

# Adding and Maintaining Users

As system administrator of your Epicor Learning Center site, you can add and modify users.

You can also deactivate users, reactivate them, assign permissions, reset passwords, and even add users in bulk.

Select an option on the right to get the details on each of these processes.

## Add User

Under Admin, choose User Maintenance. Select Add User.

Enter your student's first and last name, a unique email address, and phone number.

Click Next.

Choose a role or roles that apply to this user. For example, an assistant manager might also need to review the content for a Point of Sale Clerk.

You don't have to assign a role now—you can always assign one later—then set the appropriate time zone.

Click Submit.

To assign all the role's relevant agendas to the user, click yes.

You'll see a confirmation screen displaying that the user was successfully created.

You can modify their permissions or continue creating new users.

The new user will receive two emails.

The first contains their login credentials.

The second one will contain a list of all assignments waiting for them. They just need to click the link and they are ready to begin!

## Edit User and Passwords

Need to make changes to a team member's Epicor Learning Center account?

Click Admin then User Maintenance.

Click Edit User. Search for the account you need to edit by typing in all or part of their name.

Select them and then click Submit. You can make changes to the user's first or last name or contact information.

Click Next. If you need to change this user's role or time zone, you can confirm those changes here.

Need to reset a password or assign a new one?

Look up the user using Edit User Maintenance and then click Change Password for This User under Admin Action.

Enter a new password that meets the criteria, then confirm it and click Submit. The user will receive an email with their new password.

## Deactivate / Reactivate User

If someone leaves your company, you'll probably want to deactivate their user account.

From Admin, select User Maintenance. Choose Deactivate User, then select the user account that needs to be deactivated. Click Submit.

Here you'll have a chance to deactivate this user's account. Click Yes to confirm that you're ready to deactivate it.

You'll see a confirmation screen showing that the user account is no longer active. The user receives no notification that their account has been deactivated.

Now if this user tries to log in, the login screen will report that their account is not active.

To reactivate a user account, open the admin panel, then select User Maintenance.

Click Reactivate User.

Select the account from the dropdown list, then click Submit.

Confirm the employee's details, then click Next.

If the employee's role or time zone has changed, you can update that here. Click Submit.

The user will receive an email notifying them that they have new login credentials. Note that when reactivating accounts, this process generates a new password for the account.

## Assign Permissions

Over time you may find it's necessary to share the load of managing education assignments or need to distribute the process of creating user accounts among other staff.

To promote one or more other users to the status of Learning Administrators or System Administrators, click Admin, then User Maintenance.

Before going further, let's scroll down and discuss what these three user types are. At the bottom of the page, you can read descriptions for each of the roles, but in short:

- ▶ Standard Users are your basic learners, and they cannot add or change components of ELC.
- ▶ Learning Administrators can create and track assignments, but
- ▶ System Administrators can add, edit, and delete users, and modify agendas, roles, and tests.

Let's scroll back up. This summary shows all accounts for your company and their relevant permissions.

Note that permissions may be stacked, as you can see, some of these accounts have standard, learning, and system admin permissions.

Choose the user or users you'd like to assign permissions to from the dropdown, then grant or remove the permissions by clicking the appropriate circle.

Click Submit and you'll see a brief confirmation message.

The modified user account will also receive an email detailing the changes that have been made to their account.

## Users Approval

If a learner would like to create an account, the system administrator will need to approve that request.

From the log in screen the learner clicks Create Account and then chooses Customer.

They will need to add their Epicor Account number and press Submit.

After adding their first and last name they will need to add a unique email address, choose the correct time zone and submit their request.

As system admin, you will receive an email about this request. Use the link provided or navigate to Admin > User Maintenance > Users Approval.

If this person will also be a system administrator, check the box. If they are a standard learner or learning admin, leave it unchecked. Check Approved and then press Submit. The new user will receive an email with the new log in credentials.

If you need to make them a learning admin or if changes to permissions are needed, open Assign Permissions in User Maintenance. Locate the user and then click Submit to save any changes.

Click Admin, then User Management.

Click Users Approval.

Here, you'll see a list of new requests. To approve or deny a user's request, check the appropriate box.

If you'd like to set this user's permissions to both a system and learning admin, check the admin box.

Next, click Save. You'll see a confirmation that the user has been updated and they'll receive an email confirming that they can take the course.

Now you can continue to assign roles, agendas, or permissions to this new user's account.

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