TIMEGATE USER SETUP

OVERVIEW
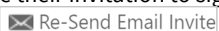
Users are set up using a three-step process :

1. Create the user
2. Assign the user to branches/sites
3. Assign function role(s) to the user

This help-sheet walks you through the process end-to-end

1. CREATE THE USER

- From the main menu select **New | User**:

- Enter a **First Name**, and **Last Name**

- Select the **Branch** that the user will have access to ensure that their default Timegate views is most appropriate

- Enter an **Email Address**

- Optionally enter a **Telephone number**

- Optionally select **Site Role Employee Access** from the options available. This setting enables the configuration of a lower level of security access i.e. at a site team level, rather than a branch level

- Select **Enable Account**

- Select **Save** to create the user—a warning message may be displayed. Select **OK**

- Finally, select [Send Email Invite] to email a link and temporary password that will enable the user to successfully activate their account and sign in

**Please Note:** If a user does not receive their invitation to sign in, the email can be resent by selecting [Re-Send Email Invite]
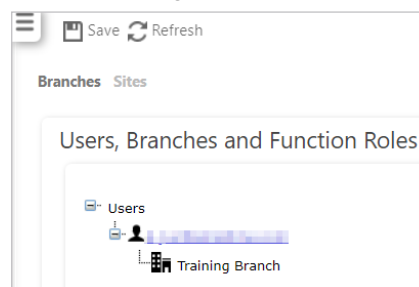
ASSIGN THE USER TO BRANCHES/SITES

- From the main menu select **Admin | Security**

- Select **Role Allocation**

- Locate and select the user you have created

- Select **Branches** or **Sites** (where configured) depending on where you would like to assign the user

- Select the **User** from the tree view (email address) to display **Branches/Sites** (regardless of your choice, the functionality below will remain the same):
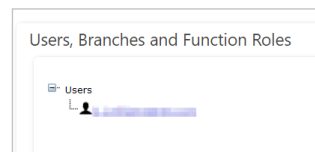
- Select one or more **Branches**:
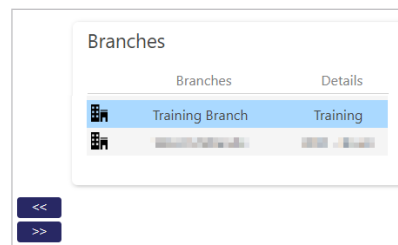
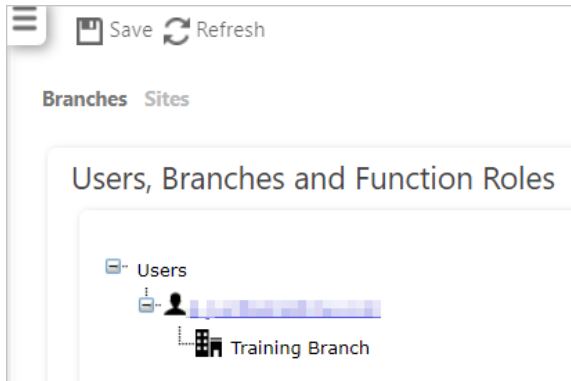- Select **<<** to assign to the selection to the user:

If you need to remove a function role that you have added to a user, select the role and press **>>** . It will disappear from under the branch

- Select **Save**

- When prompted select **OK** to continue

- Select **OK** when prompted for a second time. The branch/branches have now been allocated to the user. If the user has already signed into Timegate at this time, they will need to sign out for the changes to take effect

ASSIGN FUNCTIONAL ROLE(S) TO THE USER

- From the main menu select **Admin | Security**

- Select **Role Allocation**

- Locate and select the user you have created

- Select the user from the tree view (their email address as shown below):

- Select the **Branch** that you wish to add a function role to

- Select one or more **Function Roles**:

- Select **<<** to assign to the selection to the branch that has been assigned for the user:
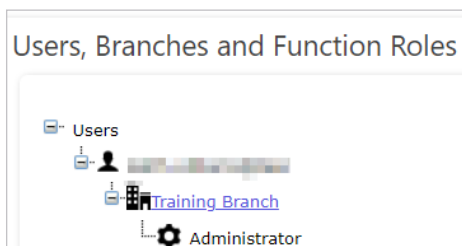
If you need to remove a function role that you have added to a user, select the role and press **>>** . It will disappear from under the branch

- Select **Save**

- When prompted select **OK** to continue

- Select **OK** when prompted for a second time. The role(s) have now been allocated to the user**.** If the user has already signed into Timegate at this time, they will need to sign out for the changes to take effect

REMOVING USERS

If you need to revoke a users access to Timegate, you have two options:

- Disable the user—for temporary user access suspension

- Delete the user—to remove from the system completely

Both actions can be performed from the User Set Up screen.

From the main menu

- Select **Set Up | User**

- Locate and select the user you wish to disable access or delete

Disable a user

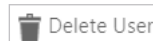- To disable the user, ensure **Enable Account** is not enabled:

- Once changed, select **Save**

- When prompted select **OK** to continue

- Select **OK** when prompted for a second time. The user has now been disabled from the system.
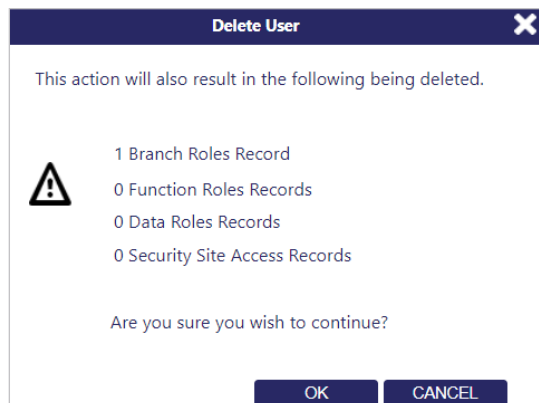
  This process can be reversed by following the steps above ensuring Enable Account is enabled

Delete a user

- To permanently delete a user, select **Delete User**

- A warning message similar to below will be displayed

- Select **OK** to proceed and delete the user from the system, or select **Cancel** to stop the operation