

Adding and Managing E Team Users

 supportcenter.nc4.com/hc/en-us/articles/218363987-Adding-and-Managing-E-Team-Users

Users are defined as those individuals who require access to the E Team application. Users must be provided with a log in ID and password and given privileges to E Team reports and features by being added to groups. To add or manager users within E Team you must be a member of the ETeam System Admin group or have the privilege user (EDITOR), and when applicable user (DELETE).

It is recommended that you plan the overall access level scheme for your organization in advance. This will help you to determine which existing groups to assign and whether or not you will need to [create new groups](#).

Adding Users

E Team provides the ability to add users three (3) ways.

1. Using the E Team Import Utility.
2. User self-registration.
3. Manually adding a user while logged into E Team.

E Team Import Utility

The import utility is generally used when adding a large number of users at one time. Review all instructions [here](#) before downloading and using this utility. When using this method users must be imported into and managed separately in the Operations and Training databases.

User Self Registration

Self-registration provides a new user with the ability to request access to E Team. To use this feature you must first [configure](#) this feature and review the [approval and rejection process](#). When using this method, upon approval, the users will be created in both the Operations and Training databases. Once created their User Administration documents must be managed separately.

Manually Adding Users

The steps below describe adding a new user who will be a member of the Procurement Department group used as the example for [Groups, Roles, and Privileges](#). When using this method users must be created and managed separately in the Operations and Training databases.

1. Select *User* under Administration from the menu. The system displays the User by Name view in the View Frame.
2. Click on the *Create* button. The system displays a new User Administration document in a new window.
3. Enter the *Login ID*. Example: smithj This is how the name will display in the User selection window on the Group Administration document.
It is recommend that when assigning Login IDs and using names of personnel, that you enter last name, first initial, to facilitate ease of use when attempting to locate a user from within the User by Name view or from within the Group Administration document.
4. Enter a *Password*. The password format is dependant on the setting made in the [General Configuration](#) document.
5. Enter the password a second time for validation.
6. Enter the name of individual to whom this login and password is assigned.
7. Highlight the Group or Group(s) to assign to this ID in the Group selection window at the left (select Procurement Department) and click on *ADD*. The system displays your selection in the window on the right.
8. Click on *Submit*. The system saves and closes newly created User Administration document and displays it in the View Frame.

Now that you have created a user and assigned them to a group, here's what you would expect to see as a result of our example: If you were to log out of the application now and log back in using this new ID and password, you would have access in the Create Menu only to Resource Requests and Critical Asset Reports. Under the VIEW/UPDATE options your access would be limited to; All Reports, My Reports, Incidents, Events, Resource Requests and Critical Assets. Clicking an Incident or Event report option would cause the system to display the associated view options, providing you with the means to view the reports. However, after selecting a report to view, you will not see an Update button allowing you to make changes to those reports. Clicking on a Resource Request or Critical Asset report option would cause the system to display the associated view options, providing you the means to view the reports. In this instance you will see an Update button after selecting which report to view, allowing you to open the report and make changes.

Managing Users

You may make changes to User Administration documents at anytime by selecting the document from within the view, clicking on the document link and then the Update button.

You will be able to change the user's password and group membership during the update process.

Password Changes

To change the password of an existing user, open the applicable User document in update mode, check *Change Password* and enter the new password in the two fields provided and click *Submit*.

Users can change their own passwords at anytime from within their [Personal Profile](#) documents.

To restrict users from changing their own passwords:

- Set the [Data Dictionary](#) keyword *UserChangePassword* to *Disable*.
- Set *Password Expiration* is set to *No* in the [General Configuration](#) document.

Group Changes

To change a user's access when logged into E Team, open the applicable User document in update mode, use the controls provided to add/remove groups as needed. When done click *Submit*.