

User management

This feature allows you to create, modify and delete internal or external users. To do this, you must have the superuser role.

Note: You can create two types of users: **internal and external**.

Internal users have direct access to the platform. **External users**, on the other hand, receive links enabling them to submit tasks without logging on to the platform.

Add a user

STEP 1

- Internal user

To create a new **internal user**, go to the **Administration** → **users**, then on the **User list** section, click on the **New user** button.

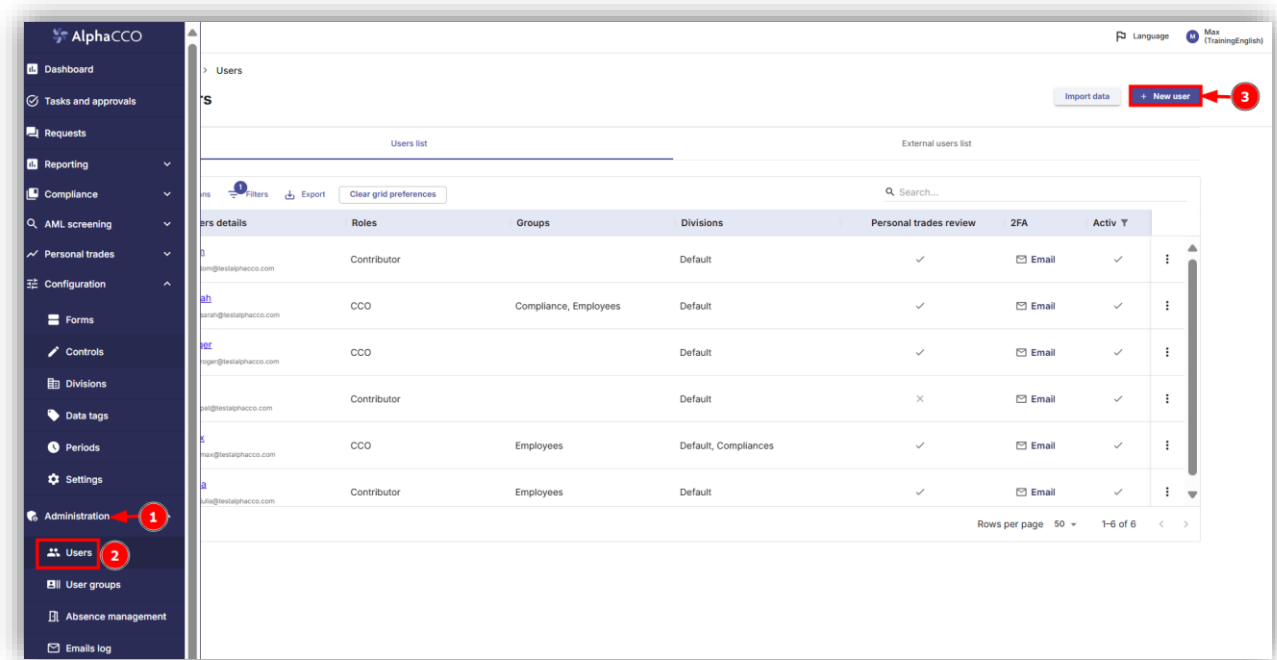


Figure 1: Users page in the Administration menu

STEP 2

Fill in the mandatory fields: **First Name, Email, Language,** and your preferred method of **two-factor authentication** for receiving the verification code.

If you select **SMS** authentication, you must also provide a **valid phone number**.

The screenshot shows the 'User creation' page in a web application. The page title is 'User creation' and the breadcrumb is 'Dashboard > Users > User creation'. The user is logged in as 'Max (Training(English))'. The form is titled 'User details' and contains several fields:

- First name:** Jerry (marked with a red arrow and '1').
- Last name:** Thomas (marked with a red arrow and '2').
- Email:** jerry@testalphacco.com (marked with a red arrow and '3').
- Language:** English (marked with a red arrow and '4').
- 2FA:** Email (marked with a red arrow and '5').
- Phone number:** (empty field).

Red arrows and numbers 1 through 5 point to the 'First name', 'Last name', 'Email', 'Language', and '2FA' fields respectively, indicating they are required.

Figure 2: Internal user creation page with required fields.

STEP 3

If your license includes the **Personal Trades module**, use the **toggle button** to include the user in the personal transaction review process. Then, select the user role and proceed with configuring the remaining options.

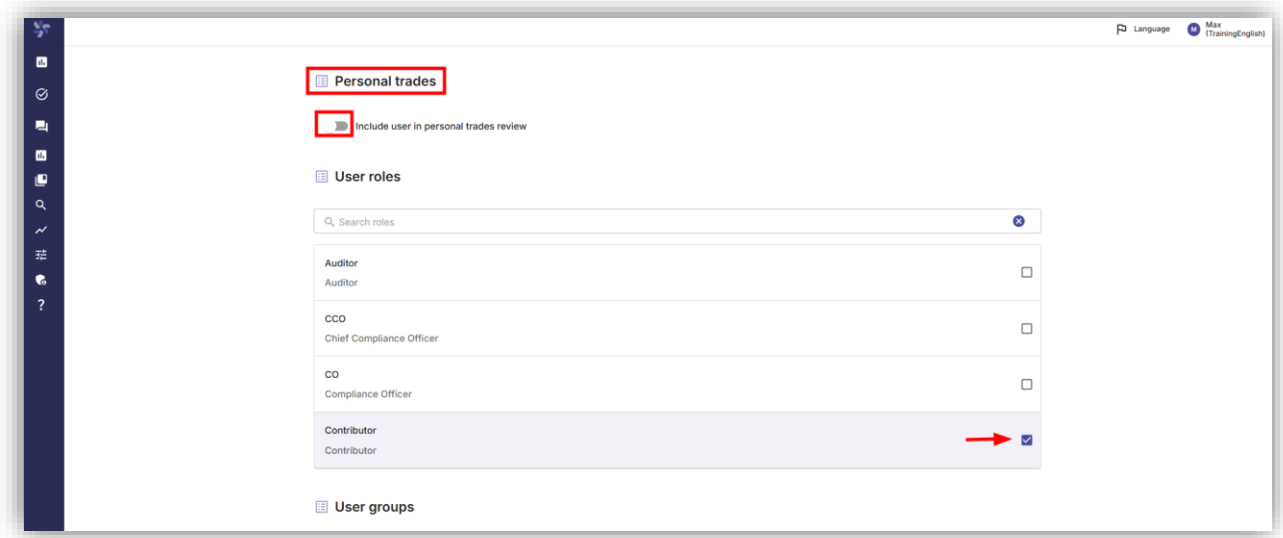
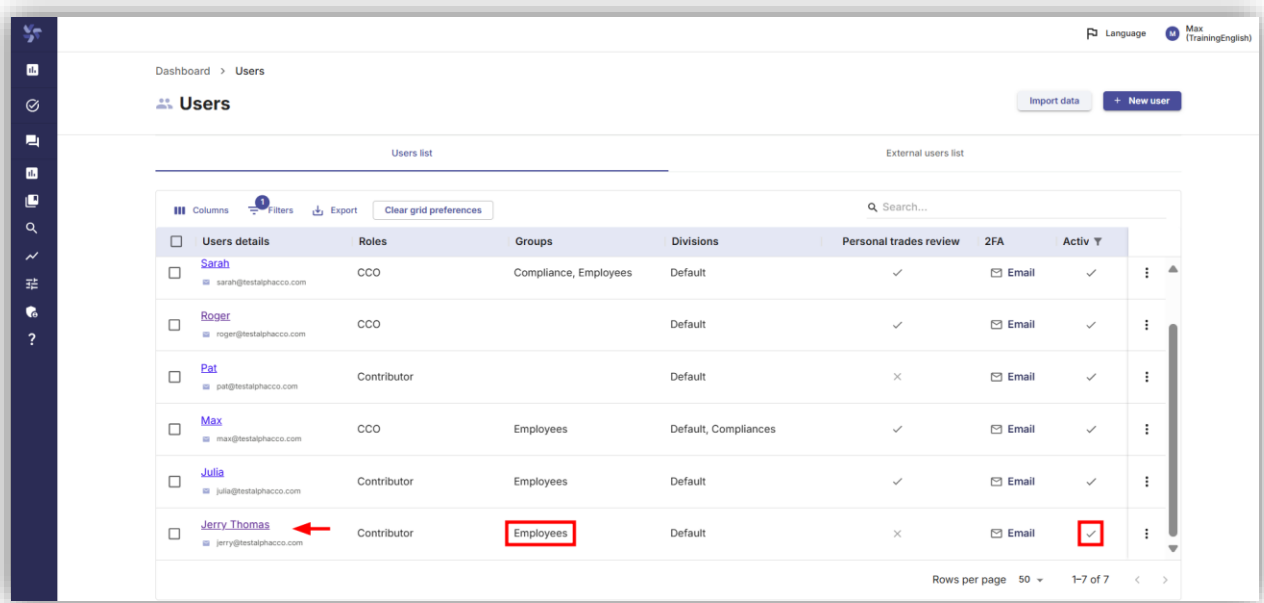
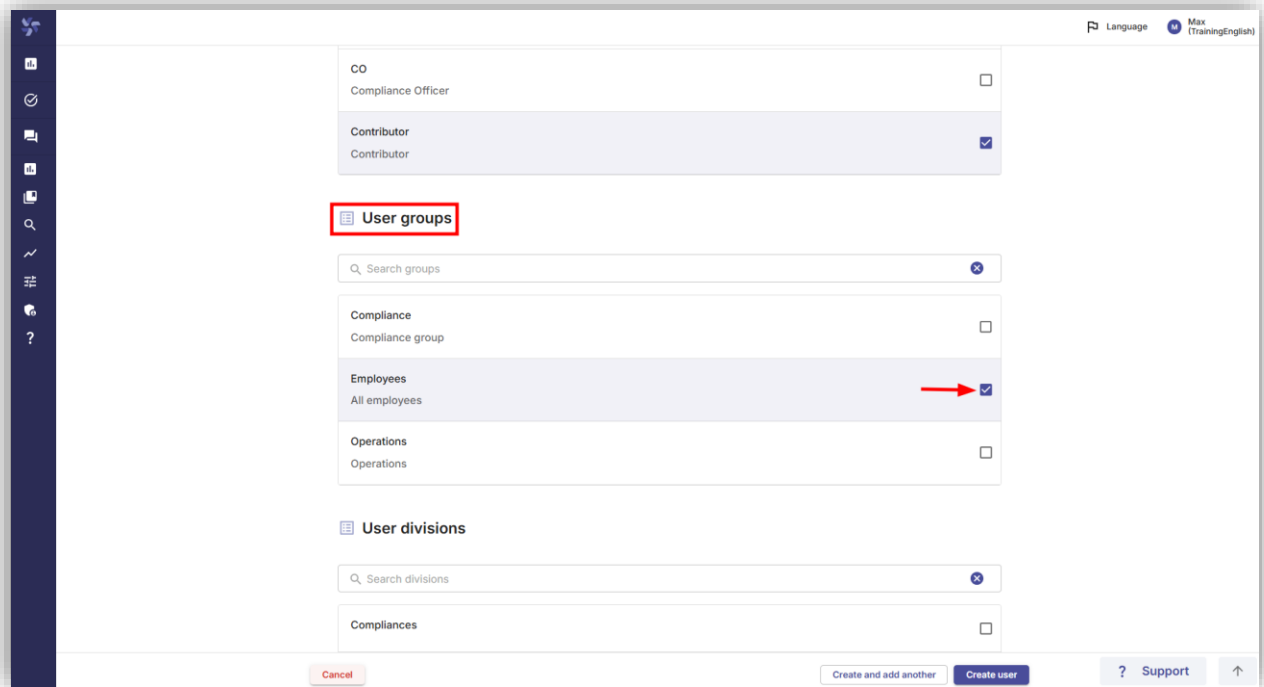


Figure 3: User creation page with role selection.

STEP 4

Select the user's **group**. If your license includes the Division feature, select the appropriate division for the user. Click **Create User** to finalize the process. The user will then be added to the list of internal users.



Figures 4,5: Internal users page with newly created internal user.

- **External user**

STEP 1

To create an **external user**, go to the **Administration** menu → **Users** → **External users list**. Click on the **New external user** button.

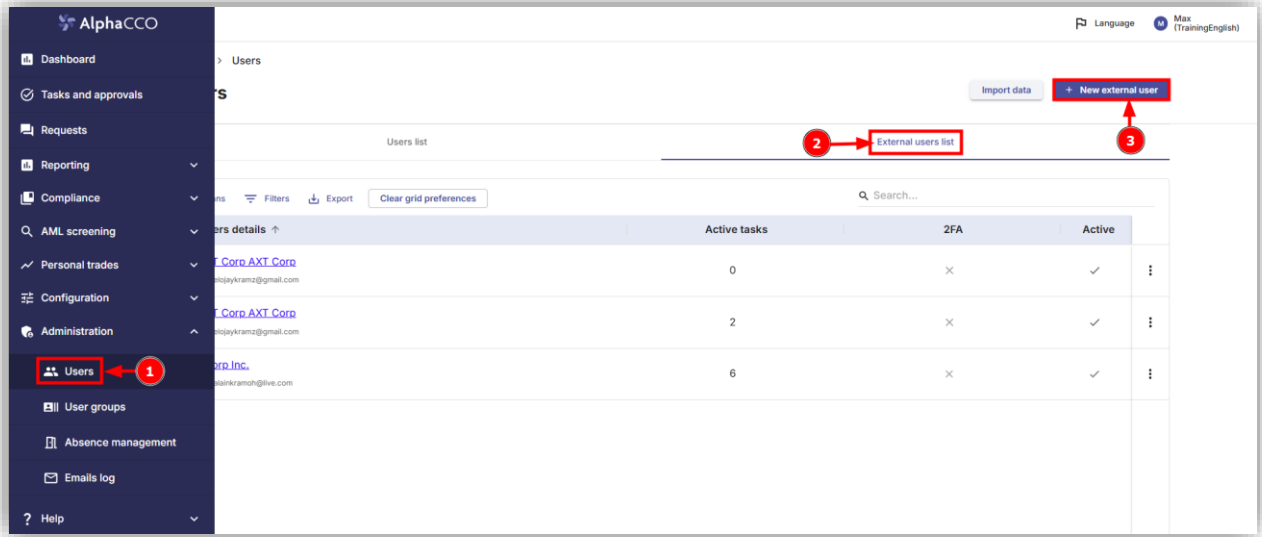


Figure 6: External user section in the Users menu.

STEP 2

Fill in the required fields: **First Name**, **Last Name**, **Language**, and **Email** of the external user. You can choose to enable or disable the display of links in the email received by external users. Additionally, you may enable two-factor authentication and provide a phone number for the external user. An authentication code will be sent to the external user’s email address, which must be valid before they can access the form. Click **Create External User** to complete the process.

Users details	Active tasks	2FA	Active
Core Inc. corpinc@gcorp.com	0	x	<input checked="" type="checkbox"/>

Figures 7, 8: External users page with newly created external user.

User management options

Once an internal user has been created, the following actions can be performed:

- **Edit user:** change name, first names, roles, and groups.
- **Reset password:** reset the user's password.
- **Deactivate:** Deactivate the user from the platform.

Edit a user

STEP 1

You can modify the profile of an internal or external user, except for the email address. Click the *Options* button to edit user information such as role, group, first name, and last name.

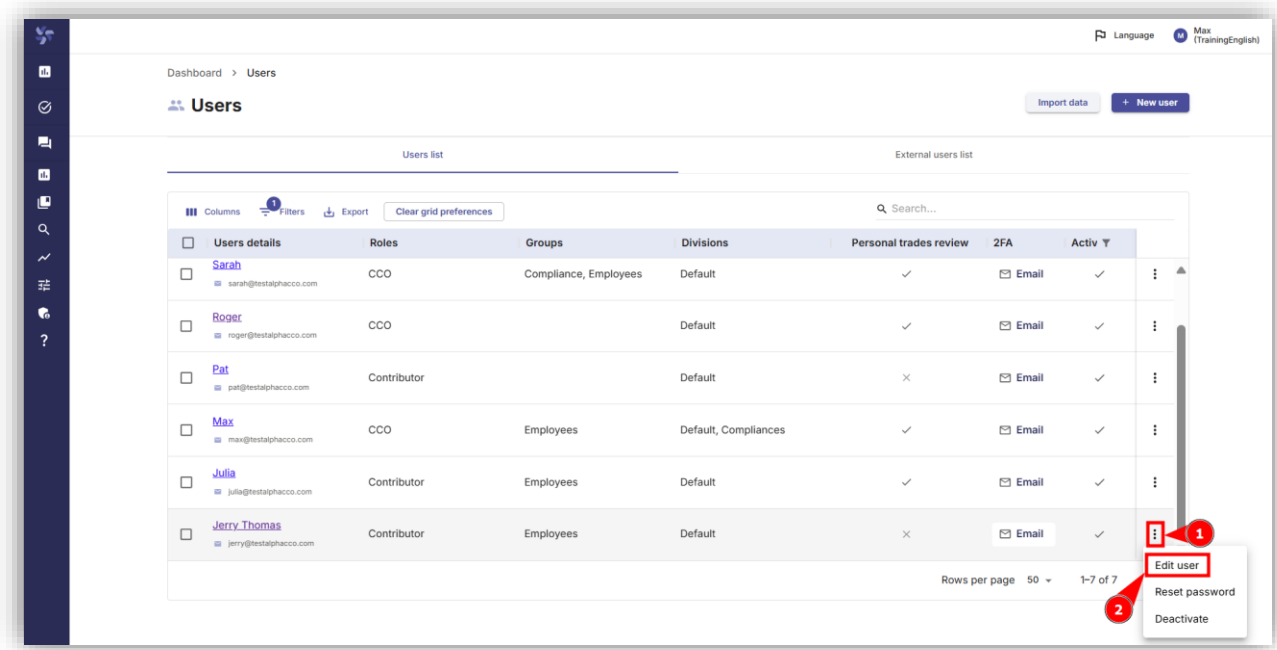


Figure 9: Internal users page, edit a user button.

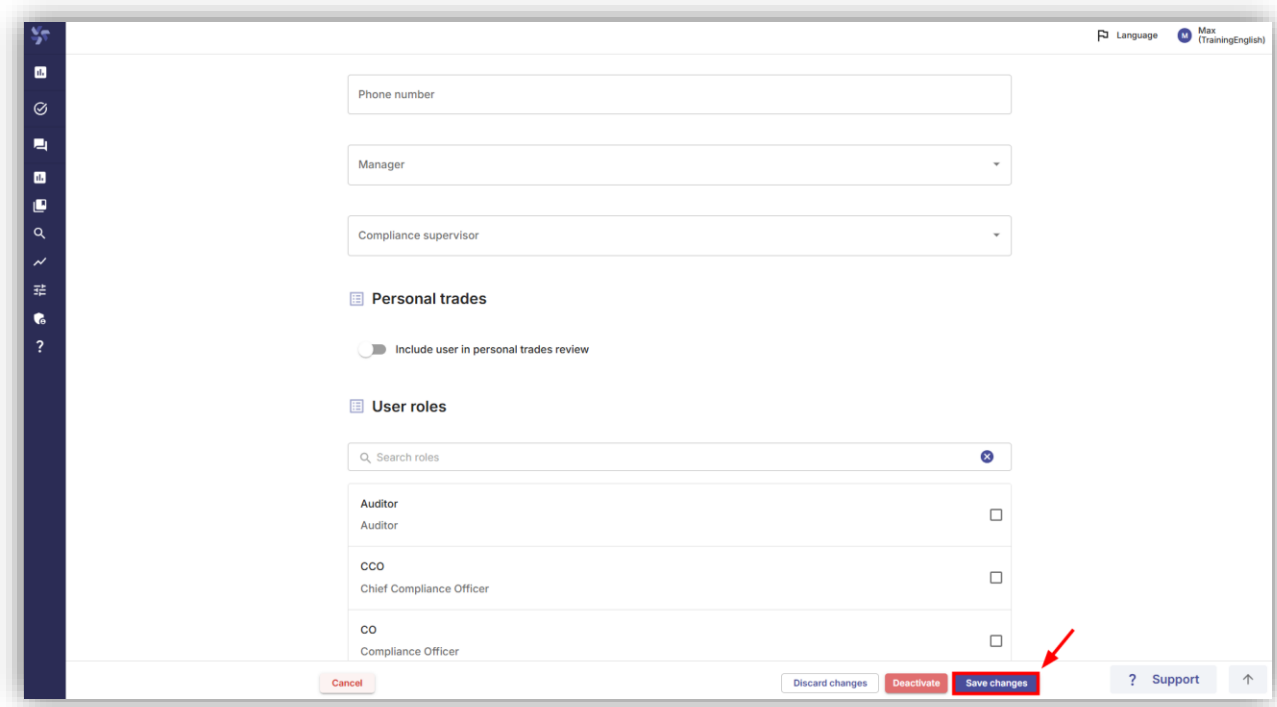


Figure 10: Internal users page, save changes button.

Reset password

Note: External users do not have access to the platform. Therefore, the password reset feature only applies to internal users.

STEP 1

To reset a user's password, click on the options button at the end of the line, then select **Reset password**. An e-mail is sent to the user to set a new password.

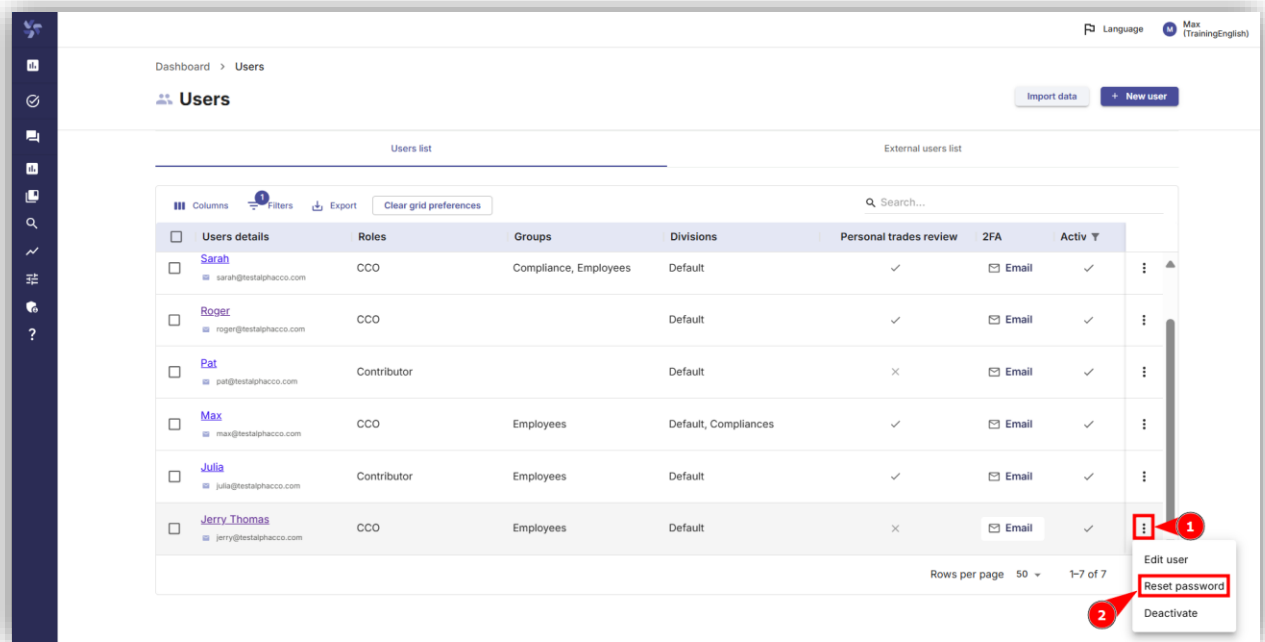


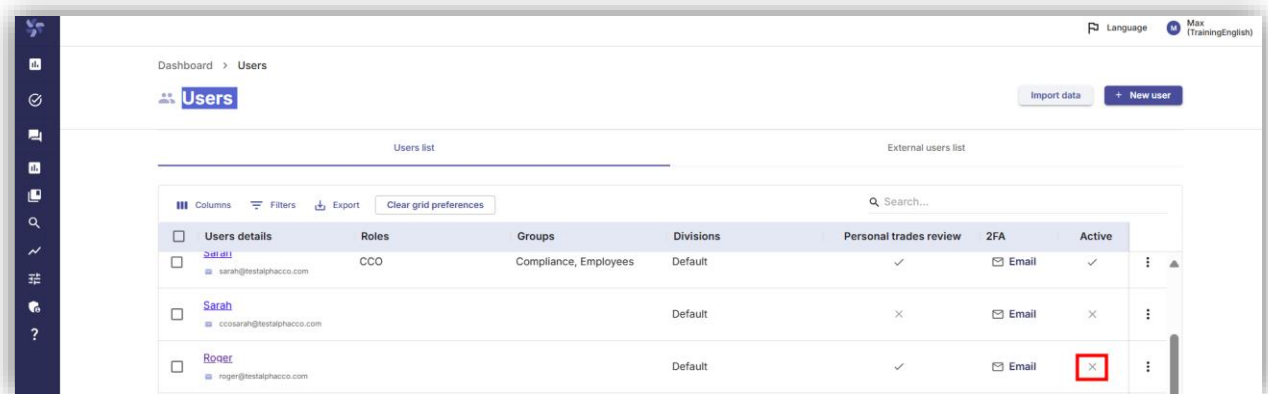
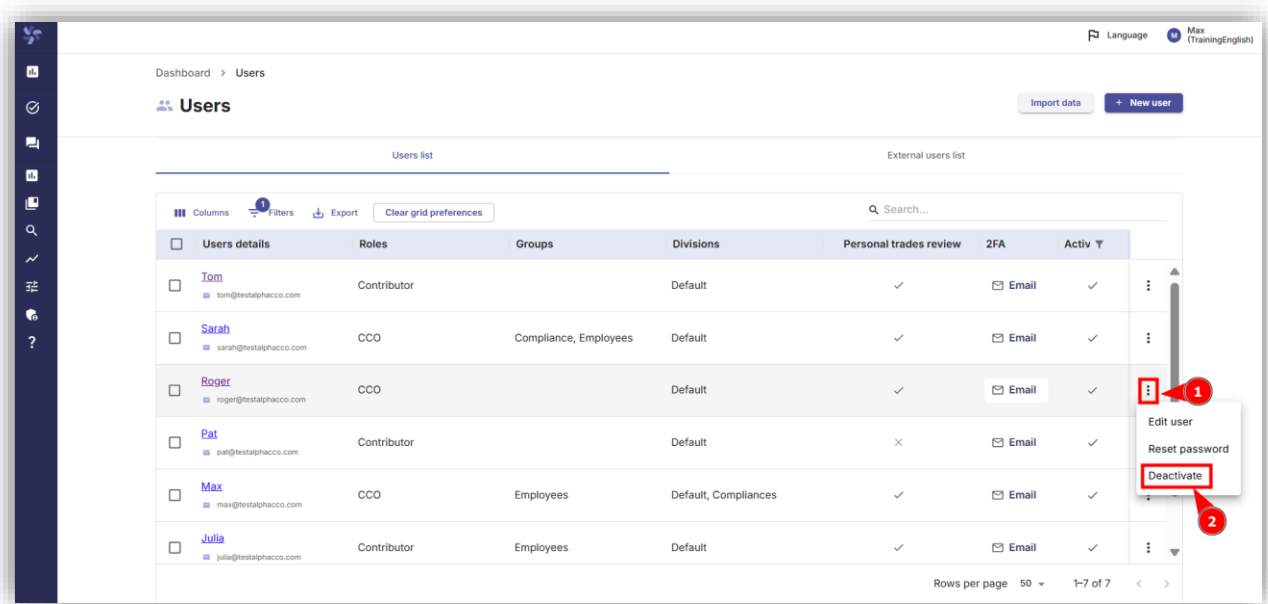
Figure 11: Internal users page, reset password.

Deactivate a user

Note: User deactivation applies to both internal and external users.

To deactivate a user, click on the options button at the end of the line, then select **Deactivate**. A cross appears in front of the user's profile, indicating that the profile is no longer active.

STEP 1



Figures 12,13: User page with a deactivated user.

NOTES

Please note that this document is only a brief guide. The AlphaCCO support team will be happy to assist you if you require further guidance. Please do not hesitate to contact us at support@alphacco.com