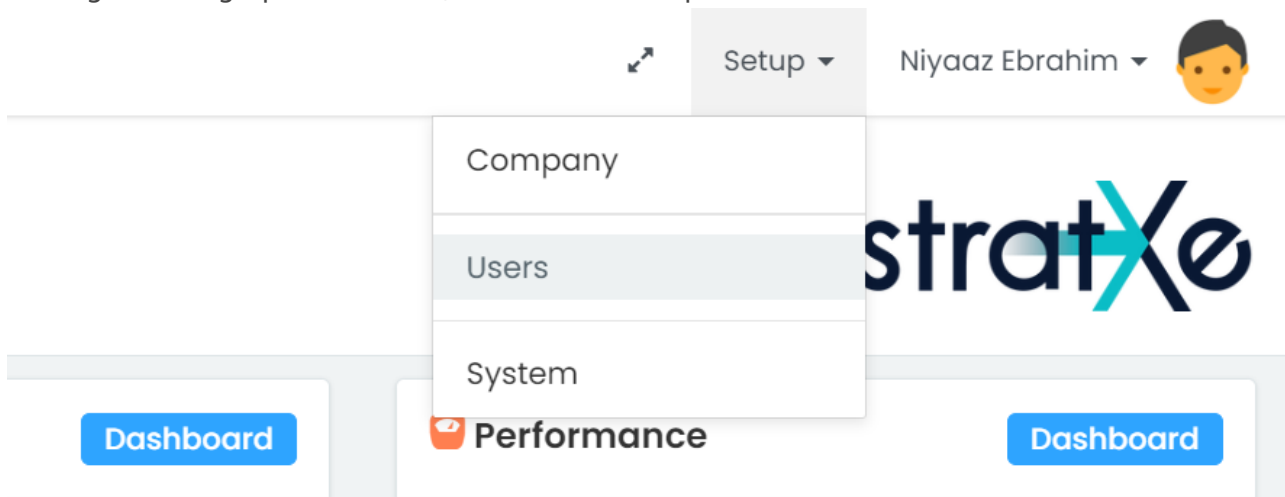


User Set-up

- Setting up new users on StratXE

Setting up new users on StratXE

1. To begin setting up a new user, select the "Setup" tab and click on users.



2. This will take you to the users page, which gives an overview of all the organisational users. To add a new user, click on "Create".

3.

Fill in the fields with the information about the new user.

Search Create

[Details](#) [Access](#) [Attendance](#) [Rates](#)

Name

Surname

Title

eMail

Picture Select an image file
 No file chosen

4.

The users access can be allocated by selecting the Primary Role of the user. Select "Organization-Owner" to grant users global access to the system or select "Organization-User" to limit the access of the user.

5. Set the users position, by selecting the relevant option.

6. Select the modules that are relevant to the user.

HR Partner ☐

Programme Manager ☐

☐

- ☐ Reports
- ☐ People
- ☒ Performance
- ☐ Expenses
- ☒ Time
- ☒ Attendance
- ☐ Projects
- ☐ Stakeholders

.S

7. Populate the remaining fields with the users information.

☐ Stakeholders

Gender: ☒ Male ☐ Female

Race: ☒ Black ☐ White ☐ Coloured ☐ Indian ☐ Asian

Availability: ☐ Yes ☒ No

Number:

Cost:

8. Select the users employment and policy commencement dates. These are required fields and must be populated in order for the user to be visible.

Details Access **Attendance** Rates

Employment Commencement:

Policy Set:

Policy commencement:

9. After inputting all of the details, click on "Create" to create the user. The user will then receive their login details via email.

Employment Commencement	<input type="text" value="2023/01/01"/>
Policy Set	<input type="text"/>
Policy commencement	<input type="text" value="2023/01/01"/>
<div><div>Create</div><div>Cancel</div></div>	

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