

# Editing Users

## Description

User names, roles, and passwords can be updated at any time.

## This section will...

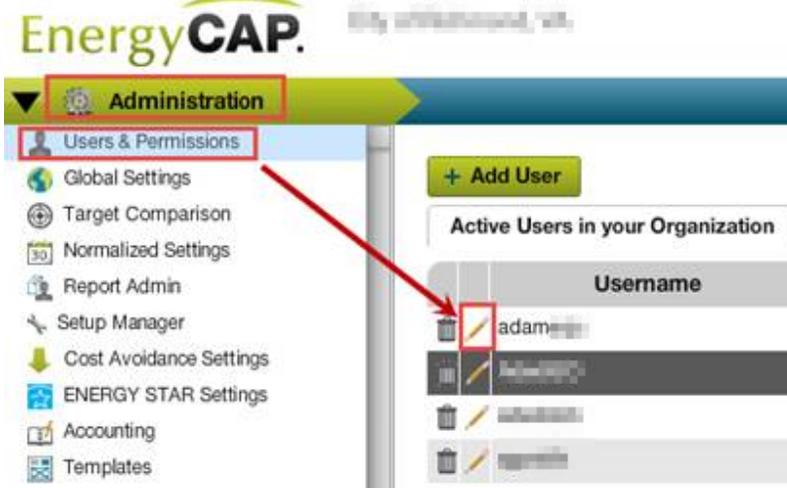
- Describe the process for editing users.

## Prerequisites

- The ability to edit Users requires permissions associated with the following User Roles:
  - Administrator - Full Access
- The ability to view Users and Role Assignments requires permissions associated with the following User Roles:
  - Administrator - Full Access
  - Bill Entry & Account Setup

## Step-by-Step

1. Navigate to the Administration section in one of two ways:
  - Select **Administration** from the Main Menu, OR
  - Click **Admin** under the More page header options.
2. Select the **Users & Permissions** tree node.
3. Click the **Pencil (edit)** icon for the user you wish to modify.



The **User Properties** window will open.

- a. There are four tabs available for editing.
  - On the **General** tab, update all required fields, including the current user email address, and select the appropriate **User Role** (more details regarding User Role descriptions are available on the [User Roles and Permissions](#) page). Then click **Continue**.
- b. On the **Password** tab, select the appropriate password settings. Then click **Continue**.
- c. On the **Limit Building View** tab, select the appropriate radio button. Then click **Continue**.
- d. On the **Limit Account View** tab, select the appropriate radio button. Then click **Continue**.

**User Wizard** [X]

**General**

- General
- Password**
- Limit Building View
- Limit Account View

**User Status**

Active  Inactive

**Username \***

**Full Name \***

**Email \***

**Select a User Role \*** ?

Administrator - Full Access ▼

**Report Group \*** ?

DEFAULT ▼

Use Active Directory for authentication (password tab will be disabled)

\* Required Field

Back Continue Cancel

**User Wizard** [X]

General

- General
- Password**
- Limit Building View
- Limit Account View

Require Strong Password

**Password \***

**Confirm Password \***

Password expires every  Days

**Require Password Change on Next Login**

Yes  No

\* Required Field

Back Continue Cancel

**User Wizard**

General  
Password  
**Limit Building View**  
Limit Account View

**Limit this User's access to portions of the Buildings & Meters treeview?**

User can view all Buildings and Meters

Limit Building view to this topmost node of the Buildings & Meters treeview

Buildings

- Master Meters
- Academic
- Administration
- Athletics
- Housing
- Parking

\* Required Field

Back Continue Cancel

**User Wizard**

General  
Password  
Limit Building View  
**Limit Account View**

**Limit this User's access to portions of the Account treeview?**

Note: You must create Cost Center nodes in order to limit User access to a Topmost Cost Center node.

User can view all Accounts

Limit Account view to this topmost Cost Center node of the Account treeview

Accounts

- Chargeback Electric
- Electric
- Natural Gas
- Steam
- Water

\* Required Field

Back Finish Cancel

4. Click **Finish** to complete the user updates.
- The **User Wizard** will close. User properties have now been updated.

## Rules & Restrictions

- A user's topmost Buildings & Meters and Account permissions apply to all areas of the application, including reports.
- Depending on system settings, a user may not be able to change his/her password more than once a day.
- Depending on system settings, a user may not be able to change his/her password to a previously-used password.
- Strong password must be 8-16 characters long and contain uppercase letter(s), lowercase letter(s), number(s) and symbol(s).
- The last date and time of a successful user login is displayed in the last column of the Users table. This is useful in determining user engagement and problem resolution when data is modified.