



User/Group Creation Guide

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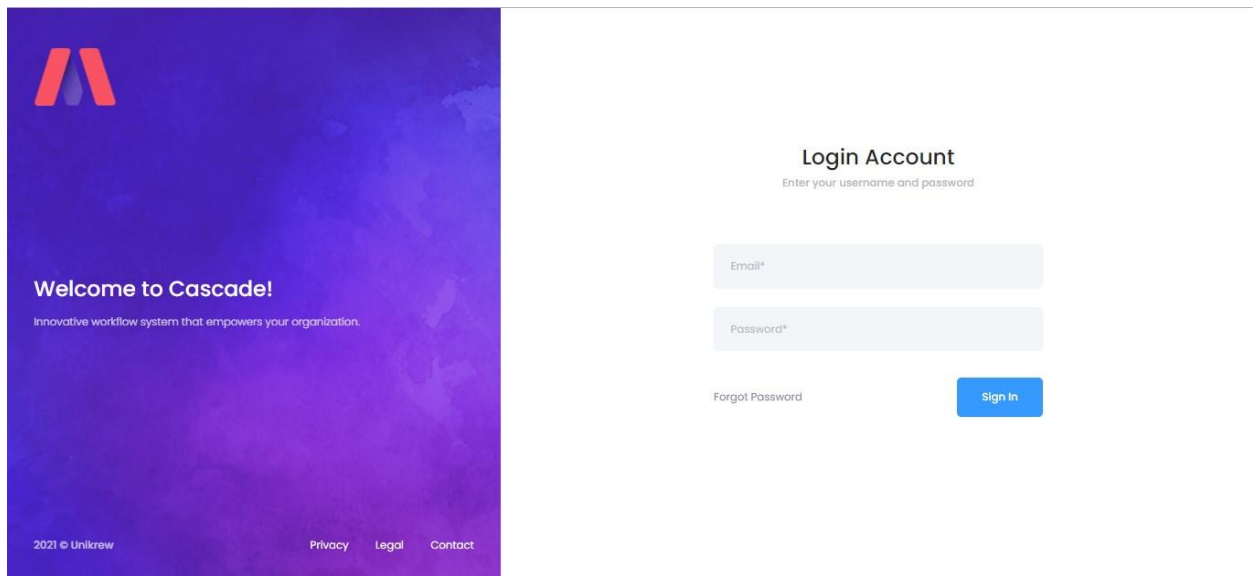
Groups..... 3

Users 10

Groups

Maker

1. Login Page. Log in with your credentials to proceed.



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Login Account

Enter your username and password

Email*

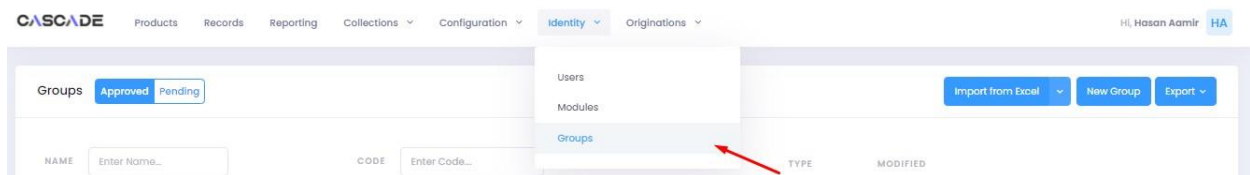
Password*

Forgot Password

Sign In

2. Click on the 'identity' tab then on 'Groups'.

Note: Modules and tabs may vary according to the rights assigned to the user.



CASCADE

Products Records Reporting Collections Configuration Identity Originations

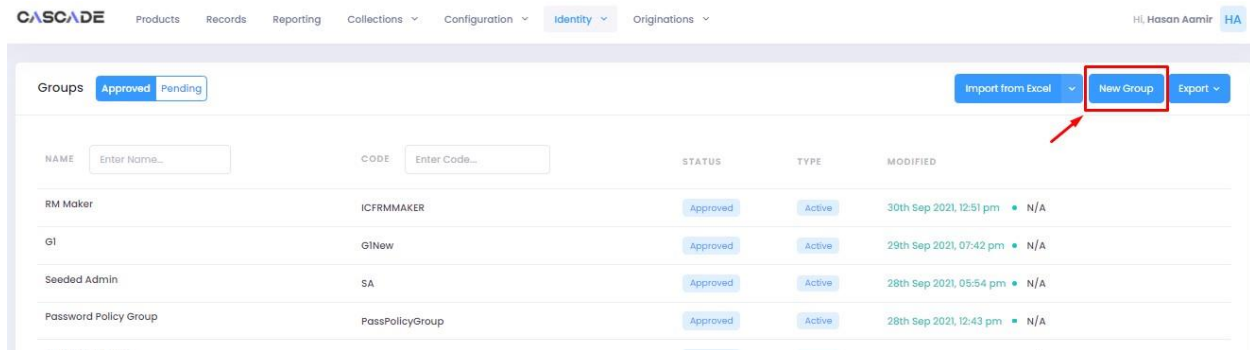
Hi, Hasan Aamir HA

Groups Approved Pending

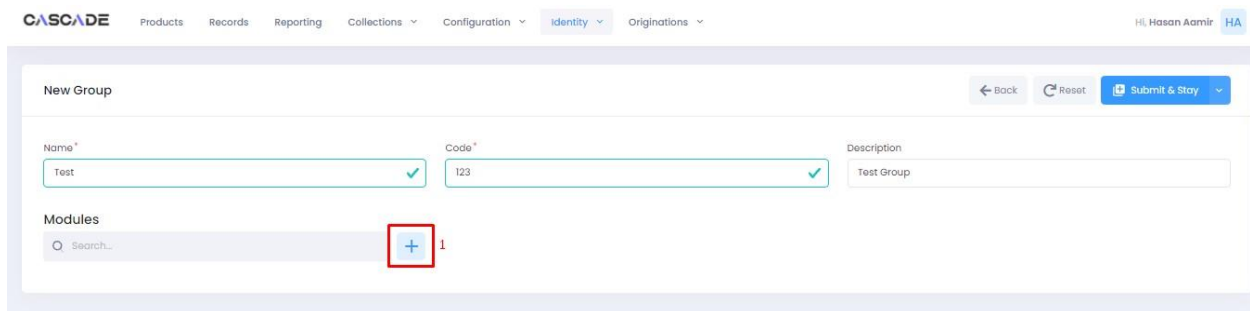
Import from Excel New Group Export

NAME Enter Name... CODE Enter Code... TYPE MODIFIED

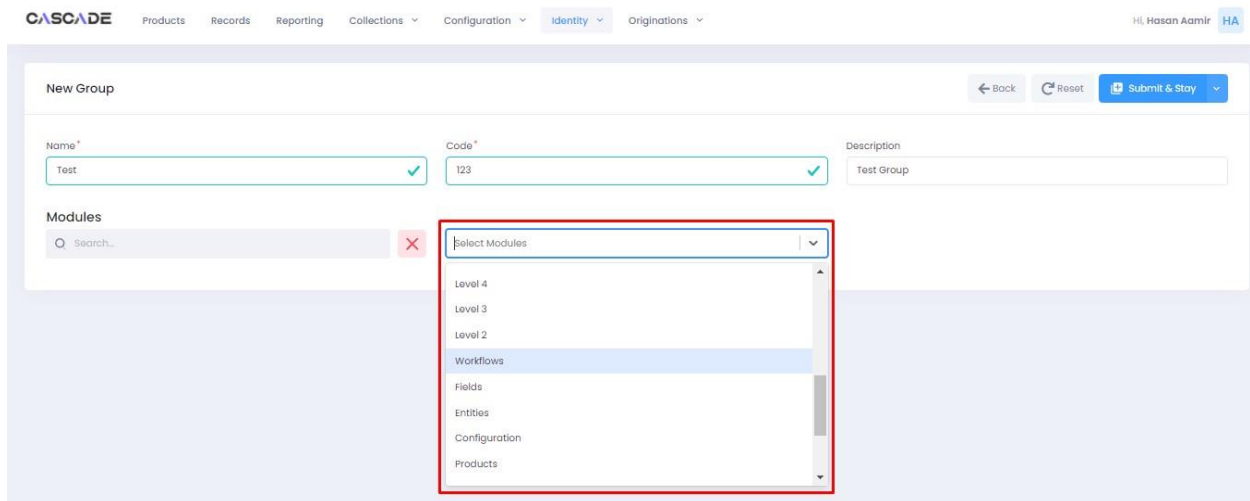
3. Click on 'new group' to create a new group.



4. Fill all the required fields, then click on the 'add modules' (1) button to select modules from a drop down menu.



5. After you select a module, you will further be able to select the rights to assign relevant to the selected module.



New Group ← Back ↻

Name* ✓ Code* ✓ Description

Modules ✕

Workflows ✕

Create ✕ Update ✕ View ✕
Delete ✕ Checker ✕ Import ✕

Select All

ICF001

DateTesting1

SBF

TESTSCOREPRODUCT

see all

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6. After you have selected a module, you can add more modules by following the same procedure. Once done, click on 'submit & stay' to save and stay on the page, or click on 'submit' to submit and leave the page.

CASCADE Products Records Reporting Collections Configuration Identity Originations Hi, Hasan Aamir HA

New Group ← Back ↻ Submit & Stay Submit

Name* ✓ Code* ✓ Description

Modules ✕

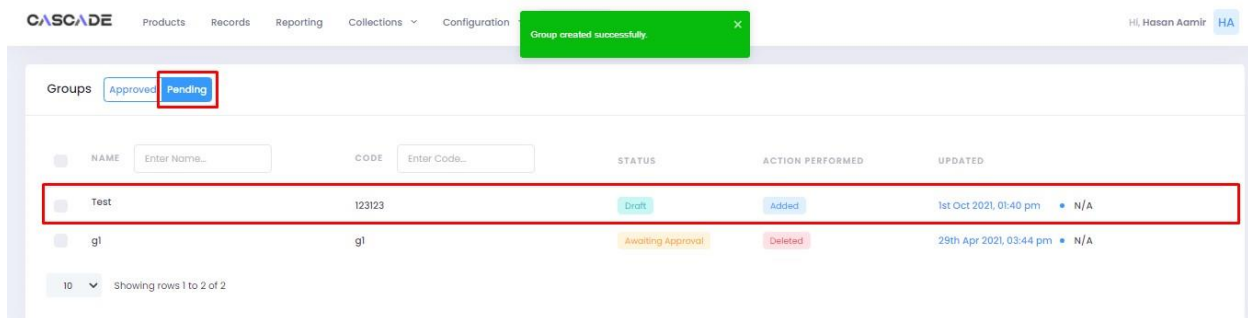
Workflows ✕

Create ✕ Update ✕ View ✕
Delete ✕ Checker ✕ Import ✕

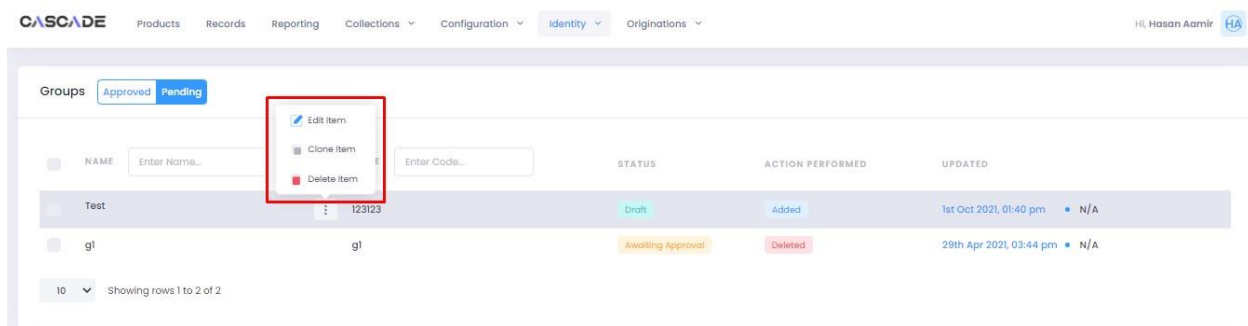
ICF001 ✕

RR003 ✕

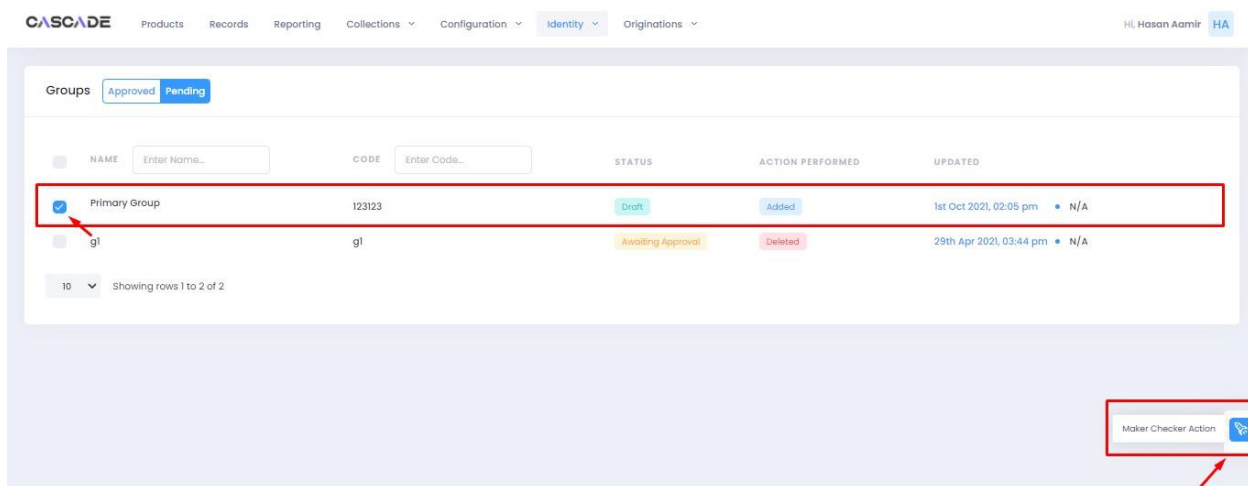
7. Your newly created group will now show under the 'pending' tab.



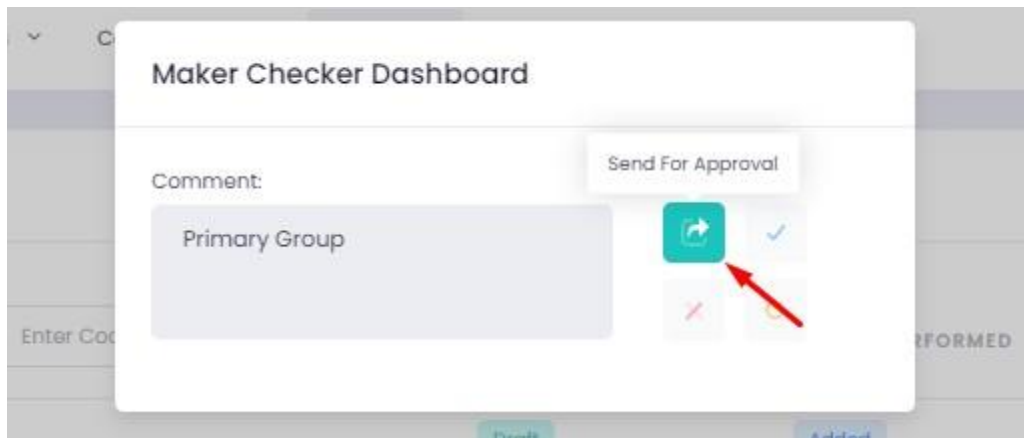
8. If you want to make any changes to the group, you can click on 'edit' to do so. You can also duplicate the group by clicking on 'clone item' or delete it by clicking on 'delete item'.



9. After you are done with making all changes, select the group by ticking the check box then click on the 'maker checker action' button.



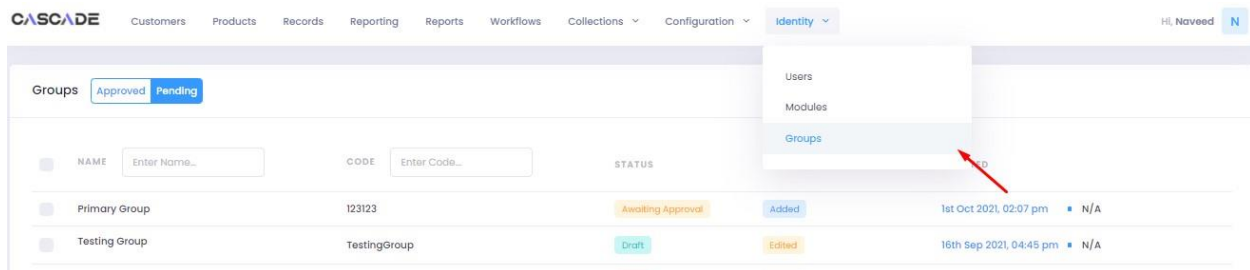
10. Leave comments then click on 'send for approval'.



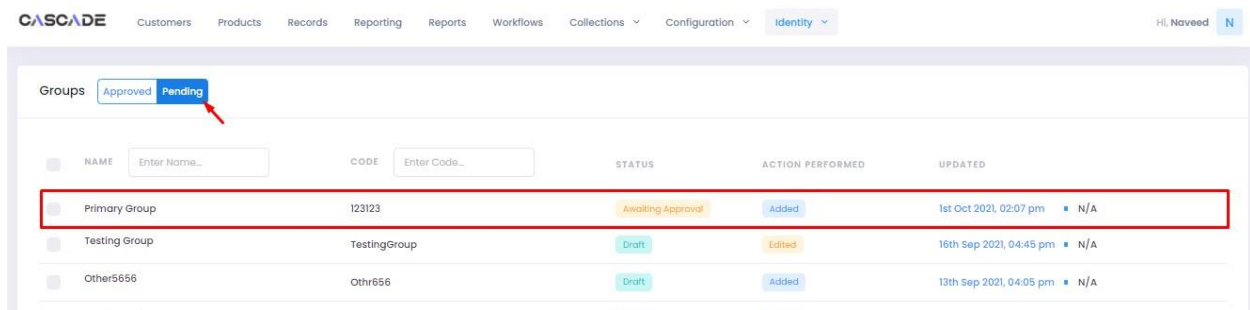
Checker

1. From the checker account, click on the 'identity' tab then on 'Groups'.

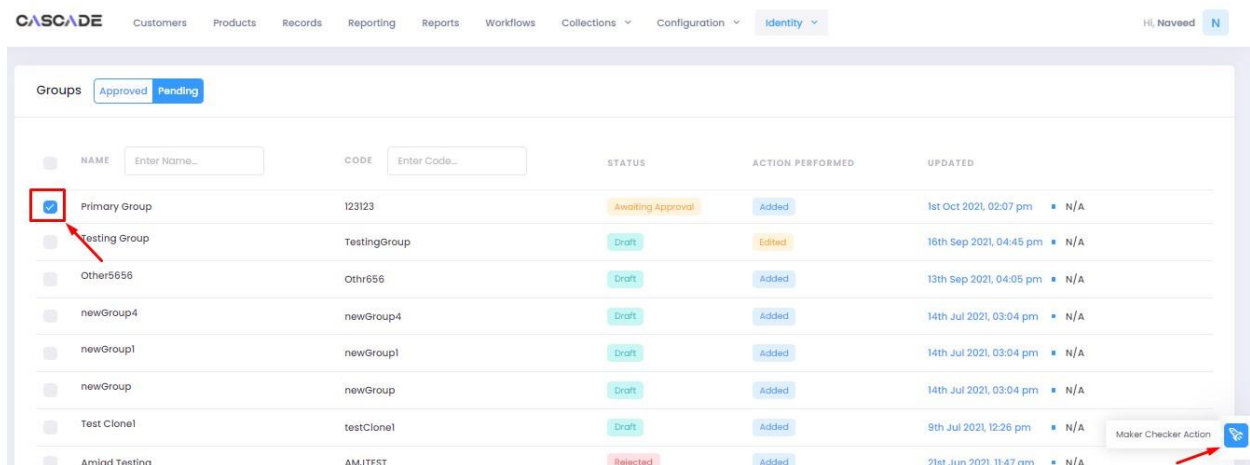
Note: Modules and tabs may vary according to the rights assigned to the user.



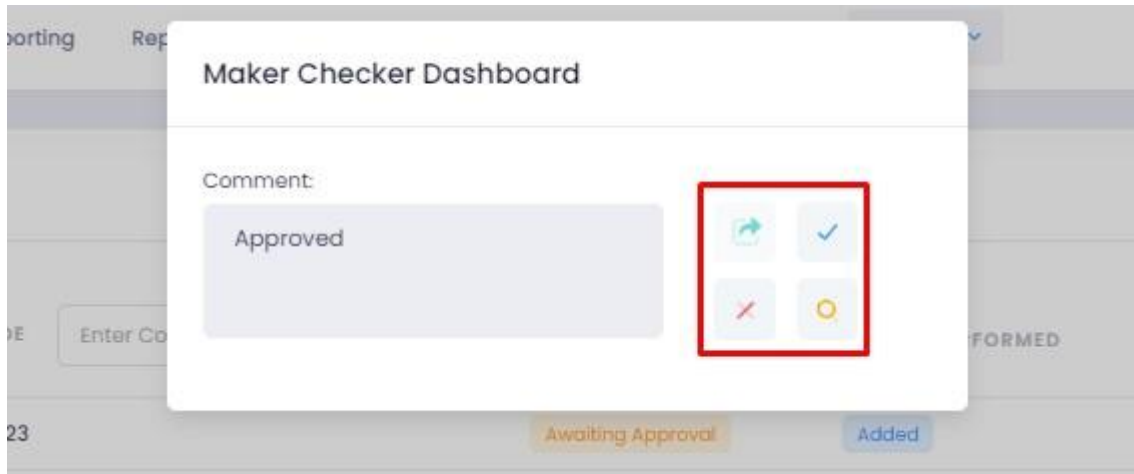
2. Then click on 'pending'. Here you will see the groups that require approval including the one that was just created.



3. Select a group by ticking the check box, then click on the 'maker checker action' button.



4. Leave a comment, then click on 'approve' to approve the group. You can also click on 'reject' to reject the group or click on 'send for review' to send it to a third person for further review.



5. The newly created group will now show as approved under the 'approved' tab.

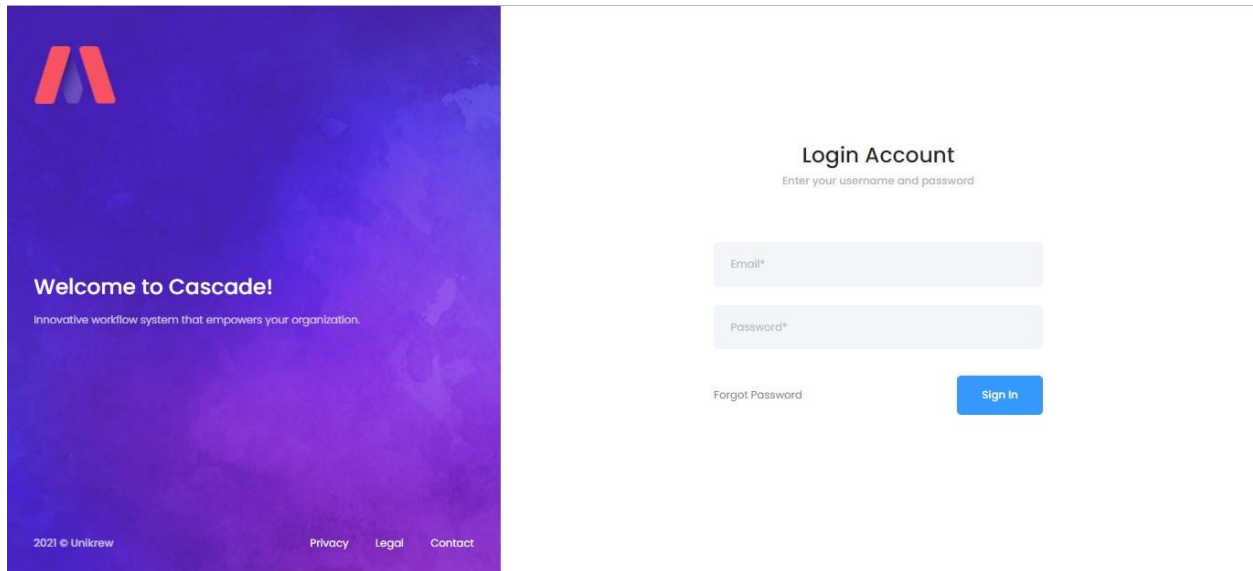
The screenshot shows the CASCADE Identity management interface. At the top, there's a navigation bar with 'CASCADE' logo and various menu items. Below it, a 'Groups' section has two tabs: 'Approved' (selected) and 'Pending'. A table lists groups with columns: NAME, CODE, STATUS, TYPE, and MODIFIED. The first row, 'Primary Group', is highlighted with a red box. Below it are 'RM Maker' and 'GI' groups.

NAME	CODE	STATUS	TYPE	MODIFIED
Primary Group	123123	Approved	Active	1st Oct 2021, 02:39 pm • N/A
RM Maker	ICFRMAKER	Approved	Active	30th Sep 2021, 12:51 pm • N/A
GI	GINew	Approved	Active	29th Sep 2021, 07:42 pm • N/A

Users

Maker

1. Login Page. Log in with your credentials to proceed.



Welcome to Cascade!
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Login Account
Enter your username and password

Email*

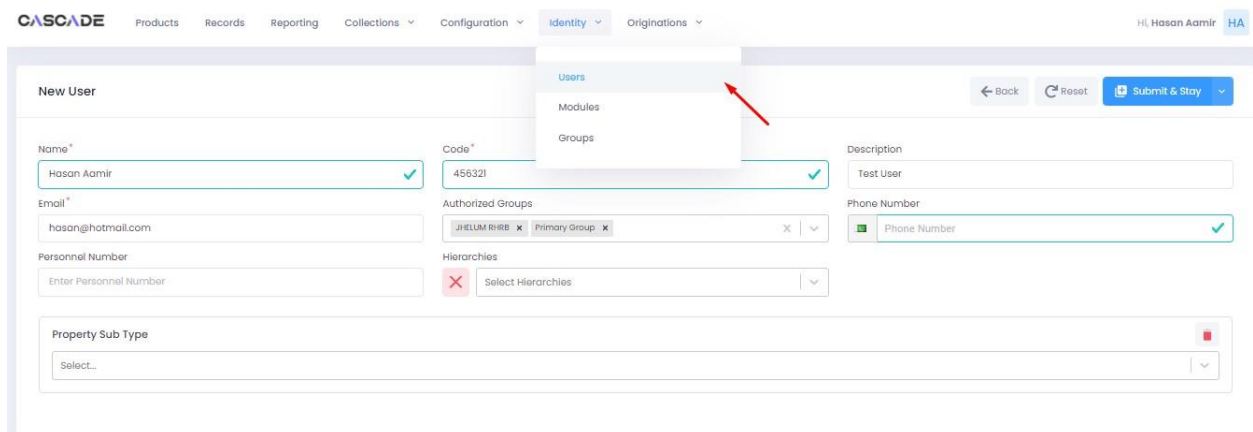
Password*

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2. Click on the 'identity' tab then on 'Users'.

Note: Modules and tabs may vary according to the rights assigned to the user.



CASCADE Products Records Reporting Collections Configuration Identity Originations Hi, Hasan Amir HA

New User

Name* Hasan Amir ✓ Code* 456321 ✓ Description Test User

Email* hasan@hotmail.com Authorized Groups JHEUM RHEB X Primary Group X X ✓ Phone Number Phone Number ✓

Personnel Number Enter Personnel Number Hierarchies Select Hierarchies X

Property Sub Type Select...

3. Click on 'new user' to create a new user.

The screenshot shows the 'Users' management interface in Cascade Identity Management. At the top, there are tabs for 'Approved' and 'Pending'. On the right, there are buttons for 'Import from Excel', 'New User' (highlighted with a red box and a red arrow), and 'Export'. Below these is a table with columns: NAME, CODE, EMAIL ADDRESS, PHONE #, STATUS, TYPE, and MODIFIED. The table contains five rows of user data.

NAME	CODE	EMAIL ADDRESS	PHONE #	STATUS	TYPE	MODIFIED
Ibrahim Khan	SQA003	Ibrahim.khan@unikrew.com	N/A	Approved	Active	4th Oct 2021, 04:55 pm • test_SQA_1
test_SQA_1	test_SQA_1	test.lusr01@gmail.com	923312182258	Approved	Active	4th Oct 2021, 04:55 pm • test_SQA_1
Maira Khan	Mairakhan	maira.khan@hbl.com	N/A	Approved	Active	4th Oct 2021, 10:02 am • Ibrahim Khan
Naseer Hussain Khan	NaseerHussainKhan	Naseer.khan4@hbl.com	N/A	Approved	Active	4th Oct 2021, 10:02 am • Ibrahim Khan

4. Fill all the required fields, then select groups under 'authorized groups' from a drop down menu.

Note: With authorized groups you can assign different rights to a user which can include modules, tabs, etc.

The screenshot shows the 'New User' form in Cascade Identity Management. The form has fields for Name, Code, Description, Email, Personnel Number, and Phone Number. The 'Authorized Groups' dropdown menu is open, showing a list of groups. The 'Phone Number' field is marked with a green checkmark.

Name: Hasan
Code: 123456789
Description: Enter Description
Email: hasan@hotmail.com
Personnel Number: Enter Personnel Number
Phone Number: +92

Authorized Groups:

- Authorized Groups
- SBA Disbursement
- RM Group
- Primary Group
- RM Maker
- GI
- Seeded Admin
- Password Policy Group
- Test Group Junni
- Workflow, Testing

5. Then select 'hierarchies' by clicking on the 'add hierarchies' button.

Note: Hierarchies allow you to assign regions to a user

The screenshot shows the 'New User' form with the following fields: Name (Hasan), Code (12345654), Description (Enter Description), Email (hasan@hotmail.com), Authorized Groups (Authorized Groups), Phone Number (+92), and Personnel Number (Enter Personnel Number). A blue button with a plus sign and the text 'Add Hierarchies' is highlighted with a red arrow.

The screenshot shows the 'New User' form with the 'Hierarchies' dropdown menu open. The dropdown menu contains the following options: 'region', 'Islamic Bank Branches Region Wise', 'Bank Branches Region Wise', 'Region', and 'Region'. A red box highlights the dropdown menu.

6. After selecting a hierarchy, you can select options from a drop down menu pertaining to the hierarchy selected.

The screenshot shows the 'New User' form with the 'Region' dropdown menu open. The dropdown menu contains the following options: 'QUETTA', 'HYDERABAD', 'MULTAN', 'Select All', 'Bahawalpur', 'Peshawar', 'Sukkur', 'Karachi', 'Sahiwal', and 'Sargodha'. A red box highlights the dropdown menu.

7. Once you have filled all the fields, click on 'submit & stay' to save and stay on the page, or click on 'submit' to submit and leave the page.

The screenshot shows the 'New User' form in the CASCADE application. The form includes the following fields and options:

- Name:** Hasan Aamir
- Code:** 735481556
- Description:** Enter Description
- Email:** hasan@hotmail.com
- Authorized Groups:** RM Group
- Phone Number:** +92
- Personnel Number:** Enter Personnel Number
- Hierarchies:** Select Hierarchies (with a red 'X' icon)
- Region:** QUETTA, HYDERABAD, MULTAN

At the top right of the form, there are three buttons: 'Back', 'Reset', and 'Submit & Stay'. The 'Submit & Stay' button is highlighted with a red box, and a red arrow points to it. Below the 'Submit & Stay' button is a 'Submit' button.

8. Your newly created user will now show under the 'pending' tab.

The screenshot shows the 'Users' table in the CASCADE application. The table has the following columns: NAME, CODE, EMAIL ADDRESS, PHONE #, STATUS, ACTION PERFORMED, and UPDATED. The 'Draft' status is highlighted with a red box.

NAME	CODE	EMAIL ADDRESS	PHONE #	STATUS	ACTION PERFORMED	UPDATED
Hasan Aamir	735481556	hasan@hotmail.com	N/A	Draft	Added	5th Oct 2021, 01:02 pm
userTesting_4	userTesting4	testinguser2@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am
userTesting5	userTesting5	myuser5@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am

9. If you want to make any changes to the user, you can click on 'edit' to do so. You can also duplicate the user by clicking on 'clone item' or delete it by clicking on 'delete item'.

The screenshot shows the 'Users' table in the CASCADE application. The table has the following columns: NAME, CODE, EMAIL ADDRESS, PHONE #, STATUS, ACTION PERFORMED, and UPDATED. The 'Edit Item' button is highlighted with a red box.

NAME	CODE	EMAIL ADDRESS	PHONE #	STATUS	ACTION PERFORMED	UPDATED
Hasan Aamir	735481556	hasan@hotmail.com	N/A	Draft	Added	5th Oct 2021, 01:02 pm
userTesting_4	userTesting4	testinguser2@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am
userTesting5	userTesting5	myuser5@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am

10. After you are done with making all changes, select the user by ticking the check box then click on the 'maker checker action' button.

CASCADE Products Records Reporting Collections Configuration Identity Originations HI, Hasan Aamir HA

Users Approved Pending

	NAME Enter Name...	CODE Enter Code...	EMAIL ADDRESS Enter Email Address...	PHONE # Enter Phone #...	STATUS	ACTION PERFORMED	UPDATED	
<input checked="" type="checkbox"/>	Hasan Aamir	735481556	hasan@hotmail.com	N/A	Draft	Added	5th Oct 2021, 01:02 pm	Hasan Aamir
<input type="checkbox"/>	userTesting_4	userTesting4	testinguser2@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am	Ifrah Khan
<input type="checkbox"/>	userTesting5	userTesting5	myuser5@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am	Ifrah Khan
<input type="checkbox"/>	userTesting7	userTesting7	myuser7@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am	Ifrah Khan
<input type="checkbox"/>	userTesting3	userTesting3	myuser3@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am	Ifrah Khan
<input type="checkbox"/>	userTesting_1	userTesting1	testinguser1@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am	Ifrah Khan
<input type="checkbox"/>	userTesting_8	userTesting8	myuser8@gmail.com	N/A	Awaiting Approval	Added	5th Oct 2021, 09:05 am	Ifrah Khan





Maker Checker Action Ifrah Khan

11. Leave comments then click on 'send for approval'.

Maker Checker Dashboard

Comment:

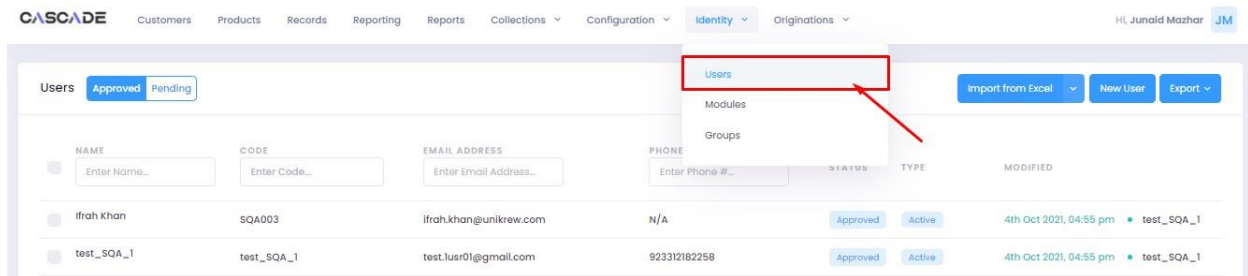
User

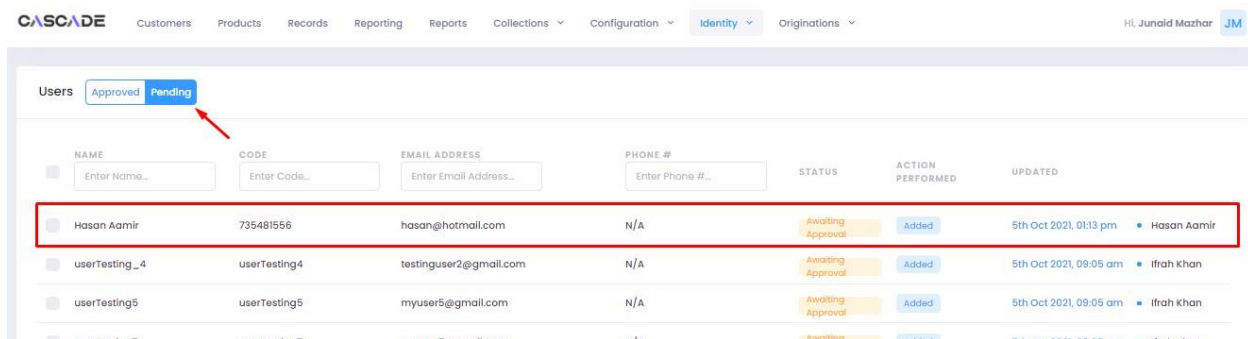
Checker

1. From the checker account, click on the 'identity' tab then on 'Users'.

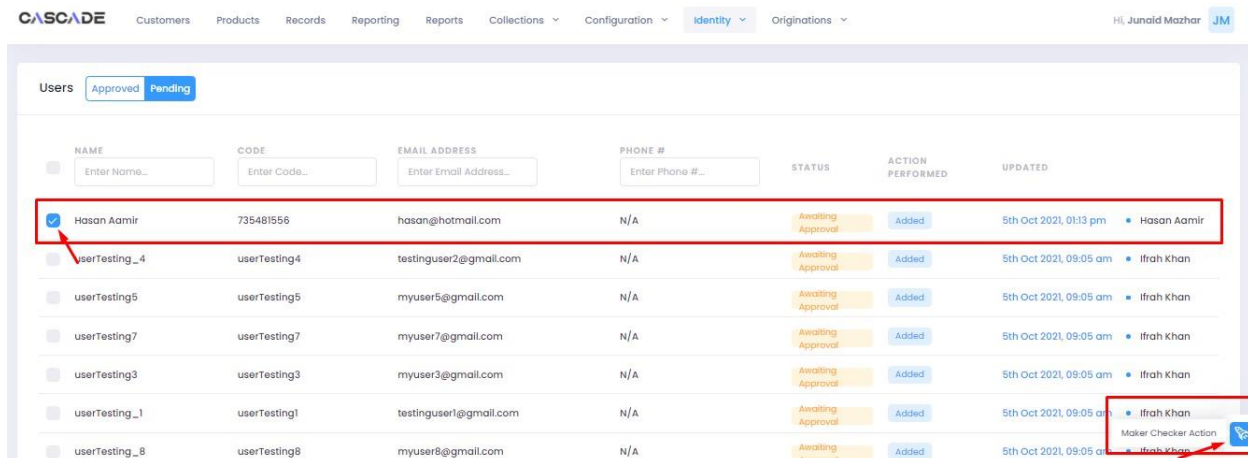
Note: Modules and tabs may vary according to the rights assigned to the user.



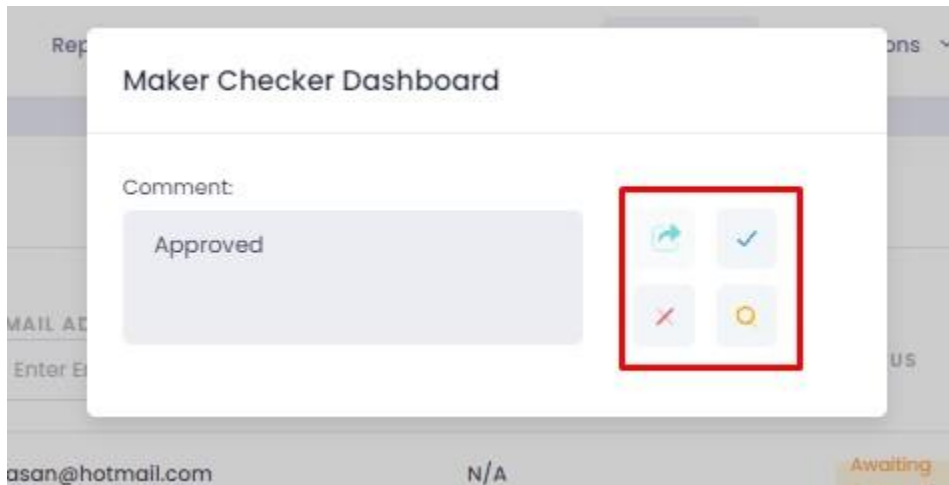
2. Then click on 'pending'. Here you will see the users that require approval including the one that was just created.



3. Select a user by ticking the check box, then click on the 'maker checker action' button.

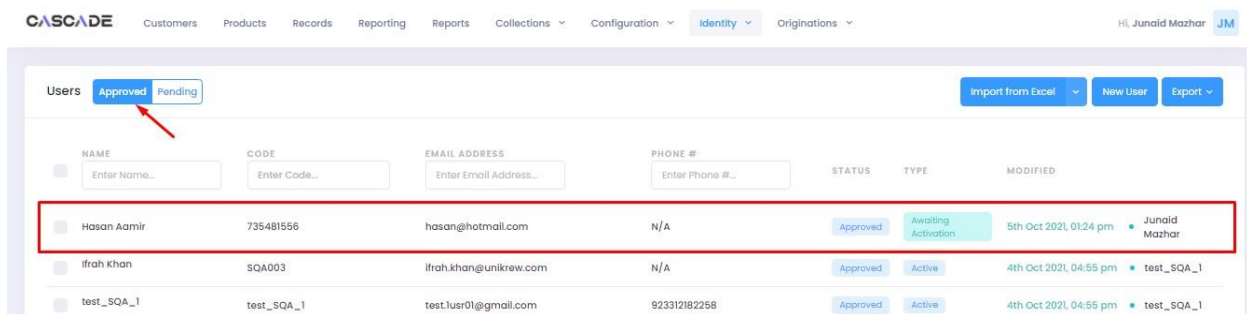


4. Leave a comment, then click on 'approve' to approve the user. You can also click on 'reject' to reject the user or click on 'send for review' to send it to a third person for further review.



The image shows a 'Maker Checker Dashboard' modal. It has a 'Comment:' label and a text input field containing the word 'Approved'. To the right of the input field is a 2x2 grid of icons: a green circular arrow, a blue checkmark, a red 'X', and a yellow magnifying glass. This grid is highlighted with a red rectangular border. The background of the dashboard is partially visible, showing fields for 'MAIL ADDRESS' and 'PHONE #', and a status 'Awaiting'.

5. The newly created user will now show as approved under the 'approved' tab.



The image shows the 'CASCADE' application interface. At the top, there's a navigation bar with 'CASCADE' logo and various menu items. Below it, a 'Users' section has two tabs: 'Approved' (selected) and 'Pending'. A red arrow points to the 'Approved' tab. Below the tabs is a table with columns: NAME, CODE, EMAIL ADDRESS, PHONE #, STATUS, TYPE, and MODIFIED. The first row is highlighted with a red border. The user 'Hasan Aamir' is listed with status 'Approved' and type 'Awaiting Activation'. The user 'Ifrah Khan' is listed with status 'Approved' and type 'Active'. The user 'test_SQA_1' is listed with status 'Approved' and type 'Active'.

NAME	CODE	EMAIL ADDRESS	PHONE #	STATUS	TYPE	MODIFIED
Hasan Aamir	735481556	hasan@hotmail.com	N/A	Approved	Awaiting Activation	5th Oct 2021, 01:24 pm
Ifrah Khan	SQA003	ifrah.khan@unikrew.com	N/A	Approved	Active	4th Oct 2021, 04:55 pm
test_SQA_1	test_SQA_1	test.lusr01@gmail.com	923312182258	Approved	Active	4th Oct 2021, 04:55 pm