



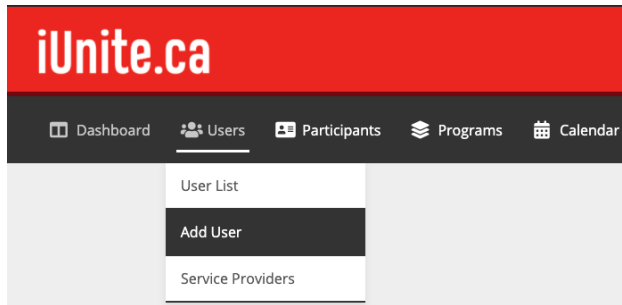
iUnite.ca User Management Guide

Add Users

Only “Administrator” and “Coordinator” roles can add users. “Administrator” users can add users at all roles, while coordinators can only add “Service Providers.”

To add a user, follow these steps:

1. Hover over the “Users” menu item and in the new dropdown menu click “Add User.”



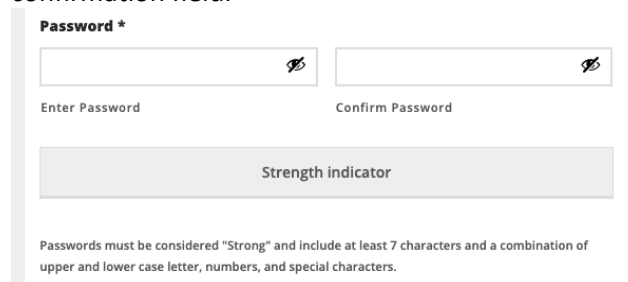
2. Once the new page loads, you will see the “New User Registration” form.



3. Fill out the required fields (marked with a “*”). Please note:

- a. **Password:**

The password field will require a strength of “Strong.” The strength indicator will display the current strength level of the password entered and if there is a mismatch with the password confirmation field.





b. User Type:

This field is used for reporting and will determine additional information you should enter in the new user profile.

User Type: *

-- Select --

c. Create User Account:

This option determines if the new user account will be allowed to sign-in and view appropriate data.

- i. If "Yes" is selected, you can select the user role in the next field and the new account will be allowed to sign in.
- ii. If "No" is selected, the account will have no role and not be able to sign in.

Create User Account *

Yes

No

d. Program Access:

Any user that is an "Administrator" will have access to all programs your organization does. All other levels will be limited to seeing only programs selected for them by higher level users.

Program Access *

- Better at Home
- Family & Friend Caregiver Supports Programs
- Social Prescribing Programs
- TAPS

4. On submission of this form, you will be redirected to one of 3 pages:

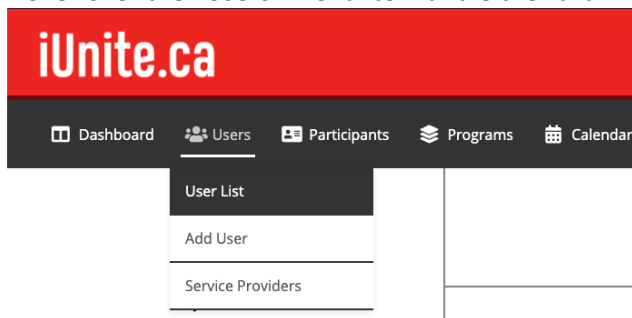
- a. If the "User Type" is "Staff," you will be redirected to the "New User Registration" to let you continue adding users.
- b. If the "User Type" is "Contractor," you will be redirected to the "Contractor Intake" form to fill out additional profile information.
- c. If the "User Type" is "Volunteer," you will be redirected to the "Volunteer Intake" form to fill out additional profile information.

Archive/Deactivate Users

Archiving a user allows you to deactivate any account and prevent signing in or any access to the system.

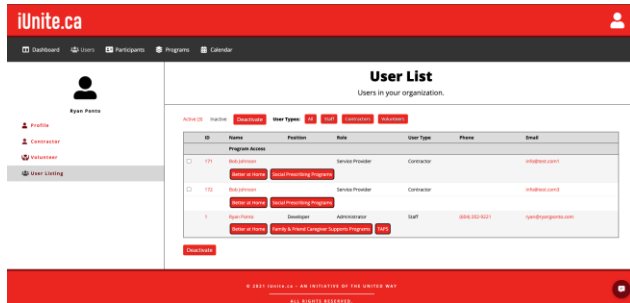
To archive a user, follow these steps:

1. Hover over the "Users" menu item and either click "Users" or in the new dropdown menu click "User List."





2. When the page loads, you'll see all active users.
 - a. Here, you can filter users by type and view the "Inactive" users using the filters above the user list table.



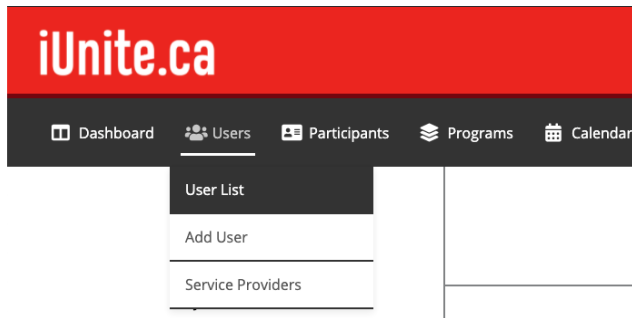
3. Select all users you want to deactivate by checking the checkbox to the left of the user.
4. Once all users are selected, click one of the "Deactivate" buttons located at the top and bottom of the user list table.
5. Once submitted, the page will reload and show all active users.

Unarchive/Activate Users

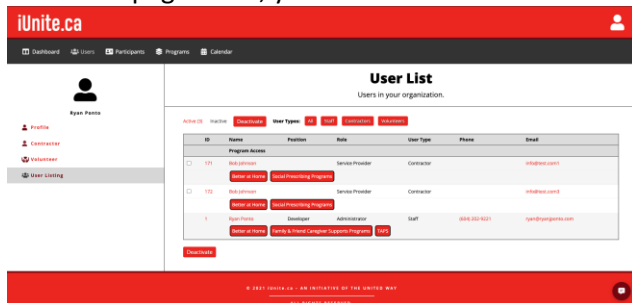
Unarchiving a user allows you to activate any account previously deactivated/archived.

To unarchive a user, follow these steps:

1. Hover over the "Users" menu item and either click "Users" or in the new dropdown menu click "User List."

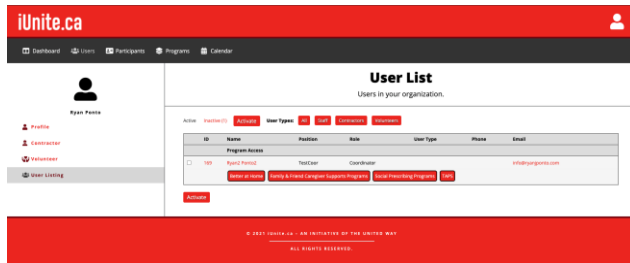


2. When the page loads, you'll see all active users.





3. Click the “Inactive” link above the user list table. Now you will see all inactive users.
 - a. Here, you can filter users by type and view the “Inactive” users using the filters above the user list table.



4. Select all users you want to activate by checking the checkbox to the left of the user.
5. Once all users are selected, click one of the “Activate” buttons located at the top and bottom of the user list table.
6. Once submitted, the page will reload and show all inactive users.

View User List

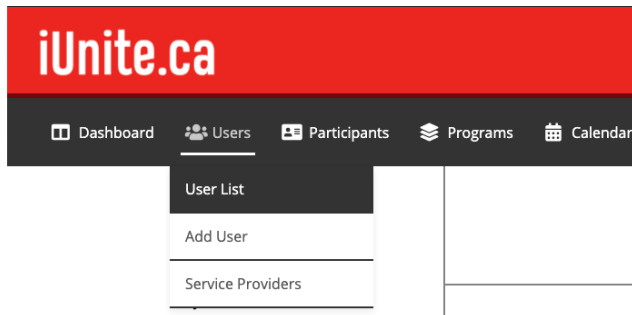
To view a user, follow these steps:

1. Hover over the “Users” menu item and either click “Users” or in the new dropdown menu click “User List.”
2. When the page loads, you’ll see all active users.
 - a. Here, you can filter users by type and view the “Inactive” users using the filters above the user list table.

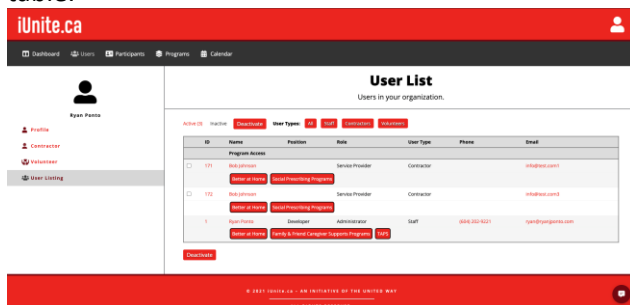
View & Edit Profiles

To view a user, follow these steps:

1. Hover over the “Users” menu item and either click “Users” or in the new dropdown menu click “User List.”

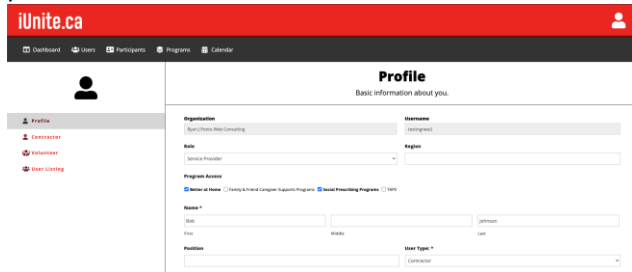


2. When the page loads, you’ll see all active users.
 - a. Here, you can filter users by type and view the “Inactive” users using the filters above the user list table.





3. Click on either the ID or Name of the user you want to view.
4. That user's profile page will now be displayed and, if you have permission to, you can also edit that user profile.

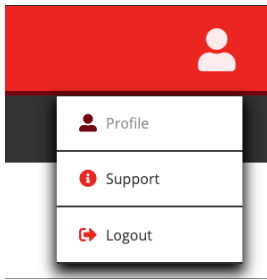


View & Edit Your Profile

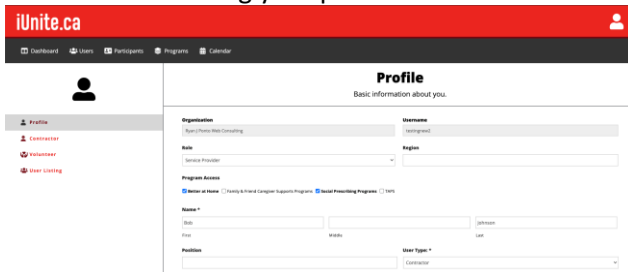
There are 2 ways to view your own profile:

1. Direct Link:

- a. Click on the user icon in the top left corner of any page.

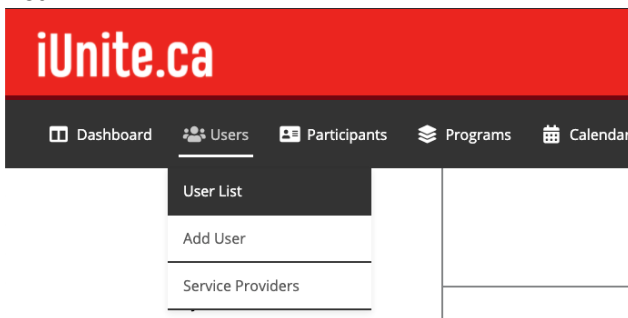


- b. Click the "Profile" navigation item in the menu that appears.
- c. You are now viewing your profile and can edit all allowable fields.



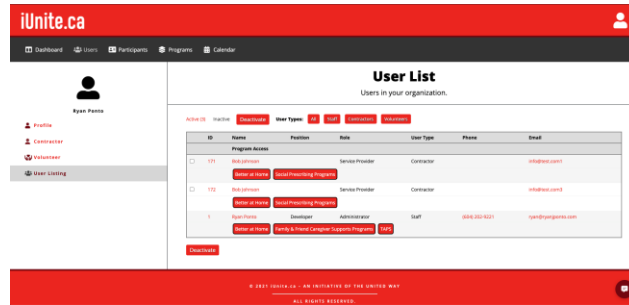
2. Through the user list:

- a. Hover over the "Users" menu item and either click "Users" or in the new dropdown menu click "User List."





- b. When the page loads, you'll see all active users.
 - i. Here, you can filter users by type and view the "Inactive" users using the filters above the user list table.



- c. Click on either your ID or Name.
- d. You are now viewing your profile and can edit all allowable fields.

