PETAL

User Training Manual

LLPT 1.6 - User Management
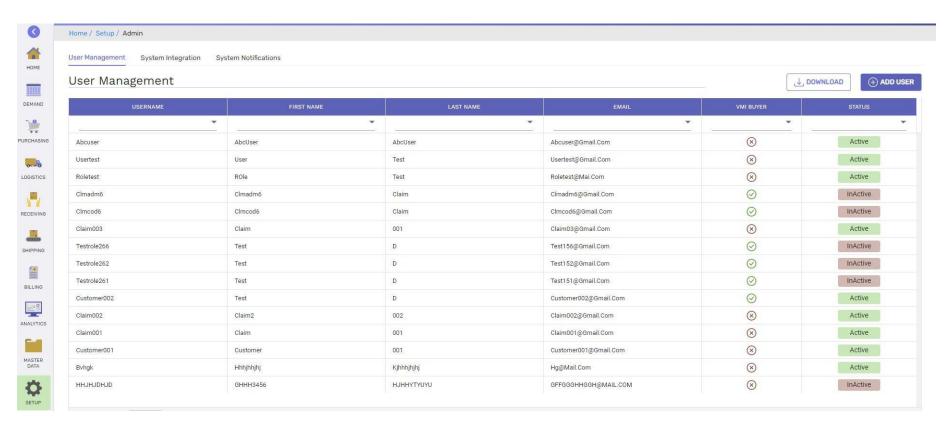
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USER MANAGEMENT
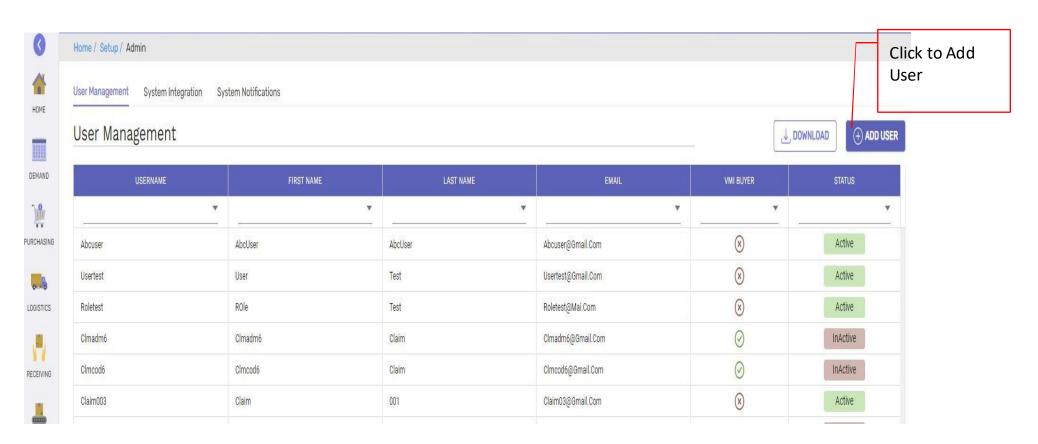
Navigation: Setup -> ADMIN -> User Management

- ➢ User Management function contains the list of internal application users under a client.
- ➢ Data can be sorted, filtered and downloaded into excel template.
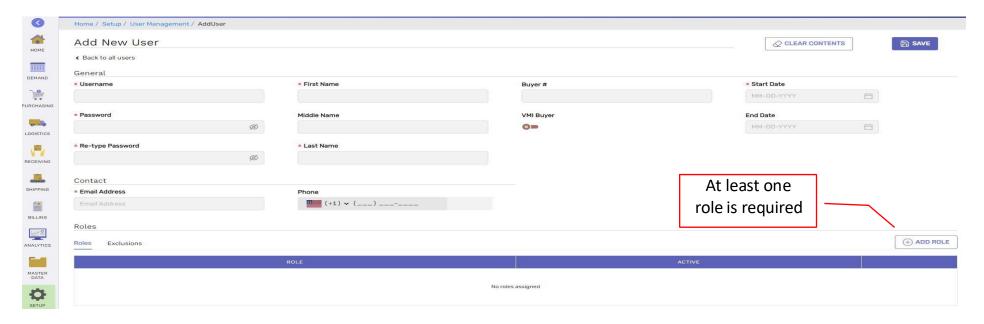- ➢ Column order can be re-arranged.

USER MANAGEMENT

How to Add a New User?

➢ Navigate to setup -> Admin and click on "Add User" button.

Click to Add User

USER MANAGEMENT
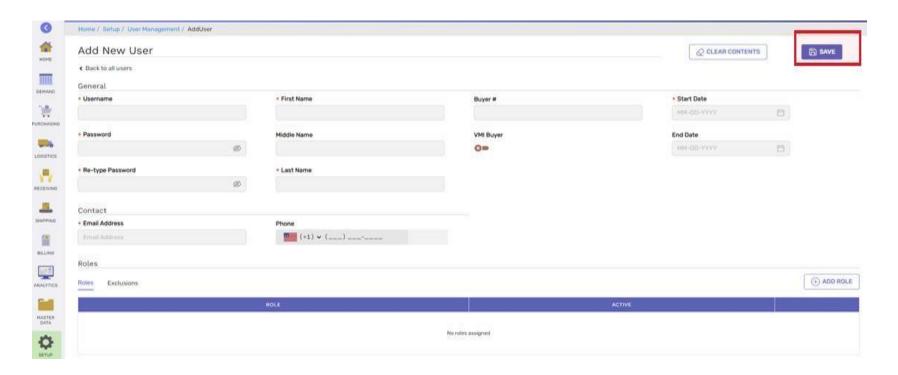
User Creation:

➢ All mandatory fields marked with an asterisk (*) require user input.
➢ Click on 'Add Role' to assign a role to the user.
➢ All available roles, based on the client type, will be displayed in the list of values.
➢ The 'Exclusions' tab is provided to limit functionalities under a specific role.
➢ The user's start date can be set to the current date or any future date.
➢ User access can be revoked by specifying an end date.
➢ Once the user is created and saved, a confirmation message will be displayed.

USER MANAGEMENT

➤ Only Users with "System Admin" role can manage user access such as create new user, change password or deactivate user accounts.

   Note: The username, e-mail, and last name must be unique for each user account.

USER MANAGEMENT
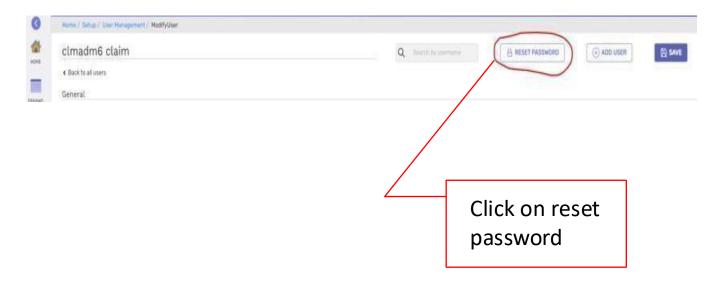
Types of roles

The Main reason for creating different Users is for assigning different roles based on their day-to-day activities.

Role	Activities
System Admin	Can Add Users and Assign the Roles , System Configurations (Setups)
Order Processor	Purchase Orders Transactions
Shipping Admin	Receiving Transactions
Billing Admin	Invoice Transactions

LIMN LABS

How to reset Password?

Home / Setup / User Management / ModifyUser

clmadm6 claim

🔍 Search by username   🔒 RESET PASSWORD   ⊕ ADD USER   💾 SAVE

‹ Back to all users

General

Click on reset password

I.   Search user and click on password reset.

II. Password reset window opens.

III. Enter and re-enter the password and click on Reset.

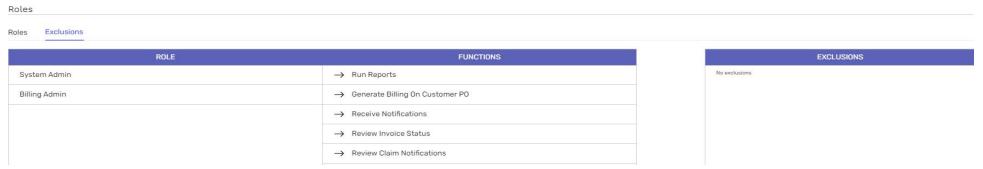IV. Password will be reset and confirmation message is displayed on screen.

Note: A Password reset option will not be enabled for ldap users (this will mostly happens when C&S employee added to the vendor account).

USER MANAGEMENT

How to Exclude functions from the role?

Roles

Roles   Exclusions

ROLE	FUNCTIONS	EXCLUSIONS
System Admin		
Billing Admin		

➢ Click on exclusions tab under a user record

➢ All roles assigned to the user are displayed

➢ Click on a role name, which populates the functions under that role

Roles

Roles   Exclusions

ROLE	FUNCTIONS	EXCLUSIONS
System Admin	→ Run Reports	No exclusions
Billing Admin	→ Generate Billing On Customer PO	
	→ Receive Notifications	
	→ Review Invoice Status	
	→ Review Claim Notifications	

➢Select the function that needs to be excluded for the users in the assigned roles,
  so that the function will move into exclusions block to the right

THANK YOU