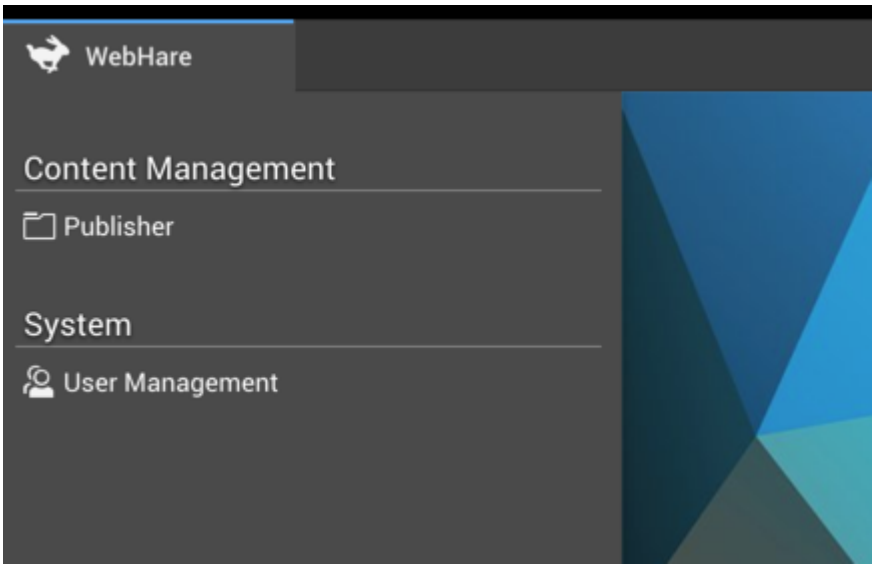
Getting started

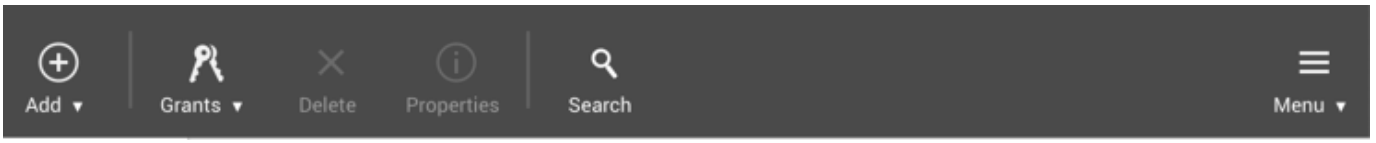
After logging in to WebHare the application can be found in the "System" group.



> **Access to the application**
>
> The User Management application is only available when you have been granted the right to either grants roles yourself or to view one or more units.

Buttonbar

The top of the screen shows buttons on the left and a menu on the far right. All available actions can be found in the menu, the most often-used actions have their own button:



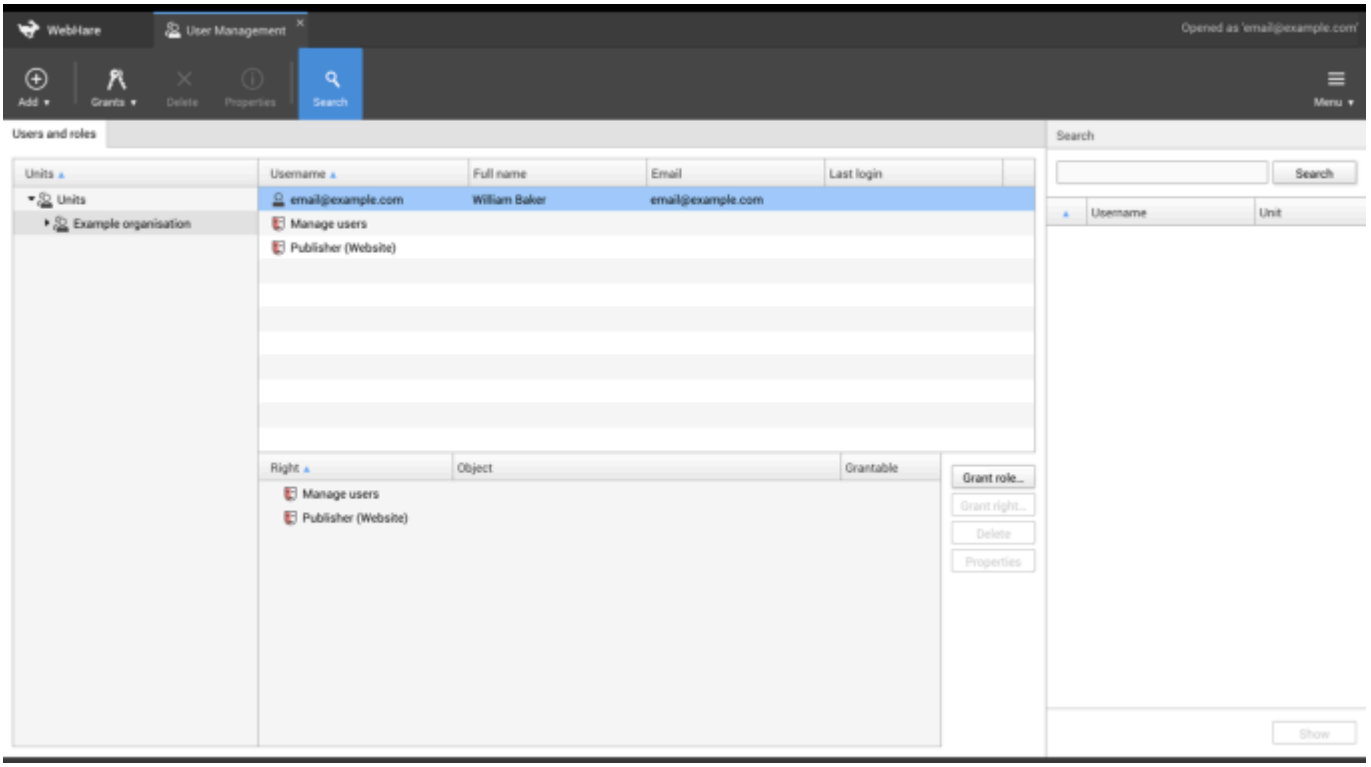
- "Add" offers a dropdown menu to add new users, units and roles.
- "Grants" offers a dropdown menu to grant roles or rights to users or roles.
- "Delete" allows you to delete users, roles or units
- "Properties" shows you to show the properties of the selected item - this can be a unit, user, role, right or grant.
- "Search" toggles a search pane on the right.

Menu

The menu on the right contains all available actions. When a shortcut key is available this is displayed behind the action. A small arrow indicates a submenu.

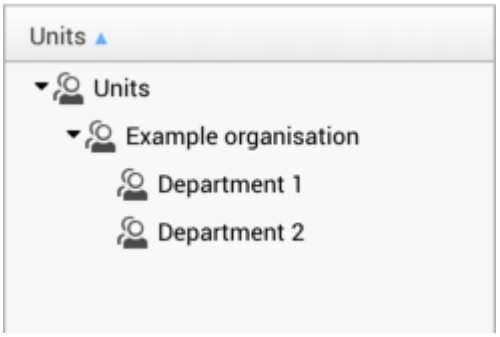
Users and roles

Below the button bar the rest of the application is displayed (in the preview below the Search Pane is enabled).



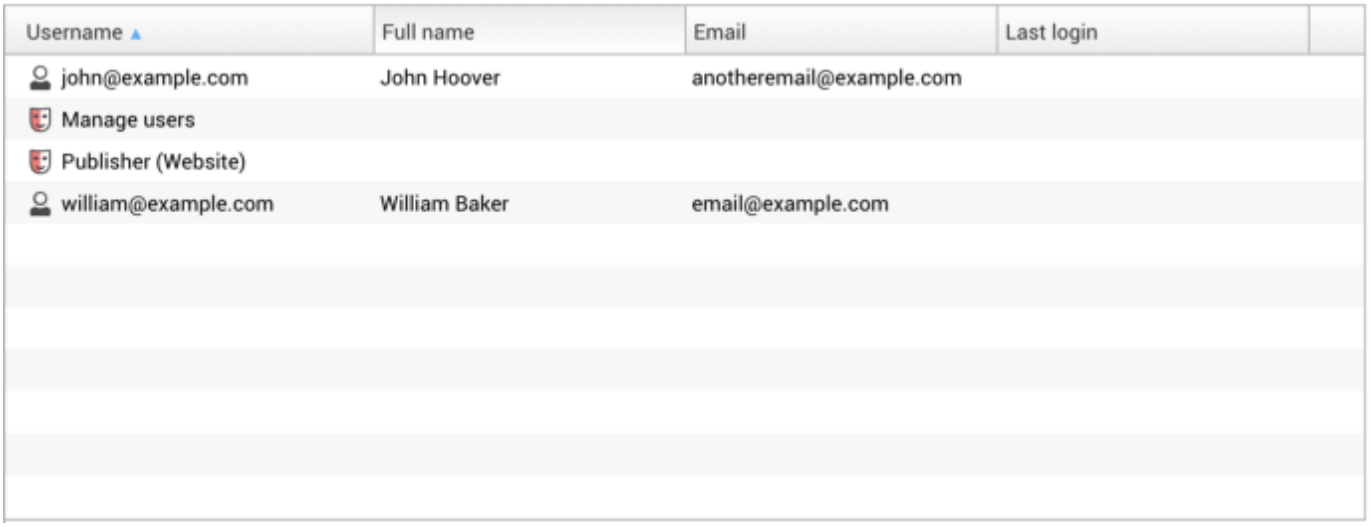
Unit tree

The unit tree is displayed on the left. This tree contains all the units you have rights for - this may be only one, but could also be several units at the same level or a unit containing other units.



Users and roles list

When a unit is selected in the unit tree, the users and roles in this unit are shown in this list on the right.



Grants list

The bottom right list contains the so-called grants. Depending on wether a user or role is selected, the grants list displays the following:

- When a user is selected the *roles* granted to this user are shown
- When a role is selected, the *users* to whom this role is granted are shown



Icons

- Unit
- System operator
- User
- Role
- Direct right
- The user is logged in

Search

When you click the "Search" button a search screen is displayed on the right. You can search for (part of) the user's full name, username, e-mail address or unit name. The search results are displayed in the list below. When you double click the search result (or use the "show" button) the user manager locates the user or role in the unit and selects it.

Units

Units are used to organise large amounts of users logically, based by department for example. Units can be organised according to your wishes. For smaller organisations a single unit will usually suffice.

> ✔ Users in the same unit
>
> Users can see which users are in their unit and in the units below. If you want a user (with access to User Management) to only see some of the users you need to move all these users into the same unit.

Adding a unit

1. Select the unit in which you want to add a new unit.
2. Click on the "Add" button and select "New unit".
3. Enter the name of the unit and, if desired, a comment.
4. Click "OK".

The new unit will appear immediately.

Changing and moving a unit

A unit can be changed by selecting it and clicking "Properties" or by simply double-clicking it. You can change the name and comments, and move the unit by choosing a different parent unit. An easier way to move units is by dragging and dropping them into the unit you want.

Delete a unit

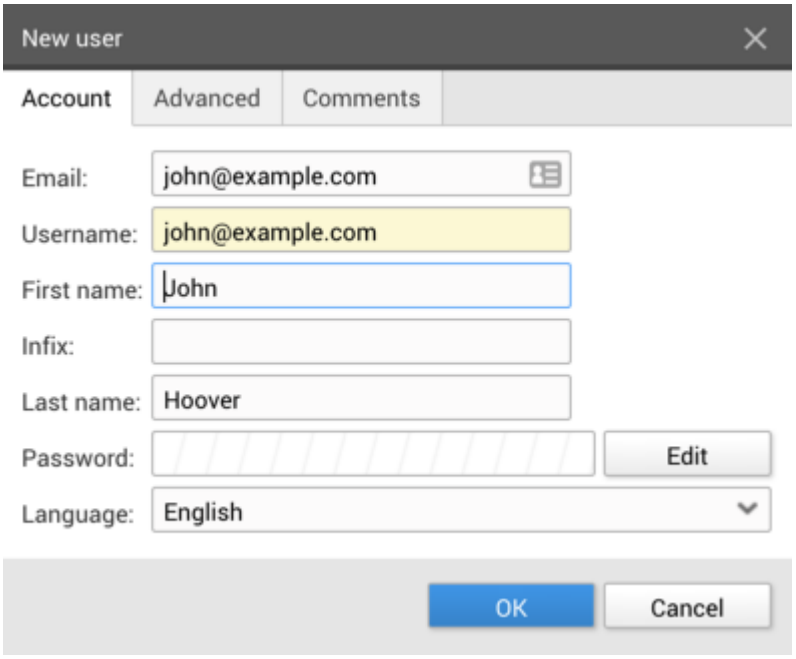
A unit can be deleted by selecting the unit and clicking "Delete". You will be asked to confirm.

> ✔ Deleting units
>
> You can only delete empty units - roles, subunits and users must first be deleted or moved to another unit.

Users

Adding a new user

1. Select the unit to which you want to add the new user.
2. Choose "Add", "New user..." from the button bar.
3. The "User properties" screen is displayed:



4. Fill in an e-mail address and the username (if available: in some configurations, the e-mail address is also the username).
5. Fill out the rest of the information.
6. You can enter a password, but it is safer to leave this empty and let the user choose their own - see "sending a password link".
7. Choose the language for the user (they can change this afterwards in their personal preferences)
8. Click "OK" to save the user.

The user is added, you can now send a password link.

Best practices

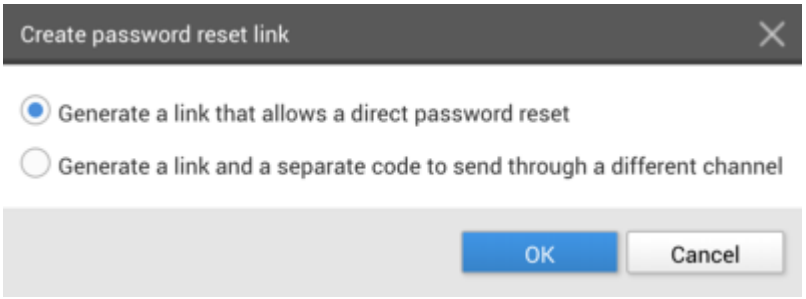
When adding users we recommend the following:

- Fill out all the relevant fields - it is much easier to find the users when the name is correct
- Do not use a single account for multiple users (IE "helpdesk@yourorg.com") - this prevents correctly identifying users responsible for certain actions.
- Do not enter a password and send it to the user - use the password link function
- Even when the username field is available we prefer using the user's e-mail address as username. Simply fill it out in both fields.

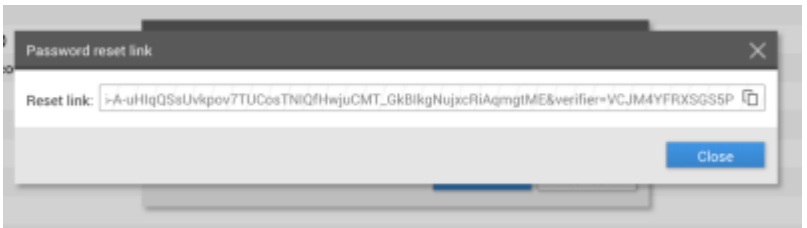
Sending a password link

After creating a new user, or when a users has requested a new password, you can let the system create a password reset link that you can send to the user. The user can then choose their own password.

1. Select a user.
2. Choose "Create password reset link" from the menu in the button bar.
3. You will offered two options - to only generate a reset link or generate a reset link and verification code:



4. Copy the reset link (you can use the 'copy' action in the link field) and send it to the user, for instance by e-mail.



5. If you opted for a verification code you need to copy and send this to the user as well, preferably trough another channel or at least a different message.

The user can open the link and create their own password. If a verification code was added, the user need to provide this when choosing their password.

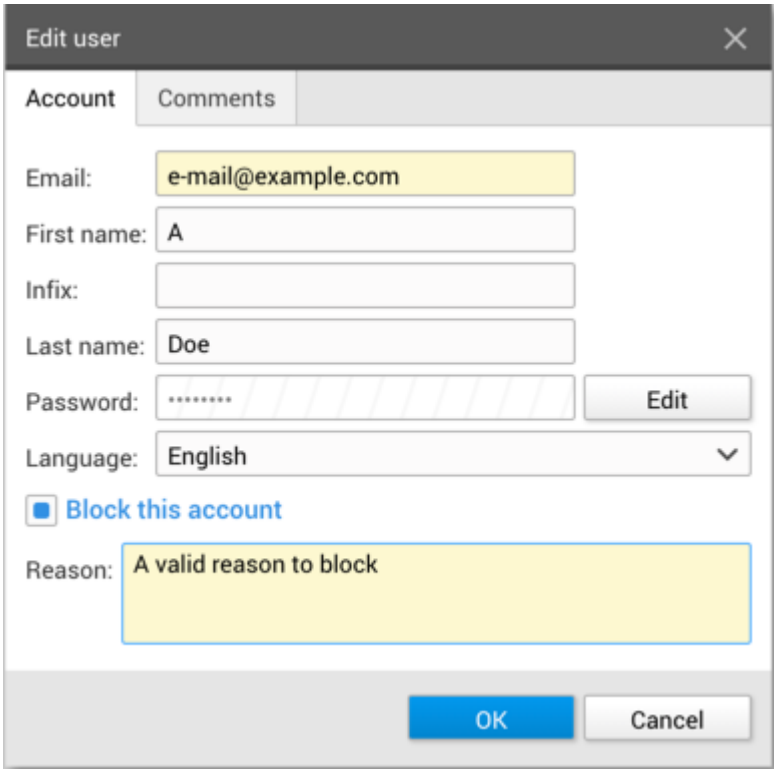
Changing a user

To change the user's properties you can double click on a user or select a user and choose "Properties". In the properties screen the information can be changed. For security reasons you can not view the current password, but you can change the password or, preferably, send a new password link.

Blocking a user

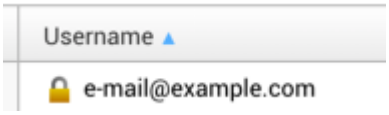
To (temporarily) prevent access to a user, you can block their account.

- Select the user and choose "Properties".
- Select the "Block this account" checkbox and enter a (mandatory) reason



- Click "OK" to save the changes

The user can no longer access this WebHare portal. You can recognise the blocked account by the 'lock' icon:



Moving a user

A user can be moved by selecting the user and choosing "Move..." from the menu. A user can only be moved to another existing unit where you have the right to add users - units you are allowed to see but to which you can't move users to have red 'forbidden' icon.

> ✔ Drag and drop
>
> An easier way to move users is by dragging and dropping them into the unit you want.

Deleting a user

A user can be deleted by selecting the user and clicking the "Delete" button. You will be asked for confirmation, after which the user definitively deleted.

Roles

Roles can best be described as *a group of rights that can be granted to one or more people*. Depending on the applications you use you may need several roles.

> ✔ Roles or rights
>
> Our advice is not to grant *rights* directly to people, but to use *roles* as intermediary. System administrators or developers should prepare these roles. These roles must have all the required rights and a clear name and description. Regular users and supervisors can then distribute the roles through their users.

Granting a role to a user

To give a user all the rights needed for their tasks you can grant them the needed role(s).

1. Select the unit the user is in.
2. Select the user.
3. Choose "Grants", "Grant role" from the button bar.
4. The "Grant role" dialog is openend.
5. Select the unit the role is in.
6. Select the role.
7. Enter the reason for granting this role in the comments.
8. Click "OK".

The role is immediately granted to the user. The user may need to press "refresh" in their browser or log out and back in to the WebHare server.

Adding a role

> ✔ Adding roles without rights
>
> Adding new roles when you do not have the right to grants rights to this role directly is not recommended - you will then need a user with more rights to further setup this role.

1. Select the unit to which you want to add the new role.

2. Choose "Add", "New role..." from the button bar.
3. Enter the name of the role and, if desired, a comment.

Changing a role

To change the role's properties you can double click on a role or select a role and choose "Properties". In the properties screen the information can be changed.

Moving a role

A user can me moved by selecting the role and choosing "Move..." from the menu. A role can only be moved to another existing unit where you have the right to add roles - units you are allowed to see but to which you can't move roles have a red 'forbidden' icon.

> ✔ Drag and drop
>
> An easier way to move roles is by dragging and dropping them into the unit you want.

Deleting a role

A role can be deleted by selecting the user and clicking the "Delete" button. You will be asked for confirmation, after which the role definitively deleted.

Granting rights

> ✔ Roles or rights
>
> Our advice is not to grant *rights* directly to people, but to use *roles* as intermediary. System administrators or developers should prepare these roles. These roles must have all the required rights and a clear name and description. Regular users and supervisors can then distribute the roles through their users.

Granting rights to users or (preferably) roles can be done through two perspectives - from the "Users and roles" perspective you first find the user or role and then find the correct right. From the "Objects and rights" perspective your first choose the object (application, folder, database etc) you want to grant rights on, then you find the user or role.

Grant a right from the "Users and roles" view

> ! Do you have the right?
>
> When you do not have a "Grant rights" option available you do not have the right to directly grant *rights* to users - you can only grant *roles* to users.

1. Select the user or, preferably, the role you want to grant a right.
2. Choose "Grants", "Grant right".
3. Navigate to the object you want to give rights to.
   For a Publisher folder for example, navigate to "File system" - "Folders and files" and select the right folder.
4. Select the object and choose the right you want to grant.
   For a Publisher folder for example, you can choose between "Full access" and "Browse".
5. Add an explanation for granting this right.
6. Choose wether you want to allow the user or role to grant this right to other users or roles and click "OK".

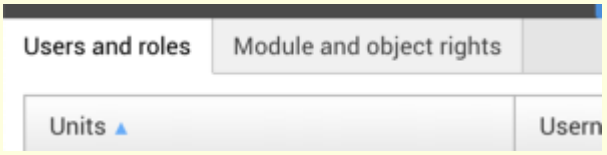
Grantable rights

If you work with roles it is recommended not to use the option "This user or role may grant this right to others" unless you specifically need this: when creating roles meant to be used by regular users this is usually not the case.

Grant a right from "Module and objects and rights"

Do you have the right?

When you do not have an "Objects and rights" tab at the top of the application you do not have the right to directly grant *rights* to users - you can only grant *roles* to users.



1. Make sure the "Module objects and rights" tab is selected
2. Navigate to the desired module or object.
3. A list of users and roles with permissions for this object is displayed.
   When the user or role is displayed in grey they have an indirect permission, most likely because they have this permissions on this object on a higher level.
4. When the user or role is not already present, choose "Grants", "Grant right" from the button bar.
5. Navigate to the right role or user and choose the desired right on this object.
6. Decide wether or not you want to allow the user or role to directly grant this right to others (usually this is not recommended).
7. Add an explanation for this grant is the explanation field.
8. Click "OK" to a finish.

The right is granted immediately and the user or role appears in the list.

Other actions

Login as

When you have sufficient rights and want to view the system as another user does you can use the "Login as", for instance to see the same view the user has when explaining an applications or checking for problems.

Select the user and choose "Login as" from the menu. A new browser window or tab is opened in which you will be logged in as the selected user.