Managing Users

The **User Management** screen of the XYZ application allows you to perform various administrative operations, e.g., maintaining user profiles and assigning users to different roles with necessary system actions.

Navigation: Administration > Security > User Management

Security: Only the administrative users having the **User Master** role with **View User** or **Update User** system action can access the **User Management** screen.

Related Topics:
- User Management Fields
- Search User
- Modify User
- Create User
- Delete User

Search User

Authorization:

*You should have the **User Master** administrative role with **View User** or **Update User** system action to search user profile.*

Procedure:

1. From the menu, select **Administration > Security > User Management** to access the **User Management** screen.
2. In the **Search User** section, enter appropriate search criteria and click **SEARCH** to retrieve the user record.
3. In the **Users** section, view the user record(s).

Related Topics:
- User Management Fields

Create User

Authorization:

*You should have the **User Master** administrative role and **Update User** system action to create user profile.*

Procedure:

1. From the menu, select **Administration > Security > User Management** to access the **User Management** screen.
2. Click **CREATE PROFILE**.
3. In the **Create User** screen, enter necessary information.
4. Click **SAVE** to save the changes or **CANCEL** to return to the **User Management** screen.

Related Topics:
- User Management Fields

Modify User

Authorization:

*You should have the **User Master** administrative role and **Update User** system action to update user profile.*

Procedure:

1. From the menu, select **Administration > Security > User Management** to access the **User Management** screen.
2. In the **Search User** section, enter appropriate search criteria and click **SEARCH** to retrieve the user record.
3. In the **Users** section, select the check box adjacent to the user record you want to update.
4. Click **EDIT PROFILE**.
5. In the **Modify User** screen, make necessary changes in the user profile.
6. Click **SAVE** to save the changes or **CANCEL** to return to the **User Management** screen.

   Related Topics:
   - [User Management Fields](#)

Delete User

Authorization:

*You should have the **User Master** administrative role and **Update User** system action to delete user profile.*

Procedure:

1. From the menu, select **Administration > Security > User Management** to access the **User Management** screen.
2. In the **Search User** section, enter appropriate search criteria and click **SEARCH** to retrieve the user record.
3. In the **Users** section, select the check box adjacent to the user record you want to delete.
4. Click **DELETE PROFILE**.
5. In the confirmation message window, click **YES** to delete the user or **NO** to continue with the same session.

   Related Topics:
   - [User Management Fields](#)

User Management Fields

The fields, links, and buttons available on the **User Management** screen are described below:

Fields & Buttons	Description
Search User section	
User ID	Text field to search user by the system-generated eight-character identity code. The User ID contains only the alphabets (A to Z) and entry in this field is not case sensitive. • If you know the User ID: Enter the identity code of the user. • If you don't remember the User ID: Enter at least two characters and use the auto-complete feature. As you go on entering the characters, you can view the list of matching User IDs. Select an appropriate User ID from the list.
First Name	Text field to search users by their first name.
Last Name	Text field to search users by their last name.
Inactive	Select the check box to search users who are inactive for more than 15 days.

Fields & Buttons	Description
CLEAR	Button to clear all the search criteria.
SEARCH	Button to retrieve records in the *Users* section based on the search criteria.
Users section	
Select	Check box to select a user record to perform different operations, such as sending notification, updating basic information or deleting user.
User ID	Eight-character unique identity code of the user.
Name	Name of the user.
Last Log	The date and time the user last accessed XYZ application.
CREATE PROFILE	Button to access the **Create User** screen to create a new user profile.
EDIT PROFILE	Button to access the **Modify User** screen to update an existing user profile.
DELETE	Button to delete selected user. Clicking this button, system displays a confirmation message. In the message window, you need to click **YES** or **NO**.