Users

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A user account on MESTEC restricts access to areas, logs actions, tracks labour bookings and skills required for specific operations.

Users are granted permissions through the roles they are assigned.

There are two ways to create a new user in MESTEC. You can either create a new user from scratch or copy from an existing user that has similar permissions to the user you're creating.

Before adding a new user, you should consider the following:

1. Do you have a user that you can copy?
2. Are **User Groups** configured?
3. Is the user part of a team?
4. Will the user be assigned to a shift. Is that shift set up?
5. Is the user's timesheet/activity going to be managed?
6. Can this user log on anywhere?

Prerequisites

You need to set up the following before you can create a new user and assign them a license:

1. User Group
2. Department
3. Team
4. User Role

Set up a new user

1. Navigate to the **Users** screen and click **New**.
2. Fill in the **New User** input screen which contains the following fields.

New/Edit User input screen

The following properties can be defined for New/Edit User:

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

- **User Group***: The group the user is assigned to.
- SUID
- **User Name***: A unique user name.

- **Full Name***: The full name of the user.
- **Title**: The user's title.
- **Password**: The login password that the user will use. If the Force password change on login tick box is ticked, the user will be prompted to change their password the first time they log in. The password is not mandatory because, if the user is only allowed to log into trusted devices (e.g. a PC on the shopfloor) the password requirement can be ignored.
- **Email**: Required for receiving system messages. For example, when you reset your password.
- **Principal Name**: This field is optional and allows you to automatically federate your account with Azure AD. The **Principal Name** maps to the **User principal identifier** in Azure AD. For further information about configuring single sign-on, refer to the SSO documentation.
- **Default Team***: The team the user is assigned to by default.
- **Menu Item**: A selection of the menu items you want displayed on your landing page. For example, people on the shopfloor would have the workstation screen.
- **Shift Selection***: The shift you are on. To learn more about how a shift is assigned to a user, see Clocking in.
- **Manager**: The user's manager who may be required for timesheet approvals and can be used as a filter for some reports.
- **Holiday Entitlement (Hours)**: The holiday hours in a year (if MESTEC manages payroll).
- **Enabled** checkbox: To enable or disable a user. You cannot delete a user in the system if they ever logged on. You can delete a user if they never logged on.
- **Trusted devices only** checkbox: The user can access trusted devices only which is a physical PC or tablet normally located on the shopfloor. The device's permissions will determine what it can access. See Devices for detailed information.
- **Manage Pay Hours** checkbox: Tick the box if you want to manage this user in MESTEC's payroll module.
- **Ignore password rules** checkbox: If you have ticked trusted devices only, you can relax the password rules so that users don't need a password to log into the device.
- **Ignore inactivity timeout** checkbox: Tick this box if you don't want the user to be logged off after being inactive for a specified length of time.
- **Start in full screen mode** checkbox: To minimise the left-hand menu when you log in. Click the burger in the top left of your screen to display the left-hand menu.
- **Force password change on login** checkbox: Tick the box if the user has to change their password the first time they log into the system.

> **Note**
> By adding a named user account, you are enabling the collection and storage of personal data for that user. You accept responsibility for the purposes for which and the manner in which any personal data are processed.

Import Users

You can import a spreadsheet of users to add users.

1. Navigate to the **Users** page and click the **Import** menu item.
   The Import Data Mapping page that is displayed shows the fields of the .csv where required fields are denoted with an asterisk (*).

2. Click the CSV icon on the left of the screen to download a spreadsheet that contains the fields (as columns) that you can populate with user information.

> **Note**
> The **Import Users** function does not support the *.xlsx* format.

3. To copy user attributes from an existing user, add that user's SUID into the **TEMPLATESUID** field for each user you want it copied to.

4. Complete the fields for each user. The fields are a subset of the New/Edit User input screen where you can find the field the descriptions.

5. Click the **Upload** button.

6. Select the **Data File Category** from the drop down list.

7. Click the **Select files...** button or drop the CSV file into the field to upload.

8. In the **Data File** section, select the uploaded file and verify that the information displayed onscreen is correct.

9. Click **Import**. Validations are done on the file. If the import contains errors, an error message is displayed. To view details about the file or to investigate errors, follow the instructions in the next steps.

10. Click the **System Log** button that appears and select the row containing the uploaded log.

11. Click **Detail** to display detailed information about the import.

Assign roles to a user

See the section on Roles for the instructions on setting up roles.

The following instructions are for assigning roles to a user:

1. Click on the user in the **Users** screen and in the menu tab that gets displayed, click the **Assign Roles** menu item.

2. Select the roles required (several roles can be highlighted) and click **Assign**.

Assign a license to a user

After the user is created, a license is needed. You cannot log in without a license.

1. Click on the user in the **Users** screen and in the menu tab that gets displayed, click the **Assign License** menu item.

2. Select the License Type required by the user, e.g., Standard User.

Copy User

You can copy a user and select the attributes you want to assign to a new user.

1. Navigate to the **Users** page and select the user you want to copy.

2. Click the **Copy User** menu item that is revealed and complete the input screen.

Copy User input screen

The following properties can be defined for Copy User:

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

User Group*: The group the user is assigned to.

SUID

User Name*: A unique user name.

Full Name*: The full name of the user.

Title: The user's title.

Password: The login password that the user will use.

Email: This field is optional, but if you are using Azure AD, then you will need to provide an email address. See How to link a user to Azure Active Directory.

Shift Selection*: The shift you are on. See Shift Selection to learn more about how a shift is assigned to a user.

Manager: The user's manager who may be required for timesheet approvals and can be used as a filter for some reports.

Copy Roles:
- **Custom** checkbox: Check if you want to copy Custom roles to the new user.
- **System** checkbox: Check if you want to copy System roles to the new user.
- **Copy Skills** checkbox: Check if you want to copy Skills to the new use. Select one of the following options:
  - **Copy Expiry Date**: Use the same expiry date as the one linked to the user that's been copied from.
  - **Extend to Max**: Apply the maximum expiry date to the Skill.
  - **Expire All**: Expire all the Skills that are copied to the new user.

Teams

Teams allow supervisors to see performance data of the people working for them. For more information, see Departments, Areas and Teams.

Skills

Explore the Skills documentation for information about managing Skills.

Properties

Users can provide additional information relating to a Skill. For more information, see the section on Properties.

Notes

You can add notes related to the user by clicking the **Notes** menu item, then clicking **Add**. When displaying notes, you can choose to hide archived notes by checking the **Hide Archived** checkbox.

Select a note to reveal options to edit, archive or delete the note.

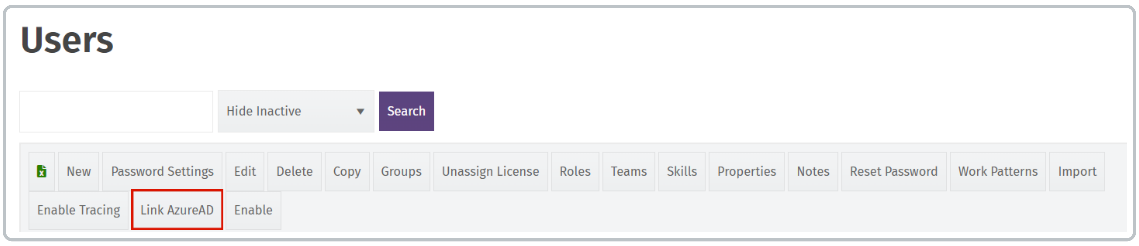
Link a user to Azure Active Directory

If single sign-on has been configured for your company, then you can link a user account following these instructions.

1. Navigate to the **Users** page and click on the user to display menu items.

2. Click **Edit** and make sure the **Email** field has the user's email address. If one wasn't provided before, add it and click **OK**.

3. Click on the user again to display the top menu and click link.


Users
Hide Inactive
Search
New
Password Settings
Edit
Delete
Copy
Groups
Unassign License
Roles
Teams
Skills
Properties
Notes
Reset Password
Work Patterns
Import
Enable Tracing
Link AzureAD
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