

Administration Pages - Overview

Security Considerations

Some installations may be configured such that only a system administrator can perform user and group maintenance tasks. In other installations, managers and department administrators may be able to share in these types of tasks.

In a Department Manager scenario, users listed as “Department Managers” can add and maintain users in their primary group.

Any user in the “Designer” group can add new groups and assign users and other groups to the newly created group.

User List

A list of users is displayed and any user available for editing is indicated with an “edit” link. Administrators and Department Managers will have a link to create a new user.

Certain administrators will have the ability to deactivate or reactive users. Only users with no tasks assigned to them can be deleted.

If a user has assigned tasks, these tasks can be globally reassigned to another user or another group by clicking on the Reassign link next to the user.

Add/Edit Users

Information on each user can be edited in the Add/Edit user page. Please note that some installations may limit the number of active users based on the software license. Also note that user administration cannot be performed when

connected to a server in test mode.

Username

Specifies the name that will be used by the system for this user. The user name is case sensitive and can contain spaces.

AKA

Optional field used to match this user with other usernames on company specific systems

First and Last Name

Full first and last name

Email Address

Email address is used for various purposes. This should be a valid email since the server may send notifications and other information to this user using this address.

Reports To

Lists the user's primary supervisor. Select "n/a" if this person does not have a supervisor.

Primary Group

Select the primary group to which this user belongs. If a Department Manager is adding a user, their primary groups must be the same.

Group List

Groups can be added, edited, and deleted from this page. Only users with the appropriate access will be able to modify groups. To edit which users/groups belong to a specific group, click on the “X_Members” link next to the group.

User Role Assignments

This page allows group managers to add and remove users and other groups

to/from the currently selected group

Both individual users and other groups may be added to a group. A user is determined to be a member of a group if he or she is directly listed as a member of that group, or is a member of a group that is included in the edited group. Please use caution when determining group members as other group members can change from time to time, dynamically changing the number of users who might have access.

Click the “+” and “-” buttons next to the names to add and remove users/groups as needed. Be sure to click on the Submit Changes button when done.

Datasource

Multiple datasources can be added in production mode. User is able to add and remove the datasources. When in test mode, there is an optional 2nd data sources can be specified.

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