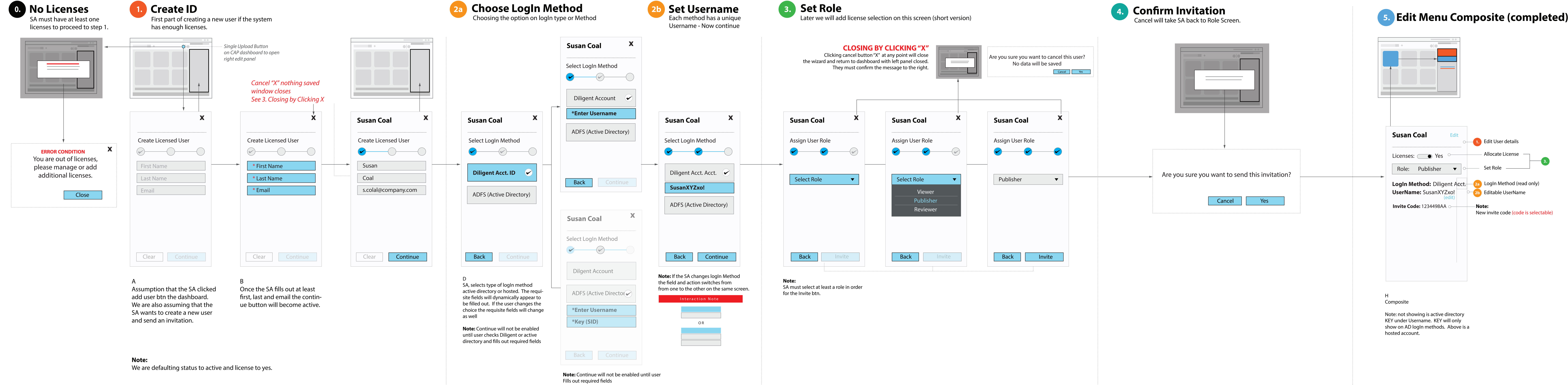
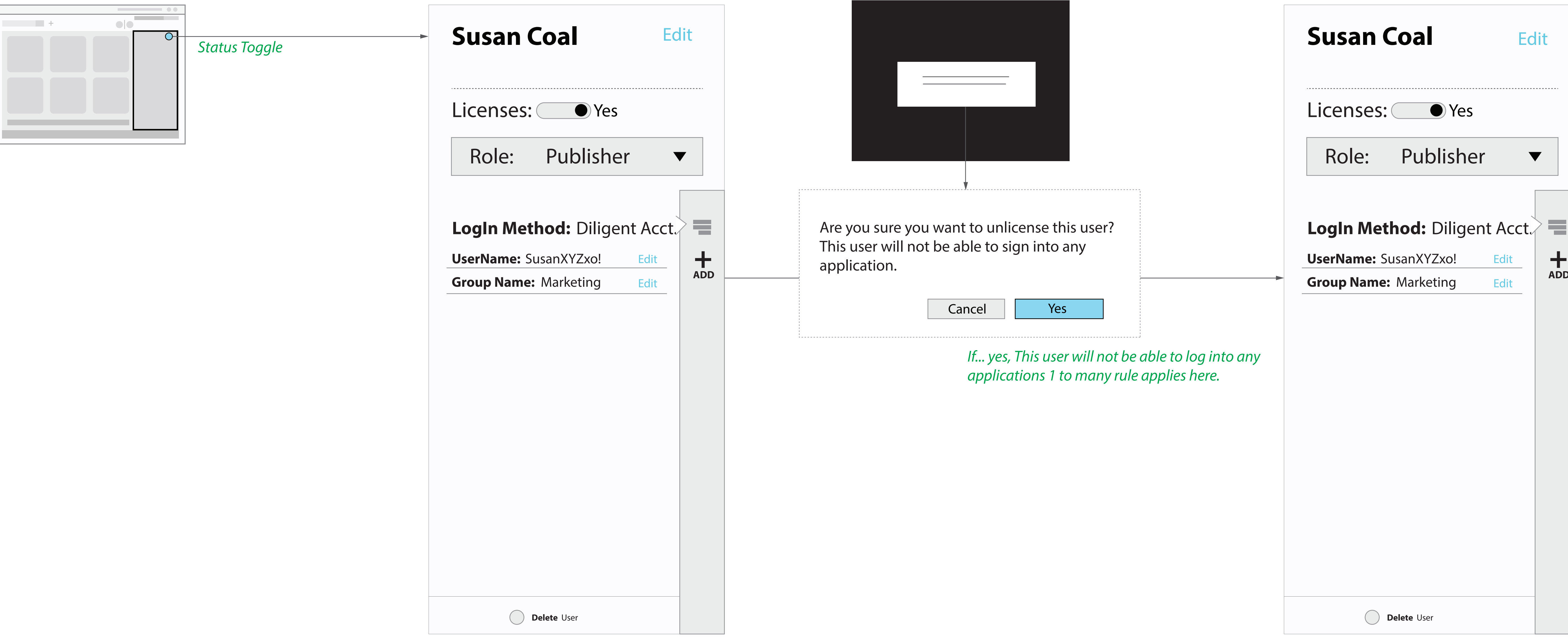


Manually Creating a User (Short Wizard version)



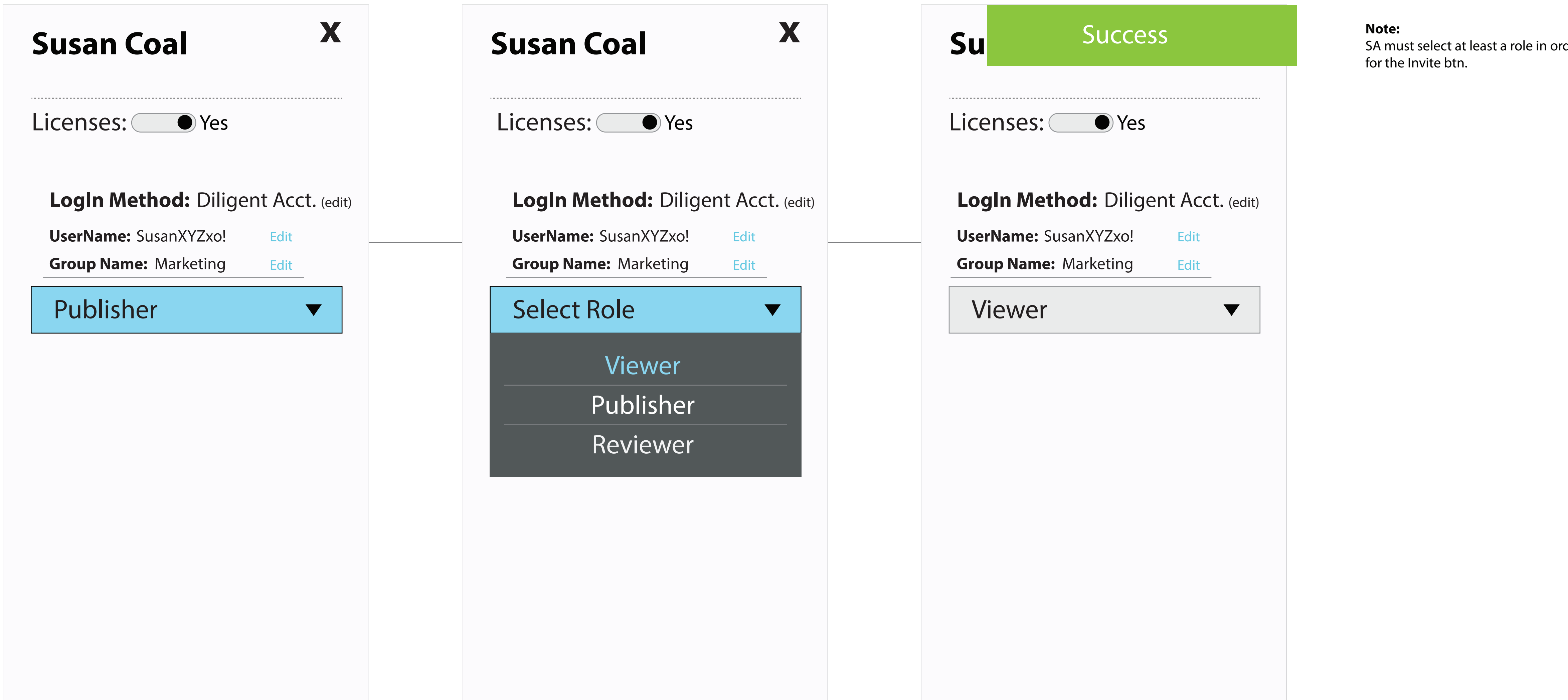
License off impact on user logging in

6. User toggles active to inactive  
Wizard will default to Active after wizard



7. User is now inactive  
Across all applications

7. Change Role  
Once the SA changes the role, a success message will appear and fade out. No confirmation screen nessasary.

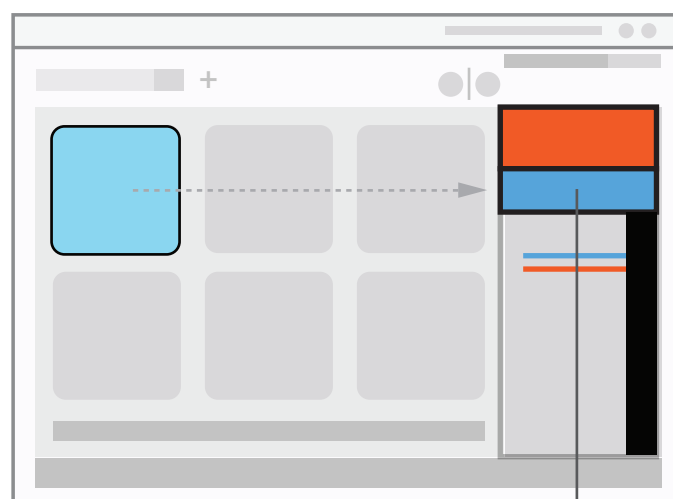




# Editing Existing User

## 11. Edit License and Role

On panel editing



**Susan Coal** Edit

Licenses: ☐ No ☒ Yes

Role: Publisher

Login Method: Hosted (edit)

UserName: SusanXYZco! Edit

Group Name: Marketing Edit

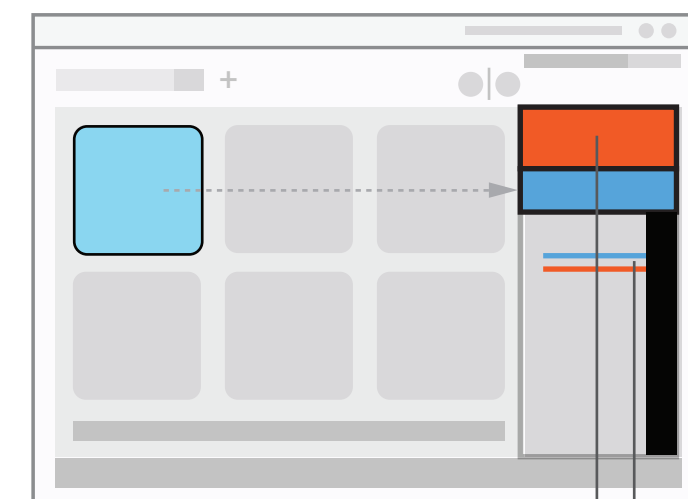
+ ADD

11. Edited on this panel (Application specific)

A  
Save is only enabled on this page if licenses or Role changes

## 12. Edit ID

Opens editing panel



**Susan Coal** Edit

Licenses: ☐ No ☒ Yes

Role: Publisher

Login Method: Diligent Acct (edit)

UserName: SusanXYZco! Edit

Group Name: Marketing Edit

+ ADD

12. Susan Cole

Edit User Details

Susan

Coal

s.colal@company.com

Marketing

Cancel

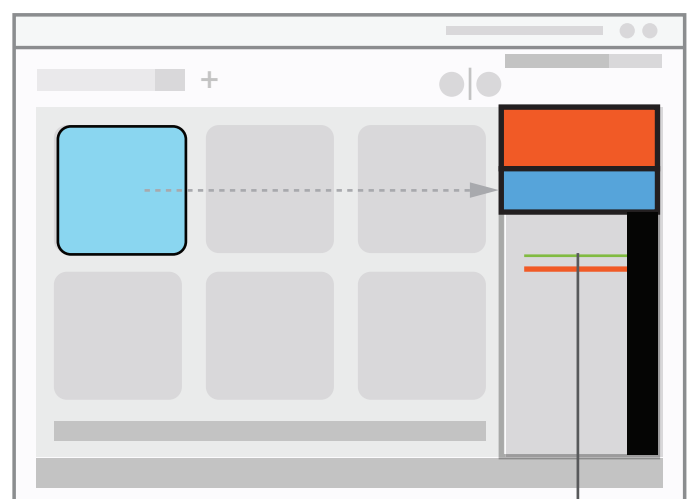
Save and go back

B  
To edit user ID details and Status takes you to that edit page with a back button on return saving is done on this panel for any ID changes.

**Note:** Group name can take you to ID section as well as ID main CTA. This may change and groups will have separate section (TBD)

## 13. Edit Username & or (adfs) KEY

Hosted accounts only have UserName - ADFS includes KEY edit.



**Susan Coal** Edit

Licenses: ☐ No ☒ Yes

Role: Publisher

Login Method: ADFS

UserName: SusanXYZco! Edit

Key: 5678-FGTR-6677 Edit

Group Name: Marketing Edit

+ ADD

13. Active Directory

Edit User Details

Susan XYZco!

5678-FGTR-6677

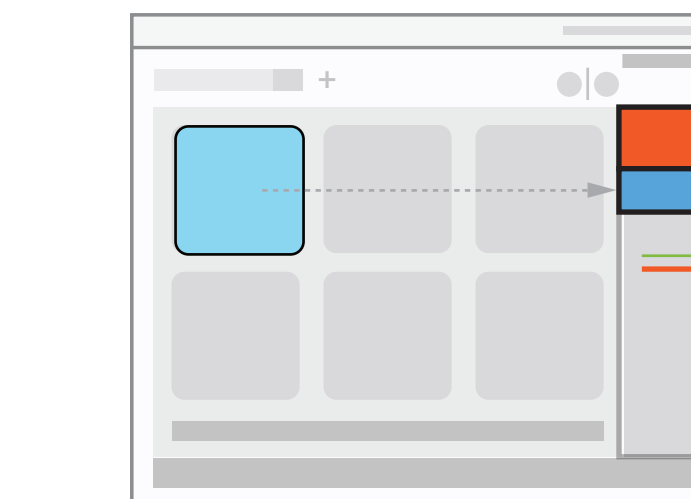
Cancel

Save and go back

C1  
**Note:** Hosted accounts only have user name - ADFS have usernames and KEY entries/editable  
Save and go back will close edit mode. Cancel will take the user out of edit mode.

## 14. Edit Username on (Hosted Accounts)

Hosted accounts only have UserName - ADFS includes KEY edit.



**Susan Coal** Edit

Licenses: ☐ No ☒ Yes

Role: Publisher

Login Method: Diligent Acct (edit)

UserName: SusanXYZco! Edit

Group Name: Marketing Edit

+ ADD

14a. Diligent Account

Edit User Details

Susan XYZco!

Cancel

Save and go back

C2  
**Note:** On "Save and go back" the user will see a prompt to reset user password. This is a necessary step.  
If the user clicks reset password - it will send the user an automated reset password email and take the SuperAdmin back to Right Panel with edit mode closed. Clicking cancel on prompt will close the prompt.

Reset Password?

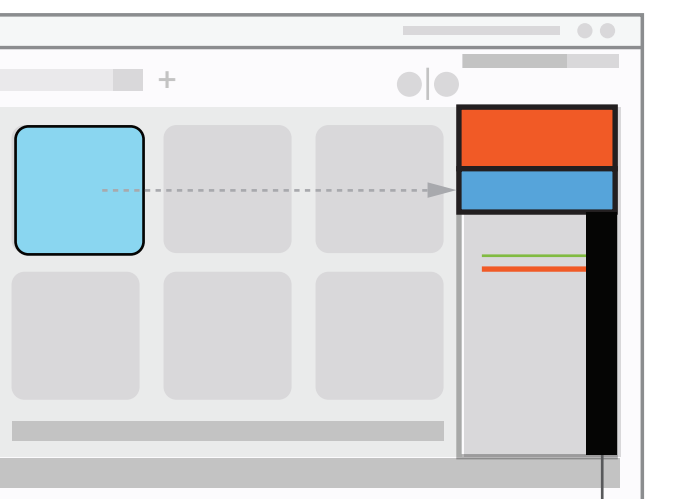
Cancel

Reset has been sent

**Note:** on resetting the password - user will see a simple success message

## 15. Editing different login Method

This happens once a user has an additional login Type



**Susan Coal** Edit

Licenses: ☐ No ☒ Yes

Role: Publisher

Login Method: ADFS

UserName: Susans-NewUN-1 Edit

KEY: 5678-FGTR-6677 Edit

Group Name: Marketing Edit

+ ADD

15. Active Directory

Edit User Details

Susans-NewUN-1

5678-FGTR-6677

Cancel

Save and go back

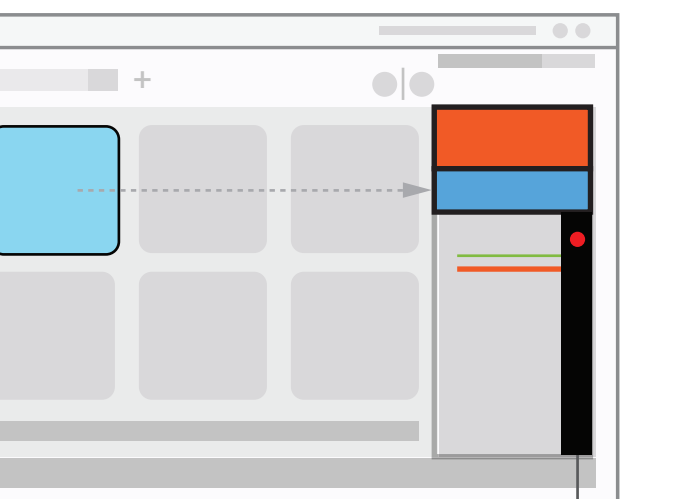
D  
**Note:** Select the Login method you want to edit - then Edit icon next to item to be edited.  
You are editing whatever login method is highlighted

The last login method created is the first of the buttons - Stacking order is that the last one created is on top.

# Adding new login Method to existing user

## 16. Adding new login Method to existing user

Clicking the + sign in login Method menu section



**Susan Coal** Edit

Licenses: ☐ No ☒ Yes

Role: Publisher

Login Method: ADFS

UserName: Susans-NewUN-1 Edit

KEY: 5678-FGTR-6677 Edit

Group Name: Marketing Edit

Invite Code: 1234fgtr5

+ ADD

1. Choose Login Method

Diligent Acct.

Active Directory

Cancel

Invite

**Note:**  
User already has an ID, Role and License.

**Note:** if the SA already has one of the options it will not be available to create a duplicate Auth type.

Are you sure you want to send this invitation?

Cancel

Yes

3. Susan Coal

Edit User Details

Susan XYZco!

5678-FGTR-6677

Marketing

Cancel

Save and go back

**Note:** On "Save and go back" the user will see a prompt to reset user password. This is a necessary step.  
If the user clicks reset password - it will send the user an automated reset password email and take the SuperAdmin back to Right Panel with edit mode closed. Clicking cancel on prompt will close the prompt.

Reset Password?

Cancel

Reset has been sent