5.3 Manage Users

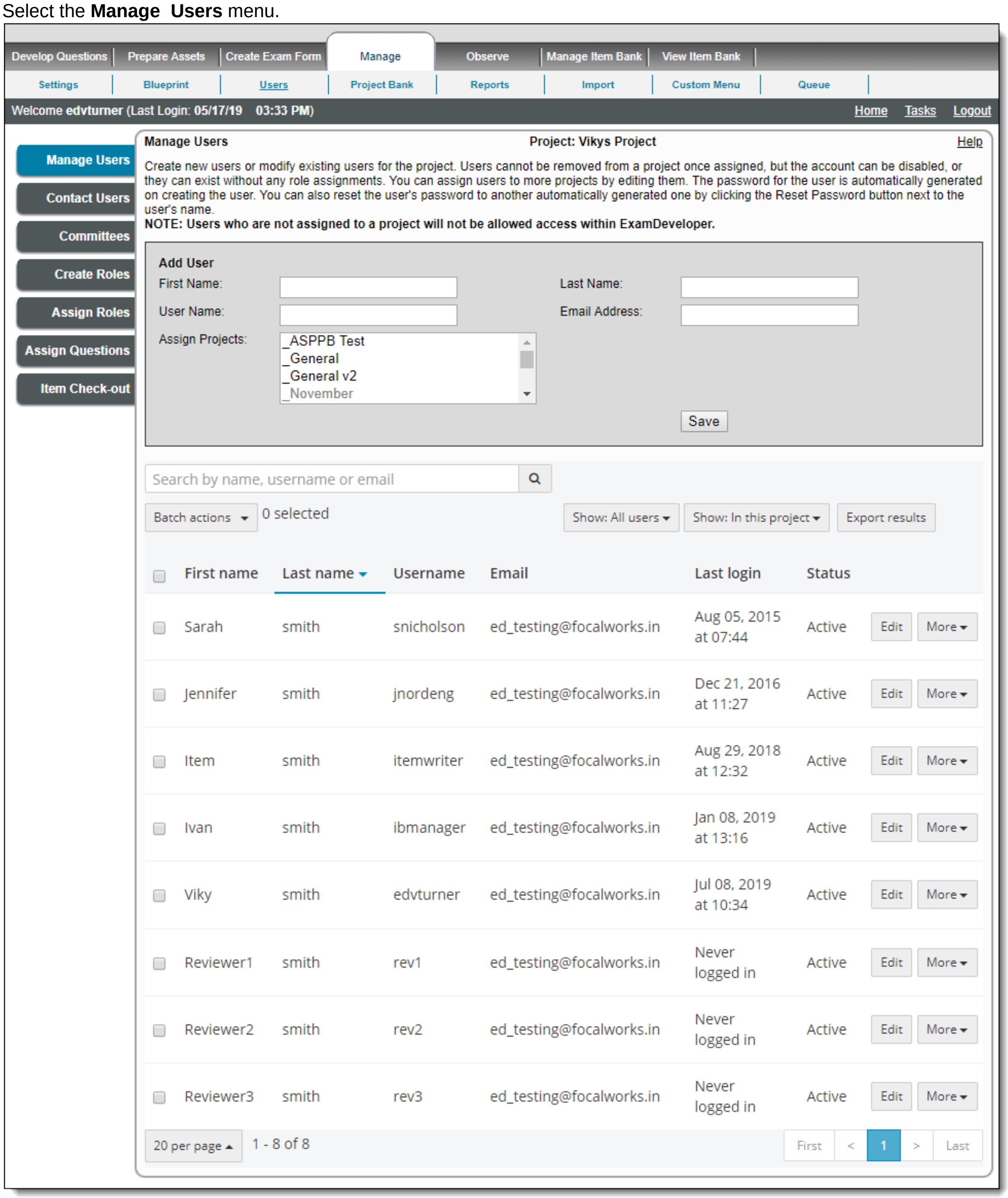
As Project Manager you can use the **Manage Users** page to:

- **Add/delete users and modify their details**
- **Export a list of users assigned to the project**
- **Contact users**
- Reset passwords and security authentication (shown below)

You can grant different access rights to users by **managing roles**, **role assignments**, and **assigning work to users**. The **creation** and **manage ment of Committees** can also be performed using this page.

Access the Manage Users page

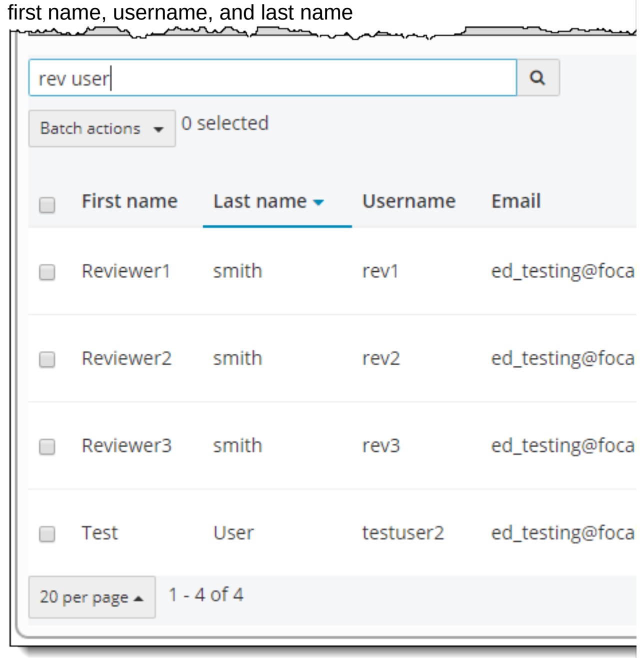
- Select the **Manage Users** menu.

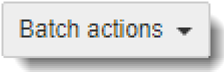
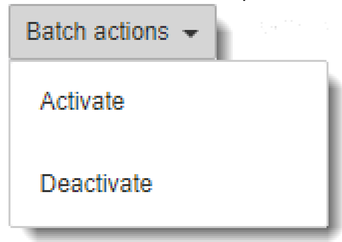
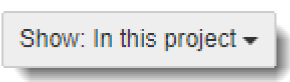
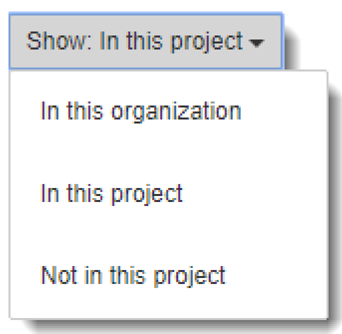
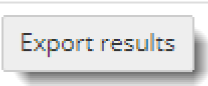


You can sort the list by First name, Last name, Username, Email address, Last Login, or Status by clicking on the respective column header. Clicking once sorts the list in ascending order; clicking a second time sorts the list in descending order.

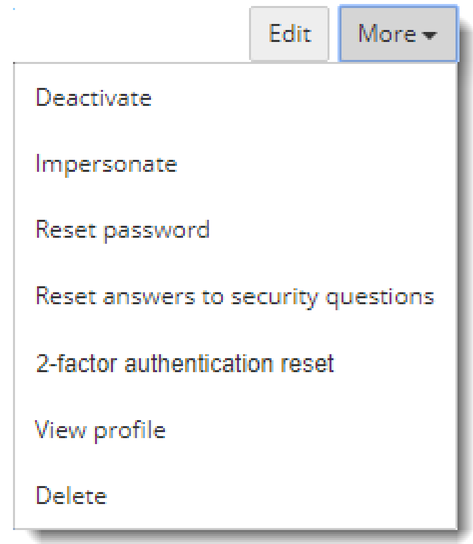
The **Manage Users** page includes the following details:

Feature	Description

	The **Search** box allows you to search for users based on first name, last name, username, or email address. The search results appear in real time as you type in the search text.
	
	• Users can **copy and paste space delimited values** into the search box (multiple leading/trailing spaces, and spaces before/after/between phrases are allowed)
	• Once values are entered in the Search box, the list is filtered and displays values that match content in any of the following fields:
	  ◦ First name
	  ◦ Last name
	  ◦ Username
	  ◦ Email
	• A filter can match one or more columns at the same time (e.g., first name and email), however, those records MUST continue to match the criteria of the **Show Users** (*All users*, *Active users*, *In active users*) and **Show** (*In this organization*, *In this project*, *Not in this project*) drop-down filters to display the results.
	• Filters are not case sensitive
	• In the example below, the entered filter "***rev user***" matches a first name, username, and last name
	

 	The **Batch actions** drop-down allows users to Activate or Deactivate selected users in one step.  The **Activate** option appears if the selection does not include any retired users. Similarly, the **Deactivate** option does not appear if the selection does not include any Active users. Upon clicking **Activate**/**Deactivate**, the relevant confirmation prompt is presented to confirm the action to be performed.
 	By default, Active as well as Inactive users are listed. To list only Active or only Inactive users, click the **Show: All users** drop-down and select the appropriate option. 
 	By default, all the users from the project are listed. To list users belonging to the organization, or only users not belonging to the current project, click the **Show: In this project** drop-down and select the appropriate option. 
 	Project Managers can export a list of all the users in the selected project. The file is exported to the **Reports** page as an Excel file called **User Report**. See **Export a list of users assigned to the project** below for details.
 	Edit the user's details. The user information appears in the **Add User** section above the list, where it can be modified and saved by clicking **Save**. If the modifications are to be discarded, this can be done by clicking **Cancel**.

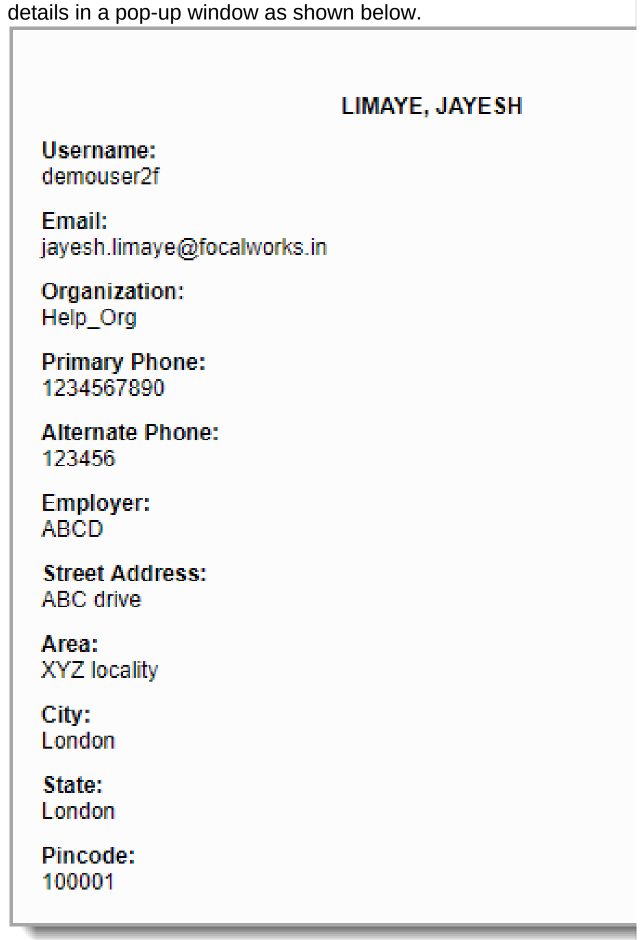
The **More** drop-down allows you to deactivate/activate, reset password, reset answers to security questions, reset 2-Factor Authentication, view the user profile, or delete the user. The action is performed after the action is confirmed in the confirmation prompt that appears next.



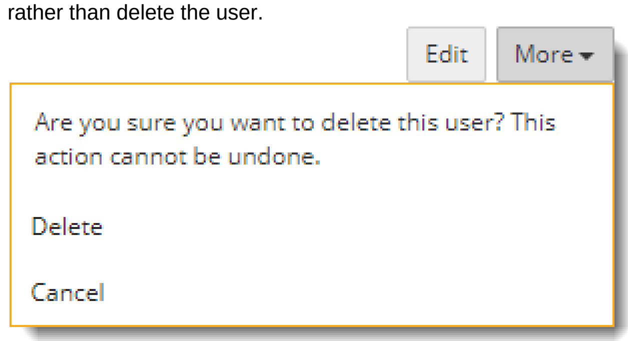
- Clicking **Deactivate** retires the user. This only appears if the user is Active.
- Clicking **Activate** activates the user. This only appears if the user is Retired.
- Clicking **Impersonate** allows you to login as the user. See **Impersonate a user** below for details.
- Clicking **Reset password** sends the user an email with the link to reset their password.
- Clicking **Reset answers to security questions** resets the user's answers to the authentication questions and he/she is required to answer them again upon logging in the next time.
- Clicking **2-factor authentication reset** resets the 2-Factor Authentication data of the user so that he/she is required to fill the information afresh upon logging in the next time. This option is only visible if **2-Factor Authentication** is enabled for the application, for the Item Bank to which the current project belongs, and also for the selected user.

<table>
<tr><td></td><td>

- Clicking **View profile** displays the user profile with various details in a pop-up window as shown below.



- Clicking **Delete** deletes the user from the system. ****Note: This is only possible if the user you are attempting to delete hasn't written to the database****
You must confirm you want to delete the user. If the user has information written to the database, you can deactivate the user rather than delete the user.

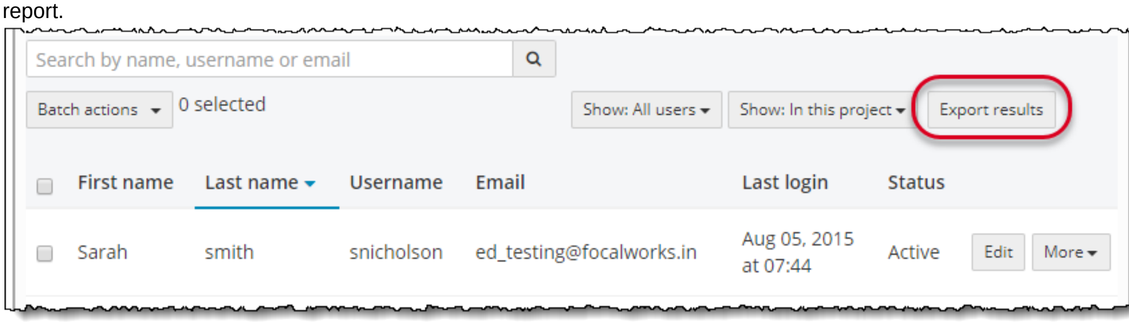


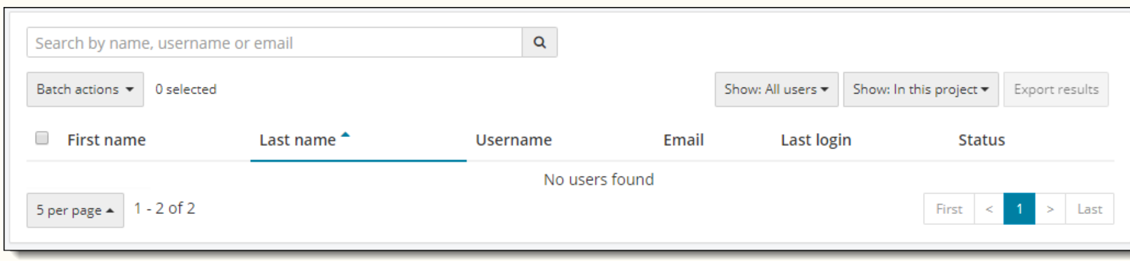
</td></tr>
<tr><td>First name</td><td>The user's first name.</td></tr>
<tr><td>Last name</td><td>The user’s last name. The list is sorted in ascending order by last name when the page is loaded.</td></tr>
<tr><td>Username</td><td>The user’s username.</td></tr>
<tr><td>Email</td><td>The user's email address.</td></tr>
<tr><td>Last Login</td><td>Date and time of the user’s last login. This appears as "Never logged in" for users who have never logged in.</td></tr>
<tr><td>Status</td><td>The current status of the user. This can either be Active or Retired.</td></tr>
</table>

Export a list of users assigned to the project

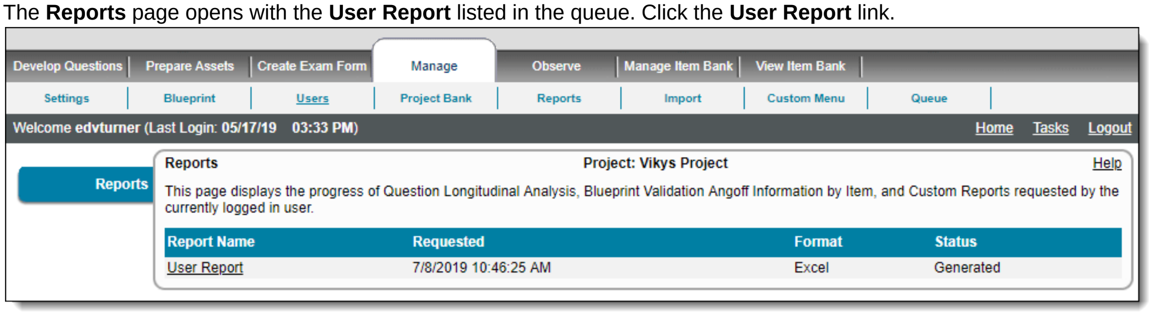
Project Managers can export a list of all the users assigned to the selected project using the **Export Results** button.

1. Navigate to the **Manage Users** page.
2. Click the **Export results** button. You do not have to select the user records. All users currently assigned to the project are exported in the report.

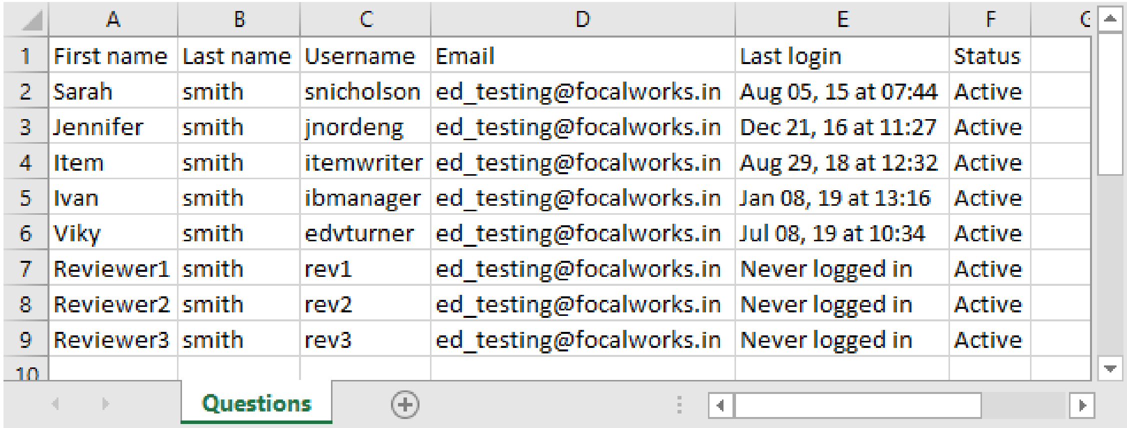


> If there are no users assigned to the project, the Export results button is disabled.
>
> 
>

3. The **Reports** page opens with the **User Report** listed in the queue. Click the **User Report** link.



4. The **User Report** opens in an Excel spreadsheet. The file name is in the following format: YYYY-MM-DD_UserReport_<project name>.xls

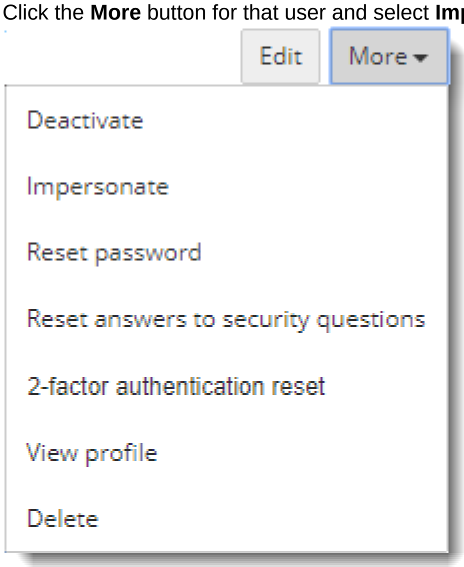


	A	B	C	D	E	F
1	First name	Last name	Username	Email	Last login	Status
2	Sarah	smith	snicholson	ed_testing@focalworks.in	Aug 05, 15 at 07:44	Active
3	Jennifer	smith	jnordeng	ed_testing@focalworks.in	Dec 21, 16 at 11:27	Active
4	Item	smith	itemwriter	ed_testing@focalworks.in	Aug 29, 18 at 12:32	Active
5	Ivan	smith	ibmanager	ed_testing@focalworks.in	Jan 08, 19 at 13:16	Active
6	Viky	smith	edvturner	ed_testing@focalworks.in	Jul 08, 19 at 10:34	Active
7	Reviewer1	smith	rev1	ed_testing@focalworks.in	Never logged in	Active
8	Reviewer2	smith	rev2	ed_testing@focalworks.in	Never logged in	Active
9	Reviewer3	smith	rev3	ed_testing@focalworks.in	Never logged in	Active

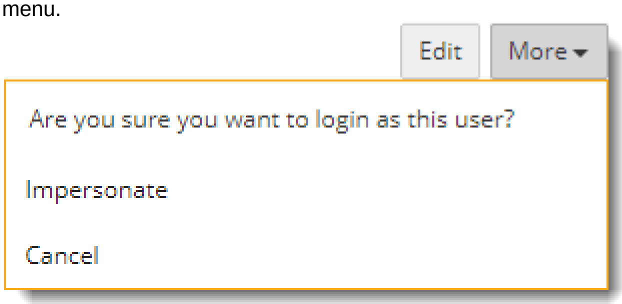
Impersonate a user

You can login as another user by selecting the **More** **Impersonate** menu option. The Impersonate menu is only available when the user is assigned to the current project.

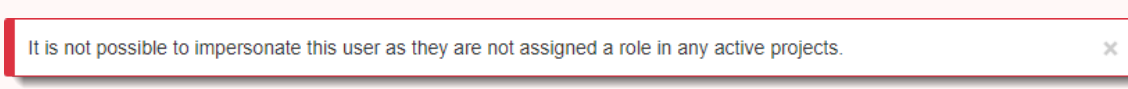
1. Locate the user in the list you want to impersonate.
2. Click the **More** button for that user and select **Impersonate**.



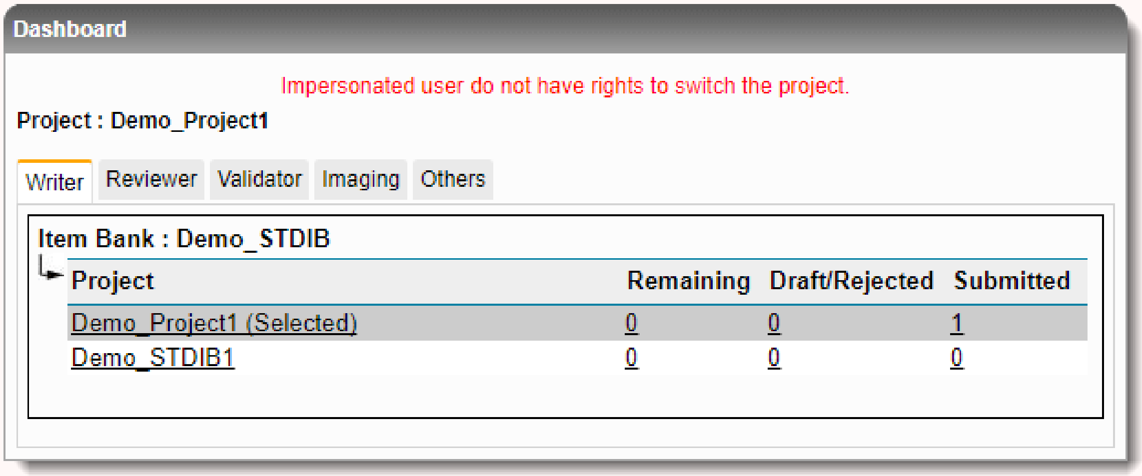
3. A confirmation message is displayed and the Project Manager can impersonate as the selected user by clicking **Impersonate** from the menu.



It is not possible to impersonate a user that does not have any assigned role in any active project. An error message is displayed if the user does not have any assigned role in any active project.



Although it is possible to login as a different user by clicking this button, the user to which the login is switched (impersonated) by this action, cannot change the project selection to anything other than the current project. Clicking any other project displays a warning message in red text.



ExamDeveloper Inc. (EDI) users assigned as Item Bank Managers of non-EDI Item Banks can use this functionality to login as any user (EDI or non-EDI) from the current non-EDI Project and also to login as any other EDI user not assigned with the current non-EDI Project (visible when **Show all users in this organization** drop-down menus are selected).

Granting project access is not enough

Granting project access is not enough to allow people to interact with a project. All users must be given a Role with the project. Roles can be assigned to a project from the **Assign Roles** page. In addition, if the user is *only* assigned permission to either Write, Review, or Validate items, they also must be given an item assignment. To assign items to users, please use the **Assign Work to Users** page.