



PETAL

User Training Manual

LLPT 1.6 – User Management

CONTENTS

- **User Management**
- **User Preferences**

USER MANAGEMENT

Navigation: Setup -> Admin-> User Management

Home / Setup / Admin

User Management System Integration System Notifications

User Management [DOWNLOAD](#) [+ ADD USER](#)

USERNAME	FIRST NAME	LAST NAME	EMAIL	VMI BUYER	STATUS
Abcuser	AbcUser	AbcUser	Abcuser@Gmail.Com	✗	Active
Ustertest	User	Test	Ustertest@Gmail.Com	✗	Active
Roletest	ROle	Test	Roletest@Mail.Com	✗	Active
Clmadm6	Clmadm6	Claim	Clmadm6@Gmail.Com	✓	InActive
Clmcod6	Clmcod6	Claim	Clmcod6@Gmail.Com	✓	InActive
Claim003	Claim	001	Claim03@Gmail.Com	✗	Active
Testrole266	Test	D	Test156@Gmail.Com	✓	InActive
Testrole262	Test	D	Test152@Gmail.Com	✓	InActive
Testrole261	Test	D	Test151@Gmail.Com	✓	InActive
Customer002	Test	D	Customer002@Gmail.Com	✓	Active
Claim002	Claim2	002	Claim002@Gmail.Com	✗	Active
Claim001	Claim	001	Claim001@Gmail.Com	✗	Active
Customer001	Customer	001	Customer001@Gmail.Com	✗	Active
Bvhgk	Hhhjhjhjhj	Kjhjhjhjhj	Hg@Mail.Com	✗	Active
HHJHJDHD	GHHH3456	HJHHYTYUYU	GFFGGGHHGGH@MAIL.COM	✗	InActive

- User Management function contains the list of internal application users under a client
- Data can be sorted, filtered and downloaded into excel template.
- Column order can be re-arranged

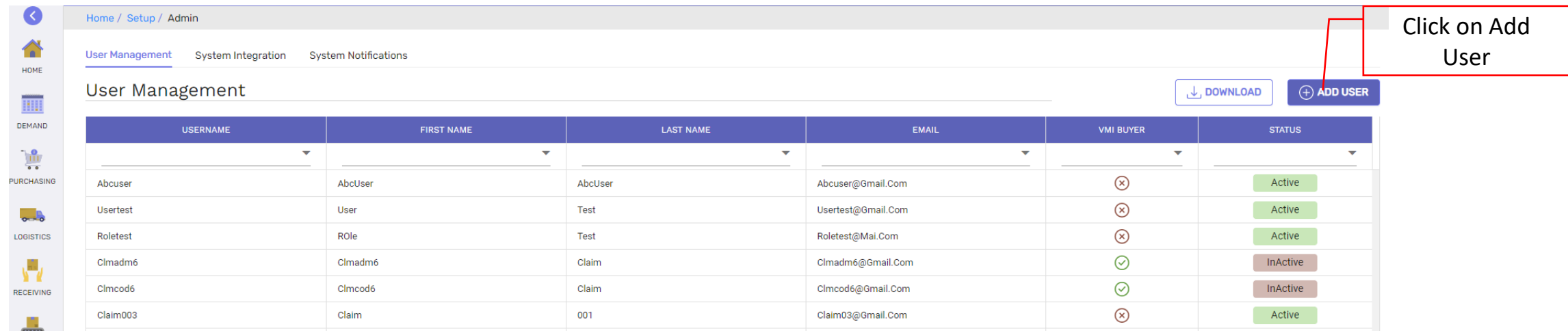
USER MANAGEMENT

How to define a new user?

All the users created in Everest platform will be stored and integrated with application via Key cloak integration. Users can be onboarded in two ways, i.e.

- LDAP integration – List of active LDAP users need to be provided by the client so that the list can be integrated into key cloak application and further integrated into Everest.
- Manual user creation – User log in credentials and password will be defined manually by the system administrator

Manual User creation:



Home / Setup / Admin

User Management System Integration System Notifications

User Management

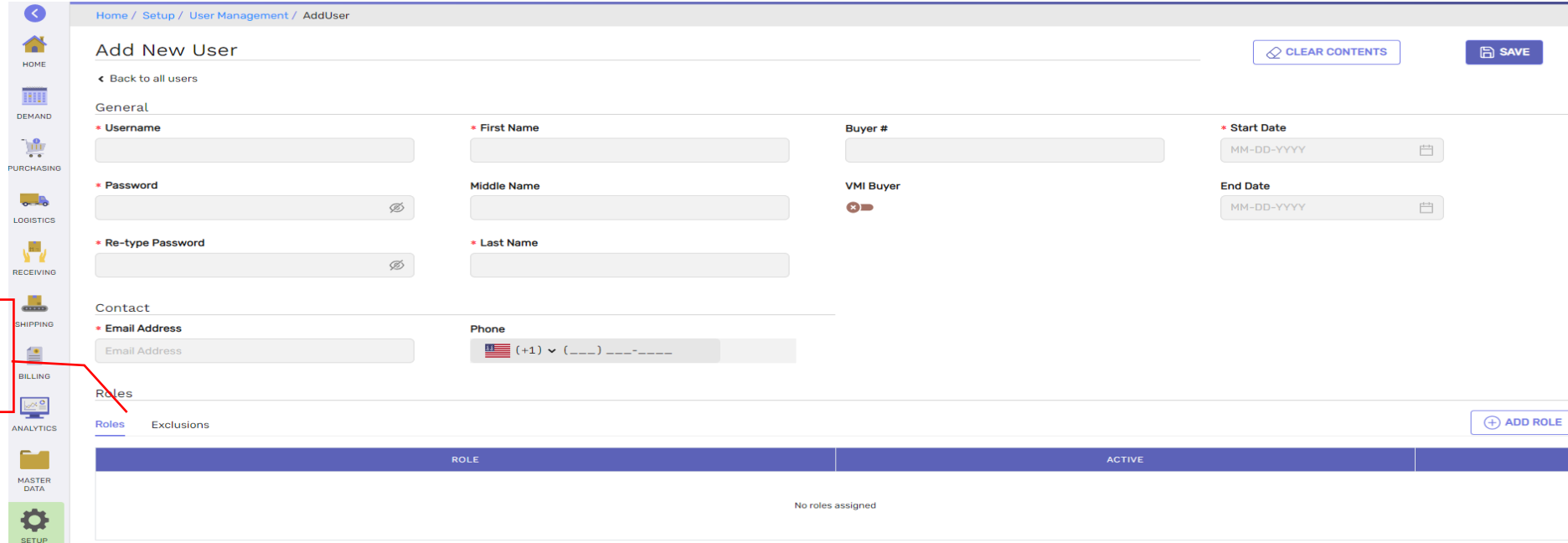
DOWNLOAD ADD USER

USERNAME	FIRST NAME	LAST NAME	EMAIL	VMI BUYER	STATUS
Abcuser	AbcUser	AbcUser	Abcuser@Gmail.Com	×	Active
Usertest	User	Test	Usertest@Gmail.Com	×	Active
Roletest	ROle	Test	Roletest@Mai.Com	×	Active
Clmadm6	Clmadm6	Claim	Clmadm6@Gmail.Com	✓	InActive
Clmcod6	Clmcod6	Claim	Clmcod6@Gmail.Com	✓	InActive
Claim003	Claim	001	Claim03@Gmail.Com	×	Active

Click on Add User

USER MANAGEMENT

User Creation:



Home / Setup / User Management / AddUser

Add New User

[Back to all users](#)

[CLEAR CONTENTS](#) [SAVE](#)

General

* Username

* Password

* Re-type Password

* First Name

Middle Name

* Last Name

Buyer #

VMI Buyer ☐

* Start Date

End Date

Contact

* Email Address

Phone

Roles

[Roles](#) [Exclusions](#) [+ ADD ROLE](#)

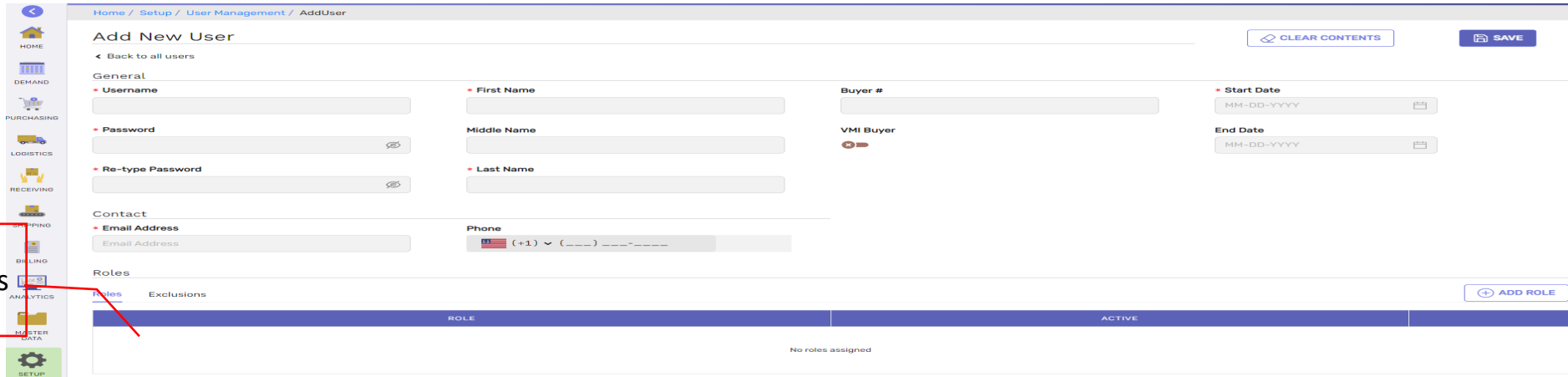
ROLE	ACTIVE
No roles assigned	

At least
one role is
required

- All mandatory fields are marked with (*) those require user input
- Click on 'Add Role' to add role to the user.
- List of roles are limited based on the client profile
- Exclusions tab provided to limit the functionalities under a specific role
- Once user is created and saved, confirmation message will be displayed

USER MANAGEMENT

LDAP Integrated User:



At least one role is required

Home / Setup / User Management / AddUser

Add New User

← Back to all users

General

• Username

• Password

• Re-type Password

• First Name

Middle Name

• Last Name

Buyer #

VMI Buyer ☐

• Start Date

End Date

Contact

• Email Address

Phone

Roles

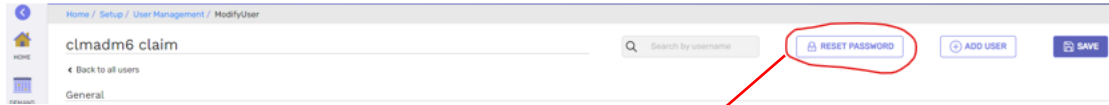
Roles Exclusions

ROLE	ACTIVE
No roles assigned	

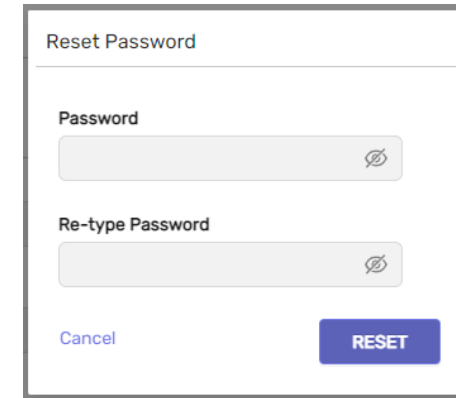
- Once the username is entered and same is available in Key Cloak based on LDAP entry then system prompts message whether to populate the same in PETAL.
- LDAP user profile do not have password reset option in petal application as it automatically consider the password from SSO credentials
- Click on 'Add Role' to add role to the user.
- List of roles are limited based on the client profile
- Exclusions tab provided to limit the functionalities under a specific role
- Once user is created and saved, confirmation message will be displayed

USER MANAGEMENT

How to reset Password?



Click on Reset
password

A modal dialog box titled 'Reset Password'. It contains two text input fields: 'Password' and 'Re-type Password'. Each field has a toggle icon (an eye with a slash) to the right, indicating password visibility. At the bottom left is a 'Cancel' link, and at the bottom right is a blue 'RESET' button.

- Search user and click on password reset
- Password reset window opens
- Enter and reenter the password and click on Reset.
- Password will be reset and confirmation message comes on screen

USER MANAGEMENT

How to Exclude functions from the role?

Roles

Roles [Exclusions](#)

ROLE		FUNCTIONS	EXCLUSIONS
System Admin			
Billing Admin			

- Click on exclusions tab under a user record
- All roles assigned to the user are displayed
- Click on a role name, which populates the functions under that role

Roles

Roles [Exclusions](#)

ROLE		FUNCTIONS	EXCLUSIONS
System Admin		→ Run Reports	No exclusions
Billing Admin		→ Generate Billing On Customer PO	
		→ Receive Notifications	
		→ Review Invoice Status	
		→ Review Claim Notifications	

- Select the function that needs to be excluded for the users in the assigned role, so that the function will move into exclusions block to the right

Thank You