

# Working with Users

## Users

Users Management

Users Groups Chart view Create User

Results 10

Users items per page 50 Filter by group... Search...

<input type="checkbox"/>	Info	Username	Full Name	Groups	
<input type="checkbox"/>	External	Administrator SAML	-	-	⚙️
<input type="checkbox"/>	External	bobber RADIUS	-	-	⚙️
<input type="checkbox"/>		limited@example.com	Limited Test	Limited 1 - QA Test Resource	👤 ⚙️
<input type="checkbox"/>	External	MajorMiner LDAP	-	-	⚙️
<input type="checkbox"/>		noperns@example.com	No Perms	-	👤 ⚙️
<input type="checkbox"/>		ops@example.com	ops	Global Admins	👤 ⚙️
<input type="checkbox"/>	Disabled	ripley@nostromo.com	Ellen Ripley	-	👤 ⚙️
<input type="checkbox"/>		user1@example.com	Approvee User	Approvee Group	👤 ⚙️

Displaying 1 to 10 of 10 items.

Previous 1 Next

Users and Groups are managed from the Admin area, under the **Users** tab. The Users tab contains three sub-tabs: **Users**, **Groups**, and **Chart View**.

- Users Overview
  - View Options:
    - Items per page
    - Sort
    - Filter by Group
    - Search
- Working with Users
  - Creating User Accounts
  - Editing User Accounts
  - Password Management
  - Delete a User
- Additional Information

## Users Overview

A User is defined as a single login account that accesses ProVision. On the Users page, users may be created, edited, assigned to groups, have password information reset, or be removed.

User Management

Users

Groups

Chart view

Create User

Results 10

Users

items per page 50

Filter by group...

Search...

<input type="checkbox"/>	Info	↕ Username	↕ Full Name	↕ Groups	
<input type="checkbox"/>	External	Administrator SAML	-	-	
<input type="checkbox"/>	External	bobber RADIUS	-	-	
<input type="checkbox"/>		limited@example.com	Limited Test	Limited 1 - QA Test Resource	
<input type="checkbox"/>	External	MajorMiner LDAP	-	-	
<input type="checkbox"/>		noperms@example.com	No Perms	-	
<input type="checkbox"/>		ops@example.com	ops	Global Admins	
<input type="checkbox"/>	Disabled	ripley@nostromo.com	Ellen Ripley	-	
<input type="checkbox"/>		user1@example.com	Approvee User	Approvee Group	

Displaying 1 to 10 of 10 items.

Previous

1

Next

When viewing the Users List, the following is shown:

**Selection checkbox:** The checkboxes on the the left side of the user may be used to multi-select users to delete

**Info:** An informational tag displays for External (external users are not editable) or disabled users

**Username:** The associated login email address for local users, or the server username for external users. Click on the username to view user details.

**Full Name:** The manually entered first and last name of the user

**Groups:** The group(s) to which the user belong - if the user belongs to multiple groups, an interactive bubble will display with the number of additional groups (+1). Click on this bubble to view all groups for the user.

**User Icon:** Click for a shortcut to view the permission chart for the user. Once in the chart view, select the desired group to finalize the view

**Gear Icon (Action Menu):** Right Click on the gear icon (or anywhere on the user row) to open the action menu for the user

## View Options:

### Items per page

Select the "items per page" filter to limit the number of users displayed at one time. Any additional users will be displayed on following pages.

User Management
Users
Groups
Chart view
Create User

Results 10

Users
items per page 20
Filter by group...
Search...

<input type="checkbox"/>	Info	Username	Full Name	Groups
<input type="checkbox"/>	External	Administrator SAML	-	-
<input type="checkbox"/>	External	bobber RADIUS	-	-
<input type="checkbox"/>		limited@example.com	Limited Test	Limited 1 - QA Test Resource

Use the page numbers and navigation arrows at the bottom of the list to view extra pages.

Sort

The Users list may be sorted for any column with the sort arrow icon ( ).

Click on the column name to toggle between ascending / descending order for that field.

Results 12

Users
items per page 50
Filter by group...
Search...

<input type="checkbox"/>	Info	Username	Full Name	Groups
<input type="checkbox"/>		ops@example.com	ops	Global Admins
<input type="checkbox"/>		limited@example.com	Limited Test	Deny Action Group
<input type="checkbox"/>		test@example.com	test test	Approvee Group
<input type="checkbox"/>		test1@example.com	test test	Approvee Group

Previous
1
Next

Filter by Group

Filter the Users list to only view a certain group by selecting a group from the "Filter by group" dropdown.

Results 1

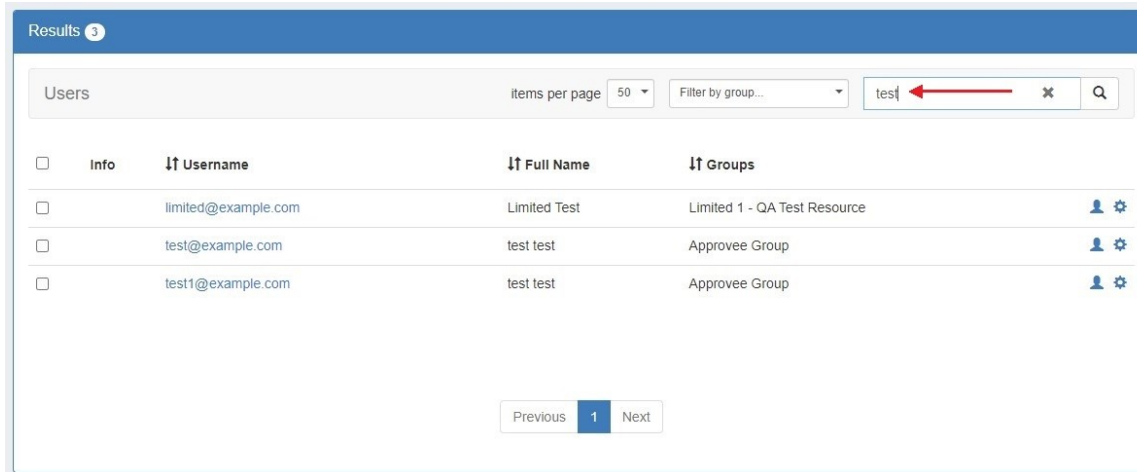
Users
items per page 50
Approvee Group
Search...

<input type="checkbox"/>	Info	Username	Full Name	Groups
<input type="checkbox"/>		test@example.com	test test	Approvee Group
<input type="checkbox"/>		test1@example.com	test test	Approvee Group

Previous
1
Next

## Search

Search the list for a specific username or full name by typing all or part of either name in the search box.



Results 3

Users items per page 50 Filter by group... test

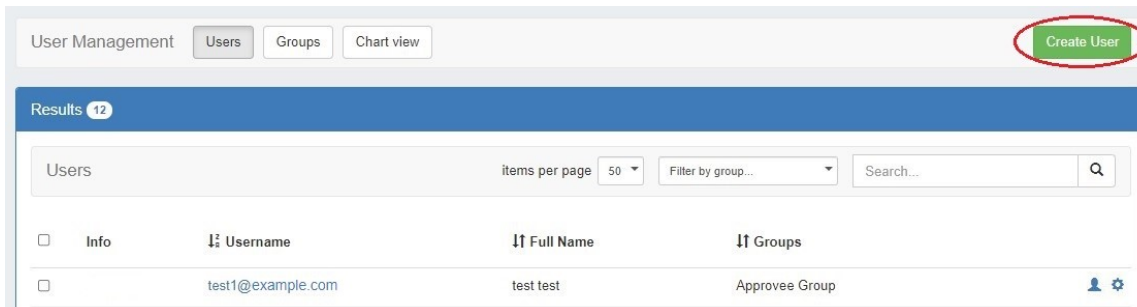
<input type="checkbox"/>	Info	Username	Full Name	Groups
<input type="checkbox"/>		limited@example.com	Limited Test	Limited 1 - QA Test Resource
<input type="checkbox"/>		test@example.com	test test	Approvee Group
<input type="checkbox"/>		test1@example.com	test test	Approvee Group

Previous 1 Next

## Working with Users

### Creating User Accounts

Add Users by clicking on the "Create User" button at the upper right of the "Users" page. This will take you to the Create User screen.



User Management Users Groups Chart view Create User

Results 12

Users items per page 50 Filter by group... Search...

<input type="checkbox"/>	Info	Username	Full Name	Groups
<input type="checkbox"/>		test1@example.com	test test	Approvee Group

You may enter or edit the Username, First Name, Last Name, whether to enable help bubbles, and select one or more permissions groups to which to assign the user.

Create User

Basic User data (\*) Required field

\* Username

user@example.com

This user is enabled

First Name

Last Name

Comments

\* Password:

Help bubbles disabled

Send email?

Groups No groups added

Filter the group list

Write a group name

Showing all groups

Approvee Group

Approver Admin Group

Approver Admin Group 2

Deny Action Group

Global Admins

Global Read-Only

Limited 1 - QA Test Resource

New Global Group

Cancel

Save

A list of existing User Groups is listed under the "Groups" tab on the right.

To assign a user to one or more groups, click on the area to the left of a group name. A green checkmark will appear when the user is successfully assigned. You can search for a specific group using the filter box above the list.

Create User

Basic User data (\*) Required field

\* Username

user@example.com

This user is enabled

First Name

Last Name

Comments

\* Password:

\*\*\*\*\*

Help bubbles disabled

Send email?

Groups 2

Filter the group list

Write a group name

Showing all groups

Approvee Group

✓ Approver Admin Group

Approver Admin Group 2

Deny Action Group

Global Admins

Global Read-Only

Limited 1 - QA Test Resource

✓ New Global Group

Cancel

Save

When assigning users to multiple permissions groups, be sure to review the group permission details to ensure that they do not conflict with each other!

To create a password for a new user, simply type it in the "Password" field. Click the eye icon to the right of the field to toggle visibility. You may also create a password and automatically send an email to the new user with their credentials. In the Password section, move the "Send email?" selector to the "ON" position. An email template will appear. Fill in a password for the new user and it will be added to the email template. When done click "Save" and the email will be sent.

\* Password:

examplepassword

Help bubbles disabled

Send email?

From

ops@example.com <ops@example.com>

To

example user <user@example.com>

Subject

Credentials for: user@example.com

Message

Dear example user

Support <support@example.com> has sent your login credentials

Your username is: user@example.com

Your password is: examplepassword

Login at:

Go to the User Preferences in the upper right to reset your password at any time after you have logged in successfully.

Regards,

Automated Admin

Passwords must be eight characters in length.

## Editing User Accounts

External users may not be edited

To edit a user's information click on the Action Menu (gear icon) for the user and select "User Details" or click on the user name.

<input type="checkbox"/>	test@example.com	test test	Approver Group	<div><div>User Details</div><div>Delete this user</div></div>
<input type="checkbox"/>	test1@example.com	test test	Approver Group	

This will bring up the Edit User screen.

Edit user

Basic User data (\*) Required field

\* Username

test@test.com

This user is enabled

First Name

test

Last Name

test

Comments

Help bubbles enabled

Reset Password

\* New Password:

Send email?

Reset Password

Delete user

Cancel

Save

Groups 1

Permission Check

Filter the group list

Write a group name

Show all groups

✓ Approve Group

By default, the group list is filtered to show the group(s) to which the user is currently assigned.

In order to assign the user to another group, move the selector at the top of the group list to "Show all groups" and the list will expand to show all existing groups.

To assign a user to one or more groups, click on the area to the left of a group name. A green checkmark will appear when the user is successfully assigned. You can search for a specific group using the filter box above the list. Clicking the arrow to the right of a group name will take you to the corresponding Group Details page.

Basic User data (\*) Required field

\* Username  
test@test.com ☒ This user is enabled

First Name Last Name  
test test

Comments

☒ Help bubbles enabled

Reset Password

\* New Password:

☐ Send email?

Groups 1 Permission Check

Filter the group list  
Write a group name ☒ Showing all groups

- ✓ Approve Group
- Approver Admin Group
- Approver Admin Group 2
- Deny Action Group
- Global Admins
- Global Read-Only
- Limited 1 - QA Test Resource
- New Global Group

When done, be sure to save your changes by clicking "Save" at the bottom right of the page.

## Password Management

To reset an existing user's password, simply type in a new password and hit "Reset Password". Use the eye icon to toggle field visibility.

Reset Password

\* New Password:

☐ Send email?

To reset a user's password and send the credentials in an email, move the "Send email?" selector to the "ON" position and email fields will appear that may be edited as desired.

Enter a new password into the password field and it will prepopulate in the email template. When complete, hit "Reset Password and send email".



Reset Password

\* New Password:

test1234

☒ Send email?

From

ops@test.com <ops@test.com>

To

test test <test@test.com>

Subject

Credentials for: test@test.com

Message

Dear test test

Support <support@test.com> has sent your login credentials

Your username is: test@test.com

Your password is: test1234

Login at:

Go to the User Preferences in the upper right to reset your password at any time after you have logged in successfully.

Regards,

Automated Admin

Reset Password and send email

If desired, the system admin may enable login token links for users. To enable the Login Token functionality at the system level, change the 'ENABLE\_TOKEN\_LOGIN' in the includes/constants.php file to "true".

```
define('GENERAL', 'GENERAL');  
define("VLAN", "VLAN");  
// User section  
define('ENABLE_TOKEN_LOGIN', true);  
// permissions
```

Once enabled, the option to enable tokens on a per-user level will be available under Edit User Basic User Data. Once enabled for a user, click "generate new token" for a token link to be created.

Edit user

Basic User data (\*) Required field

\* Username

test@test.com

This user is enabled

First Name

test

Last Name

test

Comments

Help bubbles enabled

Token Enabled

generate new token

Once enabled for a user, click "generate new token" for a token link to be created.

Copy the provided URL, and save in a secure place. Token information may not be retrieved after the "Generate New Token" window is closed; a new token must be generated instead.

## Delete a User

To remove a user from the Users list, click on the Action Menu (gear icon) for the user and select the "Delete this user" option.

<input type="checkbox"/>	test@example.com	test test	Approver Group	<div><div>User Details</div><div>Delete this user</div></div>
<input type="checkbox"/>	test1@example.com	test test	Approver Group	

You may also delete a user from the User Details page by clicking the "Delete User" button at the bottom left of the page.

Delete user

Cancel

Save

You may also select more than one user to delete.

To do so, select the checkboxes for the desired users, then under the "Actions" menu at the top of the list, select "Delete selected users".

Results 12

Users ✓ Selected 2 items Actions ▾ Items per page 50 ▾ Filter by group... Search... Q

Info ⌵ Us ⌵ Full Name ⌵ Groups

Clear selection  
Delete selected users

<input type="checkbox"/>	ops@example.com	ops	Global Admins	⌵ ⚙
<input type="checkbox"/>	limited@example.com	Limited Test	Deny Action Group	⌵ ⚙
<input checked="" type="checkbox"/>	test@example.com	test test	Approver Group	⌵ ⚙
<input checked="" type="checkbox"/>	test1@example.com	test test	Approver Group	⌵ ⚙

Previous 1 Next

## Additional Information

For more information on Users and Groups, see the following areas:

- [Working with Groups](#)
- [Users & Permissions](#)
- [Global Permissions](#)
- [Resource Permissions](#)
- [Verifying Permissions](#)