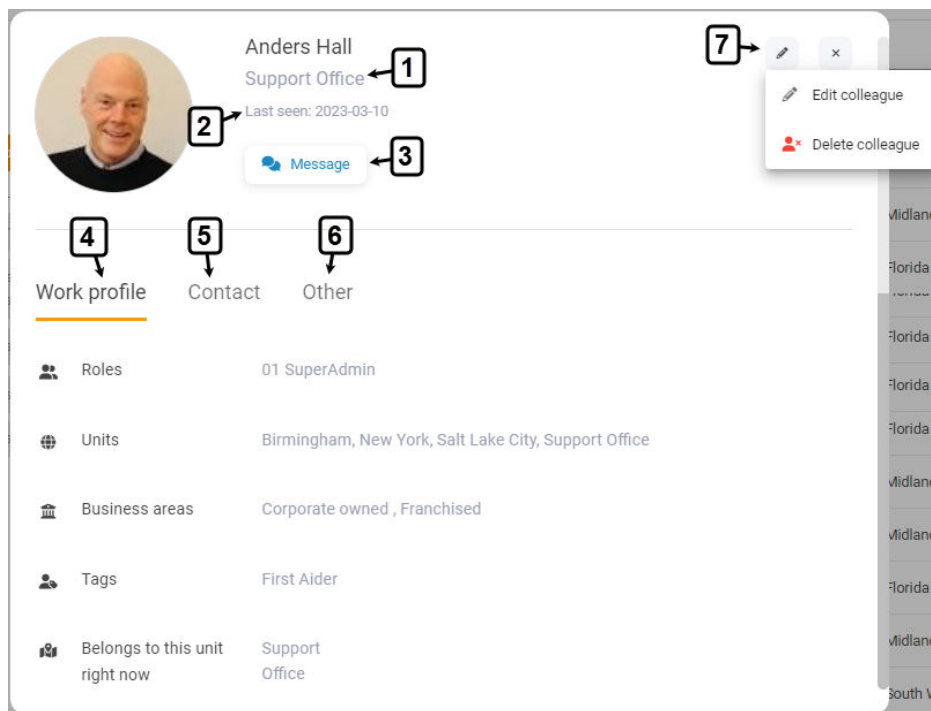
1. You can see the **current unit** of the selected colleague under their name.

2. You can see the last sign in of the selected colleague to their Chainformation account next to the **Last seen** label.

Note: You can't see the last seen a colleague if you don't have the editing rights for this particular user. See the User Guide for **Our Organisation Rights (Roles Administration)**

3. You can start/resume messaging with the selected colleague by clicking the **Message** button. See the User Guide for **Chat/Messaging**

4. Under the **Work Profile** header, you can review the roles(s), unit(s), business area(s), tag(s) and the unit to which the selected colleague currently belongs.

5. Under the **Contact** header, you can review the email address(es), phone number(s) and street address of the selected user (if available).

6. Under the **Other** header, you can review the selected user data for the colleague custom fields (if available). See the User Guide for **Custom Fields (Other Settings)**

Note: You can't see the **Other** tab and information related to custom data fields for a colleague if you don't have the editing rights for this particular user. See the User Guide for **Our Organisation Rights (Roles Administration)**
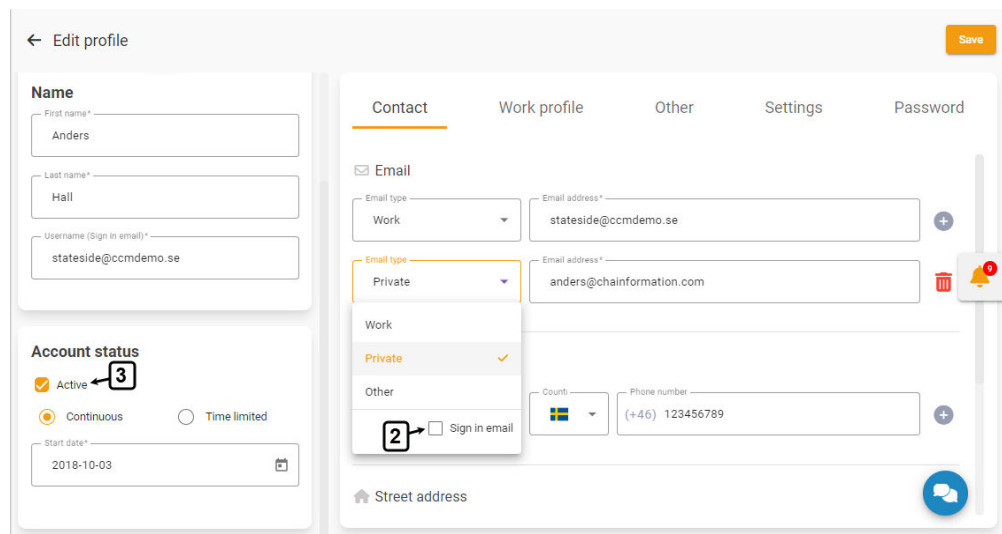
7. You can edit or delete a user by clicking the **Edit** (✏) icon in the top-right corner of the user profile dialogue and then, selecting the required option from the dropdown.

Clicking on the **Edit colleague** option will open the **Edit user** page where you can change the account status, password, and other profile details of the selected colleague.

Edit a User Profile

1. On the **Edit user** page, you can update the selected user information on different tabs as demonstrated in the previous section. See the User Guide for **Add a New User**

Remember, certain changes in the work profile of a user e.g. changing/removing a role and/or unit might affect sharing selection of different content items shared with this user. They can lose access to these content items after you save this change. See the User Guide for **Sharing Selection**

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These are three of the most significant changes you can make on the **Edit user** page.

Update Username (Sign in Email) of a Colleague

By default, the primary contact email address of a user serves as their sign in email and vice versa.

You can update the username (sign in email) of a colleague to a different email address, if the selected user has at least one more unique email address in their contact emails list.

2. Under the **Contact** tab of the **Edit user** page, click the **Sign in email** option from the **Email type** options of the email address you want to make the username (sign in email) of the selected user.

Note: You can't select an email address as the **Sign in email** of a user if it's associated with any other user account in your organisation.

Once you save this change, the selected user can use the updated sign in email to login to their Chainformation account.

Remember, the selected user can still use their old sign in email to login as long as it's not associated with any other user account in your organisation.

When a user logs in with a unique email address from their contact list that is not their registered sign in email. The system will automatically update their sign in email to the email address they have last used to login to their Chainformation account.

Deactivate/Activate a User Account

3. **Disable** the **Active** checkbox under the **Account status** header to deactivate the selected user account.

Note: When you deactivate a user account, their current login session will be terminated immediately after you save this change.

Now, they can't login to their **Chainformation** account until you reactivate their account by **enabling** the **Active** checkbox under the **Account status** header on the **Edit user** page.

Send Password Reset Link to a User

Suppose a user has forgotten their **Chainformation** account password or the system has forbidden their access to the platform due to any other reason. In that case, you can send them a password reset link to login to the **Chainformation** platform again.
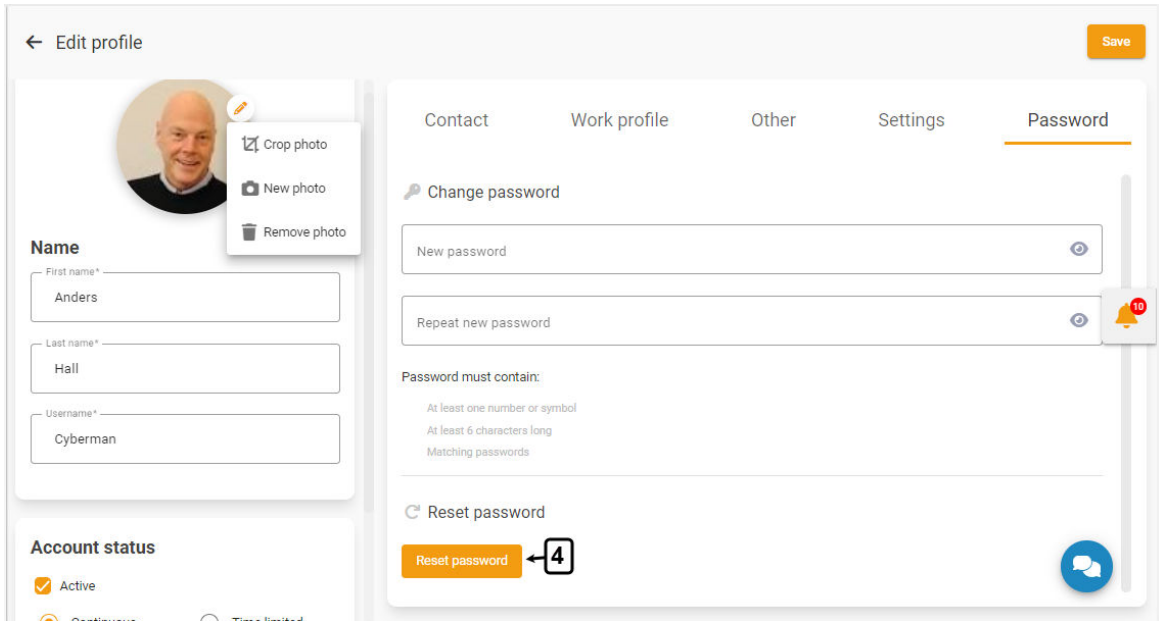
4. Click the **Reset password** button under the **Password** tab on the **Edit user** page.

5. Click the **RESET PASSWORD** button from the dialogue message to confirm your action.
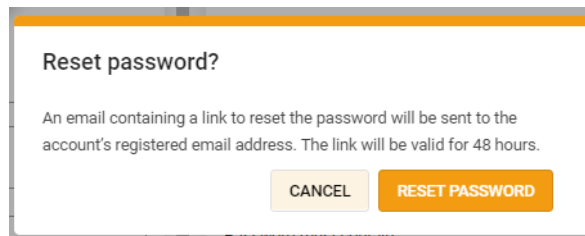
The selected user will immediately receive an email on their primary email address with a link to reset their password. They will choose a new password and sign in to the Chainformation platform using the link.

Remember, the link will be valid for 48 hours and a user can use it only once. However, you can send the link again if the user has expired the link without signing in to the platform.

Change Date/Time Format of a User

By default, a new user sees dates and time across the Chainformation platform in date/time format of the area of the very first unit they belonged to i.e the unit they belonged to when their account was created. See the User Guide for **Geographical Areas**

6. However, you can change the date and/or time format of an existing user from their profile settings.
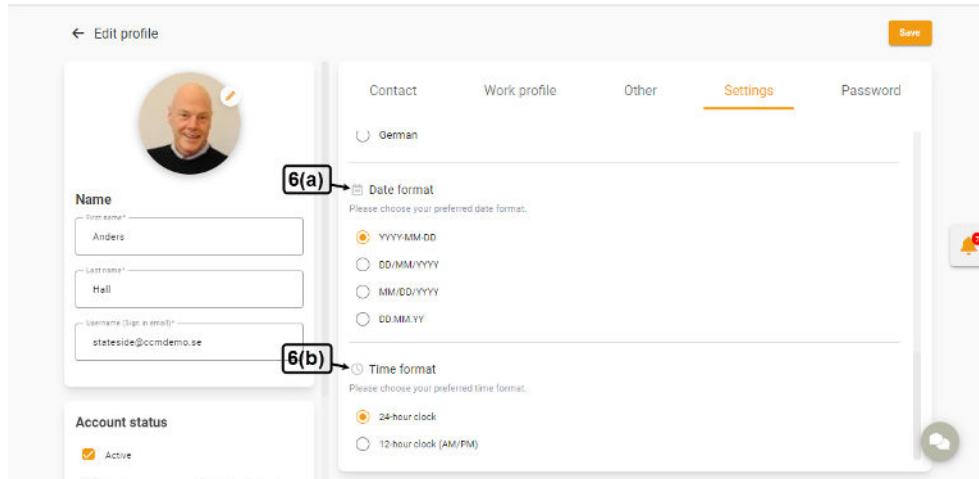
<u>Delete a User Account</u>

Remember, there is no **Trash** folder for the **Colleague** module on the **Chainformation** platform from which you can restore a deleted user.

Therefore, when you delete a user account, the system will delete all the user activity related to their Chainformation account permanently. All information about the selected user will be lost and some content created by this user may be lost or locked in the process.

So, you might consider deactivating a user account instead of deleting it permanently. <u>See the User Guide for **Deactivate a User**</u>

Nonetheless, follow the navigation steps demonstrated below to delete a user if you still want to do this.
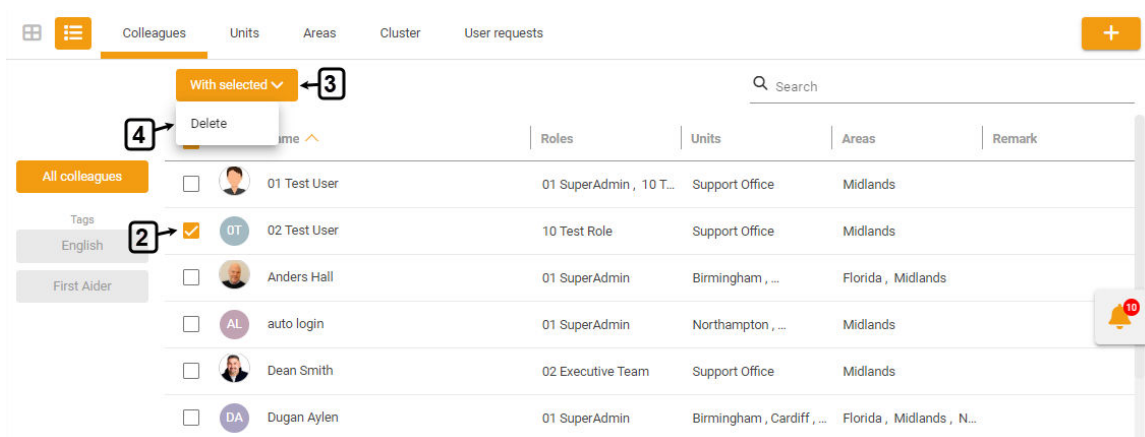
1. Access the **Colleagues** tab on the **Our organisation** page by following the navigation steps as demonstrated in the previous section.

2. On the **Colleagues** page, navigate to the user(s) you want to delete and **check** the **checkbox** next to their name.

3. Click the **With selected** button above the listed users.

4. Click the **Delete** option from the **With selected** dropdown to delete the selected users.

5. You can also delete a user by selecting the **Delete colleague** option from the **Edit** menu on the user profile dialogue. See the User Guide for **Review a User Profile**

6. Type the **DELETE** text in the required field on the warning dialogue and click the **CONFIRM** button to delete the selected user account(s).

Warning

You are about to delete the selected colleague from the system. All information about this colleague will be lost and some content created by this user may be lost or locked in the process. Unless you are confident that this will not be a problem, you should consider changing their status to 'not active' instead - locking their account but leaving all other information intact.

If you still want to delete this colleague, please type the word "DELETE" in the field below and press confirm to proceed.

DELETE

CANCEL   CONFIRM

The system will permanently remove the profile of the deleted user from the database. Now, they can never login to the Chainformation platform again.