

# Users and organization chart

## Overview

The user management page is split into two main parts:

1. **Organization Chart:** this tree-like structure of folders (nodes) represents the core logic for user's organization, and will be used by most of the other features of the LMS. To simplify user's selection and automate massive operations.
2. **User List:** this is the list of the users in the selected folder. Select the root folder to list all the registered users.

### Organization chart

Forma

- Departments
- Regions
  - Asia
  - Europe
  - France
  - Germany
  - Italy
  - Spain
  - Middle-East
  - Noth-America

Add node Import users

☐ Show also children node content ☒ Show also suspended users

Advanced search

New user More actions 0 Selected elements Select: All pages, None

Username	Last name	First name	Level	Email	Last access date					
admin	Smith	John	Super-administrator		30-04-2020 19:23					
utente1	Cognome1	Nome1	User	utente1@email.xx						
utente2	Cognome2	Nome2	User	utente2@email.xx						
utente3	Cognome3	Nome3	User	utente3@email.xx						
utente4	Cognome4	Nome4	User	utente4@email.xx						
utente5	Cognome5	Nome5	User	utente5@email.xx						
utente6	Cognome6	Nome6	User	utente6@email.xx						

New user More actions 0 Selected elements Select: All pages, None

« Start < Previous 1 Next > End » 1 - 7 of 7 25 ▼

# Organization Chart



## Add Node

Click on this link to add a new folder:

The 'Add node' dialog box is shown. It has a title bar with the text 'Add node' and a 'CLOSE' button. The dialog contains three input fields: 'Code', 'Default template' (set to 'standard'), and 'Name (english)'. At the bottom are 'Submit' and 'Undo' buttons.

**Code:** Add an alphanumeric code that can be used by other features like registration with code or I/O task

**Default Template:** assign a specific template for the users in this node

**Name (language):** Name for this node, a different field for each language will be shown

## Import Users

This feature lets you import a list of users from a .CSV file.

Check the [user import guide](#) page for details

# Assign users to a node

Click this icon to select users that you want to assign to this node

By default, users can be assigned only to a single node. It is possible to assign users to multiple nodes, although this is strongly discouraged to avoid possible undesirable or unpredictable behaviors in other platform areas (i.e., reports, administrators assignments, or other). To enable multi-node user assignment, check the relative option under advanced configuration

# Assign Field to node

This feature lets you define which custom fields must be assigned for users in this node:

Assign node fields

CLOSE

List fields for the folder:

Departments

Field name	Assign field	Descendants	Mandatory	Invisible to the user	user inherit
Gender	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telephone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Submit

Undo

**Assign Field:** the selected fields will be available in the profile of users in this node

**Descendants:** the selected fields will be available in the profile of users in the subnodes of this folder

**Mandatory:** filling this field will be mandatory in the user registration form

**Invisible to user:** the selected field will be hidden on user registration form

**User Inherit:** all users of this node will get the same value. If you change the value for a user, it will be sett for all the others.

# Users' List

1

New user

More actions

0 Selected elementsSelect: All pages , None

2

Advanced search

3

	Username	Last name	First name	Level	Email	Last access date					
	aabadi	Abadi	Asma	User	AsmalbtihalAbadi@jourrapide.com						
	askillman	Skillman	Arlene	User	ArleneBSkillman@cuvorex.de						
	baswad	Aswad	Batul	User	BatulSuhaylaAswad@jourrapide.com						
	bjamison	Jamison	Bobby	User	BobbyDJamison@teleworm.us						

5

4

New user

More actions

0 Selected elementsSelect: All pages , None


« Start < Previous 1 Next > End » 1 - 4 of 4 25

# Add new user

Click to insert a new user in the selected node.

- 1. **Details Tab:** fill user fields
- 2. **Organization chart Tab:** select the nodes to assign the user to

New user


CLOSE

Details

Organization chart

Username

testuser




First name

Last name


Email

Password

.....




Retype the password



☐ Require password change upon next login


Level

User



Language

english



Submit

Undo

## Search Users

**Show also child nodes content:** the list will show also the users from subnodes of the selected node. If you are displaying the root node, all users will be displayed.

**Show also suspended users:** show or hide suspended users from the list

**Search:** will search on any of the visible field in the user list below

**Advanced Search:** will display an advanced search form with possibility to add search over specific fields and conditions:

Add Gender Add

Gender Contains Delete

First name Contains Delete

☒ All conditions must be satisfied ☐ At least one condition must be satisfied

Search Reset

## Dynamic columns

Select from the dropdown which data field to show in the correspondent columns, and sort for the displayed data.

The search engine will search over the displayed data.

## User Actions

Actions you can take over each user:

**View user profile:** opens a pop-up window with user information

**Remove from node:** user will be removed from the selected node, but remain registered to the platform

**Activate/Suspend:** lets you suspend or reactivate users. Suspended users will be still visible in reports if needed, but can't access the platform

**Delete:** user will be deleted from the platform. This action can't be recovered

## Massive Actions

Lets you massively apply actions over all the users selected in the list.

- **Export** the selected users in a CSV file
- Massively **suspend, activate, delete**
- Massively **edit**:

Edit

×

CLOSE

Users: 3

☐ New password

Retype the password

☐ Send new login credentials to users

☐ Require password change upon next login

☐ Send an email with the link to reset password

☐ Level

Super-administrator

Submit

Undo

Revision #3

Created 25 January 2024 15:40:43 by Lorenzo Polizzi

Updated 14 October 2024 19:42:04 by Lorenzo Polizzi