How to: Edit a users' infomation
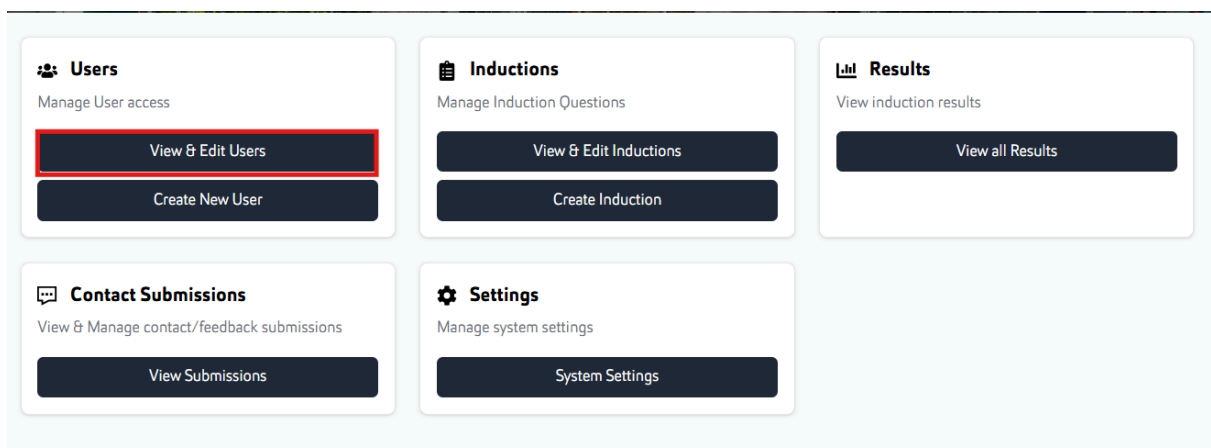
This is a guide on editing an existing users' information in the AUT Events Induction Portal.

Manager or Administrator access required

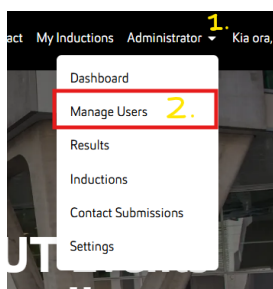Last updated by Thomas Brears on 06/05/25. V1.0

1. Navigate to the user & manage users page

Use the "View & Edit Users" button from the management dashboard on the Users card

OR

Navigate to the manage users page from the navigation dropdown

NOTE: For administrators, this dropdown text in the navigation is called Administrator, and for Managers, it is called Manager

You will now be taken to the view an manage users

2. View users page overview

All user of the portal will be displayed here

a. There is a search bar to search by the users name to filter the results.

b. There is a button to create new users

c. You can sort the table by a column, i.e. alphabetically by name, by clicking the two arrows next to the column title text.

d. Each user's row has two action buttons, one for editing their information and another for managing their induction assignments
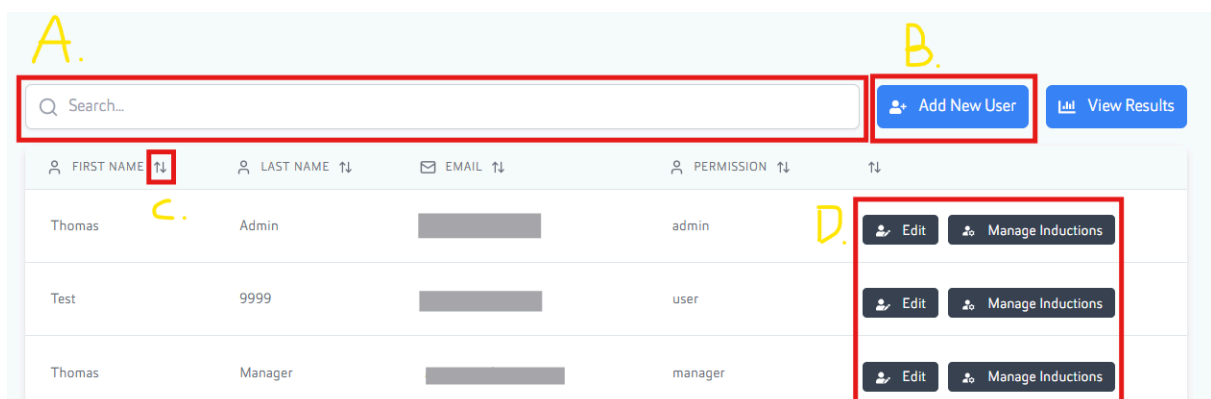
3. Click edit user

Once you locate the user you would like to edit,

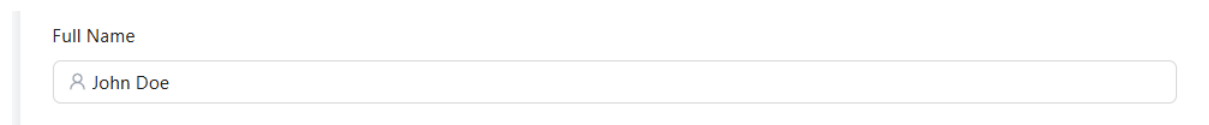Click the dark grey "Edit" button in the users row
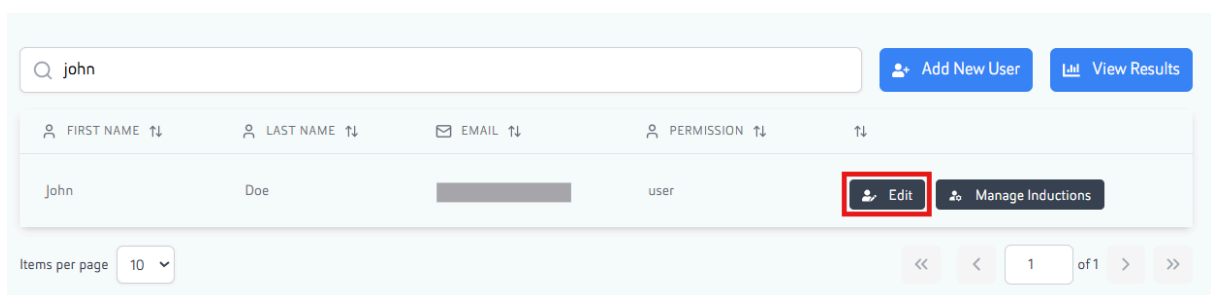
You will now be taken to the users page where you can edit one or more fields for the user

4. Edit the users' details

Click on the relevant field you would like to edit, then type in or select the information required for that field

4.1. Full name

Enter the updated users' full name (First and Last) if desired
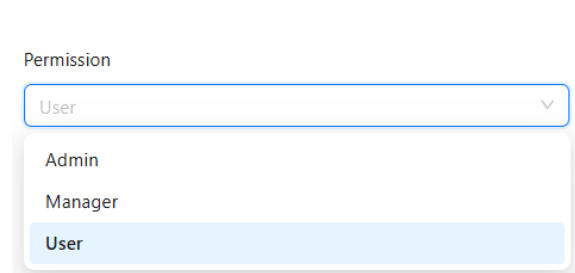
4.2. Email address

Enter the users' updated email address if desired

This email address must be unique to the user and can only be used with one account at a time.

NOTE: If the email you entered already has an account associated with it, it will inform you of this and not permit you to continue

4.3. Permission

Select the updated permission to be granted to the user from the dropdown if desired

NOTE: Admin permission is required to create a new admin account; Managers will only see user and manager as available options

4.4. Position

If you wish, please update the users position from the dropdown list

Position is the only optional field and can be left black if you no longer would like to add a position to the user

NOTE: If you wish to add, edit or remove a position, this can be done by an administrator in system settings (Check out that guide for more information)

4.5. Department

Select an updated department from the dropdown selection if desired

NOTE: If you wish to add, edit or remove a department, this can be done by an administrator in system settings (Check out that guide for more information)

4.6. Location(s)

Finally, select one or more locations from the location field if desired

To remove a selection, click the "x" next to the name in the field

NOTE: If you wish to add, edit or remove a location, this can be done by an administrator in system settings (Check out that guide for more information)

5. Save changes

Now that you have updated the information, you can save the changes to the user.

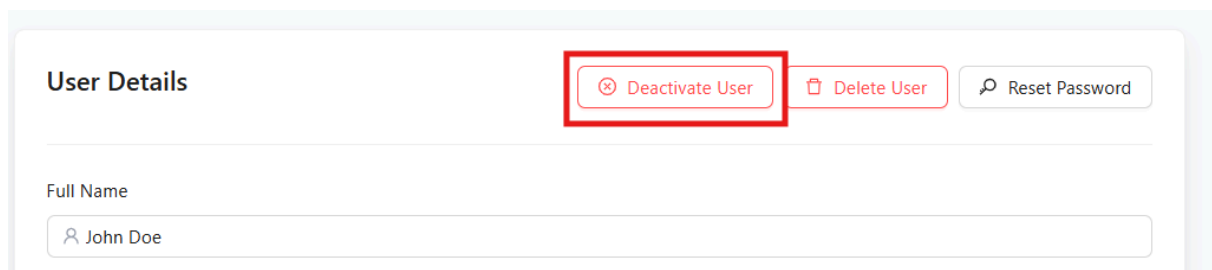Click the blue "Save changes" button

You will see a confirmation message confirming that the updated information has been saved.

6. Deactivating a user's account

For result retention, this is preferred over deleting

Click the red outlined "Deactivate User" button to deactivate and disable the user's account

Their account will be deactivated immediately and they will be prevented from logging into the system. If they are already logged in, it will take effect when their current session ends (about 1 hour from last use)
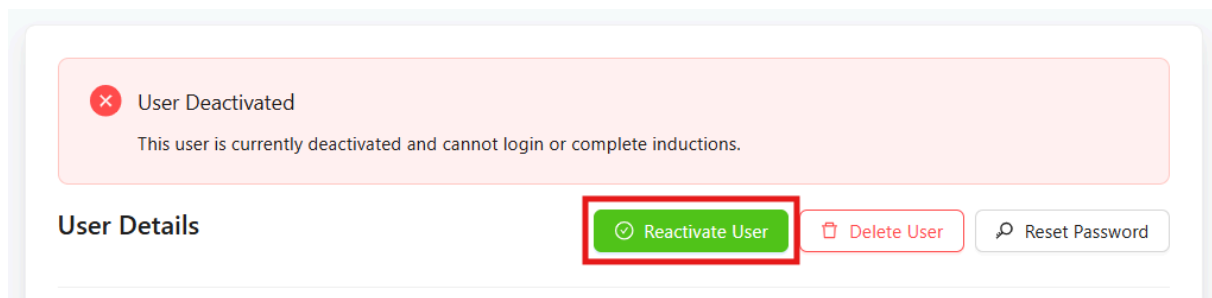

7. Reactivating a user's account

If a user's account has been deactivated, reactivating it is easy!

Click the green "Reactivate User" button.

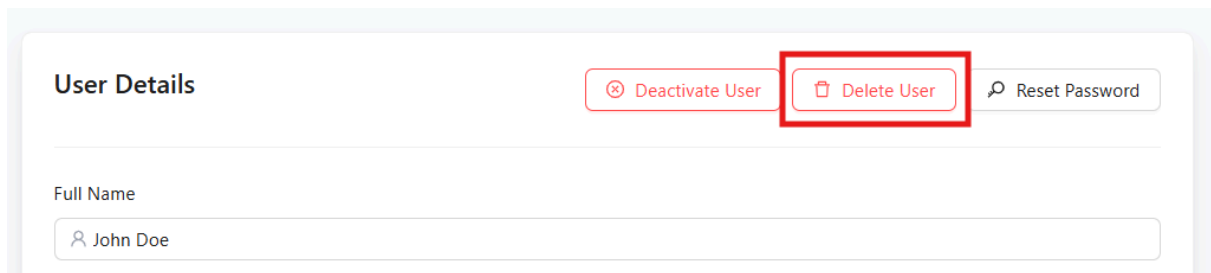Their account will be reactivated immediately and they'll be able to log in again.

8. Deleting a user's account

For result retention, deactivating is preferred over deleting

Click the red outlined "Delete User" button to permanently delete user's account

Their account will be deleted immediately and they will be prevented from logging into the system. If they are already logged in, it will take effect when

their current session ends (about 1 hour from last use)

IMPORTANT:

Deleting a user's account will also disassociate any induction results associated with them, and will be displayed in results as an unknown user

This action will be permanent and cannot be undone - Deletion is final!

9. Resetting a users account password

If the user would like to reset their account's password,

Click the black outlined "Reset Password" button

This will send the user an email with a link to set a new password - They can then follow the prompts to set their new password

You can now view and update a user; keep up the good work!