How to Manage User Access

How to Create a New User Login

Administrators can create new user logins to give additional people access to their Views account. To create a user login:

- Hover over **My Account** and select **Administration**

- Select **User Access** from the Access & Security section on the left-hand side

- Select **Manage Users** from the sub-menu on the left-hand side

- Click on the plus   **+**   icon

- Enter the **Personal Details** for the new user

- Under **Type** select the kind of user that you wish to create:

    - Agency User
    - Agency Administrator*

- Enter a **Username** and **Password** for the new user

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* ***Agency Administrators*** *are the only users that can access the Administration area of the system and have the ability to delete records*

- In the **Extra Security Question**, enter your password

- Click **Create**

- Select the User Group(s) that the user should belong to. This defines the user privileges that the user will have when accessing Views. Information on creating new User Groups is described below

- Re-enter your password and click **Save**

How to Edit a User Login

- Hover over **My Account** and select **Administration**

- Select **User Access** from the Access & Security section on the left-hand side

- Select **Users** from the sub-menu on the left-hand side

- Click on the pencil icon

- Make the relevant changes and then click **Update**

How to Create a User Group

User Groups enable Administrators to define the access privileges for their users. A user needs to belong to at least one User Group in order to access the account.

To create a User Group:

- Hover over **My Account** and select **Administration**

- Select **User Access** from the Access & Security section on the left-hand side

- Select **User Groups** from the sub-menu on the left-hand side

- Click on the plus   +   icon

- Give the user group a name and enter your user password

- Select the areas of Views that you require the users in this User Group to have access to. Change the permission to **Enabled** for any area you want to be switched on, and change the permission to **On** for any function that you wish users in this group to have access to

- Click **Save**

How to Assign Users to a User Group

- Hover over **My Account** and select **Administration**

- Select **User Access** from the Access & Security section on the left-hand side

- Select **User Groups** from the sub-menu on the left-hand side

- Select the eye icon to the right of the relevant user group

- Click on Actions and select Manage Users

- Enter your user password and select the users that should be added to this group

- Click **Submit** to save

How to Generate a User Report

To view a usage report for all of the users of your account:

- Hover over **My Account** and select **Administration**

- Select **User Access** from the Access & Security section on the left-hand side

- Select **Users Report** from the sub-menu on the left-hand side

A report will be displayed, which lists the last login date for each user, along with the number of records that the user has created in various areas of the system.

- To download the report into a .CSV file, click **Actions** and select **Export Users Report**