Bioland 2 – Adding New Users

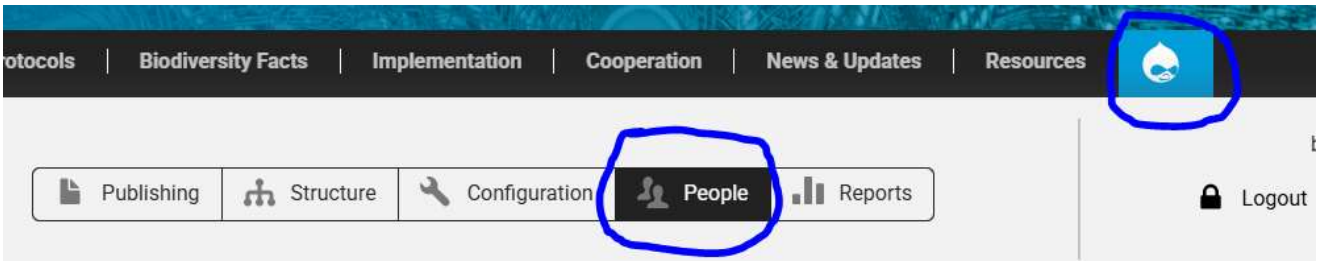
Availability of functionality

Managing users is a functionality only available to users with the role of Site Manager. While there is a self-registration option for new users, they still need to be confirmed and have the roles assigned by the existing user with the Site Manager permissions.

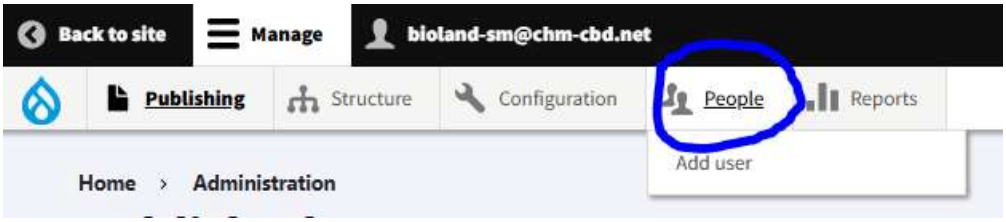
Accessing User Management interface

The user management screen is part of the administration interface. There are three ways to access it, once logged-in with the *Site Manager* permissions.

1. Direct access:
   https://sitename/en/admin/people (e.g. https://training.bl2.chm-cbd.net/en/admin/people)
2. From public interface via Quick Admin menu's *People* menu entry:

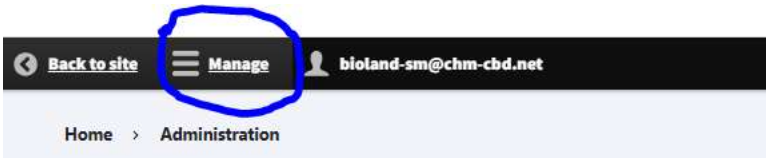


3. From anywhere within Admin interface, via *People* menu entry



If those options do not appear, the logged-in account does not have the appropriate permissions.

Note that sometimes, the Admin Interface menu does not show up at all. This may happen if it were collapsed with the menu *Manage* toggle. Pressing on the toggle again will show the menu.



Adding new user by the Site Manager



New users can be added from the User Management screen by pressing "+ Add User" button:

There is also a direct link from the Admin menu, as was shown above.



Once on the user creation screen, the following fields need to be entered:

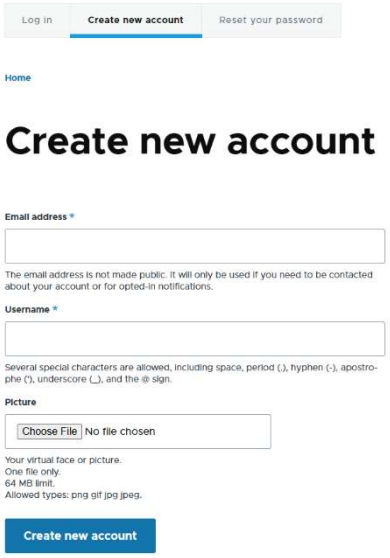
Field	Compulsory	Explanation
Email address	Yes, text	Required for password reset and various notifications
Username	Yes, text	The name used for login
Password	Yes, text	The initial password, however, there is a way for user to also set their own on first login
Status	Yes, Choice: • Blocked • Active	Blocked users cannot login, only Active ones can
Roles	No, Multichoice: ▪ Site Manager ▪ Content Manager ▪ Contributor ▪ Authenticated User (compulsory for all)	While the interface is a multi-choice, the higher-level role includes functionalities of all lower-level roles. • Site Manager is the highest-level role and can manage users and advanced site functions • Content Manager is a next level down role that can create content for the site and manage menus • Contributor role can create content for review, but cannot publish it directly.
Notify user of new account	No, checkbox	If this option is checked, the new user will receive the email and the password-reset link. Left unchecked, they will need to be told their information separately.
Picture	No, file picker	User profile picture
Site language	Yes, drop-down	Admin user interface can be in one of the UN languages. This option allows to choose which one. English is a useful default, especially while learning the interface as most documentation uses English.
Local setting	Yes, drop-down	Defaults to UTC but can be chosen to be a local time zone. This affects times and dates displayed on the admin interface.

Once, all the fields are filled, "Create new account" button can be pressed. This will return Site Manager to the User Management screen. If "Notify user of new account" option was selected, the new user will receive the email.

Self-registration option



To self register, a potential user can click on Login button from the main menu bar and then select “Create new account” tab.



On the tab, the user need to fill in the email address and username fields. Profile picture can be uploaded, but it is optional.

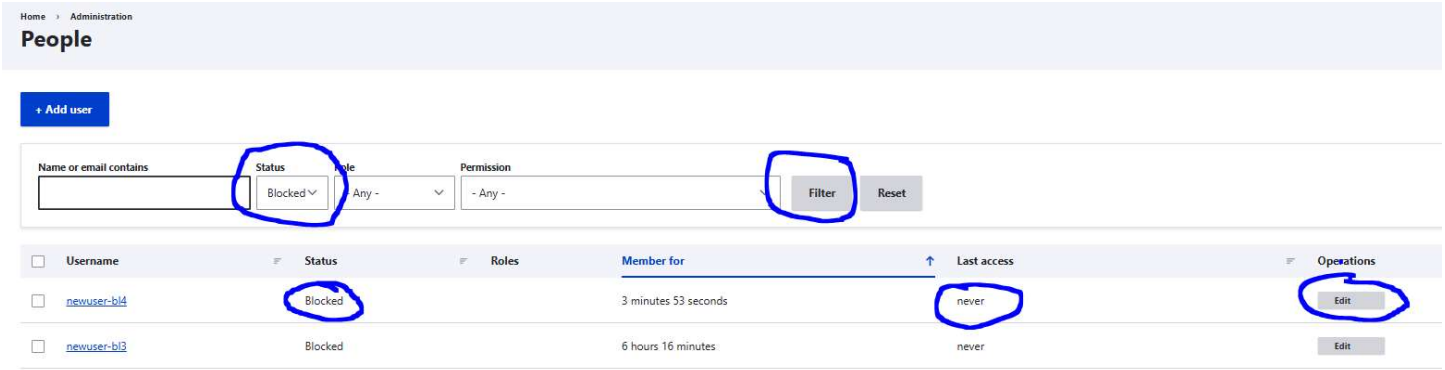
At this point, no password is chosen.

Once the “Create new account” button is clicked, the user will be returned to the home page. At this point, their account is not ready yet.

They will receive an email notifying them of their request and that it is pending admin approval.

CHM Helpdesk will also receive a notification email, as part of anti-spam monitoring.

For the Site Manager, the new users can be activated from the same User Manager screen as before. The new user account will be initially “Blocked”, preventing it from being able to login. If there are many accounts in the list, it is helpful to use “Status” filter to just review blocked accounts. The new accounts would also show “Last access” as “never”.



By clicking the “Edit” button next to the user, site manager will be taken to the screen nearly identical to the one during the new user creation. They don’t need to create a password and don’t need to choose Notify options, as both of these are forced by the self-registration workflow. They can edit the proposed user’s name and the email and they still need to select the correct role.

The most important step is to change user’s status to “Active”.

Once the record is updated and saved, the new user received the second email, stating that they were approved and providing them with the single-use password-reset link. They can now login, with the appropriate role given to them by the Site Manager.