



Superuser Functionality

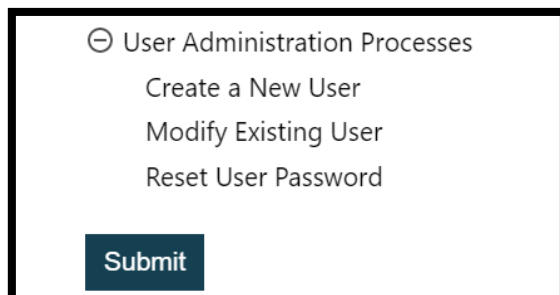
Create new users

Superusers now can create accounts for new users without contacting the Fund to aid self service. Accounts can be created for: other Superusers, General Processing Users or Read Only Users.

Employers are still required to contact the Fund if they wish to change their payroll provider.

To create an account for a new user:

1. In the “Start a Process” Tile, select the “Create a New User” process. This process will be stored in the “User Administration Processes” dropdown. Select **Submit** to start the process.



2. Choose the employer that the new user works for to start the process against. **A superuser can only create accounts for new users within their organisation.**



3. Further basic details for this employer should display. Please check the process is being started against the correct employer. Once checked, if the employer is correct, select **submit** to continue to the next stage where the new user's details will be input.

ACTIONS

- ★ Enter the name of Employer
- ◆ Back to Select the process you wish to start

Choose Employer to start process against

★ Enter the name of Employer

Test Employer

Employer Details

Reference: 1400

Name: Test Employer Hub

Additional Details

There are no additional details

Submit

Last Modified: 24/11/2020, 10:49:33

4. Input the new user's details in the fields provided, then select **submit**. To create the new account, the superuser will need to provide:
- Forename (in capital letters)
 - Surname (in capital letters)
 - Email address
 - Access required (access abilities are detailed in the main General Processing Handbook)

Please note, email addresses used must be unique- group email addresses cannot be used. If an email address is provided which is already in use, the superuser will receive an error within the process, prompting that a different email address is required.

ACTIONS

- ★ Enter Basic Account Details

Account Details

Enter Basic User Details

★ Enter Basic Account Details

Please provide the following information to create an account

Forenames *

DAVE

Surname *

YELLOW

Email *

dy@dy.com

Confirm Email *

dy@dy.com

User Template *

Superuser

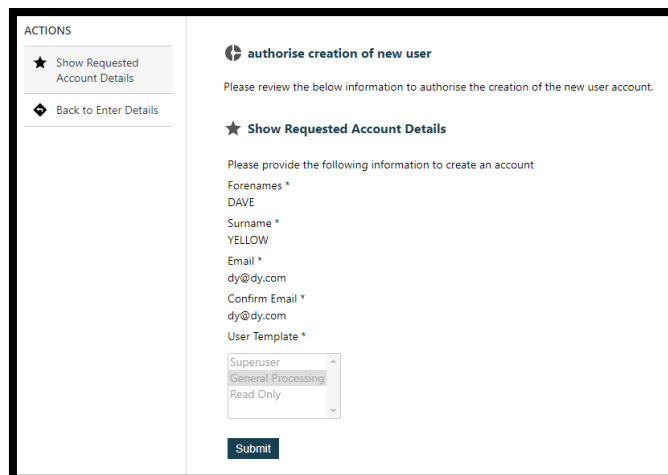
General Processing

Read Only

Submit

5. The details input will then require checking and authorising. Please ensure all information provided is correct. As information cannot be edited at this stage, if an error is noted, the user should follow "Back to Enter Details" in the actions and amend the data as described in Step 4.

Once the superuser is satisfied the information provided is correct, select **submit**. This will create the new user's account.

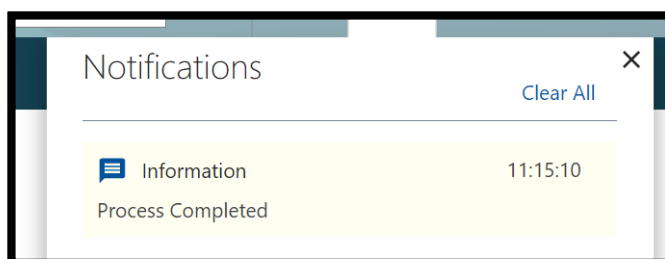


The screenshot shows a web interface for authorizing the creation of a new user. On the left, there is an 'ACTIONS' sidebar with two buttons: 'Show Requested Account Details' (with a star icon) and 'Back to Enter Details' (with a diamond icon). The main content area is titled 'authorise creation of new user' and contains the following text: 'Please review the below information to authorise the creation of the new user account.' Below this is a section titled 'Show Requested Account Details' with a star icon. The text reads: 'Please provide the following information to create an account'. The form fields are: 'Forenames *' with the value 'DAVE', 'Surname *' with the value 'YELLOW', 'Email *' with the value 'dy@dy.com', 'Confirm Email *' with the value 'dy@dy.com', and 'User Template *' which is a dropdown menu currently showing 'General Processing' and 'Read Only' as options. A 'Submit' button is located at the bottom of the form.

6. The superuser should then receive a notification within the portal to confirm that the process has been completed successfully.

The superuser will then also receive an email confirming that an account has been created for the new user. This email will include an activation code. This code is active for **10 days only**.

An email will be sent to the email address provided for the new user, informing them that an account has been created which they need to activate. This email will include their login username and advise that they must contact the superuser who set up their account to receive their activation code in order to activate their account. Instructions for how to activate an account are provided in the Activate Your Account (New Hub User) section of the General Processing Handbook.

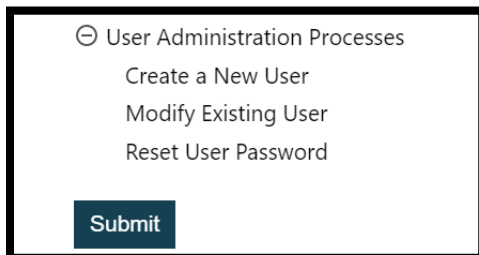


Reset existing users' passwords

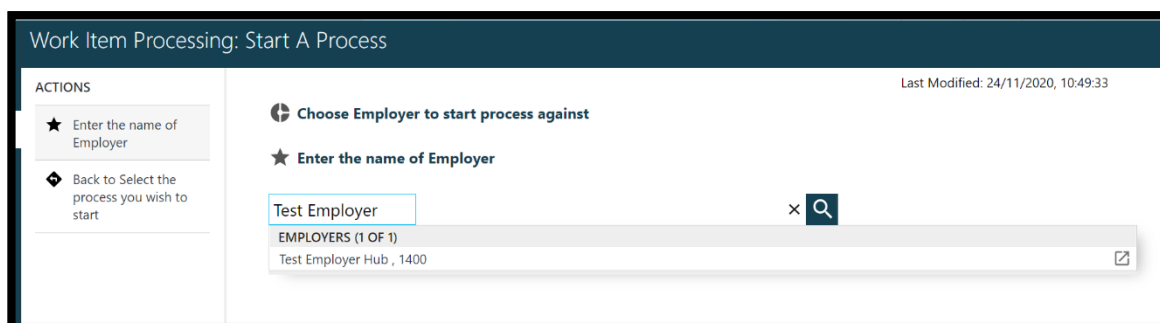
If a user forgets their password or locks themselves out of their account, as part of new self service functionality, superusers are now able to reset passwords for users within their organisation.

To reset a user's password:

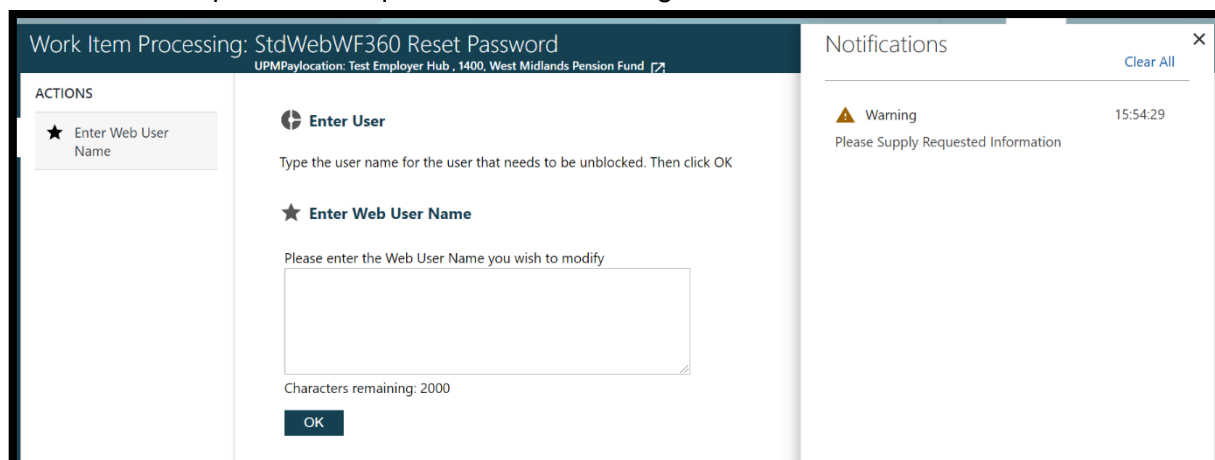
1. In the “Start a Process” Tile, select the “Reset User Password” process. This process will be stored in the “User Administration Processes” dropdown. Select **Submit** to start the process.



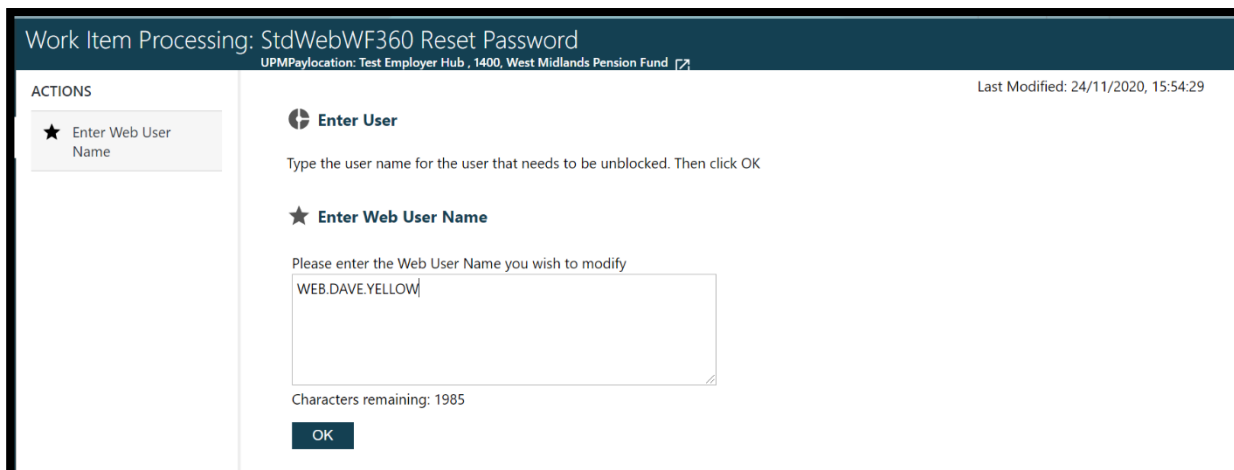
2. Choose the employer that the new user works for to start the process against.



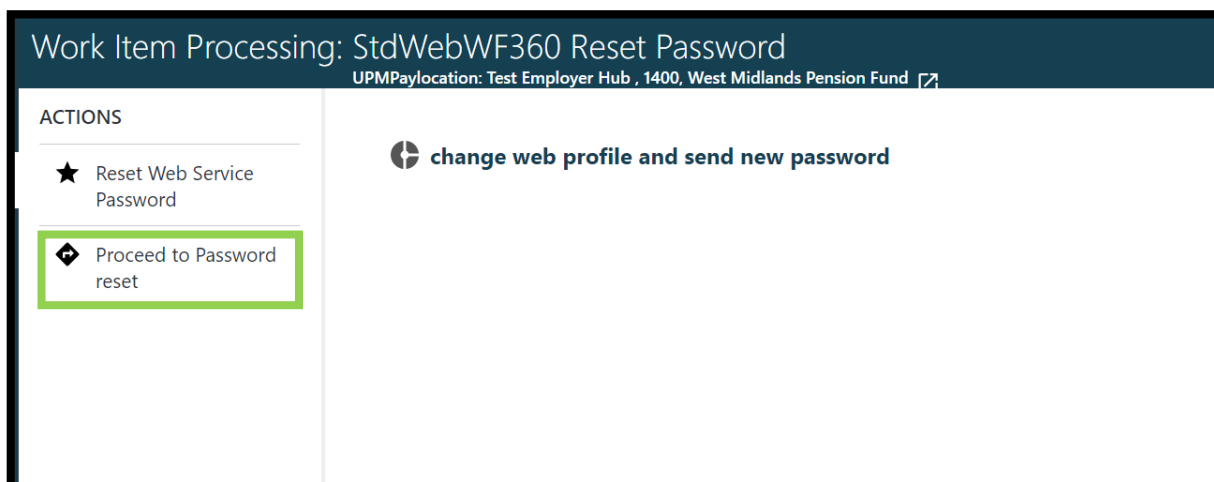
3. The user will then be prompted by a warning to input the web username for the user whose password requires reset/unblocking.



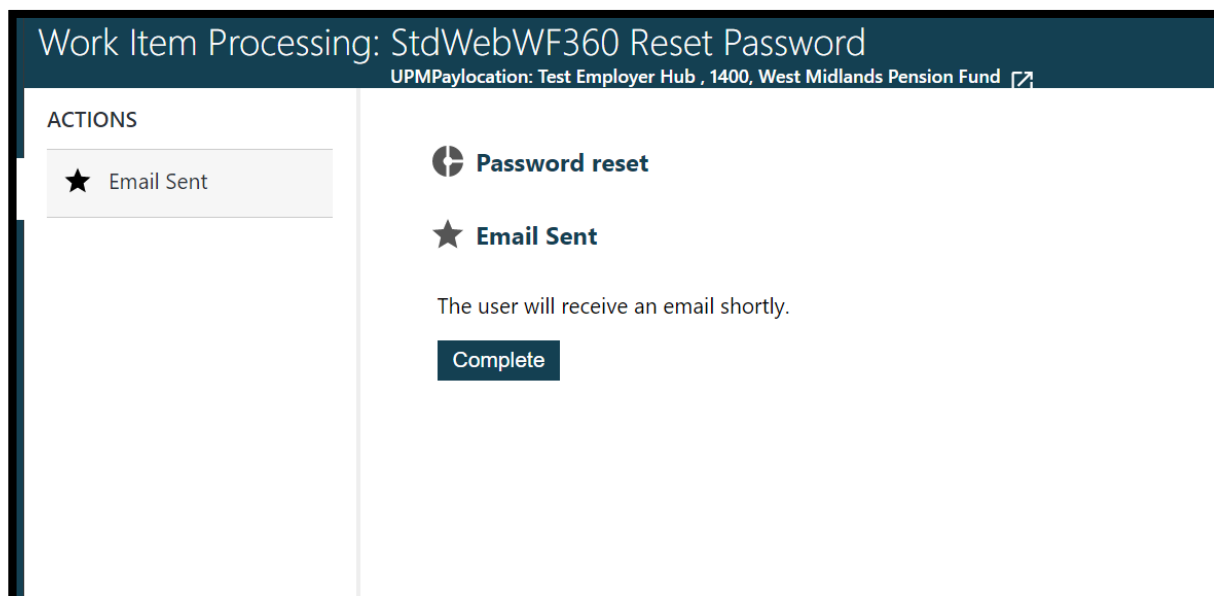
4. This notification can be crossed off and the web name should be input in the box provided. This can be found in the “managed user” report if not known. Once happy that the correct name has been input, select **Ok**.



- The user should then select the “Proceed to Password reset” action to confirm the password reset.



- The user will then be notified that the process has been completed and the process should be **completed**. The user whose password has been reset will receive an email with a temporary password included and instructions on next steps.



Managed User Report

This report will only be available to Superusers. This will show all users currently registered with access for a superuser's organisation and will be useful for ensuring all users have the required access and will assist employers to ensure access is only available to users required within their organisation.

All superusers will only be able to view users with access within their organisation e.g. a payroll provider will not be able to see a client's users if a client also has access to the Hub and a client will not be able to see who at their payroll provider has access to the Hub.

List of Managed Users							
for user WF360CHARLIE.GRE							
23/11/2020 11:09:08							
LOGIN	USERID	SURNAME	FORENAMES	USER_CREATED	EMAIL ADDRESS	HUB PROFILES	EMPLOYER PROFILES
WEB SUSAN BLUE	WEB SUSAN BLUE	Blue	Susan	20/10/2020	SB@SB.com	Superuser	External Users - Test Employer Hub
WEB CHARLIE GREEN	WF360CHARLIE.GRE	GREEN	CHARLIE	20/11/2020	CG@CG.com	Superuser	External Users - Test Employer Hub
WEB RACHEL JONES1	WF360RACHEL.JONES	JONES	RACHEL	10/11/2020	RJ@RJ.com	Read Only	External Users - Test Employer Hub
WEB JAMES SMITHS	WF360JAMES.SMITH	SMITH	JAMES	10/11/2020	JS@JS.com	General Processing	External Users - Test Employer Hub
TOTAL USERS		4					
END OF REPORT							

This report will enable users to see:

- Which users have access to the Hub
- The login username for all users who have access to the Hub
- What level of access users are assigned e.g. superuser, general processing, read only
- When users were created

What email addresses are in use for the organisation (email addresses must be unique for users created e.g. group email addresses cannot be used for all users)