

User Administration

Welcome to user administration

From this section of the client portal we can add or change users that are under our control as a company administrator.

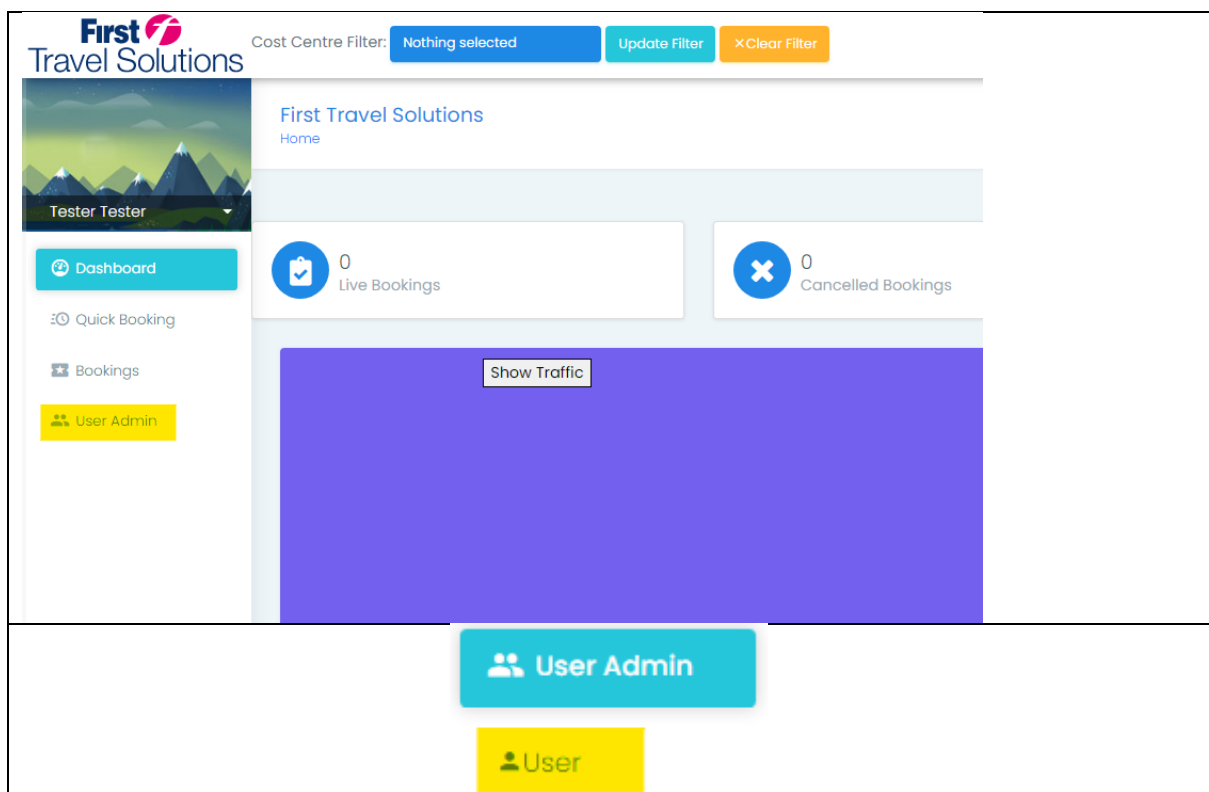
First how do we access the user administration?

From the Dashboard we can select the "User Admin" within the navigation panel on the left side of the screen. If this is not visible like shown in the image below speak to your administrator to set you up with the permissions to see this.

Select "User Admin"

Select "User"

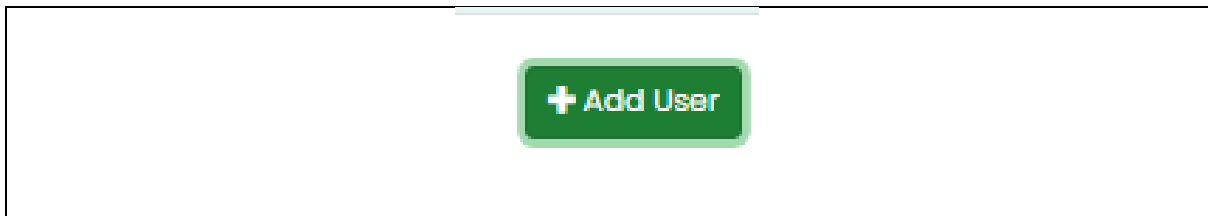
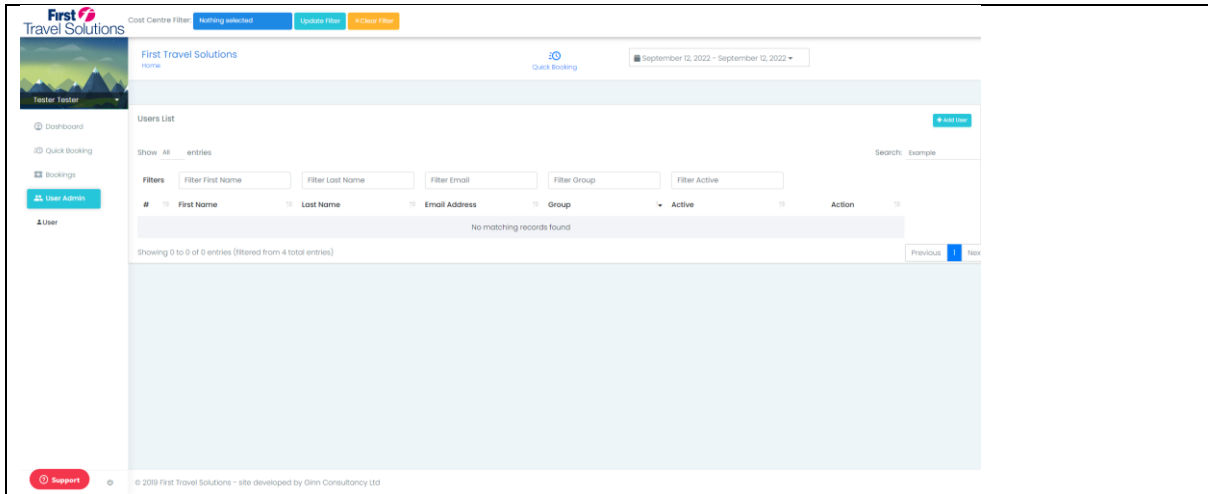
Now that we are in the administration section we may **"Add"** **"Delete"** or **"Change"** users as shown in the below sections.



Creating A User

To create a new user we select the "Add User" button located on the right hand side of the screen.

Once selected a modal will appear on the screen allowing us to progress further.



Model Introduction

Below is an image of the pop up model that we use to create a new user.

User Settings
✕

User Active

Generate random password and send confirmation email to new user

Cancel Save

Fill the users name into the first name where the forename is filled and the last name section where the surname is filled.

	<input style="width: 95%; border: 1px solid #ccc;" type="text" value="First Name"/>
	<input style="width: 95%; border: 1px solid #ccc;" type="text" value="Last Name"/>

Enter the Users official work email address in the Login Email address section.

The secondary email section allows for the user to have a group email also input, this is not intended to be for personal email addresses and we don't advise these being used. Instead it would allow for a workplace email used by multiple members of a team for example:

Support@Firsttravelsolutions.com

<input checked="" type="checkbox"/> Login Email
<input checked="" type="checkbox"/> Secondary Email

This checkbox will allow you to select if the user is active right away or inactive at this point in time.

If you have a new user coming onto the team in 2 weeks then we would recommend leaving this user as inactive (unchecked) until the user starts work.

<input type="checkbox"/> User Active
<input checked="" type="checkbox"/> User Active

Role assignment allows for addition / removal of roles.

To add a role:

Select available roles drop-down



Select the role you wish to add

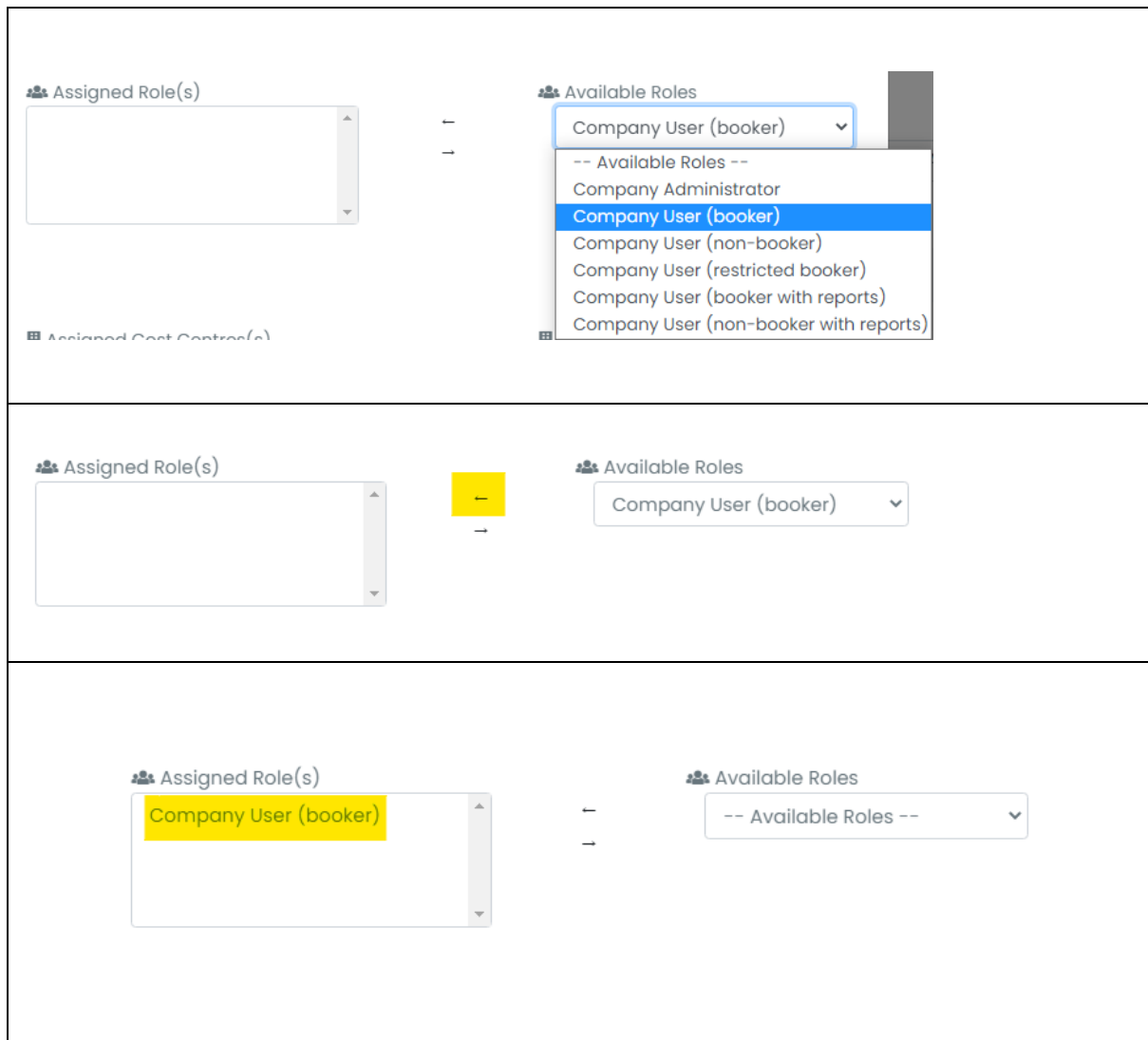
Select the arrow pointing to assignment

Please use the images below to help visualise the process if you need.

To remove a role:

Select the role on the left you wish to remove and click the arrow pointing right.

<p> Assigned Role(s)</p> <div style="border: 1px solid #ccc; height: 50px; width: 200px;"></div>	<p>←</p> <p>→</p>	<p> Available Roles</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">-- Available Roles --</div>
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Cost Center assignment allows for addition / removal of Cost Centers.

To add a Cost Center:

Select available Cost Center drop-down

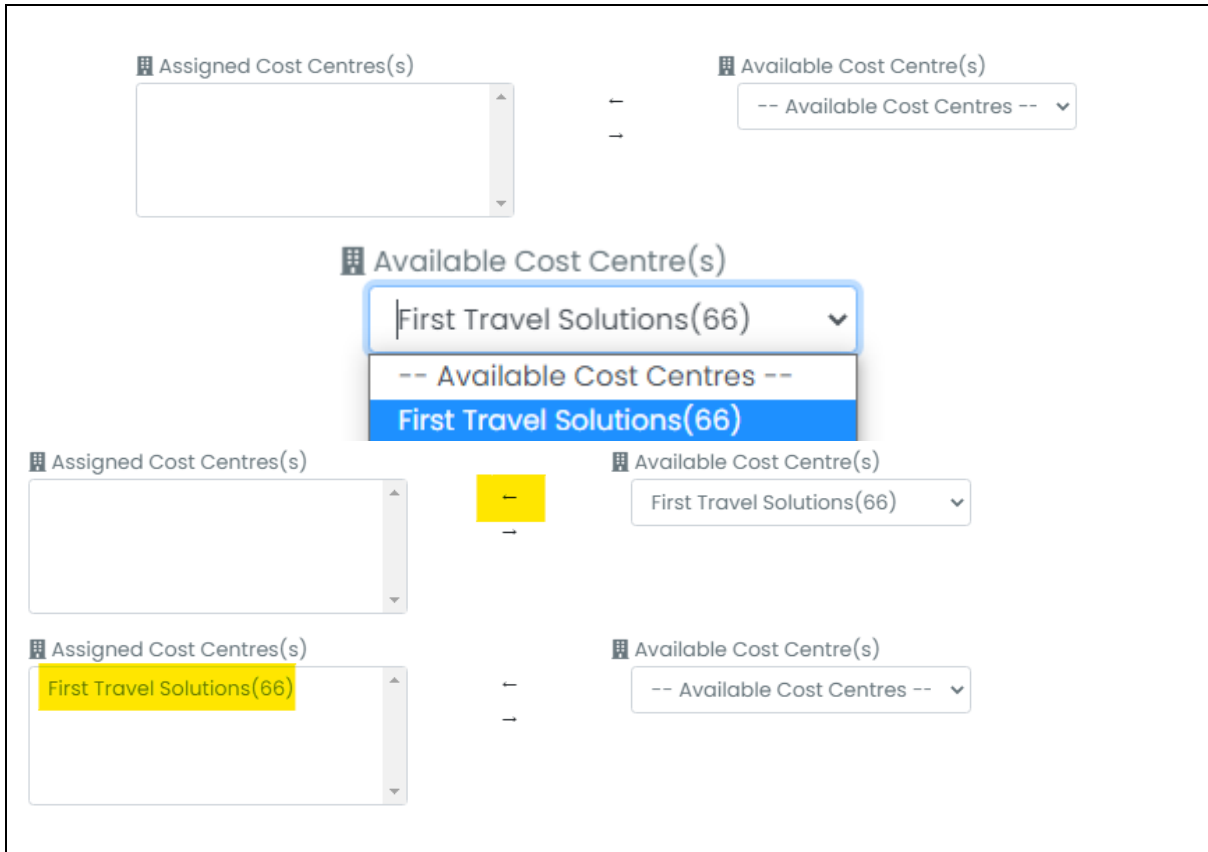
Select the Cost Center you wish to add

Select the arrow pointing to assignment

Please use the images below to help visualise the process if you need.

To remove a Cost Center :

Select the Cost Center on the left you wish to remove and click the arrow pointing right.



Creating a password,

Enter the password for the user you are creating, Re-enter in the confirm password section.

The second option here is to select the Generate Random Password box to make the system autogenerate a password.

Select Cancel to delete the data you have entered or save to create the user.

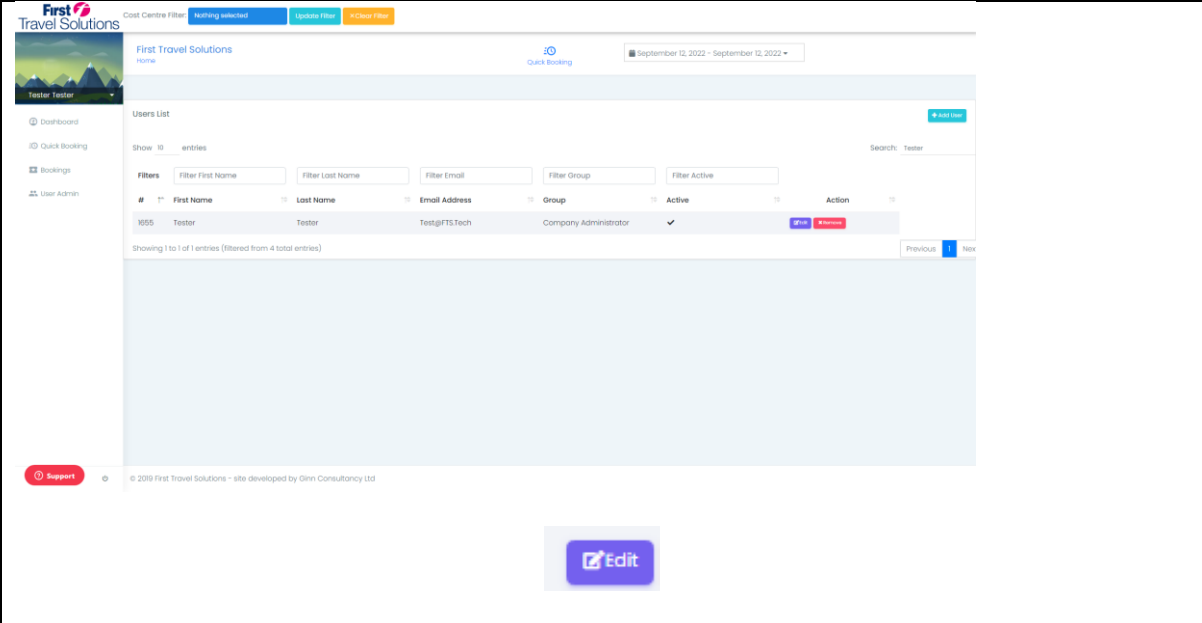
Cancel

Save

Editing A User

To edit a user we simply click the edit button shown in the images below.

To edit the user please follow the sections above with the creation process to show the details required for each section.



The screenshot displays the 'First Travel Solutions' user management interface. The top navigation bar includes the company logo, a 'Cost Centre Filter' section with 'Nothing selected', 'Update Filter', and 'Clear Filter' buttons, and a date range of 'September 12, 2022 - September 12, 2022'. The main content area is titled 'Users List' and features a search bar with the text 'Tester'. Below the search bar are filter fields for 'Filter First Name', 'Filter Last Name', 'Filter Email', 'Filter Group', and 'Filter Active'. A table lists users with columns for '#', 'First Name', 'Last Name', 'Email Address', 'Group', 'Active', and 'Action'. The first entry is for user ID 1055, with first name 'Tester', last name 'Tester', email 'Test@FTS.Tech', group 'Company Administrator', and an active status. The 'Action' column for this user contains a blue 'Edit' button and a red 'Remove' button. The table indicates 'Showing 1 to 1 of 1 entries (filtered from 4 total entries)'. A sidebar on the left contains navigation links for 'Dashboard', 'Quick Booking', 'Bookings', and 'User Admin'. A footer at the bottom left includes a 'Support' button and copyright information: '© 2019 First Travel Solutions - site developed by Glin Consultancy Ltd'. A large blue 'Edit' button is overlaid at the bottom center of the image.

#	First Name	Last Name	Email Address	Group	Active	Action
1055	Tester	Tester	Test@FTS.Tech	Company Administrator	✓	Edit Remove