Viewing/Editing People Introduction

Wed, Jan 17, 2024 Viewing/Editing People

There may be occasions when a User needs to view all the People located at a certain site or for a certain Resource. These and many other kinds of searches can be performed using the "People List" button. With this function, it is possible to search for People within the system using many types of criteria such as Client, Profile, Category and Buildings. Click "People List" to begin.

1. Clicking "People List" displays the Search People screen. This is where the details of the search are specified to ensure the correct list of People is returned.

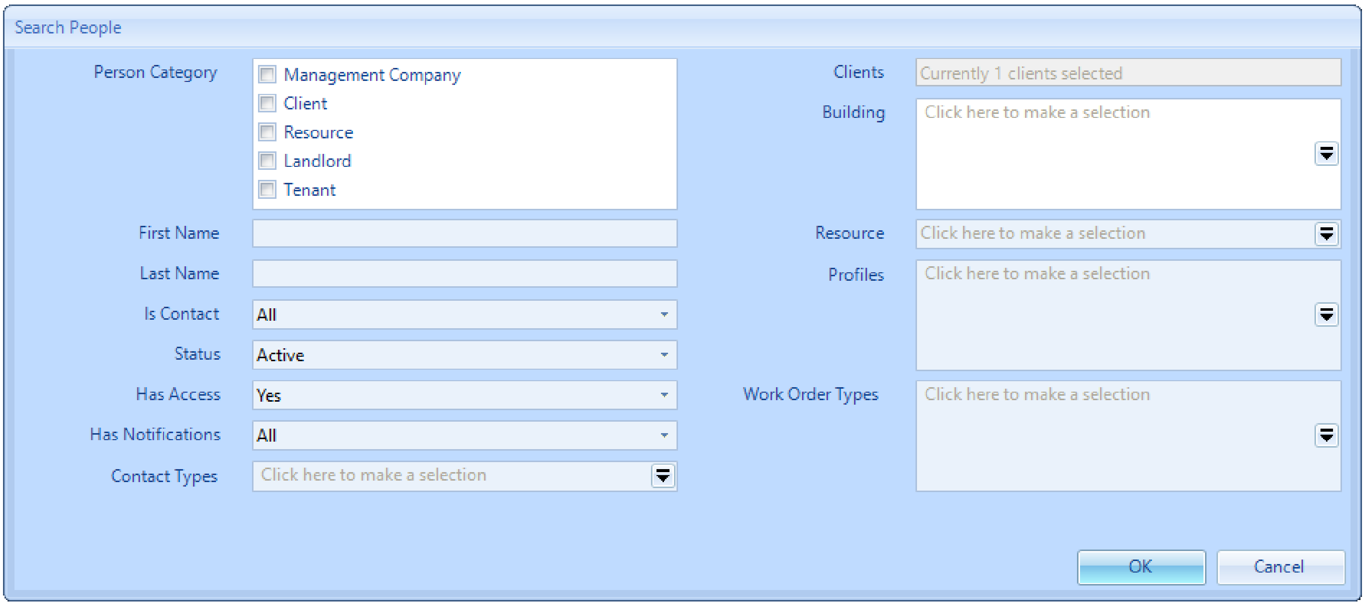
The **Person Category** field is where it is possible to view People by the category they have assigned to them, such as ticking Client will only bring back Client People.
First Name and **Last Name** fields are text fields in which either the first or last name is entered.
The **Is Contact** drop down enables searching for People who may or may not be contactable via the Call In/Call Out menus.
The **Status** field is a drop down where it allows Users to search for People Records that are Active, Inactive or a combination of both.
The **Has Access** field defaults to "Yes" but allows the User to specify whether the returned results should be People who have login access to the system.

The **Has Notifications** field allows for the search of any People who have notifications set up against their person record.

The **Clients** field displays a pop up of all the Clients available to the User which allows them to tick the respective Client(s).

Finally, the **Building**, **Resource**, **Profiles**, **Contact Types** and **Work Order Types** fields are all separate menus where one or more items can be ticked.

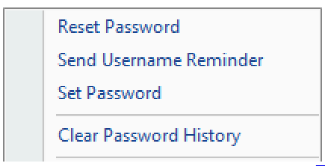
Once the required details have been entered, click "OK" to perform the search.

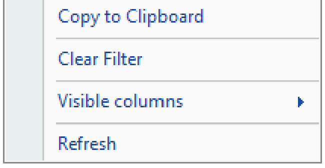


2. A list of all the People, as defined by the search criteria will then appear. This list shows a number of details about each Person Record such as their First Name and Last Name, the Category and Client(s) they have, contact information such as an Email Address and Telephone number and even their Username and when they last logged into the system. To view a Person Record, double click an item in the list or select an item and click the "Open" button.

3. Once open, it is possible to modify a Person record if a modification required. If any changes have been made, click "OK" to save the changes. If no changes have been made or the changes can be discarded, click "Cancel" to return to the main application screen.

Note: To reset a Person's password, right click the Person Record in the People List Results and select the "Reset Password" option. A confirm message will appear. Click "Yes" to reset the password. The User will then be sent an email with their new password details. These emails also occur when different types of access (Application, Portal or Mobile access) is given to Users. It is also possible for Users to send Username Reminders and to even Set Passwords from this right click menu.





It is also possible to Clear a User's Password History using the "Clear Password History" option - this means that previously used passwords by that User can be used again.

People Documents

People Custom Data

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