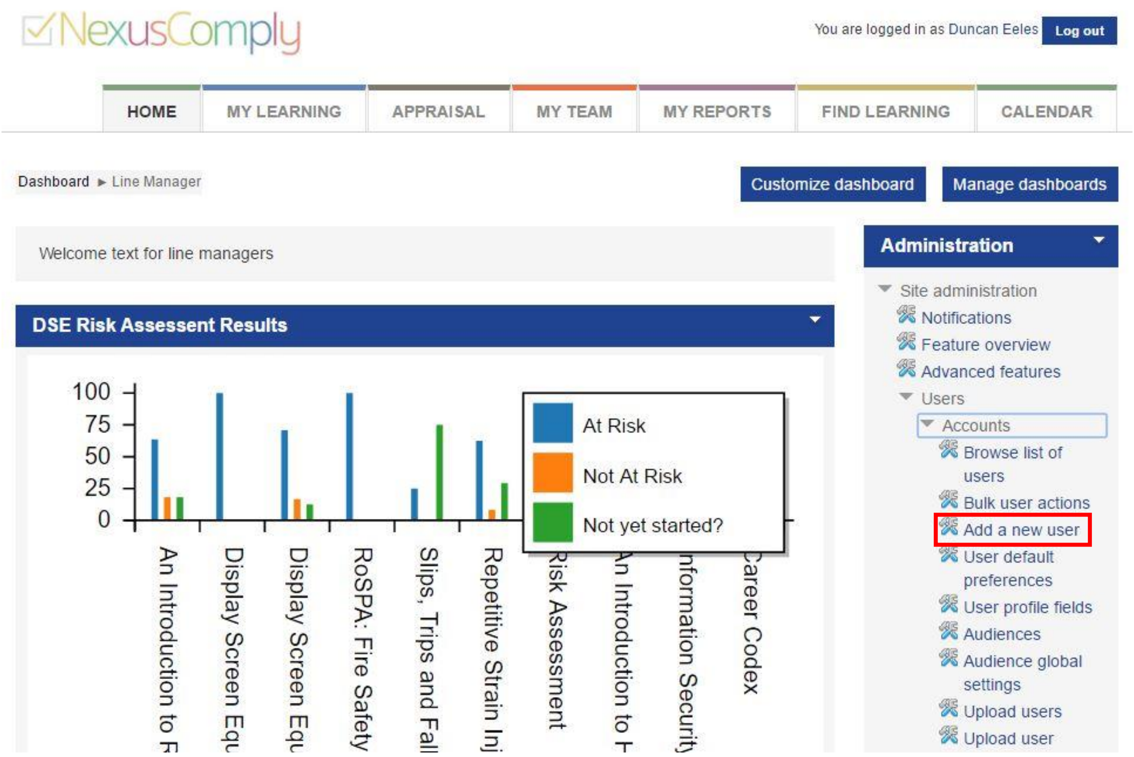
User Accounts

Create a user

1. Click *Users > Accounts* from the *Site administration* menu.
2. Click **Add a new user**



3. Complete the compulsory fields.
   Compulsory fields are indicated by a red asterisk.

   The compulsory fields in a standard install are:

- Username
- Password
- First name
- Surname
- Email address

4. Click **Expand all** from the top-right hand side of the page to view all available fields for the user profile.
5. Click **Create user** to save the new user's profile.

View user accounts

A site administrator or role with the appropriate permissions can view user accounts.

1. Click *Users > Accounts* from the *Site administration* menu.
2. Click **Browse list of users**.

View a user's profile

A site administrator or role with the appropriate permissions can view a user's profile.

1. Click *Users > Accounts* from the *Site administration* menu.
2. Click **Browse list of users**.
3. Search for and find the user.
4. Click the user's name to view their profile.

Delete a user account

A site administrator or role with the appropriate permissions can delete a user's account.

1. Click *Users > Accounts* from the *Site administration* menu.
2. Click **Browse list of users**.
3. Search for and find the user.
4. Click the delete icon next to the user's name to open their account.
5. You will be prompted to confirm deletion of the user account.
   All associated data, including but not limited to the following, will be deleted and is not recoverable:

- Appraisals where the user is in the learner role
- Grades
- Tags
- Roles
- Preferences
- User custom fields
- Private keys
- Customised pages
- Face-to-face signups
- 360 feedback assignments and responses
- Position assignments
- Programs & certifications
- Goals
- Will be unenrolled from courses
- Will be unassigned from manager, appraiser and temporary manager positions
- Will be removed from cohorts
- Will be removed from groups
- Messages will be marked as read

If you wish to retain any data you may wish to consider suspending the user instead.

6. Click **Delete** to confirm user deletion or **Cancel** if you change your mind.

Suspend/unsuspend a user account

A site administrator or role with the appropriate permissions can suspend/unsuspend a user's account.

To suspend/unsuspend a user's account:

1. Click *Users* > *Accounts* from the *Site administration* menu.
2. Click **Browse list of users**.
3. Search for and find the user.
4. Click the suspend icon next to the user's name to suspend/unsuspend the user's account.

Edit a user's profile

A site administrator or role with the appropriate permissions can edit a user's profile.

To edit a user's profile:

1. Click *Users* > *Accounts* from the *Site administration* menu.
2. Click **Browse list of users**.
3. Search for and find the user.
4. Click the edit icon next to the user's name to open their profile.
5. The fields here are self evident; the most frequent reason to access this page is to re-set a user’s password.
6. Click **Update profile** to save changes.

Bulk user actions

The bulk user actions feature in *Administration* > *Site administration* > *Users* > *Accounts* > *Bulk user actions* enables administrators to select users by creating a filter and then perform any of the following actions:

- Confirm user accounts created through Email-based self-registration which are not yet confirmed by the user.
- Send a message (requires Messaging to be enabled).
- Delete user accounts.
- Display a list of users on a page.
- Download user data in text, ODS or Excel file format.
- Force users to change their passwords.
- Add users to a cohort.

To perform a bulk user action

- If you know them, choose your users from the available list or else click *Show Advanced* to create a filter.
- Users can be filtered according to full name, surname, first name, email address, city/town, country, confirmed, first access, last access, last login, username, authentication.
- If you have set a custom profile field, this is available too from the 'Profile' dropdown box
- Select users from the list.
- Choose an action from the dropdown menu.
- Click the *Add filter* button.
- Select in the box on the left those users you require and move them to the box on the right.
- From the dropdown box *With selected users*, choose the action you wish to perform and then click *Go*.