


How To Guides – Users Editor Tool

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Overview

- 1 Add Record** – Click to create a new user record.
- 2 Edit Record** – Click to edit an existing user record.
- 3 Clone Record** – Click to create a copy of an existing record that can then be edited.
- 4 Delete Record** – Click to permanently delete a user record, revoking their access.

Users Editor 

1 Add Record
Actions
Listening Home Triggers Inactive
Add Demo Users
Search
Options

Select	Actions	Profile Username ^ v	First Name ^ v	Last Name ^ v	Email Address ^ v	Status ^ v	Employee ID ^ v	last_password_change ^ v	Last Email Sent ^ v	last_login_date ^ v	failed_lo
<input type="checkbox"/>	2  3  4 	test	Brent	Laabs	blaabs@perceptyx.com	Manager					1
<input type="checkbox"/>	  	1800contacts	Guest	User	info@perceptyx.com	HR				2020-05-14 16:20:27	0

Adding/Editing a User Record

Select **Add Record** or click the **Edit** button next to an existing record. Then, follow the instructions below to complete the user setup.

Personal Info Tab

Complete **ALL** required fields below as follows:

- **Profile Username:**

Typically, the initial of the first name and full last name is used for this field (e.g., tsmith)

- Add **First Name**, **Last Name**, and **Email Address**.

- **Status:** Select the relevant status from the drop down. Reference your Permissions Matrix for additional information about the status permissions.

- **Employee ID:** Enter the emp ID here; this is required if using Listening Home to link your accounts.
- **SSO ID:** If using SSO for this project, enter the employee ID or other unique identifier being used for SSO authentication.

- o *Note: Each user should only have one user record with their SSO ID. So, if you have a user with a portal account, the portal account should be the only one with an SSO ID filled in.*

- **Inactive user:** If using Listening Home, set accounts to 'Active' upon creation by unchecking the box. If not using Listening Home, you can opt to leave users inactive until sending account access.

The screenshot shows the 'Personal Info' tab of a user setup form. The form has five tabs: 'Personal Info', 'Data Access: Demographic Based', 'Data Access: Hierarchy Based', 'Data Access: User Based', and 'Comparison Views'. The 'Personal Info' tab is active. It contains the following fields: 'Profile Username' (required, indicated by a red asterisk), 'First Name' (required), 'Last Name' (required), 'Email Address' (required), 'Status' (dropdown menu), 'Employee ID', 'Default Language' (dropdown menu), 'Theme' (dropdown menu), 'password' (with a 'Make Password Permanent' checkbox), 'sso_id', and 'Inactive User' (checkbox, required). A 'Summary of Access' section is visible at the bottom of the form.

Once all fields are filled in appropriately, you can move to the next tabs to what data the user will be able to view.

Data Access Tabs

Data Access: Demographic Based

On this screen you are able to assign the users view based on your demographic data (eg. Region, Department, Job Title, Gender, Age, etc).

1. Click **Create View**. A new window will open.

2. Select the demographic from the dropdown menu.

3. Check the box of the value(s) in that demographic for which the user should have access.

4. If you need to further restrict the view using another demographic, select **Further Refine View** to continue defining the access.

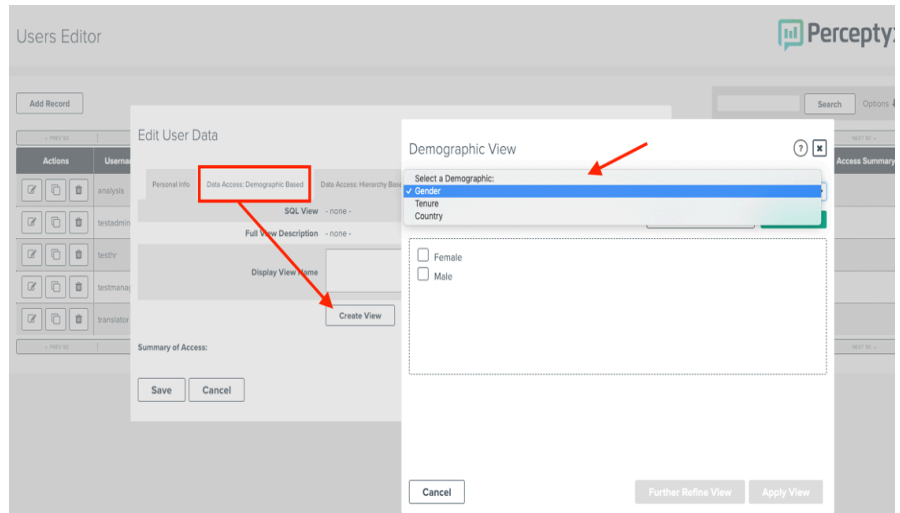
- a. Note: Using further refine review will create an 'AND' view; eg. Country = US *AND* Department = HR.

For an 'OR' view (eg. Country = US *OR* Department = HR) please reach out to [Customer Support](#) for assistance.

5. Once you have selected all demographic and demographic option(s) requested, click **Apply View**.

6. You will be taken back to the **Data Access: Demographic Based** tab. Here you can modify the **Display View Name** that appears to the user.

7. Click **Save** if you are finished defining the access.



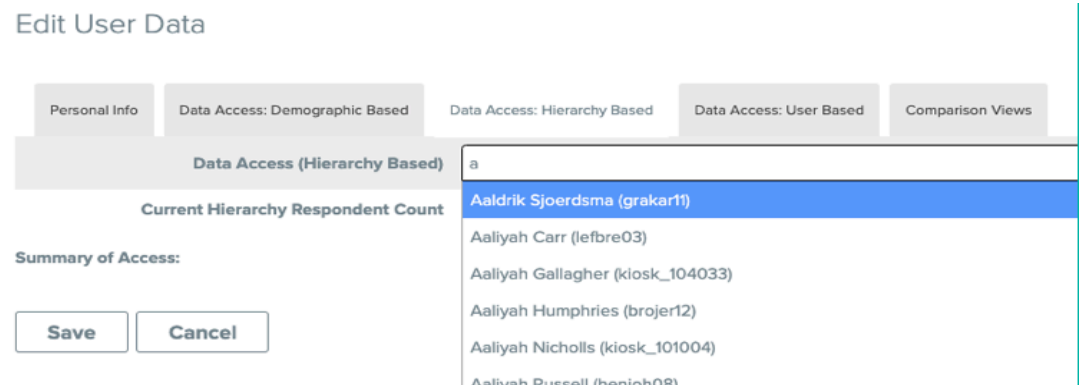
Data Access: Hierarchy Based

On this screen you are able to assign filters based on the manager hierarchy.

1. In the **Data Access** box, type the name of the manager or enter their employee ID.

2. Select the manager(s) from the drop down that appears.

3. Click **Save**.



Data Access: User Based

On this screen you are able to grant access to other existing accounts. Upon logging in, the user will need to select which account they would like to view.

Note: In order to use this option, the user must be setup as a 'Portal' status on the Personal Info tab.

1. Type the managers name or enter their employee ID in the **Summary of Access** box.
2. Select the correct person(s) in the dropdown.
3. Click **Save** once all selections are made.

Edit User Data

The screenshot shows the 'Edit User Data' form with the 'Data Access: User Based' tab selected. The 'Summary of Access' section includes a search box with the letter 'a' and a dropdown menu listing several 'Guest User' accounts. The '20thcenturyfox_mgr' user is selected in the 'User' column of the table below.

20thcenturyfox_mgr	Guest	User
		Guest User (abbvie_mgr - n=8)

Comparison Views

On this screen you can assign a comparison view which is used in the toolkit and report site to provide a user with the ability to view data outside of their view without the ability to filter within that data.

For example, if a manager should have access to a comparison view of the Region they are part of, you would select the Region demographic and then the option that is applicable.

1. Click **Add Comparison View**.
2. Select the Demographic from the drop down. You can **Further Refine View** to add additional demographic restrictions. Once finished, click **Apply View**.
3. Modify the **Display Name** as needed.
4. Repeat this process for each relevant comparison view needed.
5. Click **Save**.

The screenshot shows the 'Edit User Data' form with the 'Comparison Views' tab selected. A red box highlights the 'Add Comparison View' button. A dropdown menu is open, showing 'Select a Demographic:' with 'Region' selected. The dropdown also lists other options: Country, Location, Division, Business Unit, and Department.

How To Shadow Users

Once you have a user, you may **shadow** that user to verify they have been setup properly.

1. Select **Shadow User** under the **Functions** menu. You will see a list of all the users you have created to access the Reporting Site.
2. Click **Shadow** next to the username.
3. After clicking Shadow, you will be taken into the Reporting Site as that user; verify you are shadowing the correct user and that the reports/data are appearing as expected.
4. The top of the page gives the option to **End the shadow session and return to your account**.

Shadow User



Show 50 entries		Search: info Search Clear			
Username		First Name	Last Name	Email	Status
Shadow	pyx_admin	Administrator	User	info@perceptyx.com	Administrator
Shadow	pyx_hrhp	HRBP	User	info@perceptyx.com	HRBP
Shadow	pyx_mgrhier	Guest	User	info@perceptyx.com	Hierarchy Manager
Shadow	pyx_mgmotrend	Manager	No Trend	info@perceptyx.com	Manager WITHOUT Trend
Shadow	pyx_mgrsmi	Manager	Small	info@perceptyx.com	Small Managers
Shadow	pyx_portal	Pyx	Portal	info@perceptyx.com	Portal User
Shadow	pyx_superuser	Super	User	info@perceptyx.com	Superuser
Showing 1 to 7 of 7 entries (filtered from 12 total entries)					
		First	Previous	1	Next Last

Administrator ...
English
Logout

Filter Data

Dashboard

Manager Dashboard

My Team

Click here to end shadow session and return to my own account

Manager Dashboard

RESPONSE RATE
92%

Invited: 80 Responded: 74

Engagement Index

OVERALL

Send User Access Email

If using Single Sign on, you can simply send the user the SSO link. Alternatively, if you need to send them their initial Listening Home access or Username/Password access for individual surveys follow the instructions below to send an email via the **Users Editor Tool**.





1. Select the **Email** button.
2. Choose the **Email Template** you wish to send.
 - a. The screen will display a basic text version of your email template. Verify that this is correct.
 - b. Check the box for **Activate Inactive Users**, otherwise any inactive accounts will not be included in the email send.
3. Once you have verified everything is correct select the **Send** button.
 - a. A pop-up will appear to confirm you want to send Email Notifications, click **OK**.
 - b. A second pop-up will appear giving a summary of the actions performed, click **OK**.
 - c. After both pop-ups are confirmed you will be brought back to the **Users Editor Tool**.

1

Users Editor

Add Record Actions Listening Home Triggers Inactive

PREV 50

Select	Actions	Profile Username ^ v	First Name ^ v	Last Name ^ v
<input type="checkbox"/>	   	Otest	Brent	Laabs

2

Send Email for Selected Record(s)

CHOOSE EMAIL TEMPLATE: Demo Invite

ACTIVATE INACTIVE USERS (0 found): ☐

TEXT ONLY ☐

SENDERS NAME Perceptyx

SENDERS EMAIL customersupport@perceptyx.com

CC NAME

CC EMAIL

REPLY-TO NAME

REPLY-TO EMAIL

SUBJECT Perceptyx Reporting Login Information

EMAIL CONTENT

\$first_name,
A Demo account has been setup for you to view the survey results.
Below is the information you'll need to login:
URL: \$url
Username: \$username
Temporary Password: \$temp_password
Please let us know if you have any questions.
Regards,
Perceptyx, Inc.

3

Test Send Cancel

www.perceptyx.com says

Are you sure you want to attempt to Send Email Notifications for 1 selected record(s)?

Cancel OK

www.perceptyx.com says

Email Notification Summary:

- 1 email(s) sent for Active Users
- 0 email(s) not sent for Inactive Users
- 0 email(s) not sent for PYX/Test Users

OK