Chapter 7

Creating and Managing Accounts

Objectives

- **Creating a new user account**
- **Determining the new user access to resources**
- **Assigning a profile to the user account**
- **Blocking a user's access to StatusBoard 2.0**
- **Editing user information**
- **Copying a user account**
- **Deleting a user account**

Chapter Overview

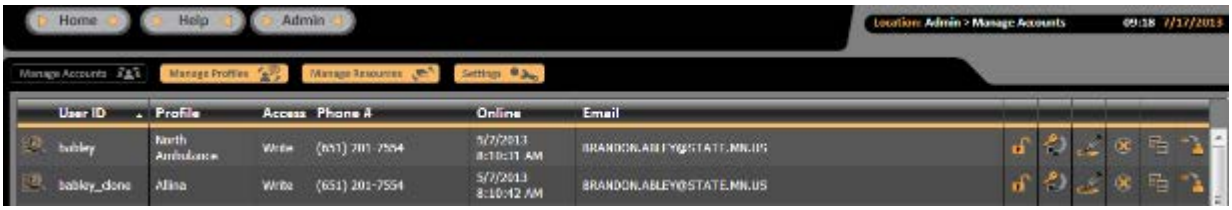
Now that you have created a profile or profiles and have assigned resources to those profiles, you can begin to add users to those profiles.

The "Manage Accounts" screen is where you can sign on new users and also determine what access they will have to the resources: either "read only" or "write."

Using the universal icons, you can lock a user's access to StatusBoard 2.0, cause a user to reset his or her password, and edit, copy, or delete a user account.

For information on user accounts policy, refer to ARMER Standard 3.31.0, "Status Board"; in particular, Section 4.

Take a look at the "Manage Accounts" screen.



You will see:

- Names of user already in the system
- The profiles these users are assigned to
- The nature of the user's access, either "read" or "write"
- The user's phone number, email address, and when he or she was last logged on to the system
- A "View Account Details" icon (on the left side) to take a quick look at the user's information
- Several more icons (on the right side) to help you manage the corresponding account.

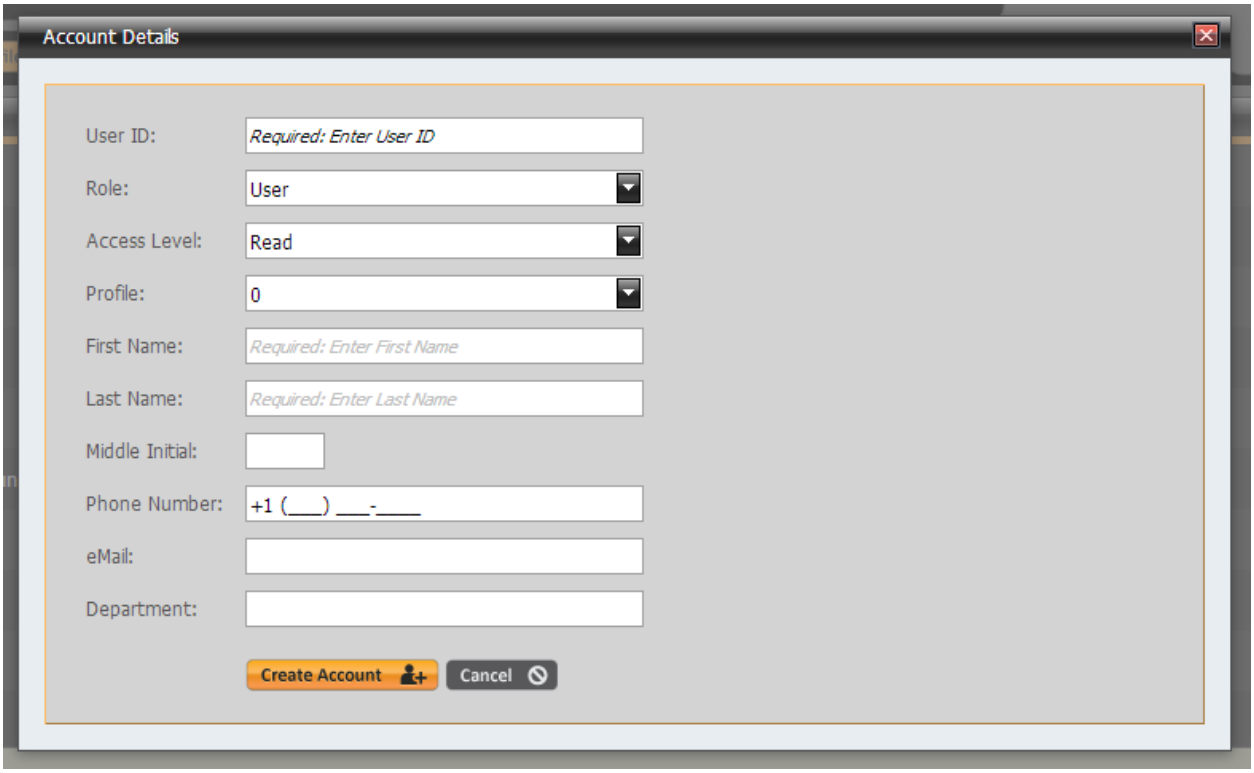
Take a look at the icons to the right of the User IDs:

From left to right, they are:

Lock Account	This allows you to block account access to this user without deleting the account.
Reset Password	This allows you to reset a user's password. The user will have to choose a new password the next time he or she attempts to log in.
Edit This Account	This allows you to edit details about the user such as name, contact information, access, and whether the user is listed as "admin" or "user."
Delete This Account	This will delete the account permanently.
Copy This Account	This will create a duplicate of the user account. You must give the duplicate a new name.
Create New Account	This will allow you to create a new account. The icon is displayed on each row, but does not correspond specifically to any existing account user.

Creating a new account:

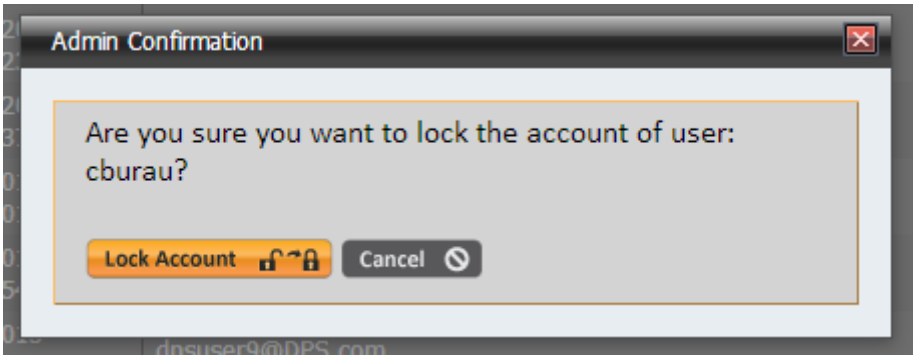
- Select the “Create New Account” icon.



- You must enter a User ID to create a new account.
- Select the role of the user. Only “admin” users have access to the Admin menu options.
- Select Access Level: Only the “write” option allows users to reserve resources, as opposed to just being able to see whether they are available.
- Enter the user information. First and last name are required fields.
- Select “Create Account” when you are finished entering the information.
- A message should appear to let you know the account was successfully created. Select “OK.”

Locking a User Account:

- For the user you created, select the "Lock Account User" icon.



- If you really want to lock this account, select "Lock Account." If not, select "Cancel."

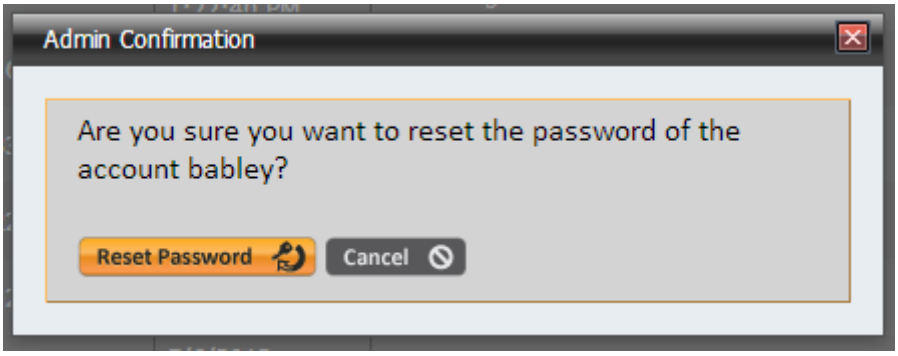
- You should see a message advising that the account has been locked. Select "OK."

- The corresponding lock icon should now look like this:

- If you wish to unlock the account, simply select the icon and confirm that you wish to unlock it.

Resetting the password for a user account:

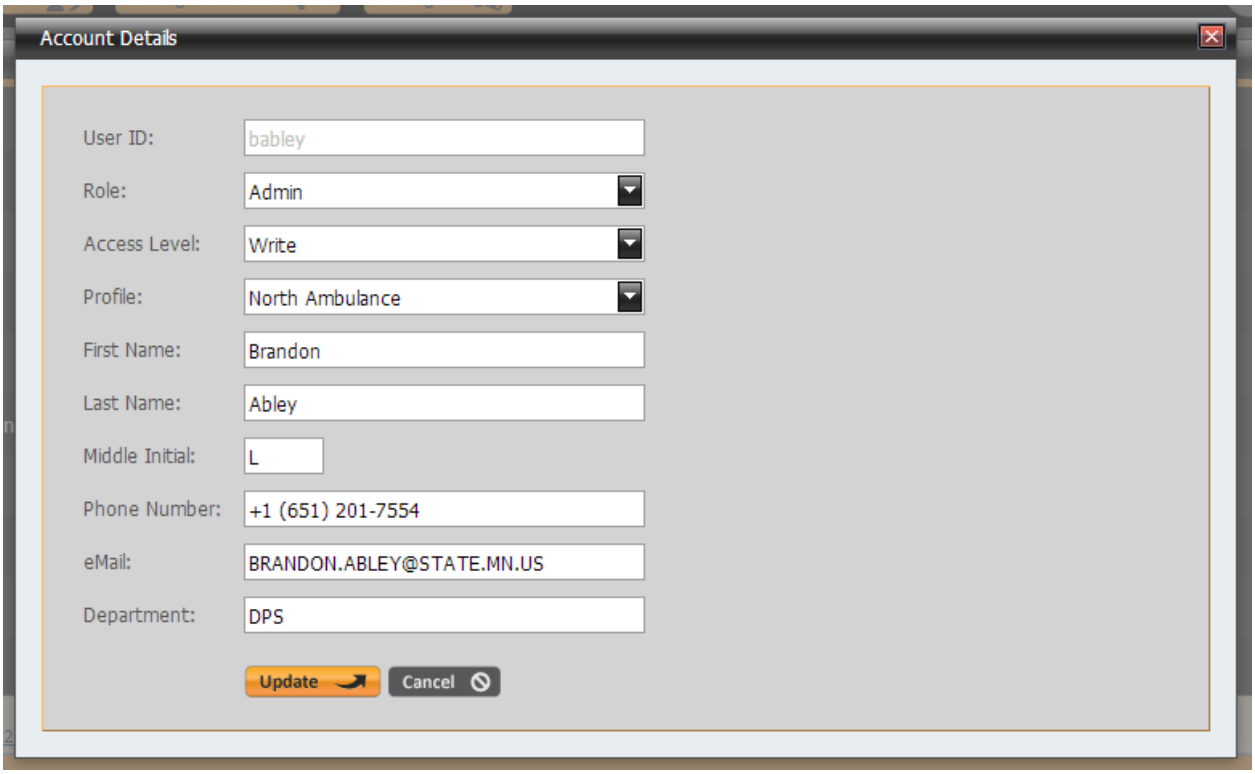
- Select the “Reset Password” icon:



- Select “Reset Password” if you are sure. This will cause the user to have to log in using the temporary password, which is generated and emailed to him or her by the system. The user will log in with the temporary password, then will have to set a new password.

Editing a user account:

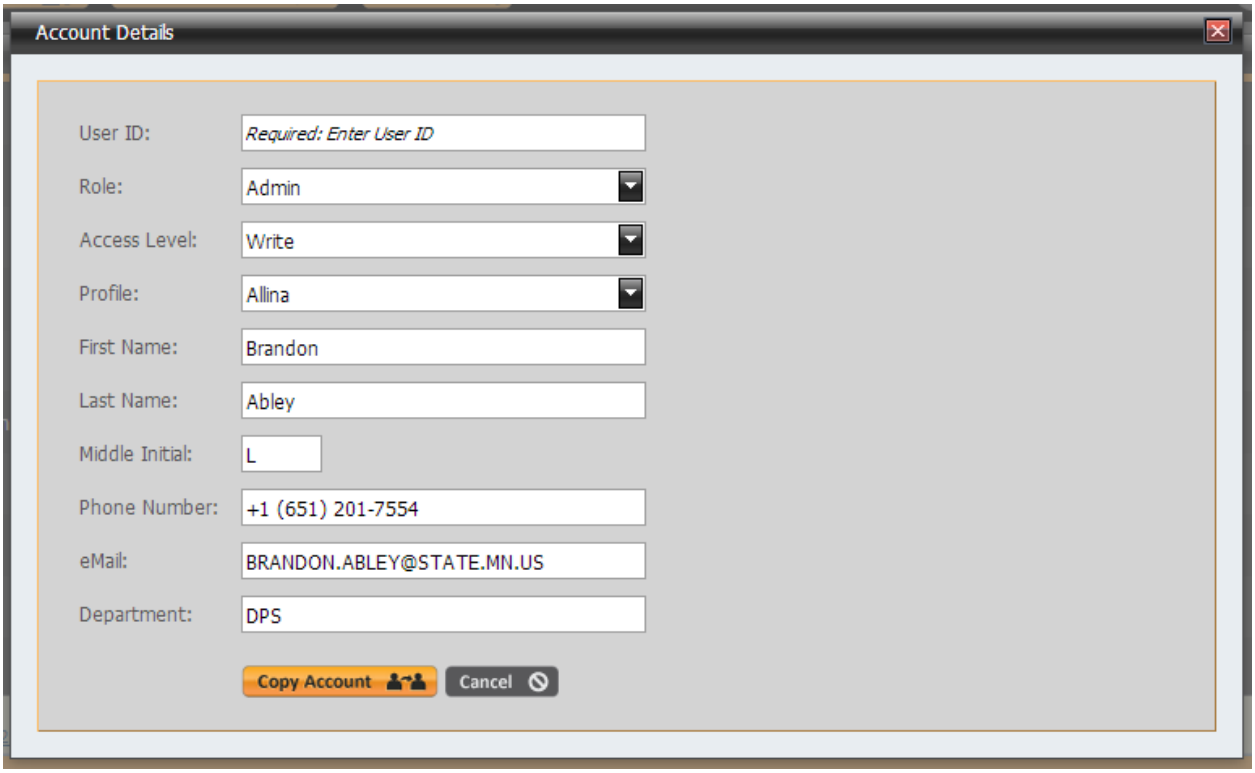
- Select the “Edit this Account” icon.



- Make the desired edits.
- Select “Update Account.”
- You should see a message confirming the edits were made successfully. Select “OK.”

Copying a user account:

- Select the “Copy this Account” icon.



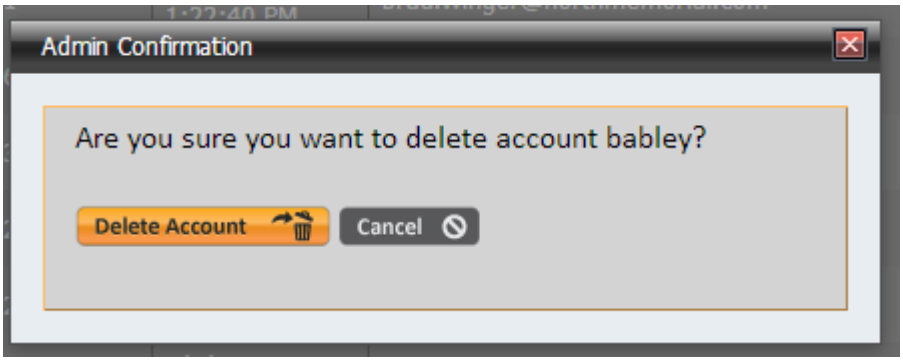
- Provide a new user name, then change any other information for this new account.

- Select “Copy Account” when you are finished entering information.

- A message should appear confirming the account was successfully copied. Select “OK.”

Deleting a user account:

- Select the “Delete this Account” icon



- Select “Delete Account” if you are sure. Select “Cancel” if not.

- You will see a message confirming the account has been deleted. Select “OK.”

Chapter Summary

- **As an administrator, you can add new user accounts to the system and assign the user a profile.**
- **Once a user account has been created, you can edit, copy or delete this account.**
- **You can also determine the user status of the account and the read or write access.**
- **You can lock the account and also force the user to reset his or her password to log in to StatusBoard 2.0.**