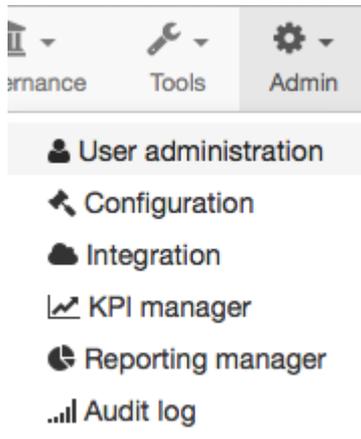


User administration

→ To get access to the User administration, the permission ADMIN_USER_ADMINISTRATION_PERMISSION is required.



Search existing BizDock User

A screenshot of the BizDock 'Search and update a user' interface. The interface is divided into two main sections. On the left, there is a sidebar with three buttons: 'Search and update a user' (with a magnifying glass icon), 'Create a new user' (with a plus icon), and 'Export users list' (with a document icon). The main content area has a header 'User administration / Search and update a user' and a search icon. Below the header, there is a text box with the instruction: 'Look for an existing user in order to perform some modifications. Please enter the user login/username, or the user mail address or the name of the user.' Underneath, there is a 'Search using' section with three radio buttons: 'Username' (selected), 'Email', and 'Full name (* allowed)'. Below this, there are three input fields: 'Username', 'Email', and 'Full name (* allowed)'. At the bottom, there is a blue 'Search' button.

First select the search criteria you want to use. You can search a BizDock user by:

- Login: exact login is required, wildcards * are not accepted.
- E-mail: exact e-mail address is required, wildcards * are not accepted.
- User full name: wildcards * are accepted. Simply keeping the default * will return all the BizDock users

Once a BizDock User has been found, it's possible to [reset his password](#), [lock his access](#) or [change his role\(s\)](#).

Create a new BizDock User

Simply click on “Create a new user” and complete the mandatory information, including the role(s) of the User.

The username can not be changed once the user has been created. It is also used as key to link a BizDock User and an [Employee](#)

The screenshot shows the 'User administration / Create a new user' page. On the left is a sidebar with 'Search and update a user', 'Create a new user' (highlighted), and 'Export users list'. The main content area has a breadcrumb 'User administration / Create a new user' and a toolbar with a pin and help icon. Below the breadcrumb, there are instructions: 'Please fill the form to create a new user. Please don't forget to set the roles for this user. Once the creation will be complete the user will be notified with an e-mail. NB: since the user creation is asynchronous, you might have to wait a few moment before the creation is completed.' The form is divided into sections: 'Password' with a checkbox 'Enter a password on behalf of the user'; 'Basic data' with three required fields: 'Username *', 'Email *', and 'First name *', each with an empty input box.

The User password could be either manually defined (simply check the box “Enter a password on behalf of the user”) or defined later by the User himself (thanks an email that is automatically sent to him).

The link is valid only during 24 hours. If the BizDock User did not set his password during this delay, the Administrator needs to trigger a password reset with [Reset password](#) feature.

After creating a User, the system checks if there is already an Employee associated with it, meaning an Employee with the created username for the “Unique ID” field. If this is not true, then the following options are proposed:

- Create a new Employee with the User data
- Select an existing Employee
- Decide later, meaning do nothing

The user has been created successfully.

Search and update a user

Create a new user

Export users list

User administration / Create a new user

The created user is not associated with an employee. You can either create automatically an employee from the user data or select an existing one. It is also possible to create him later.

Create an employee

The user data (first name, last name and email address) will be used to create the employee.

Create

Select an existing employee

Select an employee from all not already associated ones.

Employee *

Associate

Decide later

Let currently the user without employee. It's possible to make the association later, simply by creating a new employee with the username under the field "Unique ID".

Decide later

The created or selected Employee is for sure automatically associated to the User.

If the "Decide later" option is chosen, then the association would be manually done by creating or updating an Employee.

Export BizDock User list

It simply generates an Excel file with all active BizDock Users including their roles.

The file is generated asynchronously, meaning a parallel task creates it and when finishing a Notification is sent (with a link to download the file).

This is particularly useful to verify all the roles of the BizDock Users to ensure they have the correct access rights.

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Permanent link: <https://help-online.bizdock.io/doku.php?id=admin-guide:user-management>

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