

Managing user accounts and access to functions in Integris

These steps can only be undertaken by the school's Integris Administrator

Administrators: To help ensure your user accounts are managed appropriately, periodically check the status of your user accounts to ensure accounts are **active** for **current** members of staff and that **expiry dates are not due**.

These steps cover the following:

1. Viewing list of user accounts
2. Make a user account active (to reuse the account/when account not used for 120 days)
3. Make a user account inactive when a staff member has left
4. Change the expiry date of a user account
5. Unlock a locked user account
6. Reset (change) a password for a user account
7. Change Username

Please note the following:

User accounts will automatically be made 'inactive' if they have not been used to login to Integris for **120 days or more (regardless of expiry date)**. Once a user account has been made inactive, the user cannot use it to login to Integris until the Administrator has reactivated the user account (see below).

When the user account has been re-activated, the user will have **10 days to login before the user account is made inactive again**.

User accounts cannot be deleted – they can only be made 'inactive' to prevent further use of the user account.

1. Viewing list of User Accounts

Go to **System Management > User Management** to view your user accounts.

Note: the screen **defaults to** showing only '**Active users**' only - i.e. user accounts which are currently being used.

To view **ALL** the user accounts, remove the tick from the '**Show active users only**' box

Show Active User Accounts Only

Any user account with the expiry date shaded in red indicates that the user account has expired. The user account may still be active at this point (i.e. Yes shown in the **Active** column)

■ User account will expire within 7 Days
 ■ User account has expired and is not accessible

Expiry Date	Active	Locked	Logged In	
16 Feb 2021	Yes	No	Yes	
17 Jul 2016	No	No	No	
08 Sep 2014	No	Yes	No	
..	

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2. Make a user account active

The steps below refer to using the quick access icons located in a list on the right of the screen.

It is usually the case that when a user account of a current staff member has not been used for 120 days or more, it will need to be made active again. To do this, view the user account list as in 1 above and remove the tick from the 'Show Active users only' tick box to see ALL the user accounts on the system.

In the list, you should now see the inactive user account details whereby a **No** appears in the **Active** column for the user account.

Select the user account to highlight it the list and click on the **Toggle Active** icon . Click **Yes** to the prompt. The **No** will change to **Yes** in the **Active** column.

Tick the box for **Show active users only** so that you return to viewing only the active user accounts. Check that the Expiry date is not due to expire soon and that the user account is not locked. See steps below for **Change the expiry date** and for **Unlock a user account**.

3. Make a user account inactive (when a staff member has left)

If a staff member has left, then the user account should be made inactive to prevent any attempt of the user account being used again.

Follow step 1 to view the list of user accounts.

Select the user account to highlight it the list and click on the **Toggle Active** icon . Click **Yes** to the prompt. The **Yes** will change to **No** in the **Active** column and the user account will disappear from the default 'show active only' user accounts list.

4. Change the expiry date of a user account

For any user account where the expiry date has passed (highlighted in red) or due to expire shortly within 7 days (highlighted in amber), follow step 1 to view the list of user accounts.

Select the user account in the list to highlight it and click the **Update Expiry Date** icon 

Change the Expiry date to a suitable date in the future and click **Save**.

5. Unlock a 'locked' user account

If a user is unsuccessful logging into Integris after the third attempt (either because the wrong username or more likely, the wrong password has been used), they will be locked out of the system. The user account then needs to be unlocked.

Follow step 1 to view the list of user accounts.

The user account will be listed with **Yes** showing in the **Locked** column.

Select the user account to highlight it the list and click on the **Toggle Locked** icon . Click **Yes** to the prompt. The **Yes** will change to **No** in the **Locked** column.

Note: sometimes, the lock occurs because the user is not using the right password. If you believe this is the case, it is useful to change the password at this stage so that the user is able to login after which, they can set their own password again. See **Reset password for a user account** below.

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6. Reset (change) password for a user account

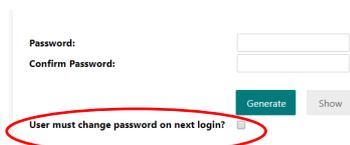
To reset (change) a password for a user account, follow step 1 to view the list of user accounts.

Select the user account to highlight it the list and click on the **Edit** icon 

On the **User** screen, enter a new password into the **Password** box – we recommend you use **Password123**

Re-enter this new password into the **Confirm Password** box

Then click the tick box for **User must change password on next login?** - this means that as soon as the user has logged into Integris using 'Password123', they will be asked to create a new password of their choosing.



Note: we recommend that you do not use *Generate* to create a new password as the password is made of random letters and characters which are hard for users to remember!

7. Change User Name

Go to Modules > Administration > Utilities > Change User Name > select the username you wish to change and click **Change User Name** button.

In the next screen, enter the username required and click OK.

Some general checks concerning user accounts:

1. **Leavers:** **As you start a new term, have any staff members left the school?** You need to mark any user account for staff that have left as '**inactive**' (*note: you are not able to delete the user account*) – see *step 3 above*

Re-starters: if any staff member who had left and is re-starting, select their user account from the list (showing ALL users) and click on the **Toggle Active** icon (answering yes to the prompt) to make the account active again. In these cases, please check that an appropriate expiry date has been allocated and that the appropriate roles are assigned (as these may need updating).

2. **Expiry dates:** from the list of active users only, click on the  heading to sort the users by expiry date until the oldest date appears at the top of the list. For any user accounts due to expire this year, please select each in turn and click **Update Expiry Dates**  icon. Change the Expiry date to a suitable date in the future and click **Save**.

3. **Check roles:** if you are planning to use additional modules or features, you need to ensure the correct roles have been assigned to users. **Select a user account from the list and check the roles assigned in the bottom right window. To add or remove roles, click on the  icon and edit accordingly.**

Please refer to the additional '**Integris _ Roles and Functions**' document for full list of roles available and an explanation of each.