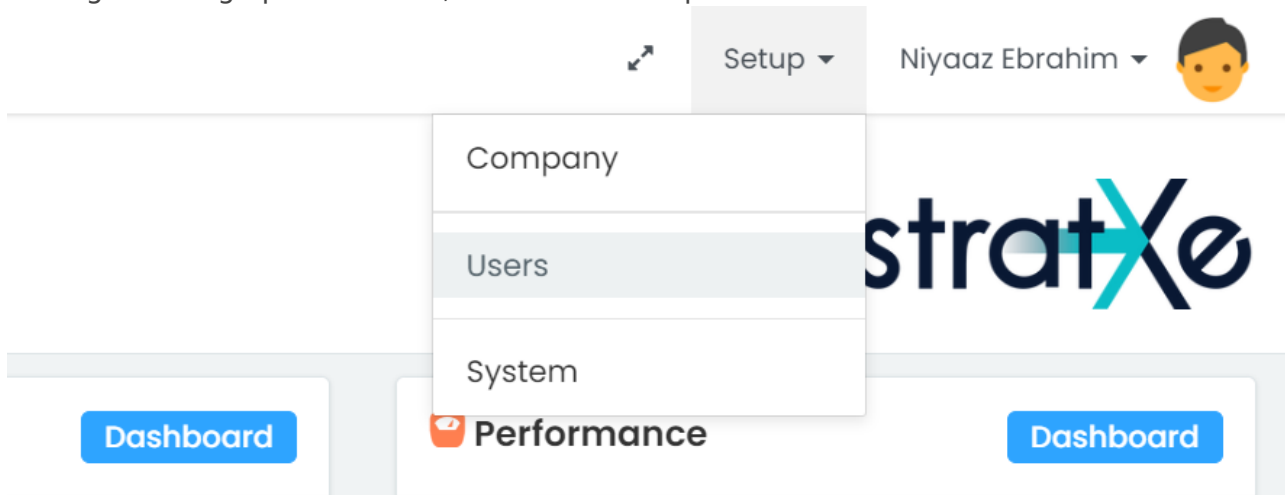


Setting up new users on StratXE

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 tabs for 'Details', 'Access', 'Attendance', and 'Rates', with 'Details' currently selected. The form fields are: 'Name' (Niyaz), 'Surname' (Ebrahim), 'Title' (Mr), 'eMail' (niyaaz.E@africaia.com), and 'Picture' (a 'Choose File' button with the text '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.

A screenshot of the 'Position' selection section of the user creation form. It lists four roles with corresponding checkboxes: 'HR Partner' (unchecked), 'Programme Manager' (unchecked), 'Project Manager' (checked), and 'Project Officer' (unchecked).

- ☐ 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:

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

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

Created Thu, Apr 20, 2023 6:38 AM by Niyaz Ebrahim

Updated Tue, May 30, 2023 7:23 AM by Niyaz Ebrahim