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How Do I Add/Edit Portal Users or reset a Portal Password?

Adding or Editing Portal Users
The 'User Roles' section of our portal allows our clients to quickly add/edit portal users, add/edit location access, and add/edit user functionality.

Navigate to User Roles < User Admin Panel in our Relatient Engage Portal

User Admin Panel - this section is used to reset a User Password and the Period Configuration. **As a note, Relatient Support does not have visibility into client's passwords. Relatient Support Analysts can only provide our clients with a temporary password.

1. To reset a user's password, find the appropriate 'Username', and choose the edit option under 'Set Pass'. Enter a temporary password for the user and change. The user will be prompted to reset their password the next time they log into the portal, or they can navigate to the username listed in the top right corner and then select change password from the drop down.
2. To change the Period Configuration, click the appropriate account number and edit the appropriate fields (Password Expire (Days), Session Timeout (Mins), and Lock Login Max).

Navigate to User Roles < User LIst in our Relatient Engage Portal

User List – this section is used to add, deactivate/remove, or update Users.

1. **Create New User –** go to the Create New User button on the top right. Input the following information:
   - Account(s) – select the account(s) that the user needs access to.
   - Name – First and Last name of the user
   - Username – Relatient Best Practice is = username as First Initial/Last Name, all lower case. Ex. jsmith
   - Email – User's individual business email address.
   - Password – Assign a temporary password to the user.
   - Role – Assign the role dependent on the user's access level. Note: See Role descriptions below.

**Activating User – The user will now be available in the 'User List'. You must check the 'Active' box for the user to be able to log in.

2. **Updating an Existing User** – Click into the existing User profile and check or uncheck the appropriate location options for account and save.

3. **Deactivating/Removing a User** – Uncheck the Active box for the user in question. Note: Never 'Delete' a user by choosing the red trashcan symbol. We need the user information listed for auditing purposes.

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Roles - The user role is assigned at the time of user creation or at any time you edit a current user. The most commonly used 'Roles' are Super Role, Manager, Reception Desk, and Standard. Each 'Role' is customizable for each individual account. One account may have different access for their Super Role Users compared to another.

1. **Editing Roles -** Choose the appropriate Role from the dropdown menu. The access is indicated by blue check marks. Clicking the plus or minus sign removes access or you can simply check or uncheck boxes.

   - If you add or remove an option for a Role, all users with that Role are impacted.
   - The Front Desk Role is not functional in active environments.