

# Users

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## Section overview

**Users** is a core section that provides an overview of all registered users in the system. The section allows to **create**, **edit**, and **disable** existing users. The list of users is presented in the form of a table with the following columns:

*Screenshot: Users section*

Status	Login	Reseller	Full Name	Role
1	admin	all resellers	Administrator	Administrator
	api-client-portal	Company Name	API Client Portal	API - Client Portal
	jerasupport	all resellers	JeraSoft Support	Administrator

Column	Description
Status	User's <b>status</b> . Depending on the icon, the status can be either <b>active</b> , <b>deleted</b> or <b>blocked URL archived</b> .
Login	User's <b>account name</b>
Reseller	Name of a <b>company</b> whom this user belongs to
Full Name	<b>Mailto links</b> of users (if specified in the user's account)
Role	User's role that determines the <b>access level</b> or <b>permissions</b>

Functional **buttons/icons**, presented in the section, are as follows:

Button/Icon	Description
	Allows <b>creating</b> a new user
	Allows <b>archiving</b> a user
	Opens an <b>Advanced Search</b> drop-down menu

## Advanced Search

In the top right corner of the section above the table, an **Advanced Search** drop-down menu is located. By default, the list of clients is filtered by **Active** status. By clicking on a red downwards arrow icon, a drop-down menu with the following structure is displayed:

*Screenshot: Advanced Search drop-down menu*

Login:

Reseller: all resellers

Role:

Active: Yes

Reset

Search


Field	Description
<b>Login</b>	Specify a desired <b>user's login</b>
<b>Reseller</b>	Select from the list of all <b>Resellers, Sub-resellers and Managers</b> registered in the system
<b>Role</b>	Select from the list of existing <b>system roles</b>
<b>Active</b>	Specify whether the user's <b>status</b> is active or not, by selecting from a drop-down list: <ul style="list-style-type: none"><li>• <b>No</b></li><li>• <b>Empty (to display users with both statuses)</b></li></ul>

Adding a New User

What you need to do to create a new user is:

- Click the **New User** button
- In the opened pop-up window, fill in all the **required fields** (list of them is presented in a column below)
- Confirm new user creation by clicking **OK**

Screenshot: New user creation window

 **Users**

Login:

Password:

Role: 

Administrator

Status: 

Active

Full Name:

Email:

Locale:

Timezone:

Reseller: 

all resellers

CoreAPI Token:

Allowed IPs:

OK

Cancel

Apply

Field	Description
<b>Login</b>	Specify a user's <b>login</b> .
<b>Password</b>	Define a <b>password</b>
<b>Role</b>	Select a <b>role</b> for a user from a drop-down list
<b>Status</b>	Check if you need to <b>prevent</b> a user temporary from having <b>access</b> to the system. The statuses are: <ul style="list-style-type: none"><li>▪ <b>Active</b></li><li>▪ <b>Blocked</b></li><li>▪ <b>Archive</b></li></ul>
<b>Full Name</b>	Enter a <b>user's name</b> . Note that if a user's email is specified, full name in the section serves as a <b>mailto link</b> .
<b>Email</b>	Specify a user's <b>email</b>
<b>Locale</b>	Define a language for a user, and it will be used instead of the system one for displaying all dates, reports, etc. If not specified, the system settings are taken.
<b>Timezone</b>	Define a timezone for a user, and it will be used instead of the system one for displaying all dates, reports, etc. If not specified, the system settings are taken.
<b>Reseller</b>	Specify a reseller, sub-reseller or manager a user <b>belongs to</b>


<b>CoreAPI Token</b>	This field <b>cannot</b> be specified in the creation form. CoreAPI Token is <b>automatically generated</b> by the system after a user is created
<b>Allowed IPs</b>	Enter <b>IPs</b> or <b>subnets</b> , one record per line, i.e. the user will have access to the system only if he/she logs in via specified IPs

#### Attention


While creating a new user, bear in mind the following things:

- Each user can have only **one** assigned role.
- We strongly recommend **avoiding non-Latin characters** in users' logins/passwords

## Archiving a User


If you want to archive a **User**, click the  button. The following window will open, where you will be able to transfer **Report Queries** ownership to another **User**:

Screenshot: Archiving a User

 **Users**
1

Before archiving the User, you may want to transfer their data (Report Queries) to another owner. If the new owner is not selected, all data related to the User will be removed.

Transfer the ownership to:

 All data related to the User will be deleted

OK

Cancel