

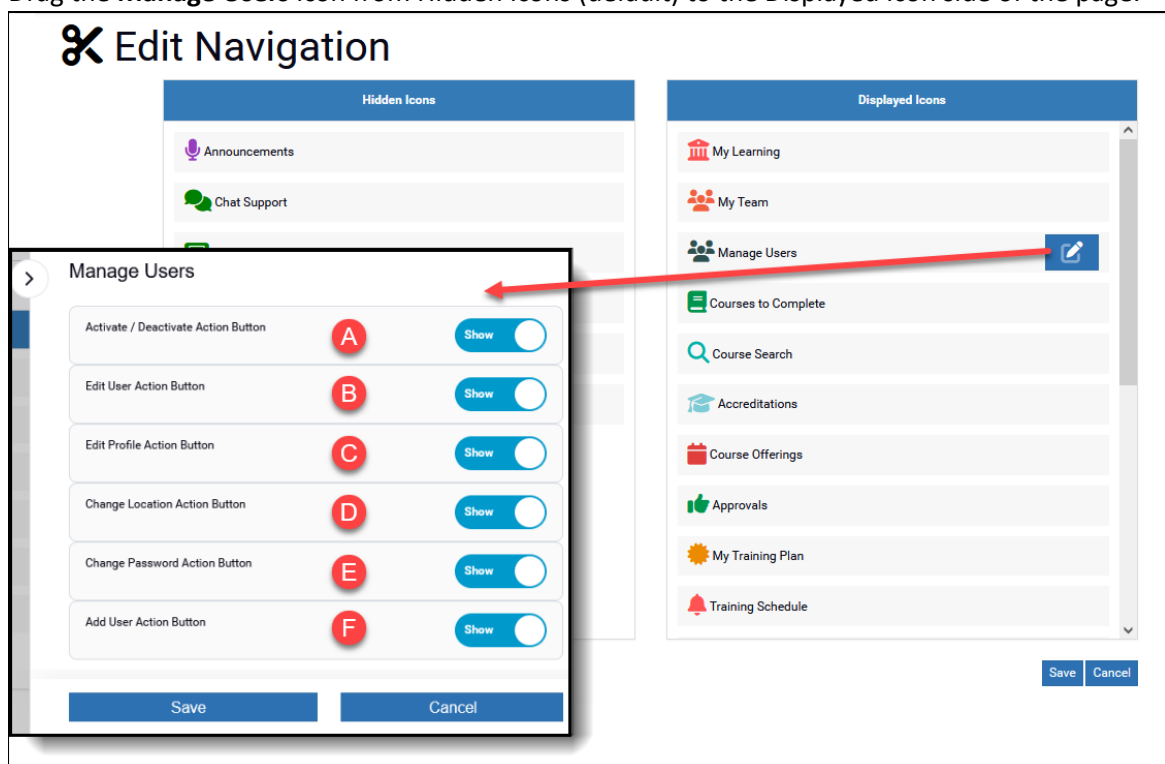
Portal administrators can enable User Management capabilities for people they have assigned a Location Administrator or Administrator role. This includes adding and editing users, editing profiles, changing locations, resetting passwords, and activating or deactivating users. They can fine-tune access to these features, controlling which specific capabilities they want to delegate.

Note: Administrative users will only be able to manage users under their purview as determined by their organizational assignments and managerial reporting settings.

Enabling User Management for Administrative Users

To turn on Manage Users capabilities, just activate the icon on the Navigation menu. Manage Users is hidden by default.

1. From the Administration menu, select **Site Management > Edit Navigation**.
2. Drag the **Manage Users** icon from Hidden Icons (default) to the Displayed Icon side of the page.



3. Upon setting it to Display, the **Edit Features Tied to This Component** button shows on the Manage Users entry. This is where portal administrators can fine tune the capabilities they want to provide.
4. To control the actions allowed on the Manage Users page, click the **Edit Features Tied to This Component** button.
5. On the Manage Users slide-in, determine which options are available to administrators on the Manage Users page. They are all set to **Show** (or visible) for Administrators and Location Administrators by default. Disable features by setting the toggle to **Hide**. The options labeled above are described below.
 - A. **Activate/Deactivate Action Button:** Set to **Show** to allow activation or deactivation of user profiles.

- B. **Edit User Action Button:** Set to **Show** to allow editing of user account level fields such as name, preferred language, email address, and address.
 - C. **Edit Profile Action Button:** Set to **Show** to allow editing of user profile information.
 - D. **Change Location Action Button:** Set to **Show** to allow the ability to move the user to a new location and remove them from the current one.
 - E. **Change Password Action Button:** Set to **Show** to allow the ability to reset a user's password.
 - F. **Add User Action Button:** Set to **Show** to allow the ability to add a new user to a location.
6. Click **Save** to update the Manage User feature settings, then close the slide-in and click **Save** to update the Edit Navigation page settings.

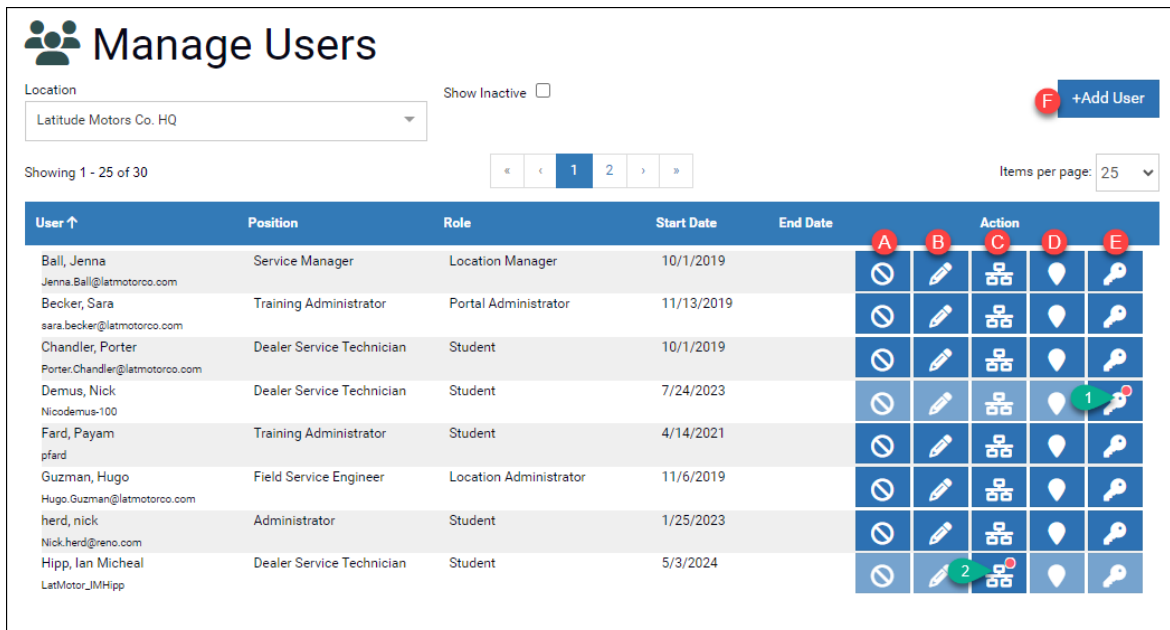
Using the Manage Users Page

After enabling Manage Users on the Navigation menu, users with the Location Administrator or Administrator roles will see the option on their Navigation menu. Their ability to manage users is based on the features enabled by the portal administrator under Edit Navigation.

Note: User Management is managed by location, one location at a time. There are no other filters available.

To manage users as a location administrator or administrator:

1. From the Navigation menu, select **Manage Users**.
2. Select the Location you want to work with from the dropdown.
To show inactive users at that location, click **Show Inactive**.
Click on a column heading to sort by that column. Each click toggles between ascending and descending sort.



The screenshot shows the 'Manage Users' interface. At the top, there is a 'Location' dropdown menu set to 'Latitude Motors Co. HQ' and a 'Show Inactive' checkbox. A '+Add User' button is in the top right corner. Below the header, there is a pagination bar showing 'Showing 1 - 25 of 30' and 'Items per page: 25'. The main table has columns for 'User', 'Position', 'Role', 'Start Date', and 'End Date'. An 'Action' column contains icons for various operations, labeled A through E. A red 'F' label is also present near the '+Add User' button.

User ↑	Position	Role	Start Date	End Date	Action
Ball, Jenna Jenna.Ball@latmotorco.com	Service Manager	Location Manager	10/1/2019		[A] [B] [C] [D] [E]
Becker, Sara sara.becker@latmotorco.com	Training Administrator	Portal Administrator	11/13/2019		[A] [B] [C] [D] [E]
Chandler, Porter Porter.Chandler@latmotorco.com	Dealer Service Technician	Student	10/1/2019		[A] [B] [C] [D] [E]
Demus, Nick Nicodemus-100	Dealer Service Technician	Student	7/24/2023		[A] [B] [C] [D] [E]
Fard, Payam pfard	Training Administrator	Student	4/14/2021		[A] [B] [C] [D] [E]
Guzman, Hugo Hugo.Guzman@latmotorco.com	Field Service Engineer	Location Administrator	11/6/2019		[A] [B] [C] [D] [E]
herd, nick Nick.herd@reno.com	Administrator	Student	1/25/2023		[A] [B] [C] [D] [E]
Hipp, Ian Micheal LatMotor_IMHipp	Dealer Service Technician	Student	5/3/2024		[A] [B] [C] [D] [E]

3. Use the Action buttons next to the user being updated. Options may vary depending on what your portal administrator allows. These options correspond to the labeled image above.

A. **Activate/Deactivate User:** Opens a slide-in to confirm activation or deactivation of the user at the selected location. If this is their only active profile, it will activate or deactivate the entire user account. Transcripts, interests, and user group membership will be moved or canceled based on existing settings under LMS Information.

B. **Edit User:** Opens a slide-in with user account fields available for editing, such as name, language, email, and address.

Existing rules apply in which Address is optional, but if one field is filled, all address fields become required.

Edit User: Jenna Ball

User Information

Username: Jenna.Ball@latmotorco.com

First Name: Jenna Last Name: Ball

Email: jenna.ball@latmotorco.com Preferred Language: English

Voice: Mobile:

Address

Street Line 1: Street Line 2: Street Line 3:

Country: State/Province: City: Postal Code:

C. **Edit Profile:** Opens a slide-in with options to update the primary/secondary positions and roles for the user at the selected location.

For portals using person to person managerial reporting, an option will appear to set the user's manager at the new location.

Edit Profile: Winston Bush

Positions

Primary Position: Sales Manager

Alternate Position(s): Alternate Position(s)

Roles

Roles: Location Manager Student

Managers

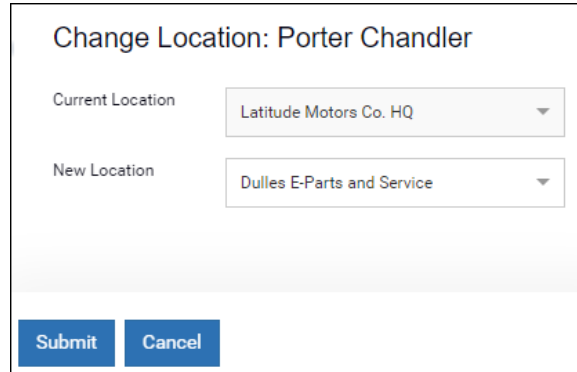
Primary Manager: Chandler, Porter

Alternate Manager(s): Alternate Manager(s)

Managers Section is Only Available for portals using Person-to-Person managerial reporting

- D. **Change Location:** Opens a slide-in that displays the current location and a box to assign a new location to the user.

Setting a new location will terminate the user's profile at the current location. If changing a primary/default profile, the new profile will be set as primary or default.



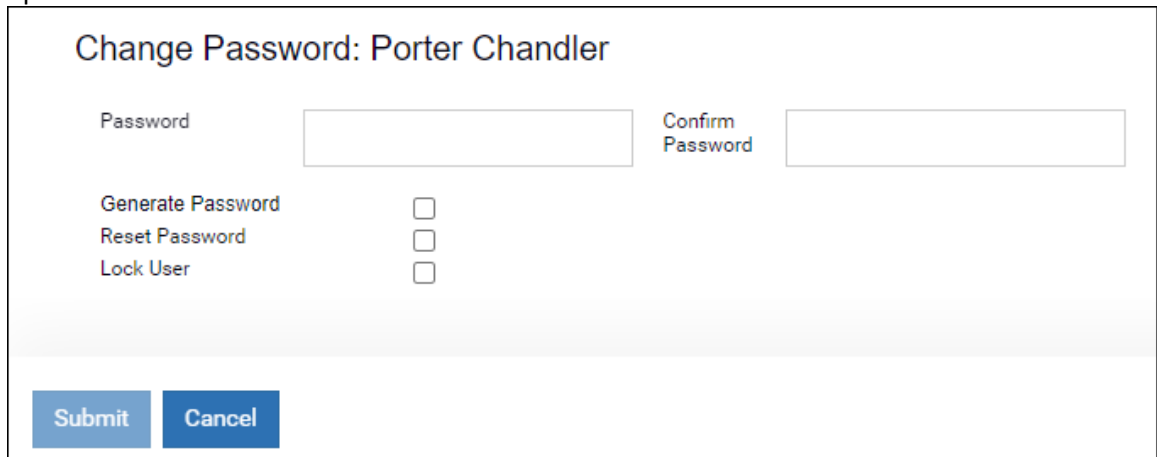
Change Location: Porter Chandler

Current Location: Latitude Motors Co. HQ

New Location: Dulles E-Parts and Service

Submit Cancel

- E. **Change Password:** Opens a slide-in to set a new password for the user either manually-selected or auto-generated, with the option to prompt a reset upon the user's next login. There is also an option to lock or unlock a user account.



Change Password: Porter Chandler

Password:

Confirm Password:

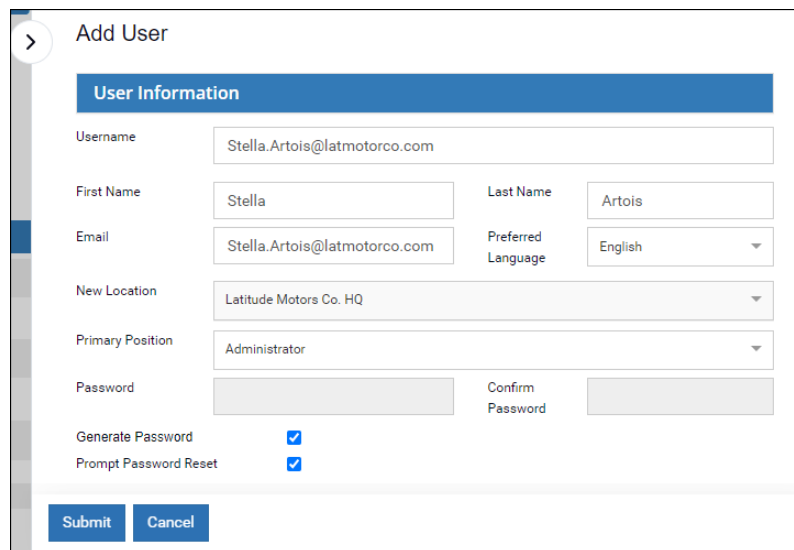
Generate Password

Reset Password

Lock User

Submit Cancel

- F. **+Add User:** Opens a slide-in with fields supporting the addition of a new user with a default Student role. If the username is already in use at another location, the administrator will receive a message indicating so and will allow them to continue adding the user at the selected location. If a username is already in use outside their portal, it will tell them the username is unavailable and they should Cancel the attempt in order to return to the Manage User page.



Add User

User Information

Username: Stella.Artois@latmotorco.com

First Name: Stella Last Name: Artois

Email: Stella.Artois@latmotorco.com Preferred Language: English

New Location: Latitude Motors Co. HQ

Primary Position: Administrator

Password:

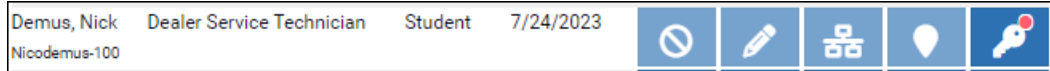
Confirm Password:

Generate Password

Prompt Password Reset

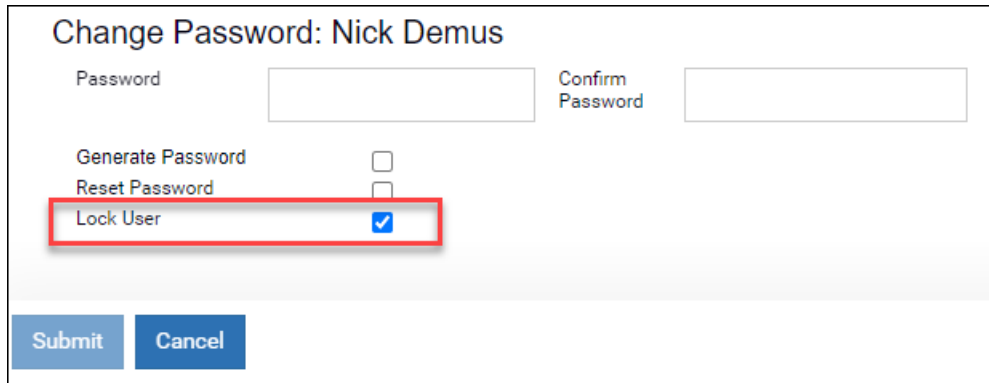
Submit Cancel

- When a red dot displays on the Change Password button, a user is locked out of the system by the administrator or from using an incorrect password too many times.



Demus, Nick Dealer Service Technician Student 7/24/2023
Nicodemus-100

The slide-in will show Lock User selected. Remove and save to unlock.



Change Password: Nick Demus

Password Confirm Password

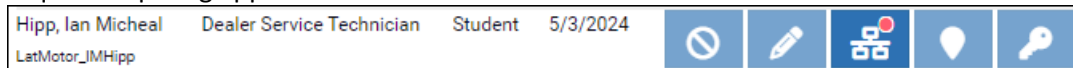
Generate Password

Reset Password

Lock User

Submit Cancel

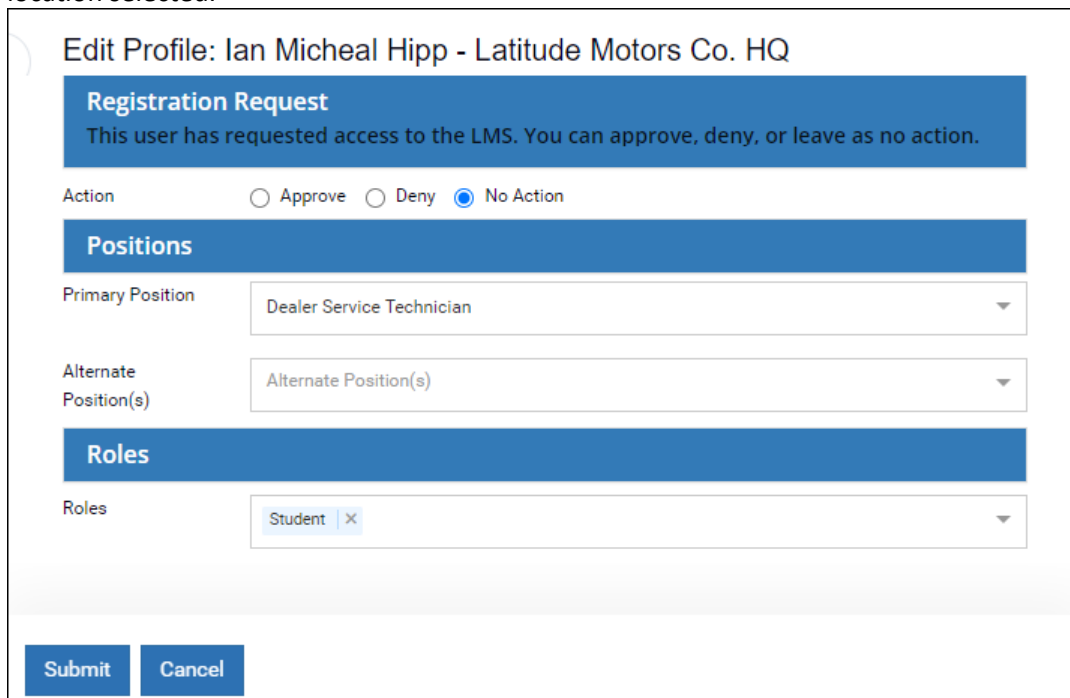
- When a red dot displays on the Edit Profiles button, a user has submitted a user registration request requiring approval.



Hipp, Ian Micheal Dealer Service Technician Student 5/3/2024
LatMotor_JMHipp

Approve or deny the registration or change the primary position and roles as needed.

Note: Positions determine who that person reports to and if they have direct reports at the location selected. Roles determine which LMS features the person has access to use at the location selected.



Edit Profile: Ian Micheal Hipp - Latitude Motors Co. HQ

Registration Request
This user has requested access to the LMS. You can approve, deny, or leave as no action.

Action Approve Deny No Action

Positions

Primary Position Dealer Service Technician

Alternate Position(s) Alternate Position(s)

Roles

Roles Student

Submit Cancel