User User Guide

User Actions

Add User

To start this action, click the   Add User   button above the User listing.

Creates a new User.

When this action starts a form is displayed to enter the details of the User.

Each field customises or controls some aspect of the User display or behaviour.

Some fields are required and must be entered before the User can be added, the required fields are Anonymous Only, Email Address Quality.

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the User you need to work on, and click the 🔍 View button in the ⋮ More Menu on that row.

Display the selected User.

This action displays the User similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the User you need to work on, and click the ✏ button on that row.

Edits an existing User.

When this action starts a form is displayed with the existing User and any previous information entered.

Each field customises or controls some aspect of the User display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Delete

To start this action, either select the User to work on and click the 🗑 button on that row. Or CTRL+click to select multiple Users and click the 🗑 button above the User listing.

Deletes an existing User.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this User.

Search

To start this action, click the 🔍 button above the User listing.

Allows a Search of Users.

This allows a simple text search across all Users.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the 🔍 Adv. Search button above the User listing in the ⋮ More Menu.

Allows an Advanced Search of Users.

The Advanced Search opens a new section at the bottom of the Users and allows several distinct features:

- Multiple Search Lines : allows User matches to be identified where more than one search criteria is required

- Nested Searches : allows a combination of AND and OR logic to find results

- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the ↻ Refresh button above the User listing in the ⋮ More Menu.

Refresh the list of Users.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the ☁ Export to List button above the User listing in the ⋮ More Menu.

Export the User results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Users shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Users will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the ⤓ Export All button above the User listing in the ⋮ More Menu.

Export all the Users to a List.

Exactly as for "Export to List" except rather than just Exporting the User results shown, all Users will be expored.

Export Item

To start this action, select the User you need to work on, and click the ☁ Export Item button in the ⋮ More Menu on that row.

Export only the selected User to a List.

Exactly as for "Export to List" except rather than just Exporting the User results shown, only the selected User is exported.

Choose Columns

To start this action, click the ⚙ Choose Columns button above the User listing in the ⋮ More Menu.

Changes the Columns shown in the User Listing.

The Choose Columns screen shows the Selected Columns on the left, and the User Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the User Listing.

Manage Filters

To start this action, click the ☰ Manage Filters button above the User listing in the ⋮ More Menu.

Creates custom Filters for Users.

A Filter is a saved Advanced Search. Multiple Filters can be created for Users.

These Filters appear at the top of the User listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Users where these can be managed.

User Field Reference

Salutation

eg. 'Fred' or 'Mr Smith'

Additional User Groups

Additional user groups that the user is a member of.

Additional Permissions

Select addtional permissions that apply to this user over and above those assigned to the user's User Group

Last Visit Date

Date of last page viewing on the site

Anonymous Only

This field is mandatory.
Checked if the user was created only as an anonymous user

Failed Login Attempts

The total number of failed login attempts since the last successful login

Last Login Attempt Time

The date and time of the last login attempt for the user, successful or unsuccessful

Last Password Reset Date

The date and time the last Password Reminder was sent

Email Address Quality

This field is mandatory.
The quality of this email address:
- OK : this email seems genuine
- Bad : this email bounced the last time it was sent to, no further emails will be sent to this User
- Force : the next email will be sent and then the status will be set back to 'OK' or 'Bad' depending on the outcome
Note: the system examines past email sends to check for bounces. If an email is bouncing this setting is changed to 'Bad'.
To ignore the bounces and force the next email to be attempted, change this to 'Force'. After the next send this will be set to 'OK'
If an email address is marked as 'OK' but bounced the last email send, it will be changed to 'Bad'.