

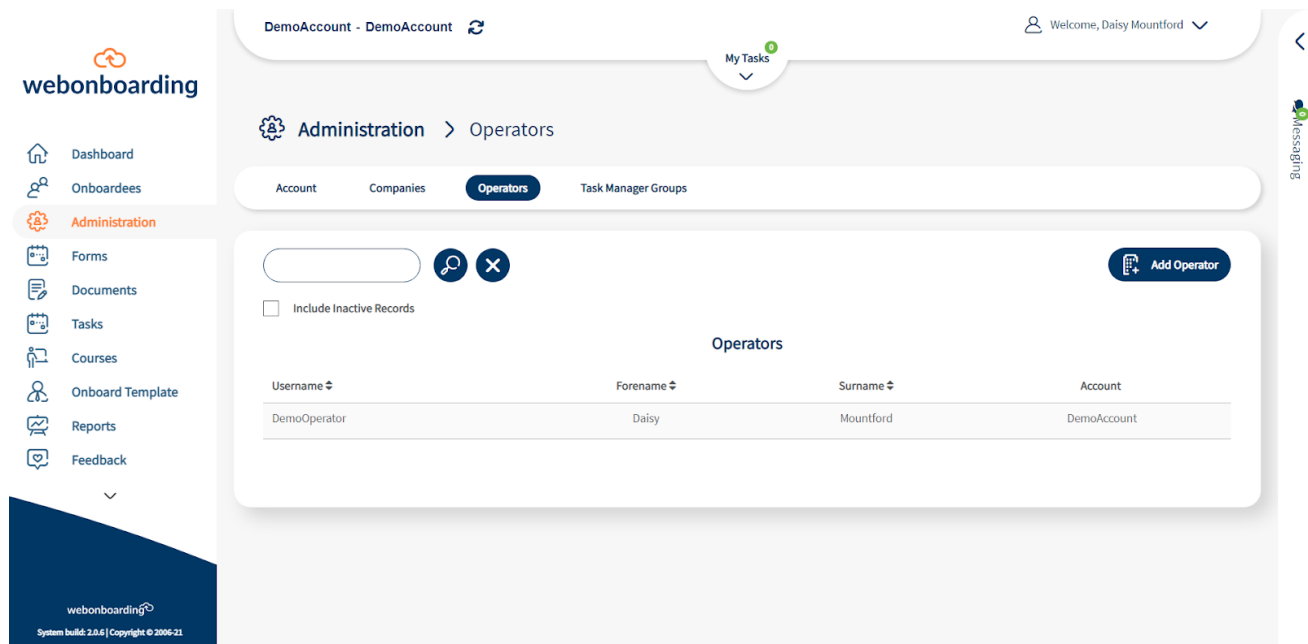
Creating a new user

This document contains a step by step guide to creating a user.
Each user has different privileges, please see guide below.

| | |
|--------------|--|
| System admin | Able to create onboardee records, edit the system and documents, see personal information, pull/create exports at account and company level and authorise contracts. |
| HR admin | Able to create onboardee records, edit the system and documents, see personal information, pull/create exports at company level and authorise contracts. |
| Manager | Able to bulk add onboardees. |
| Task Manager | Can only see the tasks assigned to them. |

Adding a user.

From the Dashboard or Menu, navigate to administration and the operator sub menu.



You will then see the “add operator” button on the right hand side, please click this.

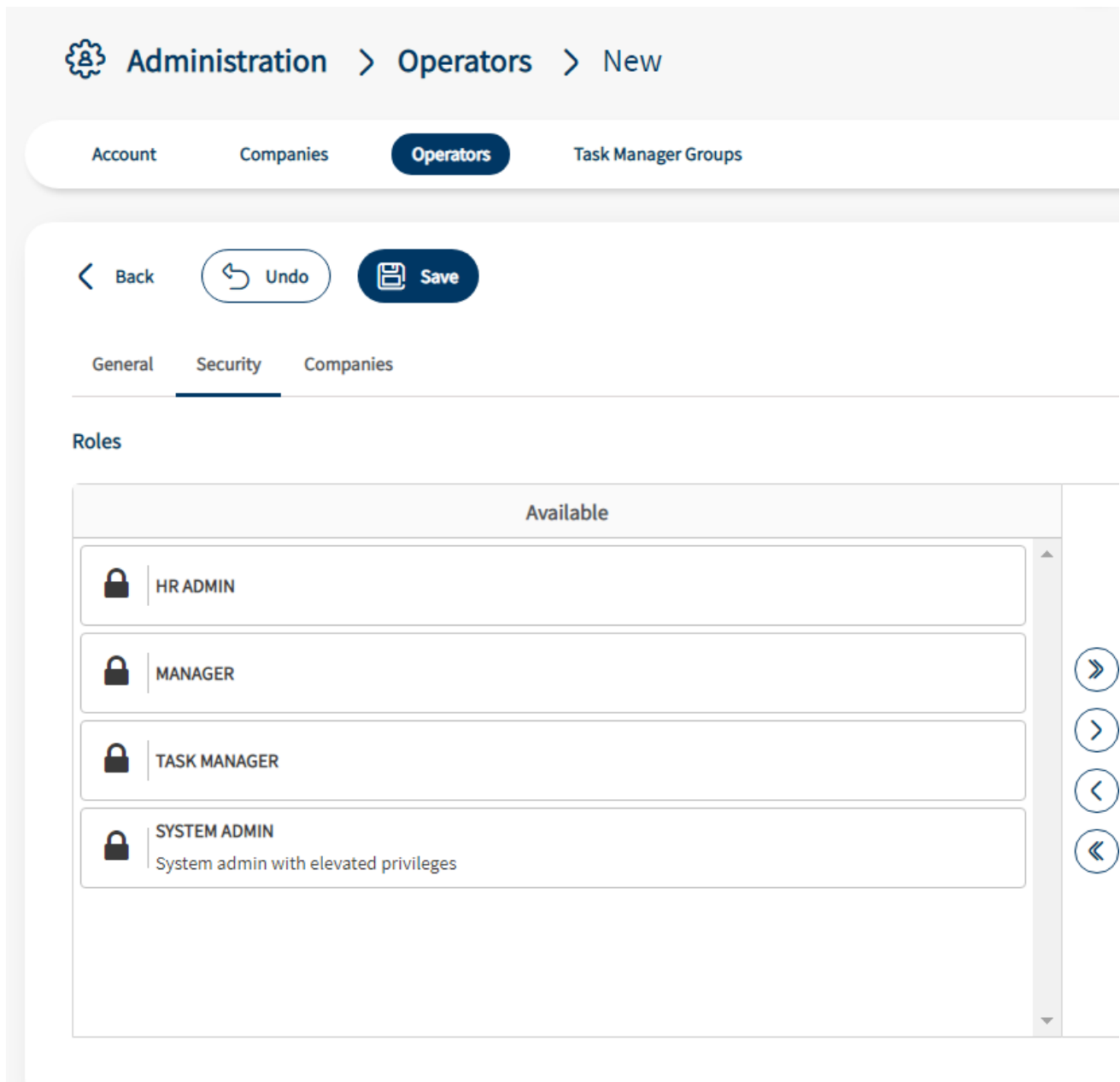


You will then be able to fill out the relevant information under the “general” tab relating to the user you are adding.

Implementation Tools Creating an operator

The screenshot displays the 'webonboarding' application interface. The top navigation bar includes 'DemoAccount - DemoAccount', a 'My Tasks' notification, and a user profile 'Welcome, Daisy Mountford'. The breadcrumb trail is 'Administration > Operators > New'. The main content area is divided into three tabs: 'Account', 'Companies', and 'Operators' (which is active). Below the tabs, there are 'Back', 'Undo', and 'Save' buttons. The form is organized into sections: 'Name' with fields for 'Forename', 'Surname', and 'Email'; 'Credentials' with a 'Username' field and a 'Force Password Change' checkbox; and 'Status' with radio buttons for 'Active', 'Inactive', and 'Active' (the second 'Active' button is selected).

The next tab is security, this is where you will be able to choose the privileges listed above.



Once you have selected the security options you will then need to select the company for the user. This means that the operator will only be able to see the company/companies you have selected.

Administration > Operators > New



Account Companies Operators Task Manager Groups

Back Undo Save

General Security Companies

Companies

Available

| | |
|---|-------------------------------------|
|  Demo Account DemoAccount | <input checked="" type="checkbox"/> |
|  Test Test | <input checked="" type="checkbox"/> |

● = Active company ● = Inactive company

Please note, if you are creating a task manager you will also need to select a task manager group for the user to belong to.



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