

Chainformation Admin User Guide (Colleagues/Users)

Last Updated: August 30, 2024

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](#)

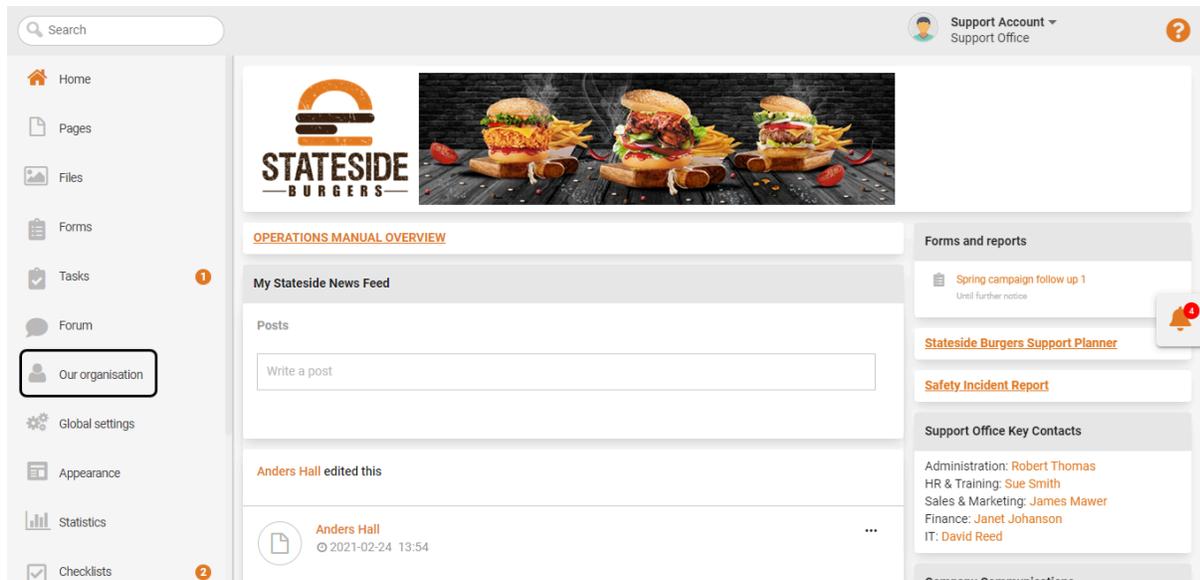
Here is a list of all the features of the **Colleagues** module that we will discuss in this manual.

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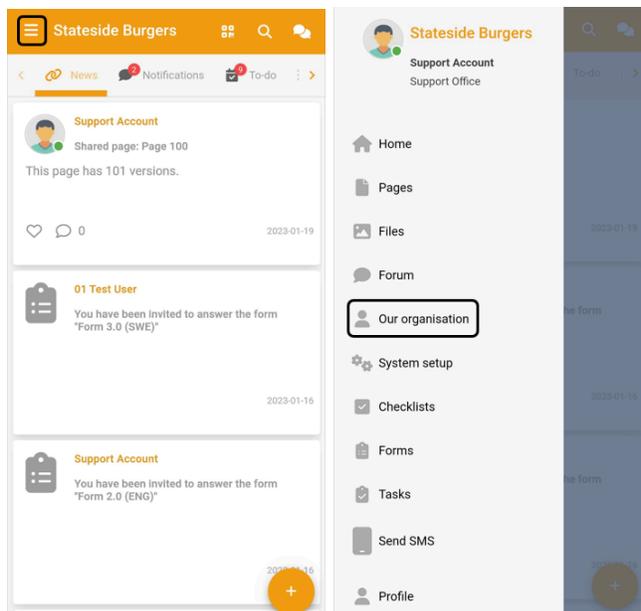
Add a New User

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.

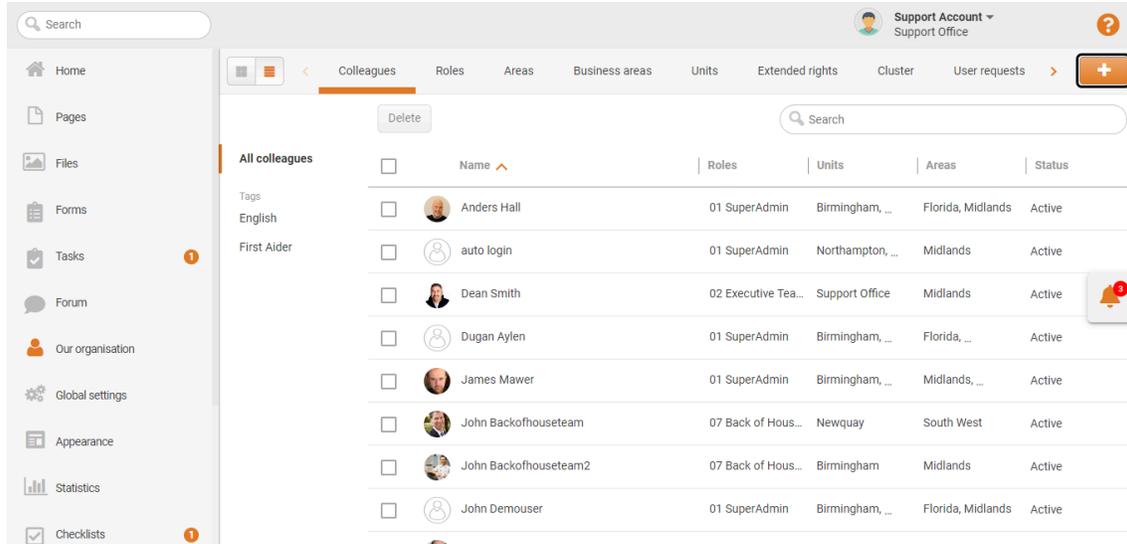


If you are accessing the platform from the **Chainformation** mobile app, you can open your profile menu by clicking the **hamburger** icon in the top-left corner of your mobile screen.



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.

New user [Save]

3: Profile picture upload icon

4: Name fields (First name, Last name)

5: Sign in with: Email (selected), Phone number

6: Account status: Active (selected), Continuous, Time limited

6(a): Start date: 2024-08-29

6(b): Start date selection icon

7: Contact tab

8: Email field (Email type: Work, Email address: demo@stateside.se)

9: Phone field (Phone type: Mobile, Country: Sweden, Phone number: (+46) ...)

10: Street address field (Address type: Home, Street address: ...)

11: Work profile tab

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. Under **Sign in with:** header, enter sign in email or phone number of the new user.

Note: A user could have only either sign in email or sign in number. So, you cannot select both sign in email or number options. Furthermore, a user's sign in email/number should be valid and unique.

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

Sign in with:

Email Phone number

Sign in email*
demo@stateside.com

This email address is associated with other accounts

Sign in with:

Email Phone number

Country*
 ▼

Sign in number*
(+46) 708143565

This phone number is associated with other accounts

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: If you have already entered an email address in the Sign in email field, this email will automatically be saved as the first email address in user's Contact list. You can also add one or more additional emails in a user's Contact list.

Remember, you cannot remove email connected with a user's sign in option from their Contact list.

When a user has only one email address in their Contact list, this email is automatically labeled as their primary email. You can also select two different emails as their Sign in option and primary email respectively if the user has two or email addresses in their Contact list.

Users receive daily/weekly summary emails, form submission copies, email updates from Checklists 2.0, Audit checklists modules and support messages on their primary email.

Note: You cannot select a non-unique email as the user's sign in email. But, a user can use a non-unique email as their primary email. So, multiple users on a Chainformation platform can have the same primary email.

9. Enter the **phone number** of the new user.

Note: If you have already entered a phone number in the Sign in number field, this number will automatically be saved as the first phone number in user's Contact list. You can also add one or more additional phone numbers in a user's Contact list.

Remember, you cannot remove a phone number connected with a user's sign in option from their Contact list.

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

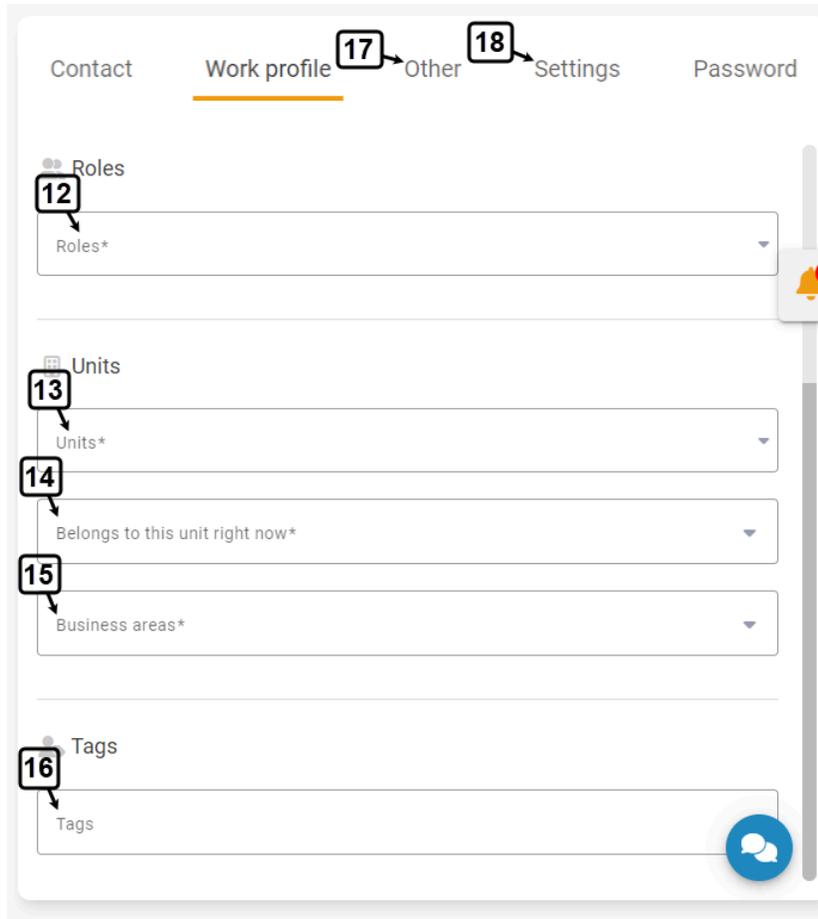
14. Select the current unit of the new user in the **Belongs to this unit right now** field.

Remember, a user must belong to an active unit in order to be activated. The user will be saved in deactivated status if you select a deactivated unit 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**



The screenshot shows the 'Work profile' tab of a user profile page. At the top, there are four tabs: 'Contact', 'Work profile' (underlined), 'Other', and 'Settings'. Below the tabs are four sections, each with a dropdown menu:

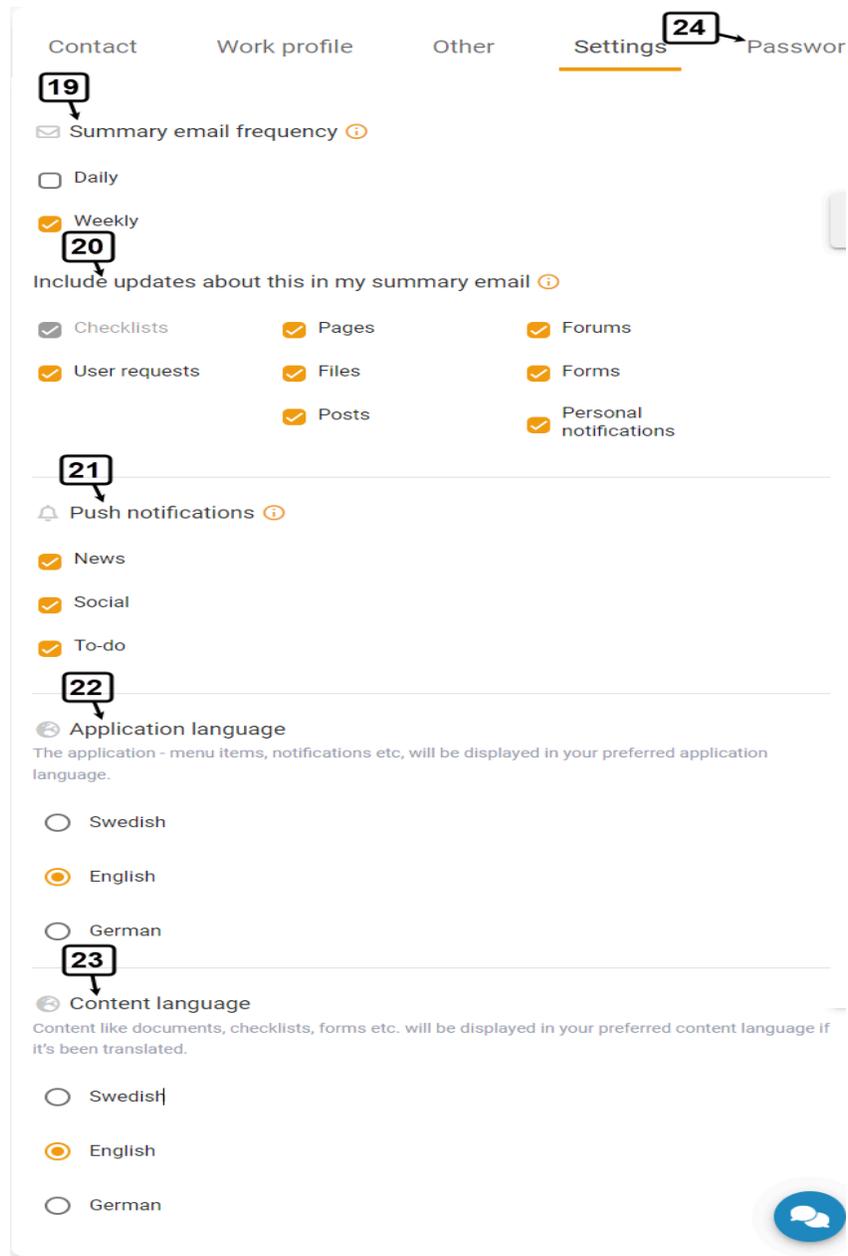
- Roles:** A dropdown menu labeled 'Roles*' with a callout box '12' pointing to it.
- Units:** A dropdown menu labeled 'Units*' with a callout box '13' pointing to it.
- Business areas:** A dropdown menu labeled 'Business areas*' with a callout box '15' pointing to it.
- Tags:** A dropdown menu labeled 'Tags' with a callout box '16' pointing to it.

Additional callouts include '14' pointing to the 'Belongs to this unit right now*' dropdown, '17' pointing to the 'Other' tab, and '18' pointing to the 'Settings' tab. A notification bell icon is visible on the right side of the page.

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 Chaininformation mobile app.

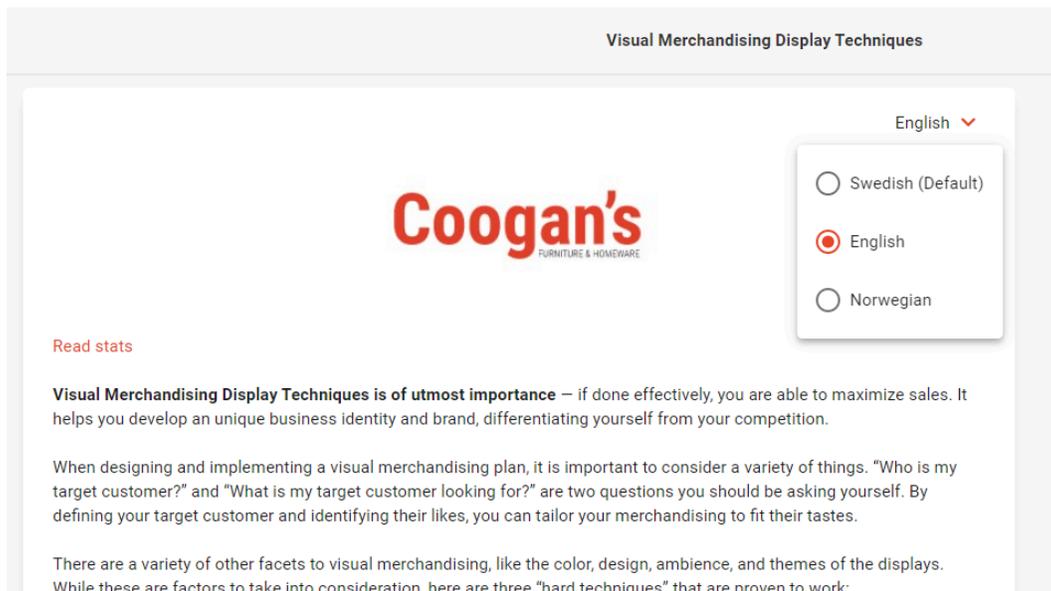
22. Select the **Application language** of the new user account.

This is the language in which application text including menu items, page headers, notifications, etc. will be shown on the user profile.

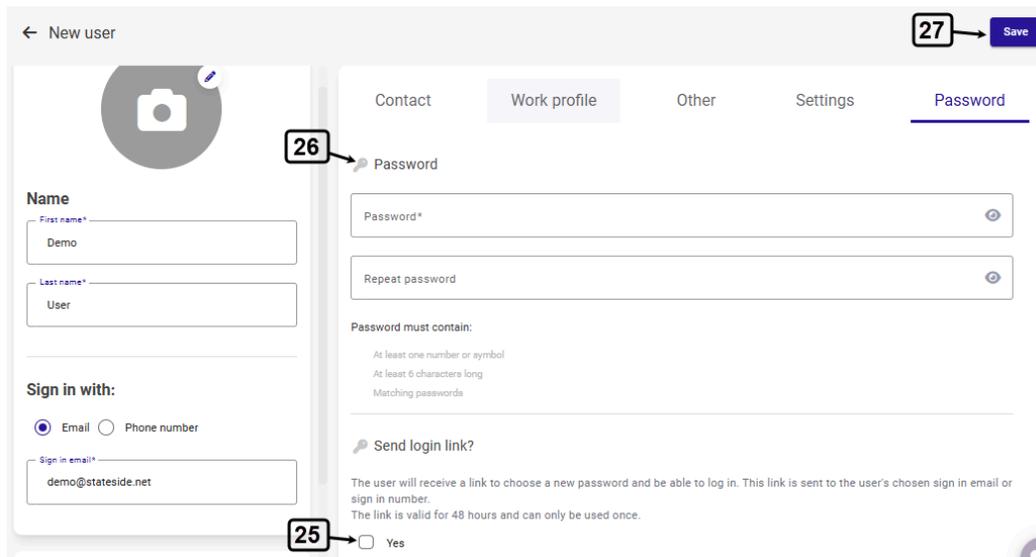
23. Select the **Content language** of the new user account.

The content language is the default language in which the user will see blog posts, forms, checklists and other content on the **Chaininformation** 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 or SMS with a link on their registered sign in email or sign in number once you have saved 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. See the user guide for **Send password reset link to a colleague**

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.

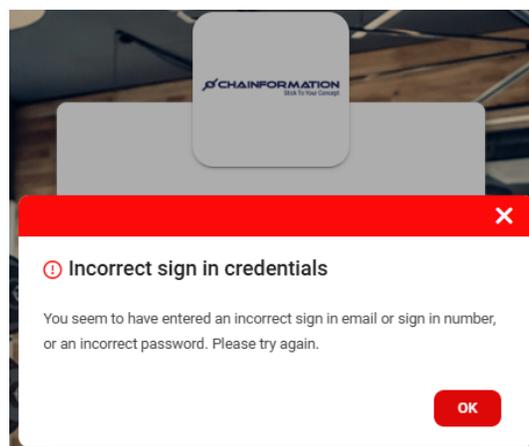
Note: All fields with the **Asterisk (*)** sign are mandatory and you cannot save the user profile if you have left any one of the mandatory fields empty.

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 sign in email/number and password.

Remember, a user can only use their chosen sign in option (email or phone number) when signing in to their account. They cannot use any other email or phone number from their profile to login even if it's unique i.e. only associated with one user account in your organisation.

When a user tries to sign in with an email address or phone from their contact list that is not their registered sign in option, "Incorrect sign in credentials" error occurs.



View Your Colleagues

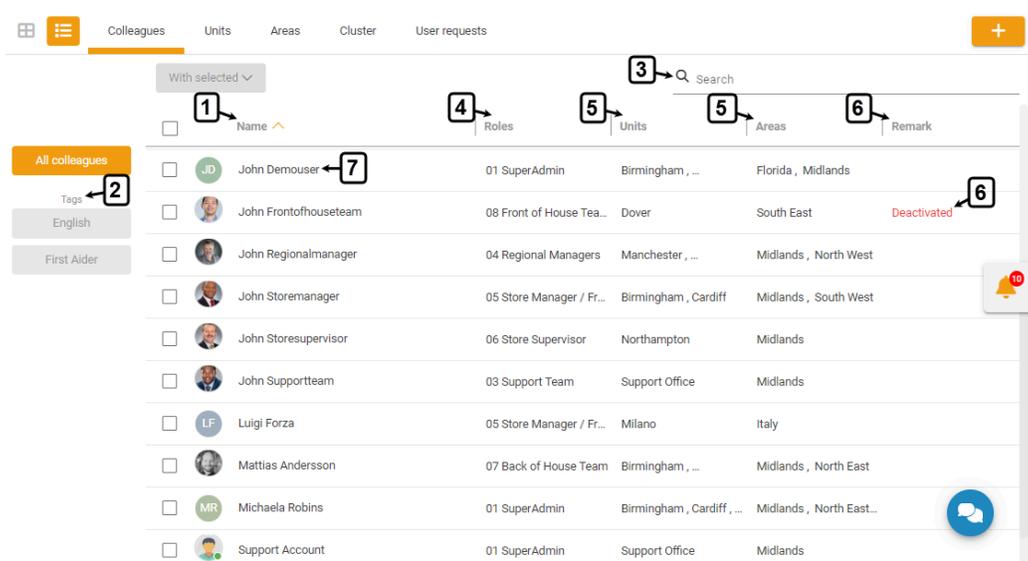
Once you have opened the **Our organisation** page as demonstrated in the previous section, you can view the names of your colleagues and their corresponding details on the **Colleagues** tab.

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.



With selected	1 Name	4 Roles	5 Units	5 Areas	6 Remark
<input type="checkbox"/>	John Demouser	01 SuperAdmin	Birmingham , ...	Florida , Midlands	
<input type="checkbox"/>	John Frontofhouseteam	08 Front of House Tea...	Dover	South East	Deactivated
<input type="checkbox"/>	John Regionalmanager	04 Regional Managers	Manchester , ...	Midlands , North West	
<input type="checkbox"/>	John Storemanager	05 Store Manager / Fr...	Birmingham , Cardiff	Midlands , South West	
<input type="checkbox"/>	John Storesupervisor	06 Store Supervisor	Northampton	Midlands	
<input type="checkbox"/>	John Supportteam	03 Support Team	Support Office	Midlands	
<input type="checkbox"/>	Luigi Forza	05 Store Manager / Fr...	Milano	Italy	
<input type="checkbox"/>	Mattias Andersson	07 Back of House Team	Birmingham , ...	Midlands , North East	
<input type="checkbox"/>	Michaela Robins	01 SuperAdmin	Birmingham , Cardiff , ...	Midlands , North East...	
<input type="checkbox"/>	Support Account	01 SuperAdmin	Support Office	Midlands	

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**

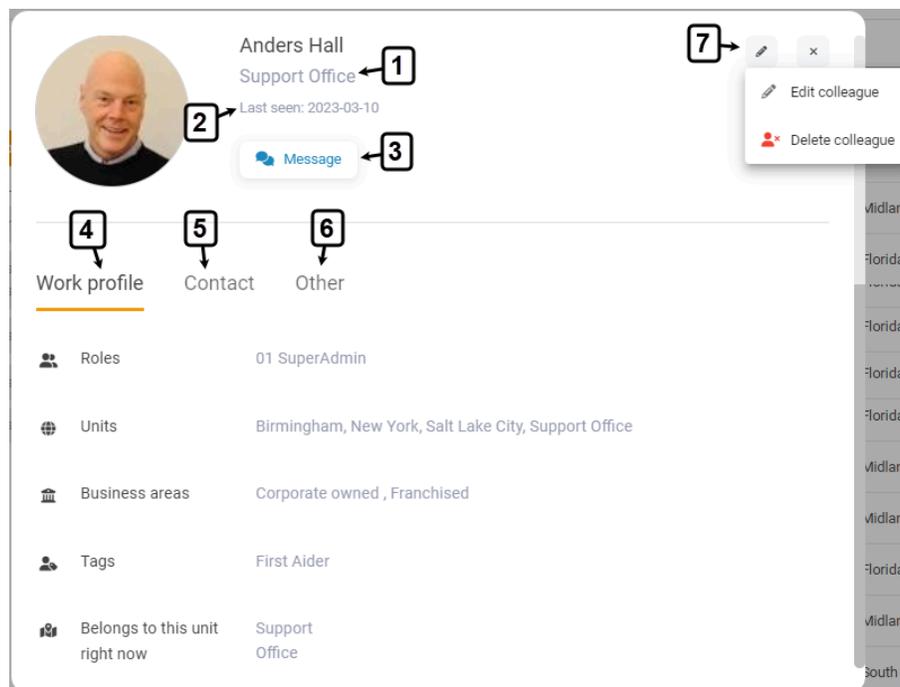
3. You can also use the **Search** field to find a colleague based on any of the available data/information. See the User Guide for **Search**

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)**

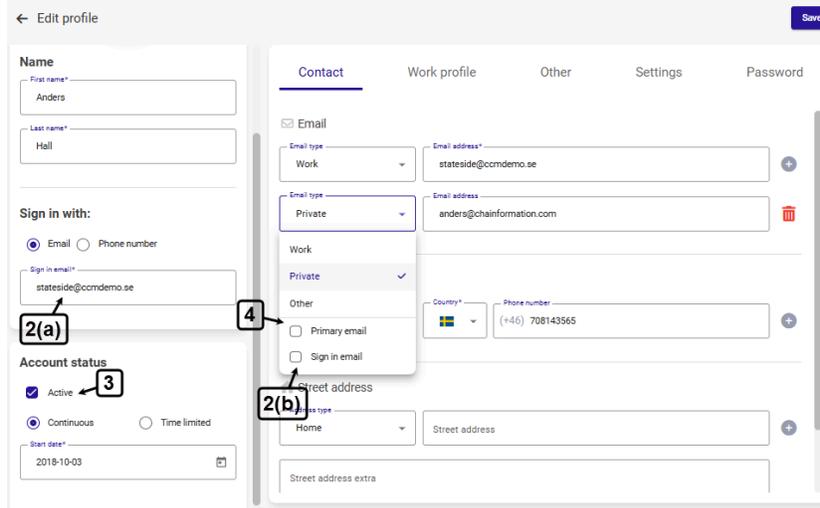
7. You can edit or delete a user by clicking the **Edit** (✎) icon in the top-right corner of the user profile dialogue and then, selecting the required option from the dropdown.

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**



These are some significant changes you can make on the **Edit user** page.

Update Sign in option of a Colleague

2(a). You can update the sign in option of a colleague to a new valid, unique email or phone number by adding this email or phone number in the Sign in email/number field.

When you update a user's sign in option to a different email or phone number, updated email/number will also be added in their Contact list. Also, user's old sign in email/number is not removed from their Contact list and still found as an additional contact on their profile.

2(b). You can also change a user's sign option to another unique email or phone number by selecting **Sign in email** or **Sign in number** label for this email/number in user's Contact list.

Remember, Sign in email/number label is only available for unique emails, phone numbers in user's Contact list. This label is not found on emails or phone numbers that are associated with two or more user accounts 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 no longer use their old sign in email/number to login even if it's unique i.e. only associated with one user account in your organisation.

When a user tries to sign in with an email address or phone from their contact list that is not their registered sign in option, "Incorrect sign in credentials" error would show up.

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.

Remember, a user must belong to an active unit in order to be activated. The user will be saved in deactivated status if they belong to a deactivated unit. You cannot activate this user account until their current business unit is reactivated or you change their current unit to another active unit. See the user guide for **Work profile of a user**

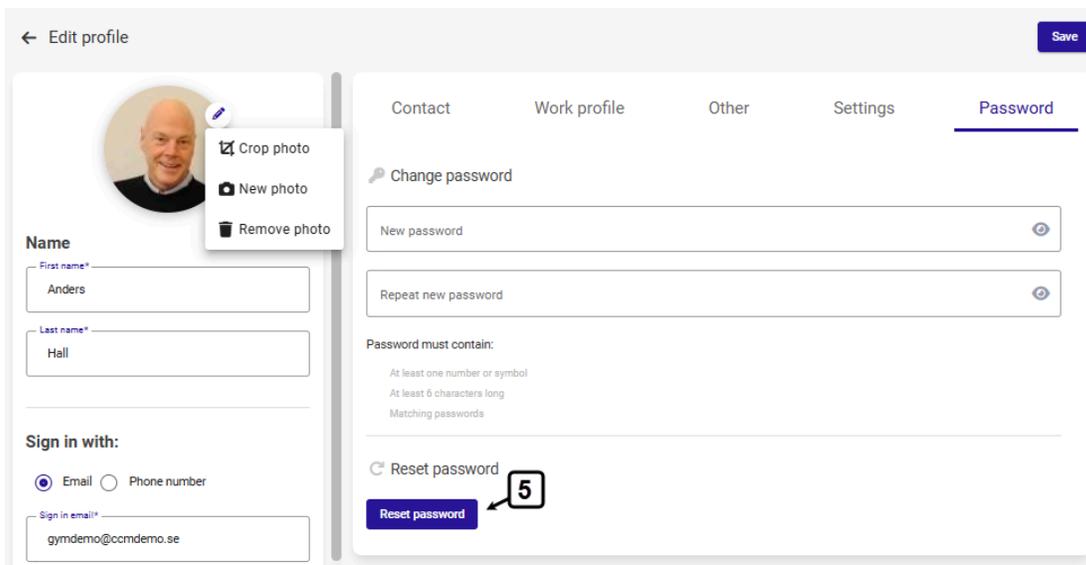
Update primary email of a Colleague

4. You can change a user's primary email to another email (if available) from their profile by selecting the **Primary email** label for this email in user's Contact list.

Once you save this change, the user will receive daily/weekly summary emails, form submission copies, email updates from Checklists 2.0, Audit checklists modules and support messages on their new primary email.

Send Password Reset Link to a User

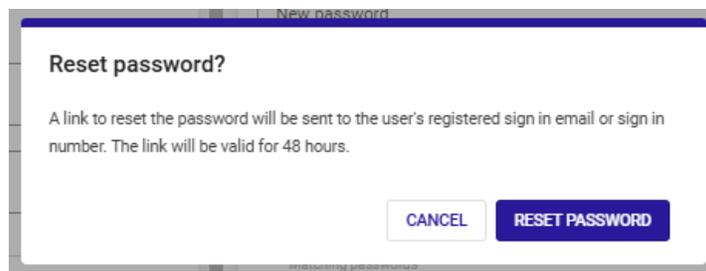
Suppose a user has forgotten their **Chainformation** account password or the system has forbidden their access to the platform due to any other reason. In that case, you can send them a password reset link to login to the **Chainformation** platform again after setting a new password for their account.



The screenshot shows the 'Edit profile' interface. On the left, there's a profile card with a photo and name 'Anders Hall'. A dropdown menu is open over the photo with options: 'Crop photo', 'New photo', and 'Remove photo'. On the right, the 'Password' tab is active. It contains a 'Change password' section with 'New password' and 'Repeat new password' fields. Below that, it lists password requirements: 'At least one number or symbol', 'At least 6 characters long', and 'Matching passwords'. At the bottom, there is a 'Reset password' button with a red circle and the number 5 next to it.

5. Click the **Reset password** button under the **Password** tab on the **Edit user** page.

6. Click the **RESET PASSWORD** button from the dialogue message to confirm your action.



The dialog box has a title 'Reset password?'. Below the title, it says: 'A link to reset the password will be sent to the user's registered sign in email or sign in number. The link will be valid for 48 hours.' At the bottom right, there are two buttons: 'CANCEL' and 'RESET PASSWORD'.

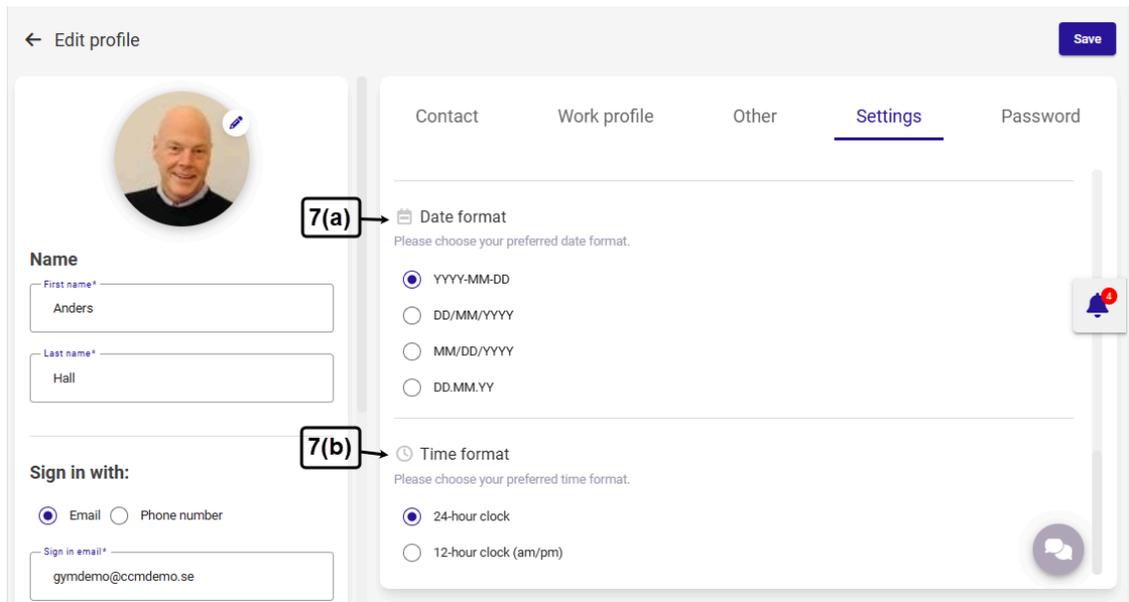
The selected user will immediately receive an email on their registered sign in email or phone number with a link to reset their password. They will choose a new password and sign in to the Chainformation platform using the link.

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**

7. However, you can change the date and/or time format of an existing user from their profile settings.



← Edit profile Save

Contact Work profile Other Settings Password

7(a) → **Date format**
Please choose your preferred date format.

- YYYY-MM-DD
- DD/MM/YYYY
- MM/DD/YYYY
- DD.MM.YY

7(b) → **Time format**
Please choose your preferred time format.

- 24-hour clock
- 12-hour clock (am/pm)

Name

First name*
Anders

Last name*
Hall

Sign in with:

Email Phone number

Sign in email*
gymdemo@ccmdemo.se

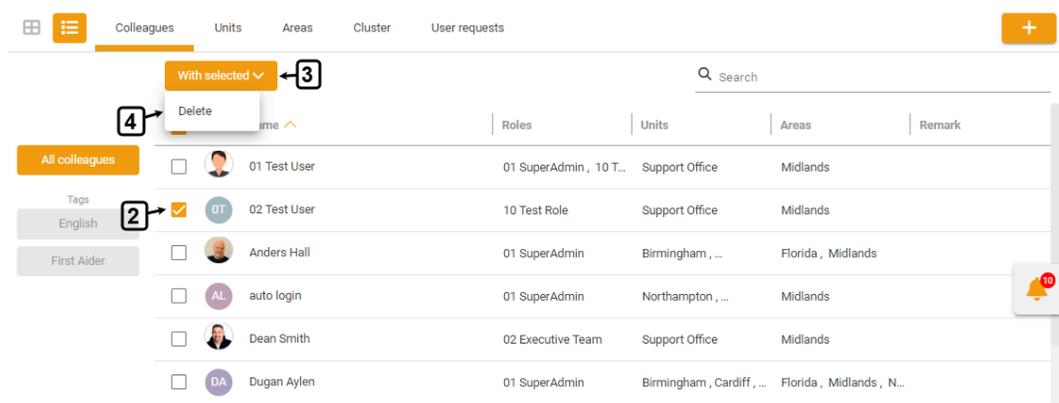
Delete a User Account

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

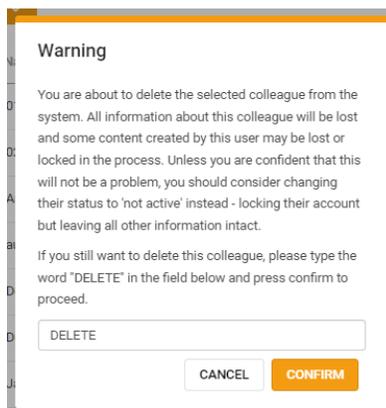
Therefore, when you delete a user account, the system will delete all the user activity related to their Chainformation account permanently. All information about the selected user will be lost and some content created by this user may be lost or locked in the process.

So, you might consider **deactivating a user account instead of deleting it permanently**. [See the User Guide for Deactivate a User](#)

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).





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