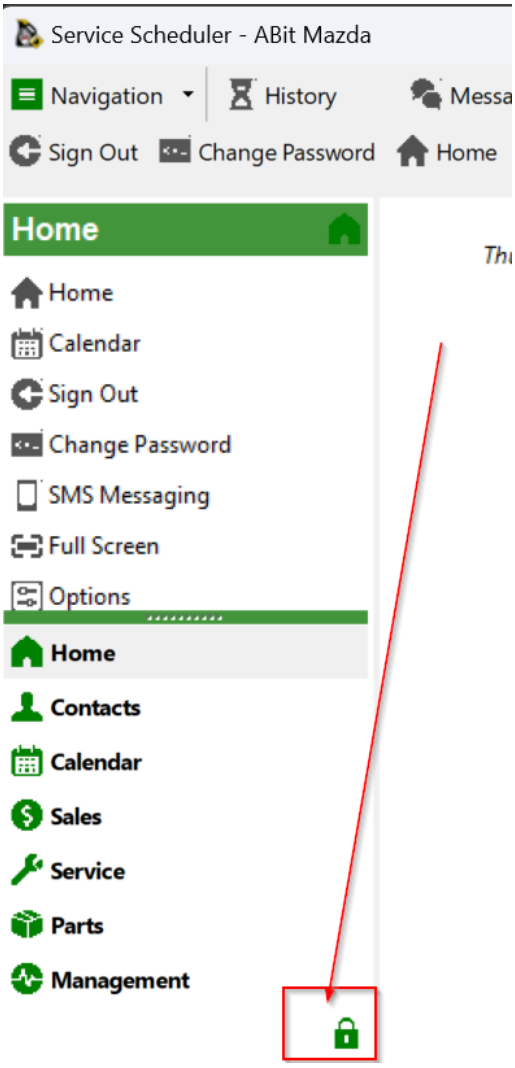
User administation

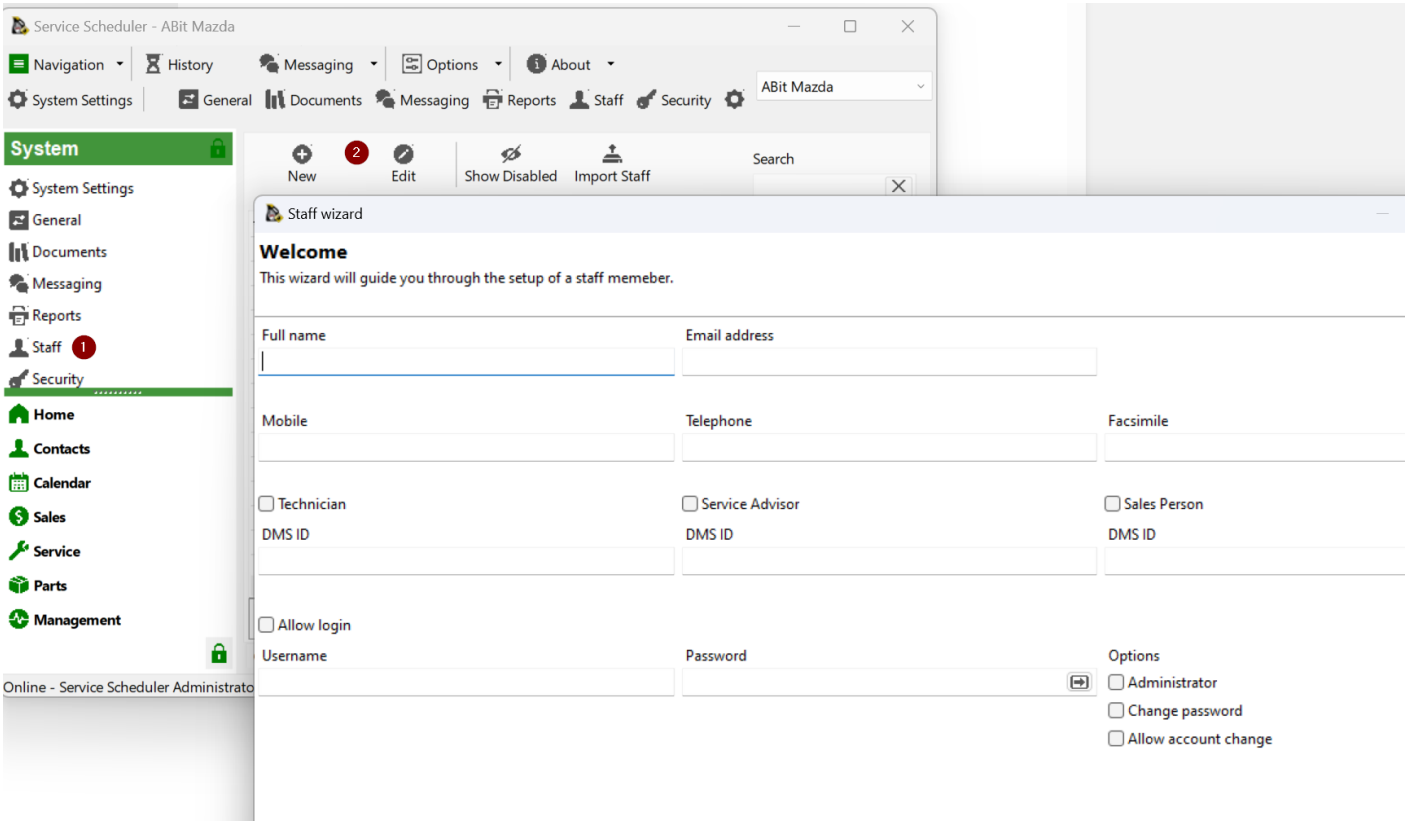
Select administration area



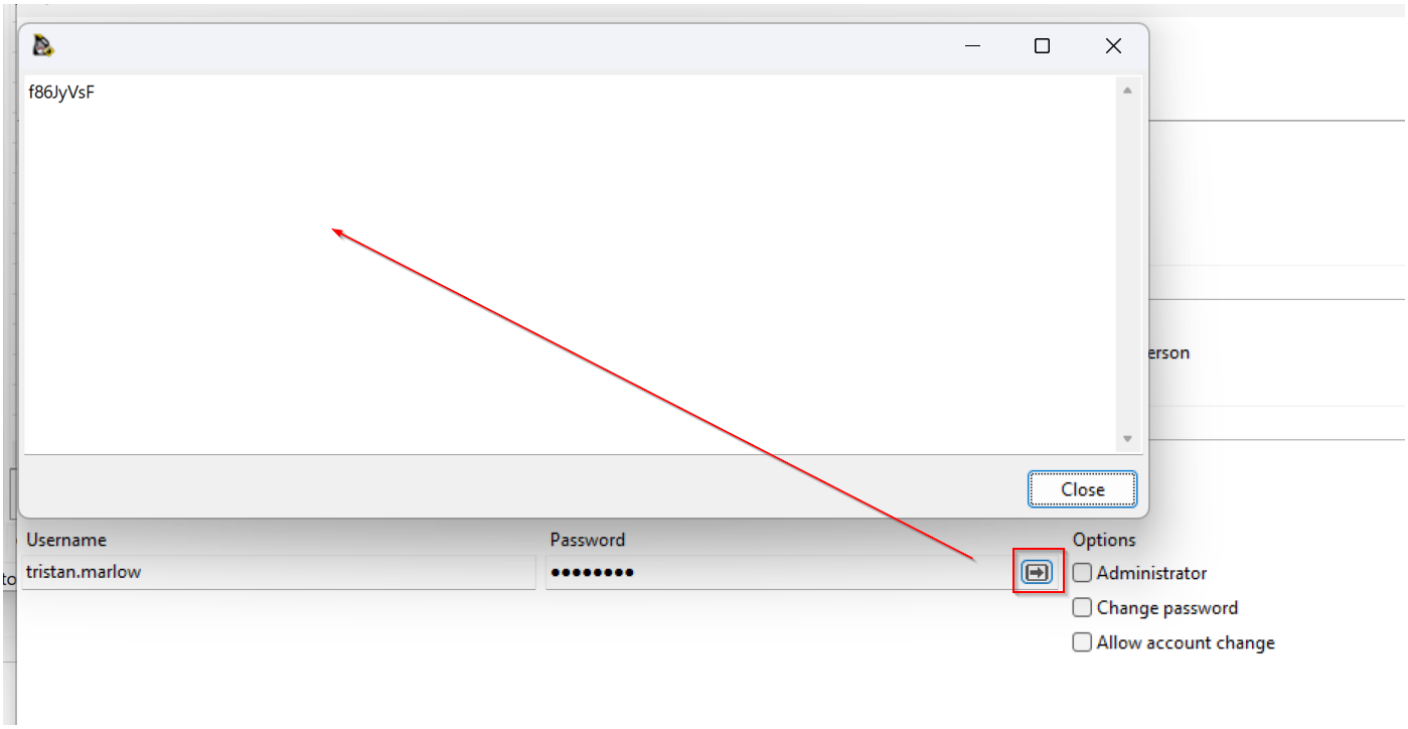
Local user accounts

Creating a new staff member

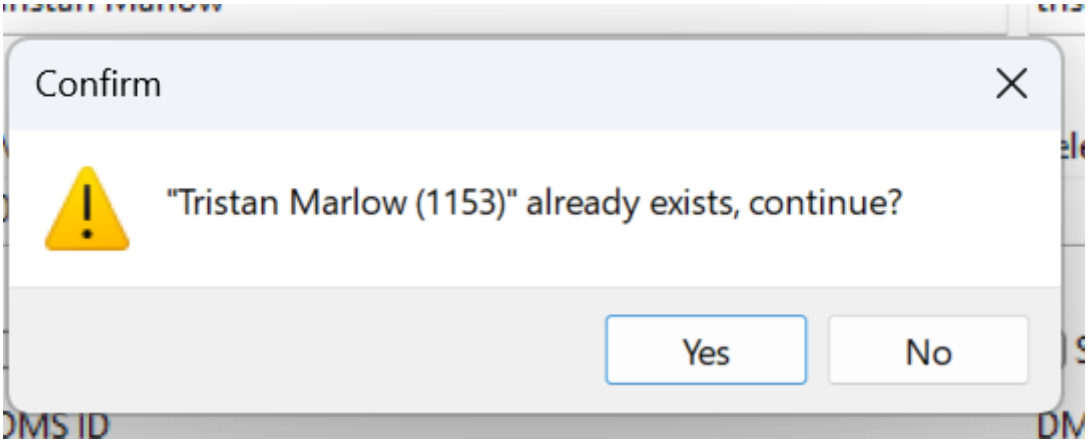
Start the new staff wizard, enter required information if the user is required to login check the "Allow login" box



You can use the generate password button to create a password

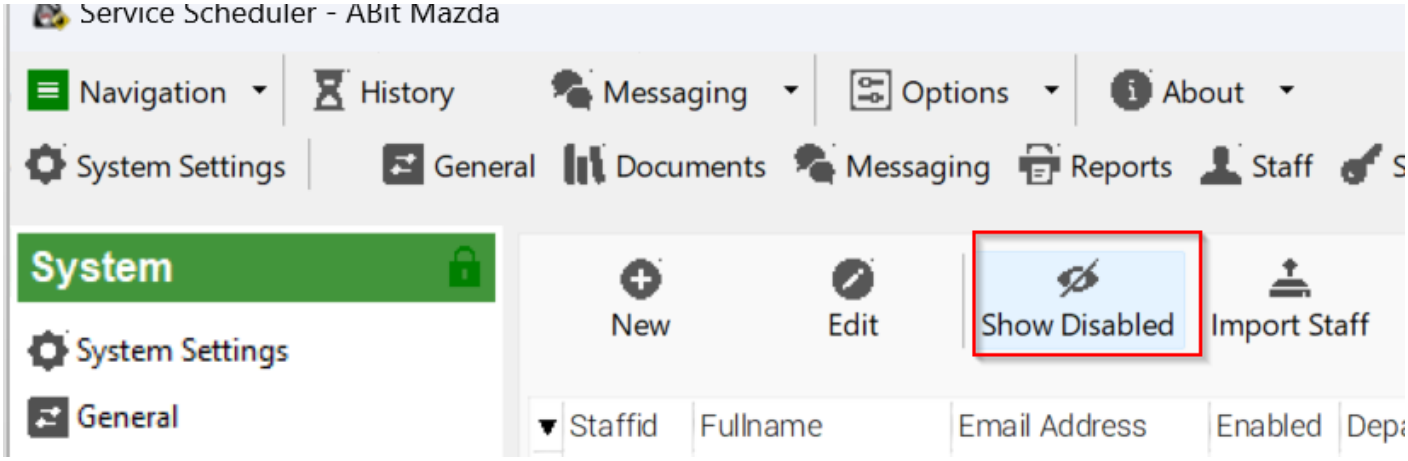


Service scheduler will check for a similar name to ensure that the user

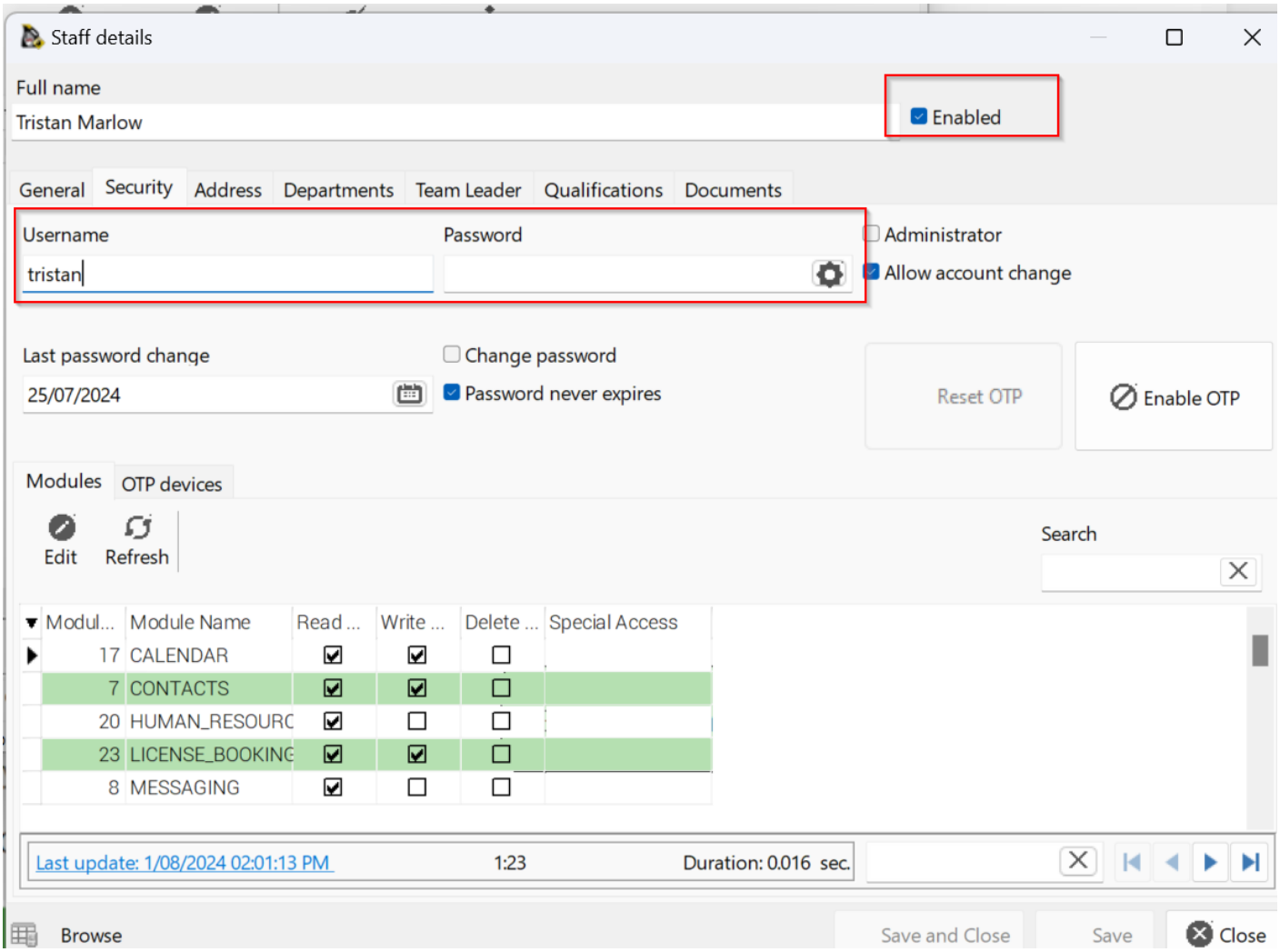


Edit existing staff member

To find a staff member that has had their account disabled. Select the following button

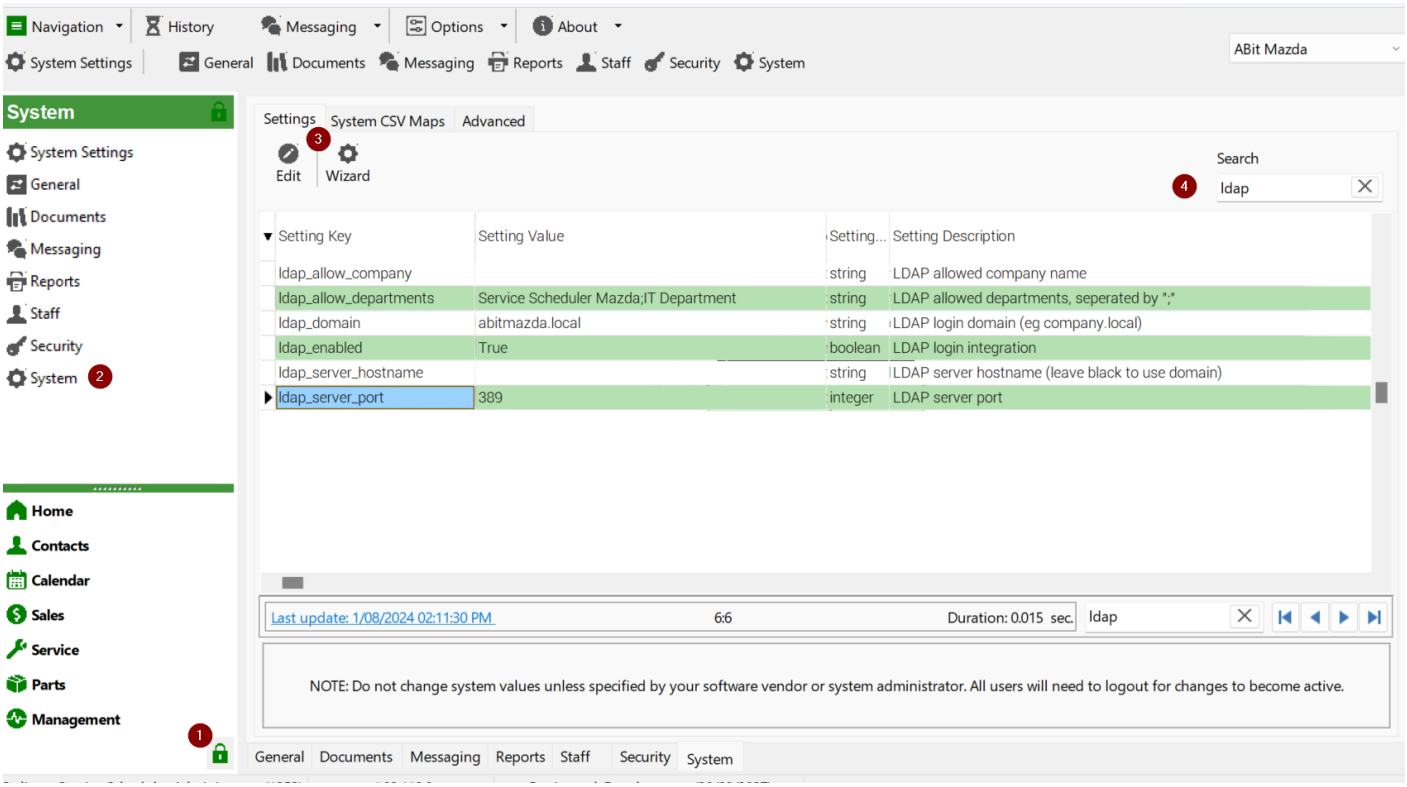


Adjust user details as required



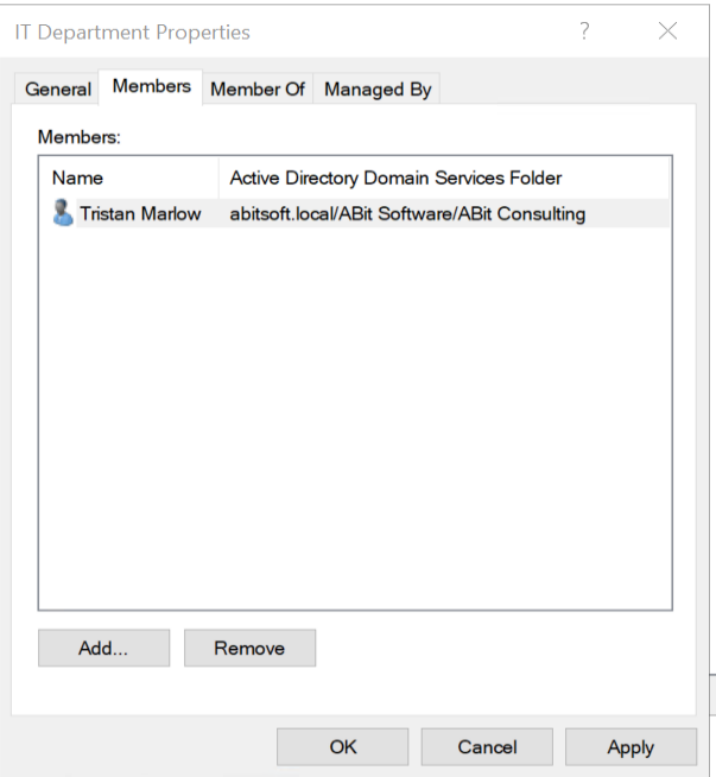
LDAP Integration (Active Directory)

To enable LDAP integration, navigate to system settings and search for "ldap"



ldap_allow_company	This will look at the users "company" and if matches will allow login/ Blank will allow any company value.
ldap_allow_departments	This will look at group the user is a member of and if they match a group name
ldap_domain	Your LDAP / Active Directory domain name
ldap_server_hostname	The domain will be used to find a server via DNS but a specific server can be specified.
ldap_server_port	Port to communicate for LDAP requests

Departments / Active Directory groups are the recommended method of controller



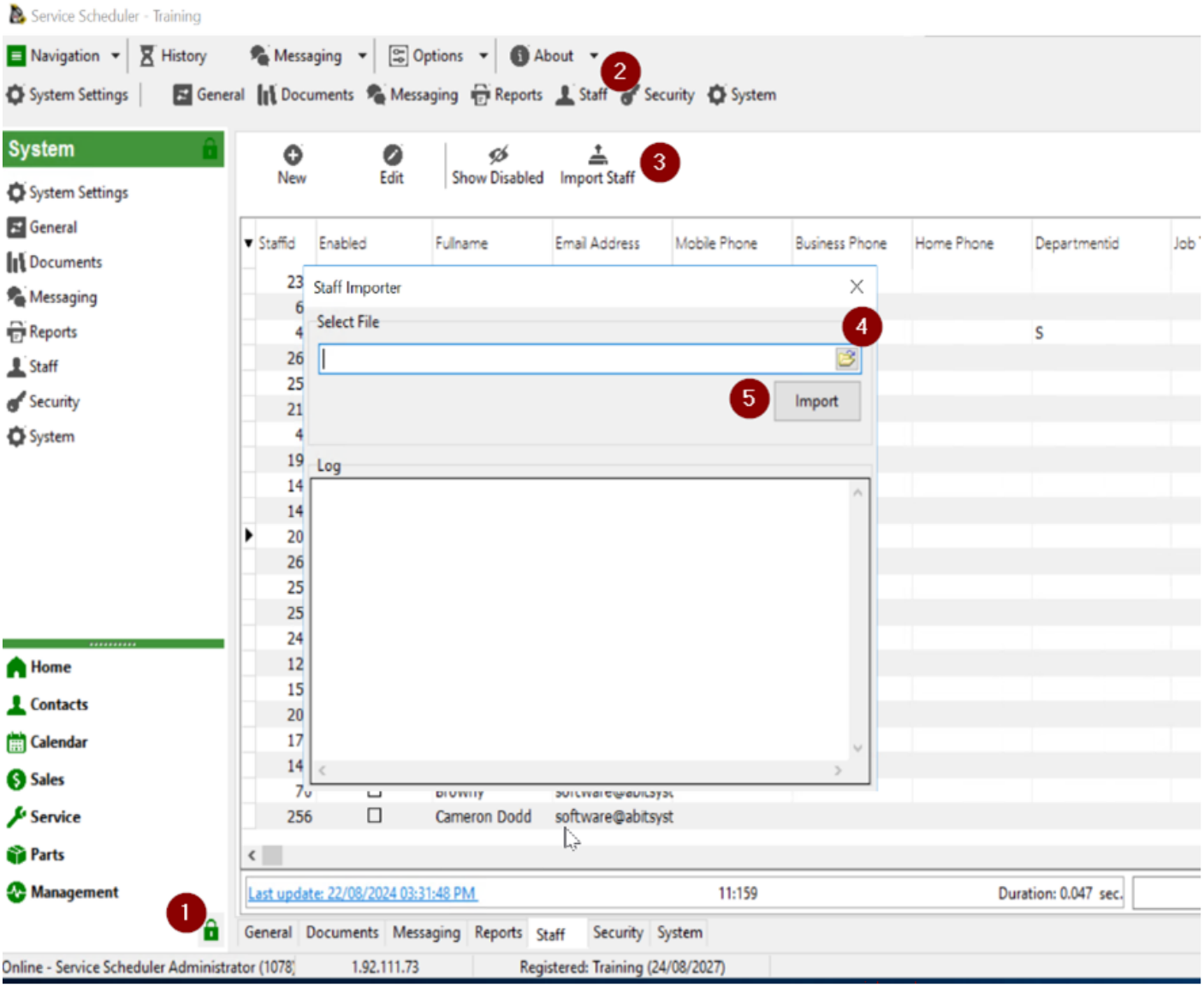
As the password is controlled by LDAP, attempting to change the password will result in "User passwords are managed by LDAP integration"

image.png

Bulk Import

Create a CSV file with the following format.

dmsid	fullname	email_address	username	password	administrator	advisor	technician
	Joe Boss	joe.boss@company.com	joe.boss	#password2024!	1	0	0
	Joe Advisor	joe.advisor@company.com	joe.advisor	#password2024!	0	1	0



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