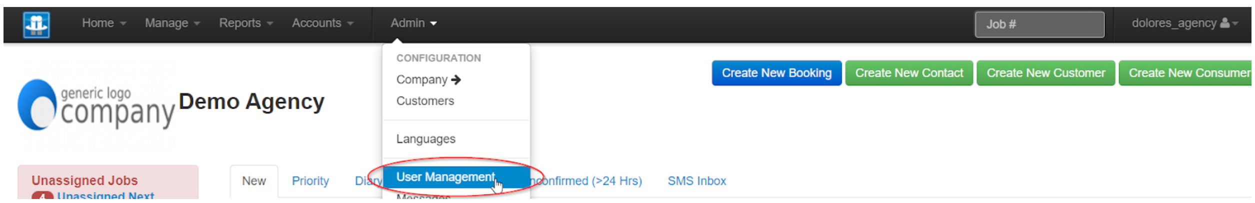
User Management

User Management allows you to manage the login accounts of users to your Interpreter Intelligence site. Users are the people who will login to your II site versus Profiles which are roles within the system which are chosen at booking/job level.

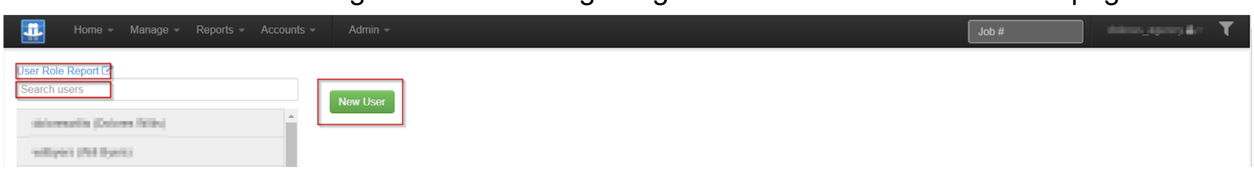
There are 3 different types of User accounts in II – Internal Users i.e. your agency staff, Interpreters who require access to the Interpreter portal and Customers i.e. Requestors who will request bookings via the Customer Portal.

To access User Management, navigate to the 'Admin' menu and select 'User Management'.



Within User Management you will find a list of any existing users in the left hand pane. You can search for a specific user by typing any part of their name or user name into the 'Search Users' filter at the top of this navigation pane. You Can also generate a report of all existing users and their **Type**, **Configuration** & **Settings**.

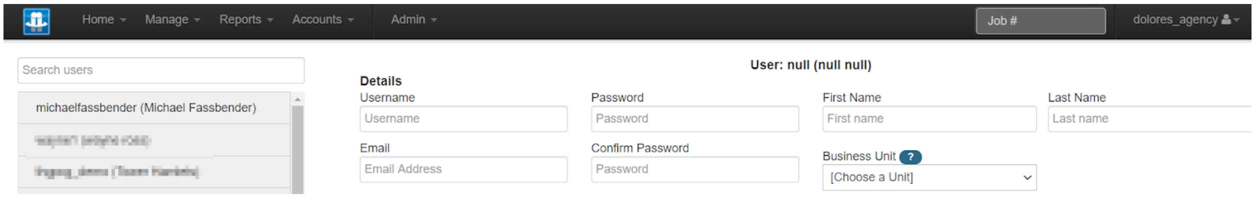
But first let's look at creating a new user using the green 'New User' button on this page.



There are 2 main sections to the User account, the top section defines the very basic

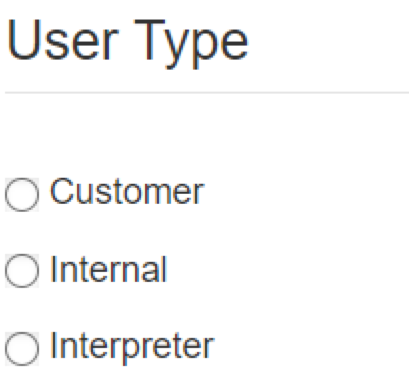
User Details:

- ➢ Username - this must be unique. For Customer Requestor accounts this can be auto generated (more on this later).
- ➢ Password - this should be a temporary password that you set at the time of user creation which can be subsequently changed by the user.
- ➢ Confirm Password - confirm password exactly as set above.
- ➢ First Name - the user's first name preferably as per their profile where appropriate.
- ➢ Last Name - the user's first name preferably as per their profile where appropriate.
- ➢ Email - the user's email address, preferable their primary email address used for all II correspondence.
- ➢ Business Unit - only for use when your agency is actually using the Business Unit hierarchy within II and where this is appropriate for the user i.e. the user will only be able to access and manage jobs within that business unit where this is applied.



The bottom section of the User account handles the specifics of the user account type and the access rights of the user. This section is further split into 3 areas:

- **User Type**
  - Customer - for Customer Requestors who will use the II Customer Poratl - see below for important information specifically related to Requestor accounts.
  - Internal - for your internal agency staff.
  - Interpreter - for interpreters who will use the II Interpreter Portal.



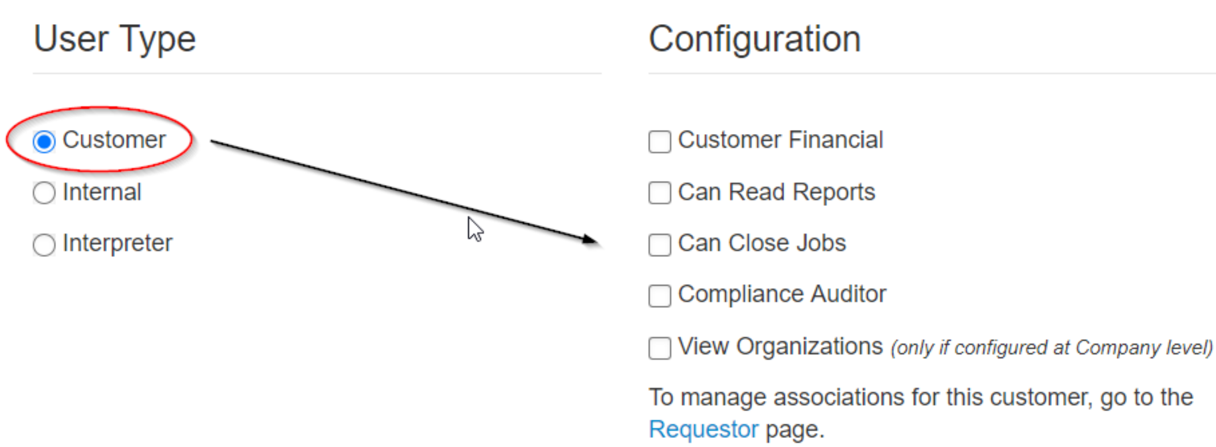
Note that the next section, Configuration, will change depending on the User Type selected. For the most part the Configuration options will relate to the menu options that the user can see, and therefore have access to, when they login to their II portal but let's look at these individually.

- **Configuration - Internal User Type**
  - Admin - this will provide the user with the Admin menu, for example a user with the Admin Configuration will be able to carry out the User Management tasks outlined in this document as well as all other functions under the Admin menu such as Company Configuration. (Quick tip: use this access with caution as any changes to Admin & Configuration options can have system wide implications and such users will need to understand any changes that are made).
  - Financial - this will allow the user to carry out all Financial actions such as Verifying jobs and creating Invoices & Payments, all of these functions will be described in detail in Financial documents.
  - Interpreter Manager - such users can create and manage Interpreter/Contact Profiles.
  - Can Read Reports - this option will provide the Reporting menu to a user and allow them to view and run all reports within II.
  - Can Close Jobs - such users can Close jobs.

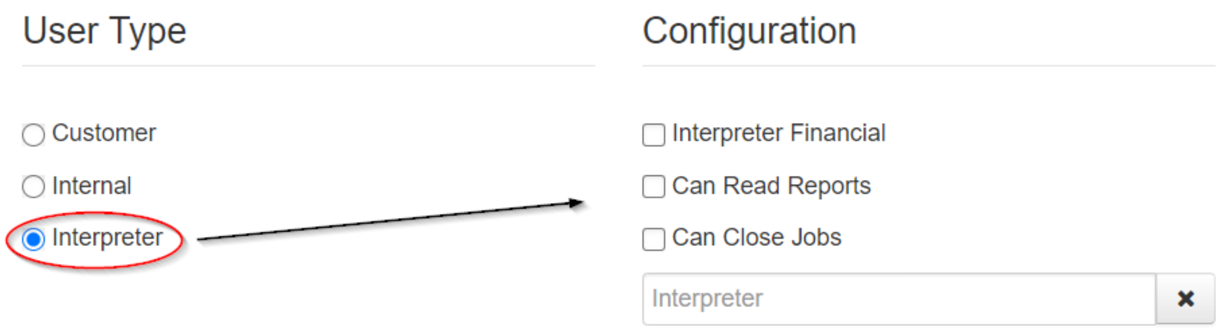
As a general rule of thumb, the majority of your internal/agency staff, i.e. schedulers, will require the Internal Account Type with perhaps only the ‘Can Close Jobs’ option under Configuration. Only those working in a finance, accounting or management role will require the Financial Configuration and all other options should be restricted to a select few and/or those in a management role.

- **Configuration - Customer User Type**
    - Customer Financial - can view invoices created by the agency and review any verification documentation related to invoices e.g. VoS, esigs etc.
    - Can Read Reports - can view and run reports for their own jobs.
    - Can Close Jobs
    - Compliance Auditor - can view Interpreter Eligibilities and Qualifications for the purpose of an audit for e.g.
    - View Organizations - a level above customer such as grouping of customers

(also see additional information below on Requestor accounts)

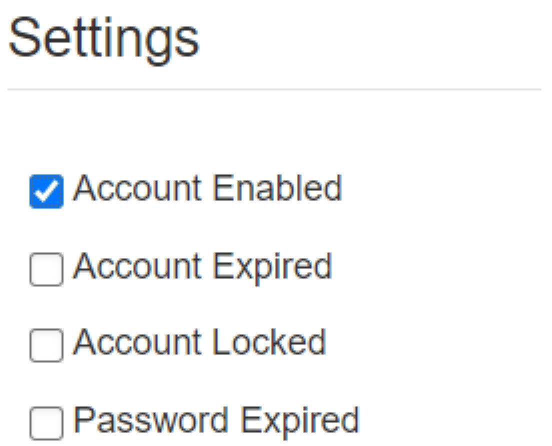


- **Configuration - Interpreter User Type**
    - Interpreter Financial - can view copies of their payment documentation and supplementary information.
    - Can Read Reports - can view system generated reports only related to jobs that they have done.
    - Can Close Jobs
    - Interpreter selection box - use this to connect the interpreter user account to their profile which is a required step, ensure that the Contact profile is created first and then simply start typing in this box and select the relevant profile from the look-up.



Finally let's look at the last section of user management:

- **Settings**
    - Account Enabled - this setting should be checked at minimum to activate the account.
    - Account Expired - this can be checked if the user’s account is no longer required
    - Account Locked - this will automatically be checked when a user exceeded the number of incorrect attempts to login.
    - Password Expired - this setting is also recommended when an account is newly activated, this will force the user at first login to change the temporary password that you just created for them.



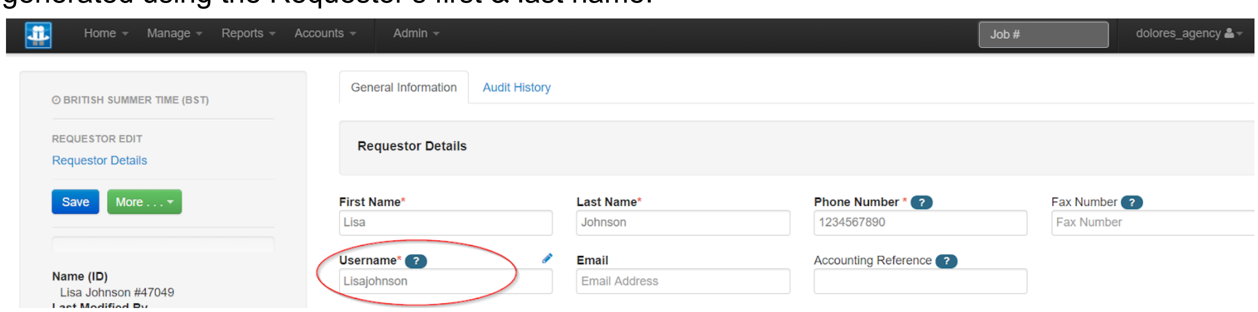
Finally, click the blue ‘Save’ button on the left hand navigation pane to save the User’s account.

User Account Maintenance
Once a user has been created you can modify their account details and permissions at any time by navigating to User Management as per above and in the user search box in the left hand pane, start typing any part of their name or username and select the appropriate user from the results. Remember to always Save any changes that are made.

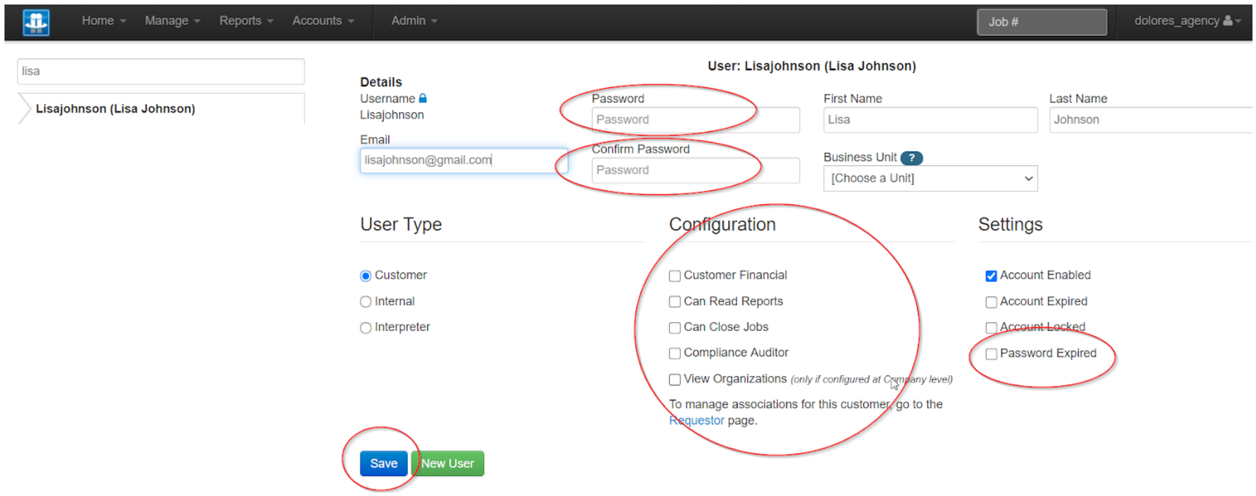
It is also worth pointing out that in some cases agencies will setup more than one user account for an individual. This may be required if an individual performs multiple roles within your organization, for example a user may work as an internal staff member and also carry out interpreting work. In this case you can setup an Internal account and a separate Interpreter account for this user, however, the usernames must always be unique.

Creating Requestor accounts
You may remember from our Module on Creating a Requestor that the process for setting up Requestor user accounts is slightly different than creating a New User for an Internal or Interpreter user.

When Creating a Requestor profile you have the option to create a username for the Requestor; you can type in a username or you can click the pencil icon and a username will be system generated using the Requestor’s first & last name.



When you are ready to enable the user account for the Requestor simply navigate to User Management as per above and in the user search box in the left hand pane, start typing the Requestor's username that you assigned when creating the profile, then select the appropriate user from the results. You will notice First and Last Name will pre-populate from the Requestor profile, and the user type will be set to 'Customer'. You can then proceed to set up a password for this user and define their user permissions in the Configuration section and the Settings as per the details above. Finally, click the blue 'Save' button on the left hand navigation pane.



Note that you may not require a user account for all Requestors, some may be setup in II purely as a Requestor role only. A user account will only be required for Requestors who also use the Customer Portal.

We will cover additional aspects of Company Admin & Configuration in other documents.