

FAQs for User Accounts

How to send an invite?

1. In the Users Editor Tool, select the **Email envelope** button under the Actions Column.
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 **Make Accounts Active**, any inactive accounts will not be included in the email sent.
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 show 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**.

What fields are *Required?

1. Personal Info
 - a. Username (typically first initial last name ex. jsmith)
 - b. First Name
 - c. Last Name
 - d. Email address
 - e. Status
 - f. Employee ID
2. Data Access
 - a. Demographic Based, Hierarchy Based, or User Based
 - i. If the view is not given, they will have a company-wide view of everything, limited only by the status

How to add a demographic view?

1. In the Users Editor Tool, select the **Pencil icon** button under the Actions Column
2. Selected **Data Access: Demographic Based** tab
3. Create view
4. Select a demographic
5. In multiple demographics are required you can click **Further Refine**
6. Click **Save**

How to add a hierarchy view?

1. In the Users Editor Tool, select the **Pencil icon** button under the Actions Column
2. Selected **Data Access: Hierarchy Based** tab

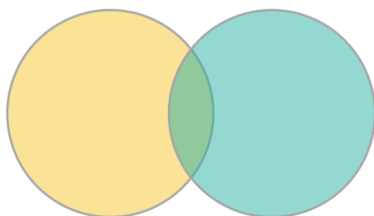
3. Type in a manager's name
4. Check the **Current Hierarchy Respondent Count** is correct
5. Click **Save**

How to add a comparison view?

1. In the Users Editor Tool, select the **Pencil icon** button under the Actions Column
2. Select **Comparison View** tab
3. Click **Add Comparison View**
4. Use the drop down list to select the comparison view
 - a. You can add more than 1 comparison
5. Click **Save**

What is AND and OR statements?

“OR” logic includes the entirety of both segments. In the User List, these are represented as separate rows. “AND” logic includes only the overlap of the segments (i.e., the small section in the middle). In the User List, these are represented by a single row, using the Refine Further feature.



How to clone an account?

1. In the Users Editor Tool, select the **Double box icon** button under the Actions Column
2. A new window will appear with the selected user details visible
 - a. You will need to alter all tabs to ensure the new employee's details are present before clicking save

How to delete an account?

1. In the Users Editor Tool, select the **Trash can icon** button under the Actions Column
2. If this is selected in error you will be unable to retrieve the account and a new account will need to be created)

How to choose a status?

1. In the Users Editor Tool, select the **Pencil icon** button under the Actions Column
2. Select the **Personal Info** tab
3. Select **Status**
4. Choose from the drop down list of preassigned role titles (for example for a HR employee select HR)

What is an inactive User?

1. In the **Users Editor Tool** scroll the far right-hand side
2. **Under inactive view**
 - a. If ticked the user has an account but the account is locked and not able to view reporting
 - b. If not ticked the user is able to view their reporting

What does 'failed_login_cnt' mean?

1. In the **Users Editor Tool** search for the required employee and scroll the far right-hand side
 - a. If empty no login error has occurred
 - b. If a number is shown this the amount of times the user has attempted and failed to log in