

## Manage Users

Antoinette France - 2023-12-06 - People

## Managing users in Holocentric Connect

Holocentric Connect administrators can choose which personnel within their organisation can access the system. They also have the ability to temporarily deactivate and/or delete users.

All users can view and search the names of other people that have access to the Holocentric Connect system.

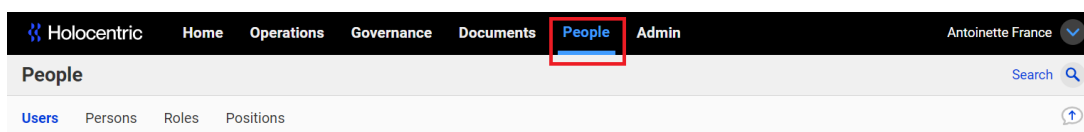
This article outlines the following topics:

1. Invite new users
2. Re-send invitation email
3. Search and filter users
4. Edit user
5. Temporarily deactivate user
6. Delete user

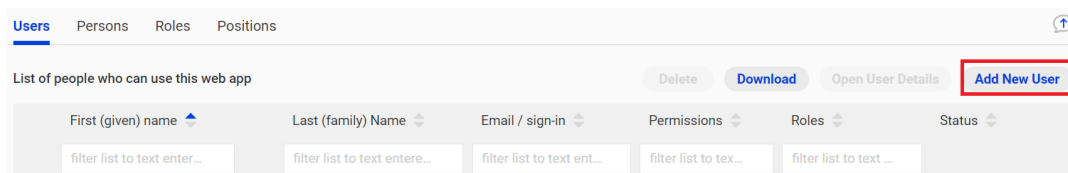
### 1. Invite new users

You can invite people in your organisation to access the web app. The number of people you can invite will depend on the number of user licenses that have been assigned to your organisation.

1.1 Click the **People** tab in your web app.



1.2 Click on **Add New User** in the top right-hand corner of the screen.



*\*Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

1.3 Enter the user's details into all the relevant fields.

**Add a person to be a user of this web app**

User activated:  Activated (6 users activated, your subscription limit is 20 users) [Cancel](#)

**USER PROFILE**

First (given) name:  ✕

Last (family) name:  ✕

Email address / sign-in:  ✕

[Save & Send Invite](#)

1.4 Click **Change** under **User permissions** and choose the permissions you want to give the new users.

*Note: Process Viewing is the standard permission for view-only users.*

**PERMISSIONS & ROLES**

User permissions:  [Change](#)

User roles:  [Assign](#)

Click **OK** once you have selected from the following permissions:

**Permissions for this User**

<input checked="" type="checkbox"/>	Process Viewing	Including Regulations, Work Instructions, Documents, Sy...
<input type="checkbox"/>	Policy Editing	Including Regulations, Documents
<input type="checkbox"/>	Process Step Editing	Edit Process Steps, Work Instructions, Documents
<input type="checkbox"/>	Process Editing	Including Work Instructions, Documents, Role & Systems
<input type="checkbox"/>	Risk Viewer	View Risk and Controls
<input type="checkbox"/>	Risk Editing	Edit Risks and Controls
<input type="checkbox"/>	Report Downloading	Enables downloading reports for all items
<input type="checkbox"/>	Incident & Improvement Manager	Maintains Incidents, Complaints, Feedback and Improve...
<input type="checkbox"/>	Model Administration	All of the above
<input type="checkbox"/>	Administration	All of the above and manage users

[Cancel](#) [OK](#)

## Permission Descriptions

Permission	Description
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Process Viewing	Gives users the ability to: <ul style="list-style-type: none"> <li>• view policies, processes, work instructions, regulations, documents</li> <li>• undertake knowledge tests</li> <li>• raise incidents, complaints and feedback.</li> </ul>
Policy Editing	Gives users the same permissions as Process Viewing and also the ability to create/edit: <ul style="list-style-type: none"> <li>• policies</li> <li>• regulations</li> <li>• documents.</li> </ul>
Process Step Editing	Gives users the same permissions as Process Viewing and also the ability to create/edit: <ul style="list-style-type: none"> <li>• process steps</li> <li>• documents</li> <li>• work instructions.</li> </ul>
Process Editing	Gives users the same permissions as Process Viewing and also the ability to create/edit: <ul style="list-style-type: none"> <li>• all parts of a process</li> <li>• work instructions</li> <li>• documents</li> <li>• roles.</li> </ul>
Risk Viewer	Gives users the ability to view risks.
Risk Editing	Gives users the ability to: <ul style="list-style-type: none"> <li>• view risks</li> <li>• create/edit risks.</li> </ul>
Report Downloading	Enables downloading reports for all items
Incident and Improvement Manager	Gives users the same permissions as Process Viewing and also the ability to create/edit: <ul style="list-style-type: none"> <li>• incidents</li> <li>• complaints</li> <li>• feedback</li> <li>• improvements.</li> </ul>
Model Administration	Gives users all the rights of administration but without the ability to view/edit web app users.
Administration	Gives users access to all permissions, including the ability to view/edit web app users.

1.5 After you have entered all relevant details, click **Save & Send Invite**.

**Add a person to be a user of this web app**

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User activated:  **Activated** (6 users activated, your subscription limit is 20 users)

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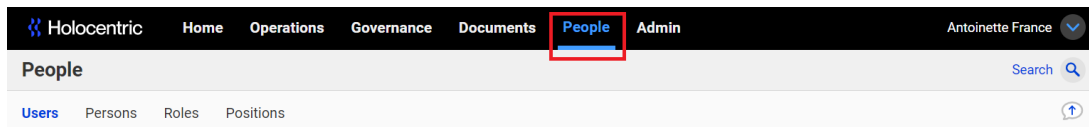
USER PROFILE \_\_\_\_\_

The new user will now appear in the **Users** menu. Once you have added the user, they will receive an invitation email. They will be able to log on to the Holocentric Connect web app by following the prompts in the email.

## 2. Re-send invitation email

You can resend an invitation email to a staff member at any time. Using this email, they will be able to set up their account on the Holocentric Connect web app, if they have not already done so.

2.1 Go to the **People** tab and access the **Users** subtab.



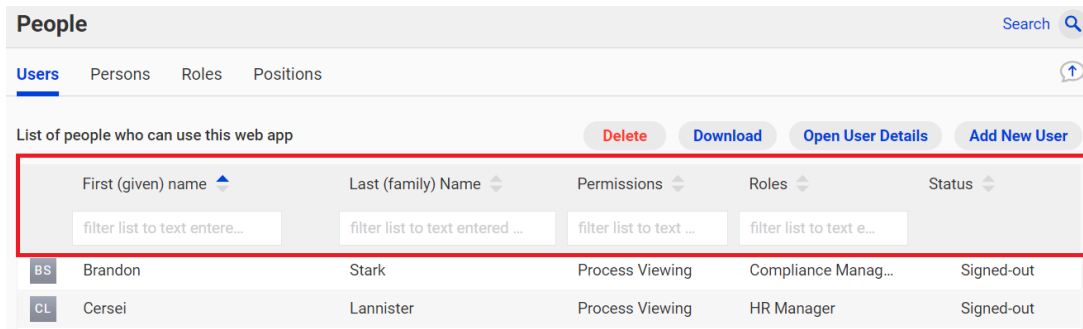
*\*Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

2.2 Check the **Reset** box and click **Save**.

A screenshot of the 'Harry Potter User Details' form in the Holocentric web application. The form is titled 'Harry Potter User Details' and has a search bar on the right. Below the title, there are three tabs: 'Profile & Permissions' (selected), 'Responsibilities', and 'Required Reading'. The 'USER PROFILE' section contains several input fields: 'First (given) name' (Harry), 'Last (family) name' (Potter), 'Email address / sign-in' (harry.potter@hogwarts.com), 'Phone number' (placeholder: enter phone number here), 'Job Title' (placeholder: enter job title here), and 'Department' (placeholder: enter department here). To the right of these fields are 'Cancel' and 'Save' buttons. Below the 'USER PROFILE' section is the 'PASSWORD' section, which includes a 'Reset password' checkbox that is checked. The text next to the checkbox reads 'Reset (user will be notified by email to create a new password)'. A red box highlights this checkbox and its text.

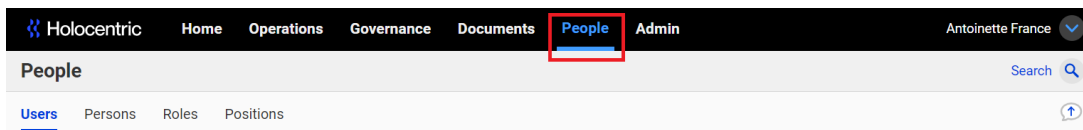
## 3. Search and filter users

For accounts with many users, you can search for users using the top search bars. You can also filter users by:



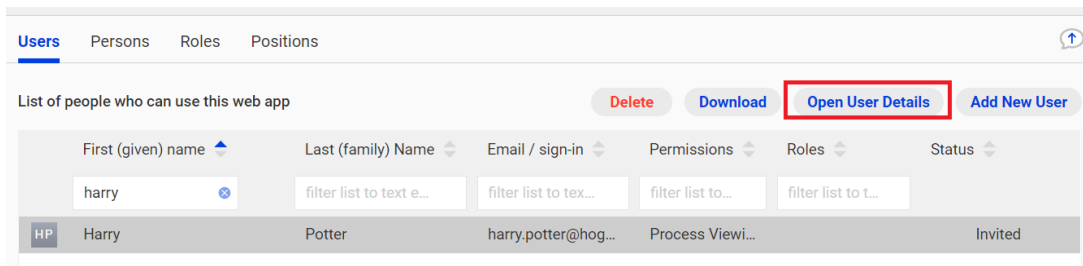
## 4. Edit user

4.1 Access the **People** tab.

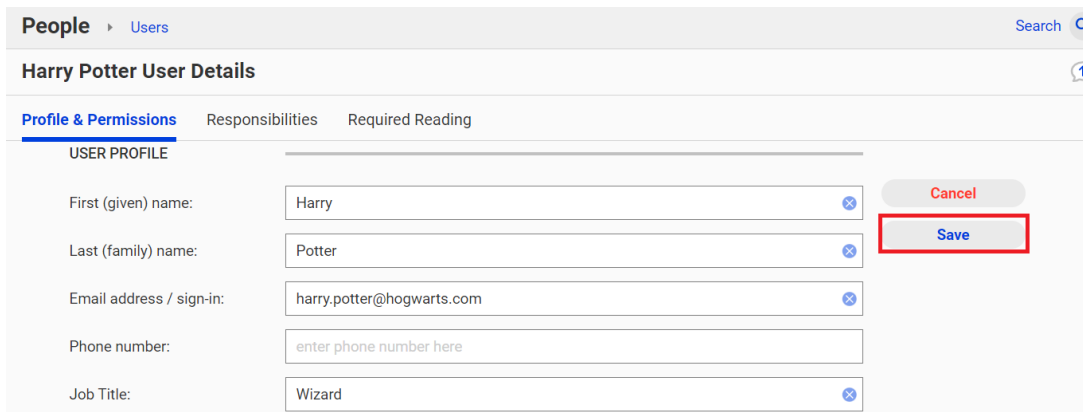


*\*Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

4.2 Click once on the user you want to edit and click **Open User Details**.



4.3 Make all relevant edits and click **Save** to confirm changes .



## 5. Temporarily deactivate user

5.1 Click on the user's name in the **People** menu and select **Open User Details**.

Users | Persons | Roles | Positions

List of people who can use this web app

Buttons: Delete, Download, **Open User Details**, Add New User

First (given) name	Last (family) Name	Email / sign-in	Permissions	Roles	Status
harry	filter list to text e...	filter list to tex...	filter list to...	filter list to t...	
HP Harry	Potter	harry.potter@hog...	Process Viewi...		Invited

5.2 Uncheck the **Activated** box.

People > Users

Harry Potter User Details

Profile & Permissions | Responsibilities | Required Reading

User activated:  Activated (7 users activated, your subscription limit is 20 users)

Buttons: Cancel, **Save**

USER PROFILE

First (given) name: Harry

5.3 Click **Save**. To reactivate user, check the **Activated** box and click **Save**.

## 6. Delete user

6.1 Click on the user's name in the **People** menu and click **Delete**.

Holocentric | Home | Operations | Governance | Documents | **People** | Admin

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People

Users | Persons | Roles | Positions

List of people who can use this web app

Buttons: **Delete**, Download, Open User Details, Add New User

First (given) name	Last (family) Name	Email / sign-in	Permissions	Roles	Status
har	filter list to text en...	filter list to text ...	filter list to ...	filter list to t...	
HP Harry	Potter	harry.potter@hog...	Process Viewi...		Invited

*\*Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

6.2 You will be presented with a prompt. Click **Delete** to permanently delete the user.

**Delete this User**

Do you really want to permanently delete the User "Harry Potter"?

Buttons: Cancel, **Delete**

END