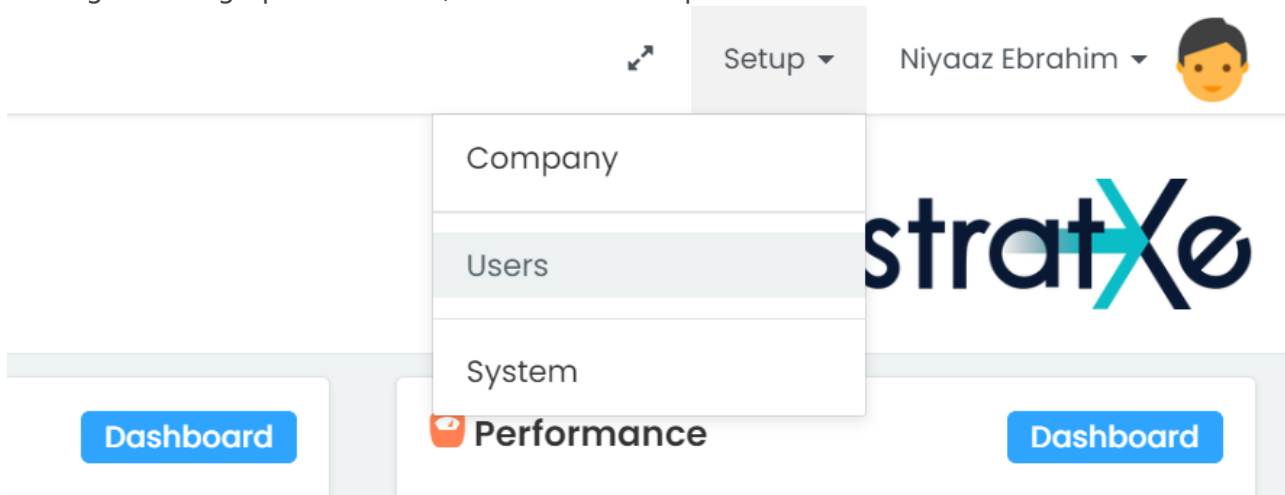


# Setting up new users on StratXE

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.

A screenshot of the 'Create User' form in the StratXE application. The form has four tabs: 'Details' (selected), 'Access', 'Attendance', and 'Rates'. Under the 'Details' tab, there are five input fields: 'Name' (filled with 'Niyaz'), 'Surname' (filled with 'Ebrahim'), 'Title' (filled with 'Mr'), 'eMail' (filled with 'niyaaz.E@africaia.com'), and 'Picture' (with a 'Choose File' button and 'No file chosen' text). The form is set against a light blue background.

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.

A screenshot of the role selection section of the user setup form. It lists four roles with corresponding checkboxes: 'HR Partner' (unchecked), 'Programme Manager' (unchecked), 'Project Manager' (checked), and 'Project Officer' (unchecked). The 'Project Manager' role is highlighted with a blue square.

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

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7. Populate the remaining fields with the users information.

☐ Stakeholders

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Gender: ☒ Male  
☐ Female

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

Availability: ☐ Yes  
☒ No

Number:

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Post:

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

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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

2023/01/01

Policy Set

Policy commencement

2023/01/01

Create

Cancel

Revision #2

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