

20.1 & 20.2 User Information Management

20.1 User Information Management

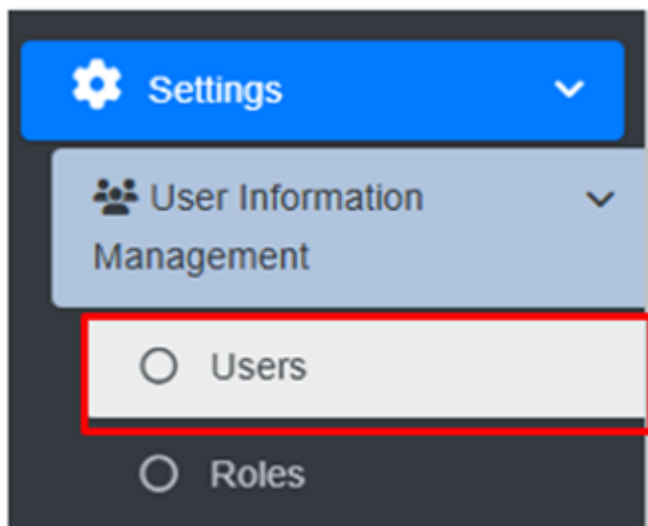
The **User Information Management** sub-module that provides information management capabilities related to user information management are grouped in this panel.

20.2 Users

The **Users** module is responsible for keeping track of system users. According to the user's defined roles, various users have access to the system at varying degrees. The municipality admin is responsible for creating and keeping up with user's data.

20.2.1 Navigation to Users

- Open the sidebar and click on the **Settings** to expand.
- Now, click on the '**User Information Management**' and select **Users**.



- This redirects to the **Users** Page.

Overview:

The user can view the lists of existing users in the system.

- User can also create new user (refer to section 20.2.2 Create User).
- Export the data (refer to chapter 8 Tools).
- For more details on the Action buttons (refer to chapter 6 Actions).

Users

Create User

Export to CSV

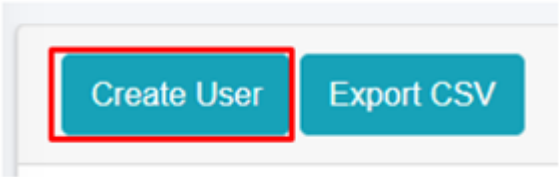
Email	Name	Role	User Type	Status	Actions
merekezed@mailinator.com	Sydnee Skinner	Service Provider - Help Desk	Help Desk	Inactive	<div></div> <div></div> <div></div> <div></div>
tameg@mailinator.com	Gillian Lucas	Service Provider - Help Desk	Help Desk	Inactive	<div></div> <div></div> <div></div> <div></div>
guest@gmail.com	Guest	Guest	Guest	Active	<div></div> <div></div> <div></div> <div></div>
public_health@gmail.com	Municipality - Public Health	Municipality - Public Health Department	Municipality	Active	<div></div> <div></div> <div></div> <div></div>
munsolid@gmail.com	Municipality - Solid Waste Management Department	Municipality - Solid Waste Management Department	Municipality	Active	<div></div> <div></div> <div></div> <div></div>
tax@gmail.com	Tax Department	Municipality - Tax Department	Municipality	Active	<div></div> <div></div> <div></div> <div></div>
water_billing@gmail.com	Water Billing Unit	Municipality - Water Billing Unit	Municipality	Active	<div></div> <div></div> <div></div> <div></div>
sanitation@gmail.com	Sanitation Department	Municipality - Sanitation Department	Municipality	Active	<div></div> <div></div> <div></div> <div></div>

Figure 20- 1 List of Users

20.2.2 Create User

Create user tool which allows users with permission to create a new user.

- Click on **“Create User”** button.



User will be redirected to the following page:

Create User

Full Name*	<input type="text" value="Full Name"/>
Gender*	<input type="text" value="Gender"/>
Username*	<input type="text" value="Username"/>
Email*	<input type="text" value="Email"/>
Password*	<input type="text" value="Password"/>
Confirm Password	<input type="text" value="Confirm Password"/>
User Type*	<input type="text" value="User Type"/>
Roles*	<input type="text" value="Roles"/>
Status*	<input type="text" value="Status"/>

Figure 20- 2 Create new User

- After filling out the form, click **Save** and make sure a pop-up message is displayed, refer to section 7.1 Save for more details.
- If a mandatory form field is left out or any form failed validation during the form submission a validation message box will be prompted, refer to section 7.2 Validation Message Box for more details.

Users must fill in the required fields which are mentioned below:

- Full Name - Name of the user.
- Gender - Gender of the user.
- Username - Username of the user.
- Email - Email address of the user.
- Password - Encrypted Password of the user.

- Confirm password – Retype the same password again for which user entered for password field.
- User Type - Type of user, such as "Municipality" or "Service Provider"
- Roles - The role from which the user is involved to the specific user type.
- Status – Status of the user in order to access the related roles.

User Form Submission:

The form is dynamically changed according to the User Type that is selected. The role assigned should be carefully selected to ensure the correct role and permissions are being provided to the user.

Overview:

- If a **Municipality User** is selected, the roles are limited to the Municipality Related Roles.
- If the **Treatment Plant User** is selected, the roles are limited to Treatment Plant-related roles and the corresponding treatment plant must be chosen as well.
- If the **Service Provider User** is selected, the roles are limited to Service Provider related roles and the corresponding service provider must be chosen as well.
- If a **Help Desk User** is selected, the roles are limited to Help Desk-related roles and the corresponding help desk must be chosen as well.
- Choose the appropriate predefined roles and click Save button. The newly created user record will be added at the list.

Note:

- If predefined role is not suitable, the user can add a new role as required via the role page. However, the creator must be careful while creating new role.
- When the user successfully creates a new Role by following the naming convention, the newly created "Role" will be displayed in the **Roles Field** of Create User form.

The screenshot shows a form for creating a user. On the left, there are labels for 'Roles*' and 'Status*'. Below these are two buttons: 'Back to List' and 'Save'. On the right, a dropdown menu for 'Roles' is open, displaying a list of roles. The roles listed are: 'Municipality - Public Health Department', 'Service Provider - Admin', 'Service Provider - Emptying Operator', 'Treatment Plant - Admin', 'Guest', and 'Municipality - Testing'. The 'Municipality - Testing' role is highlighted with a blue background and a red border.

Roles
Municipality - Public Health Department
Service Provider - Admin
Service Provider - Emptying Operator
Treatment Plant - Admin
Guest
Municipality - Testing

Figure 20- 3 The New Role is displayed in the User Create form

- If the user is associated to any data record, then the deletion is not allowed. If the removal is necessary , it is recommended to change the status to Active/ Operational to Inactive/ Non-operational.

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