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

Organization Chart

Add Node

Click on this link to add a new folder:

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	☐	☐	☐	☐	☐
City	☐	☐	☐	☐	☐
Telephone	☐	☐	☐	☐	☐
Country	☐	☐	☐	☐	☐
Company	☐	☐	☐	☐	☐

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

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

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:

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