Manage Users

User Management helps you to add new users for Pressure Vessel module, and manage multiple number of users and their roles. You can assign the projects for the added users.

Users assigned with **Admin** role only can access the **Manage User** menu and their functionalities.

1.0 Users List

The **Assign User Roles** tab in the **Manage User** menu used to add and manage the user account details and assign roles for the users. If you want to add a user account, do the following steps,

1. Click **Manage User** menu and the **Users** page opens.

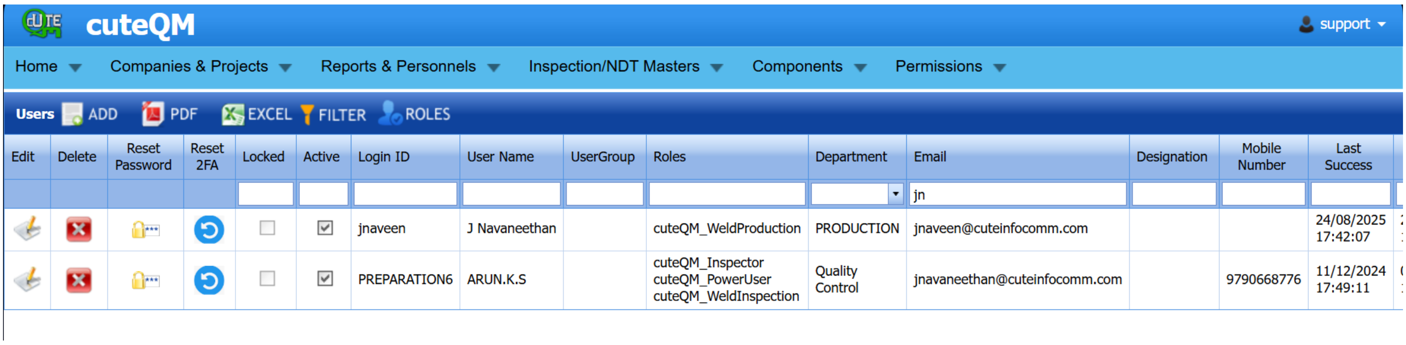

Figure 1.1: Users page

Add a User Account

If you want to add a new user account,

1. Click image-16510469788830.png image not found or type unknown (**ADD** button) in the **Users**

The page shows a new box to add the account details of the user.

image-16510470001012.png image not found or type unknown

2. In the **Login Details** window,

a. In the **Login ID** box, enter the login id for the user account.

b. In the **Email** box, enter the email of the user.

3. In the **User Name** box, enter the user name for the user account.

4. In the **Designation** box, enter the designation of the user.

5. In the **Comments** box, enter your comments if any.

6. In the **Mobile Number** box, enter the mobile number of the user.

7. In the **Office Contact Number** box, enter the office contact number of the user.

8. In the **Expiry Date** box, select the expiry date of the user account.

9. In the **Roles** box, select the checkbox of the roles which you want to assign for the user.

To know about the roles with their access details, see the topic, "**User Access Overview in Pressure Vessel Module**".

image-1651047123072.png

Image not found or type unknown **Note:** Once you have assigned the roles for the user, the user can get access to the respective functionalities based on the assigned roles.

10 Click **Save**.

The user account is successfully added and listed in the **Users** page. An email containing the user name and password to login the ***cuteQM*** app will be sent to the given email id of the user.

image-1651047123072.png

Image not found or type unknown **Note:** The password received through the email can be used only once. So, the user must change their password while login into the app for the first time.

Reset Password for any User Account

Once you have added a user account including the login id for any user, you can set password for the respective login id. To set password,

image-1651047401232.png

1. Click Image not found or type unknown (Password icon) in the **Reset Password** column for the respective user. See Fig 4.1.

The **Reset Password** window opens with the login id name.

image-1651047425267.png

Image not found or type unknown

2. Click **Reset Password**.

The password will be reset and sent to the respective email id of the user.

Lock a User Account

The user account can get locked by the user management team or it can also get locked automatically when there are too many incorrect password attempts. (default is 10 times incorrect attempts).

If you want to lock any existing user account,

1. Enable the checkbox in the **Locked** column for the respective user account. See Fig 4.1.

   The selected user account will be locked.

image-1651047123072.png

Image not found or type unknown **Note:** You can also unlock the respective user account by disabling the checkbox of the user account.

Similarly, the same check box can be used to unlock an account.

Deactivate a User Account

If you want to deactivate any user account,

1. Disable the checkbox in the **Active** column for the respective user account. See Fig 1.1.

   The selected user account will be deactivated.

image-1651047123072.png

Image not found or type unknown **Note:** You can also activate the respective user account by enabling the checkbox of the user account.

Edit a User Account

If you want to edit any existing user account in the **Users** page, do the following,

image-1651047597340.png

1. Click Image not found or type unknown (Edit icon) in the **Edit** column for the respective user account.

The **Users** page shows the details of added user account.

image-1651047610105.png

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2. Click on any box where you want to edit the details, and then edit the details in the respective box.

3. Click **Save**.

Delete a User Account

If you want to delete any specific user account from the list of added user accounts, you can use image-1651047665144.png

Image not found or type unknown (Delete icon) provided in the **Delete** field of the **Users** page.

Export User Accounts List

You can export a list of user accounts added in the **Users** page in the pdf and excel formats by using image-1651047703985.png Image not found or type unknown (**PDF** button) and

image-1651047717127.png

Image not found or type unknown (**Excel** button).

Filter a User Account

If you want to filter any specific user account in the **Users** page, do the following,

1. Click image-1651047765266.png Image not found or type unknown (**FILTER** button) located on the **Users** See Fig 4.1.

Once you clicked the **Filter** button, the filter box opens in each column of the **Users** page.

image-1651047784022.png

Image not found or type unknown

2. Enter relevant detail in the respective column's filter box to filter any user account.

2.0 Roles Management

If you want to add a new role,

image-1651047270555.png

1. Click Image not found or type unknown (**ROLES** Button) in the **Users**

The **Roles** window opens.

image-1651047291867.png

Image not found or type unknown

image-1651047310864.png

2. Click Image not found or type unknown (**ADD** button) in the **Roles**

image-1651047321642.png

Image not found or type unknown

3. In the Role **Name** box, enter the role name.

4. Click **Save**.

The role is added and listed in the **Roles** window.

Roles and Access definition

This is common roles defined in the cuteQM. But it can be customized by clients needs.

Admin	The Admin role has full access to the system. Do not assign this to any one who really does not require.	Full Access to the system.
cuteQM_Document	The Document Controller role manages access to inspection-related documentation across various modules. It includes viewing and managing key records for traceability and audit purposes	Access to Below Inspection Menus: 1.WPS and Weld Details 2. Project Data (like Joint, Drawing etc.) 3.Materials management 4.Fit-up & NDT records 5.Stage-wise inspection 6. Documentation

cuteQM_PowerUser	This role is designed for power users responsible for setting up new projects and managing critical administrative tasks across the cuteQM.	Access to Below Inspection Menus: 1. Project and Company creation 2. Manage User
cuteQM_WeldProduction	This role user only able to fitup/weld production activity	This role user only able to fitup/weld production activity
cuteQM_WeldInspection	This role user only able to fitup/weld Inspection activity	This role user only able to fitup/weld Inspection activity

3.0 Assign Projects

The **Assign Projects** tab in the **Manage User** menu used to assign the projects for users. Once you have assigned the projects for any user, the user can get access to the assigned project. To navigate to the project assigning page,

1. Click **Assign Projects** in the **Manage User**

The **Assign Projects/Users** page opens with the **Assign by User** and **Assign for Project** options.

image-1651047854510.png

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Figure 3.1: Assign Projects/Users page

Assign Projects for Users

If you want to assign projects for any user, do the following steps,

1. Click **Assign by User** in the **Assign Projects/Users**

The page shows a list of users in the left side and a list of projects in the right side.

image-1651048106899.png

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2. Select a user for whom you want to assign the projects.

3. Select the checkbox of the respective projects you want to assign.

4. Click **Save**.

The selected projects will be assigned for the user.

Assign Multiple Users for Any Project

If you want to assign multiple users for any specific project, do the following steps,

1. Click **Assign for Project** in the **Assign Projects/Users**

The page shows a list of projects in the left side and a list of users in the right side.

image-1651048200254.png

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2. Select a project for which you want to assign the users.

3. Select the checkbox of the respective users you want to assign.

4. Click **Save**.

The selected users will be assigned for the project.

4.0 Assign Email Alerts

Assign Email Alerts is the process of assigning an email for a specific project to send any alert related with the project. The **Assign Email Alerts** tab in the **Manage User** menu used to add an email for a specific project to send any alert related with the project. To navigate to the email adding page,

1. Click **Assign Email Alerts** in the **Manage User**

The **Manage Alert Configuration** page opens.

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2. In the **Select Alert Module** box, select a module from a drop-down list.

3. In the **Email Address** box, enter the email address.

4. In the **Project** box, select a project from a drop-down list.

5. Click **Save**.

The email id is added and assigned for the selected module and project.

5.0 Assign Widgets

The **Assign Widgets** tab in the **Manage User** menu used to assign the widgets to users. Once you have assigned the widgets to any user, the user can access the assigned widget. To navigate to the widget assigning page,

1. Click **Assign Widgets** in the **Manage User**

The **Assign Widgets to User** page opens.

image-1651048569529.png

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2. In the **Module Name** box, select the respective module name.

The page shows a list of users in the left side and a list of widgets in the right side corresponding to the selected module.

3. Select a user for whom you want to assign the widgets.

4. Select the checkbox of the respective widgets you want to assign.

5. Click **Save**.

The selected widgets will be assigned to the user.

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