Manage Users in Organisational Management on Cloud

Org Man Users · https://cclearninghub.co.uk/docs/manage-users-in-organisational-management-on-cloud/

Org Man Manage Users

This guide will cover managing users within the organisational management app in Cloud.

Please follow the interactive guide below, a written guide is also available at the bottom of the page.



Embedded media:

https://demo.arcade.software/pkyITfIDh6vHOCAVpbRi?embed&embed_mobile=tab&embed_desktop=inline&show_copy_link

Written guide

1. Enter the **Org Management app.**
2. Select to **Visit** the **Users** section.
3. Toggle the **Hide Inactive Users** switch to see users that aren’t correctly mapped.
4. Click the **eye icon** to view the user.
5. The details tab shows all of the user’s details, items with an asterisk are required information.
6. The role assignment tab gives access to different areas and sites.
7. Edit the User Roles.
8. Pick the App Role and the Org Role to give them access to that app and site.
9. Select **Add** in the middle of the screen to apply those roles then click **Save Changes.**
10. A user may inherit certain roles due to their department or position that differ to their individual roles, you can see those on the **Inherited Roles** tab.
11. The **Access Information** tab will show what areas the staff member has access to.
12. Enter the **Site Mapping** tab to correctly map the User to a Staff member.
13. Click **Edit User Mapping.** Then select the **Mapped Staff Record** drop-down and select the correct staff member from the list.

14. Select **Save Changes** when done.
15. The **Security** tab will show details about the user. They include:
    - **Reset Account** – resets the log in details and status for the staff member.
    - **Deactivate Account** – removes the accounts access and ability to use CC – useful if a staff member leaves.
    - **Reactivate Account** – enables the accounts access and ability to use CC – useful if a staff member rejoins an organisation.
    - **Unlock Account** – unlocks a staff members account which has auto-locked due to failed log-ins.
16. The settings page gives further details such as adding MFA, expiry times and more. You can see further details on that page here.
17. When done, close the box.