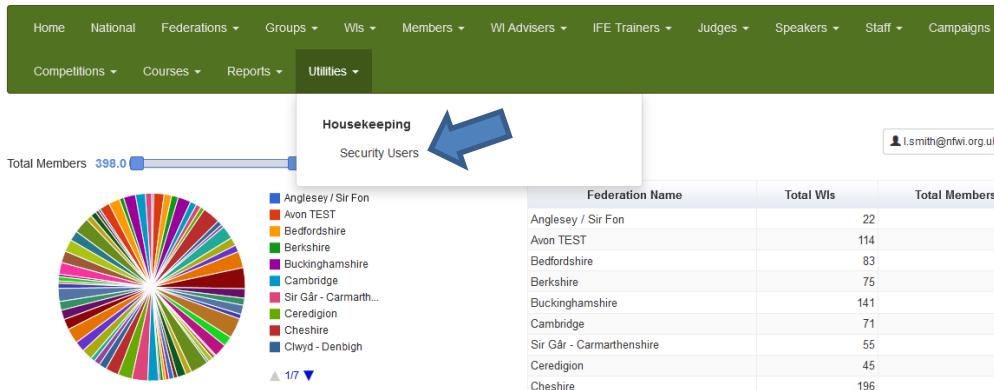


## CHECKING & SETTING UP USERNAMES AND PASSWORDS (FEDERATIONS ONLY)

### HOW TO CHECK/CHANGE A PASSWORD

Click on ‘Utilities’ in the top menu, and then on ‘Security Users’



Total Members 398.0

Housekeeping Security Users

l.smith@nfw.org.uk

Federation Name	Total WIs	Total Members
Anglesey / Sir Fon	22	
Avon TEST	114	
Bedfordshire	83	
Berkshire	75	
Buckinghamshire	141	
Cambridge	71	
Sir Gâr - Carmarth...	55	
Ceredigion	45	
Cheshire		
Clwyd - Denbigh		
Cheshire	196	

This will open up the ‘Security User’ Search screen

### Search for Security User

Please specify your search criteria below, then click 'Search'

Search Criteria

Securityuser	<input type="text"/>
First name	<input type="text"/>
Surname	<input type="text"/>
Federation	<input type="text" value="Buckinghamshire"/>
Lastlogon	<input type="text"/> to <input type="text"/>
Passwordexpirydate	<input type="text"/> to <input type="text"/>
Userexpirydate	<input type="text"/> to <input type="text"/>
Lastfailedlogin	<input type="text"/> to <input type="text"/>
Status	<input type="text"/>
Created by	<input type="text"/>
Created date	<input type="text"/> to <input type="text"/>
Modified by	<input type="text"/>
Modified date	<input type="text"/> to <input type="text"/>

Here, you can either search for a members username (her email address) or create a new user.

To search for a user, to make sure they have been set up as either an MCS Rep or Federation Rep, you will need to put her email address (or the first part of it) in the ‘Securityuser’ box

### Search for Security User

Please specify your search criteria below, then click 'Search'

Search Criteria

Securityuser	<input type="text" value="l.smith@nfw.org.uk"/>
First name	<input type="text"/>
Surname	<input type="text"/>
Federation	<input type="text" value="Buckinghamshire"/>

If you do not know her email address or you wish to search under something else, you can do, like the name etc.

Then click on Search at the bottom of the page



If the person already has a user set up, they will show up as seen below

### Security User Search Results

Security User Search Results								
SecurityUser		Firstname	Surname	Lastlogon	Passwordexpirydate	Userexpirydate	Loginattempt	Lastfailedlogin
l.smith@nfwi.org.uk		Melton		17/09/2014			0	
Showing 1 to 1 of 1 entries								
<a href="#">Search Again</a> <a href="#">Create New</a>								

Click on the username – (the email address)

This will then take you into the users security profile record.

If you click on the box next to ‘Show Password’ it will reveal the password for that person’s account

### Security User Details - l.smith@nfwi.org.uk

[Save](#)

Status	<p><b>• Status</b> Approved</p> <p><b>• Application</b> MCS2</p>
<b>Basic Details</b>	
<p><b>• Person</b> Melton, Rita</p> <p><b>• Username</b> l.smith@nfwi.org.uk</p> <p><b>• Password</b> testing</p> <p><b>• Password</b> <input checked="" type="checkbox"/> Show Password</p> <p><b>• Password Expiry Date</b></p> <p><b>• User Expiry Date</b></p>	

If you untick the Show Password box, you can then overwrite it with a new password. You will also need to confirm it in the following password box

<p><b>• Person</b> Melton, Rita</p> <p><b>• Username</b> l.smith@nfwi.org.uk</p> <p><b>• Password</b> testing</p> <p><b>• Password</b> <input checked="" type="checkbox"/> Show Password</p> <p><b>• Password Expiry Date</b></p>	<p><b>• Person</b> Melton, Rita</p> <p><b>• Username</b> l.smith@nfwi.org.uk</p> <p><b>• Password</b> testing</p> <p><b>• Password</b> <input type="password"/> <input type="button" value="Save"/></p> <p><b>• Password Expiry Date</b></p>
---	--

Then click on ‘Save’ at either the bottom or top of the page

## HOW TO SET UP A NEW USER

When an MCS Rep has the position of MCS Rep assigned to her, she should automatically have a security profile set up for her, and an email is automatically sent to her, informing her of her login details.

If however, you should ever need to set up a user that has not worked for, you should follow these steps:

Follow the first steps above to get to the main Security Users search screen

You can search for their email address to make sure that they are not already set up. If not, click on 'Create New' at the bottom of the page

### Search for Security User

Please specify your search criteria below, then click 'Search'

Search Criteria

Securityuser	<input type="text"/>
First name	<input type="text"/>
Surname	<input type="text"/>
Federation	<input type="text" value="Buckinghamshire"/>
Lastlogon	<input type="text"/> to <input type="text"/>
Passwordexpirydate	<input type="text"/> to <input type="text"/>
Userexpirydate	<input type="text"/> to <input type="text"/>
Lastfailedlogin	<input type="text"/> to <input type="text"/>
Status	<input type="text"/>
Created by	<input type="text"/>
Created date	<input type="text"/> to <input type="text"/>
Modified by	<input type="text"/>
Modified date	<input type="text"/> to <input type="text"/>



This will open up the 'Create New Security User' screen

Click on 'Search', to find the member

### Create New Security User

Status

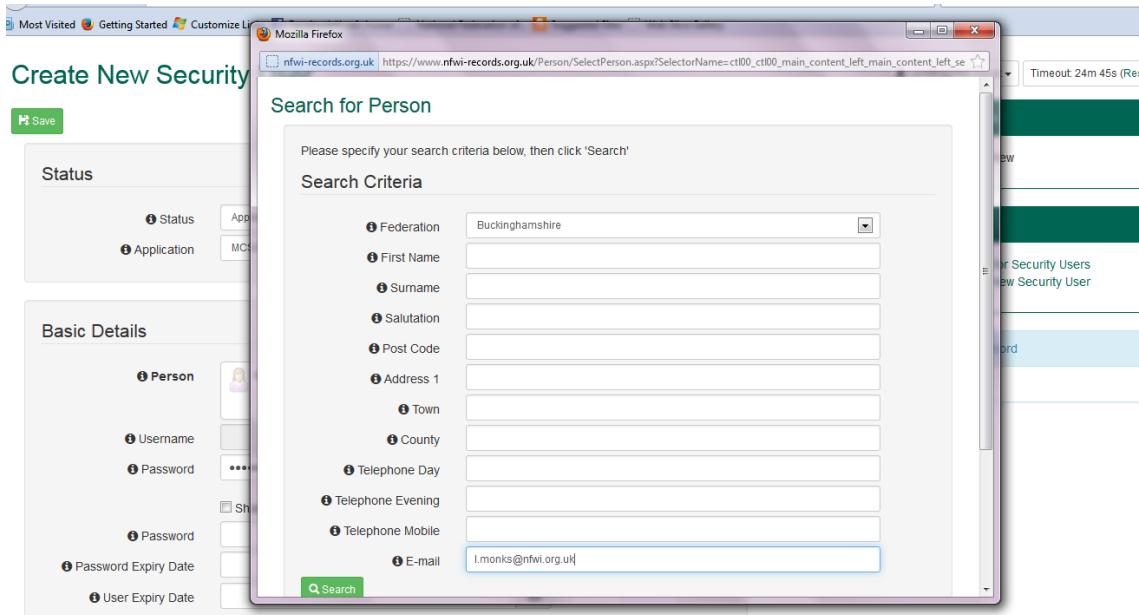
Status	<input type="text" value="Approved"/>
Application	<input type="text" value="MCS2"/>

Basic Details

Person	<input type="text" value="No item selected"/> <input type="text" value="i.smith"/> <input type="button" value="Search"/> <input type="button" value="Clear"/>
Username	<input type="text"/>
Password	<input type="text" value="*****"/>
<input type="checkbox"/> Show Password	
Password	<input type="text"/>
Password Expiry Date	<input type="text"/>
User Expiry Date	<input type="text"/>



This will open up a popup window



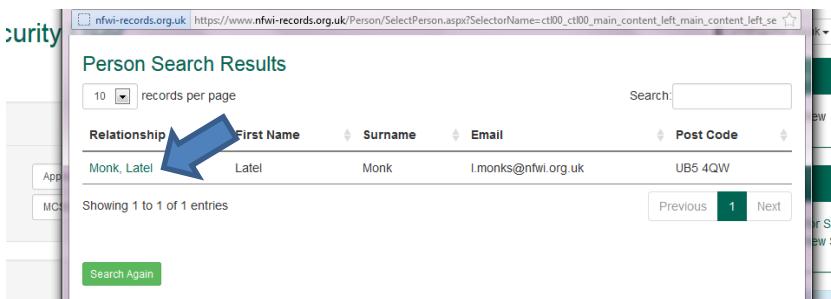
Here you can search using the criteria you want in order to find the member that you wish to make a user

In this case I have used the email address, as above.

Then click on 'Search' at the bottom

This will bring up everyone with that specific criteria

If this is the member you want, click on their name (under the Relationship column) to select them



This will then put their details into the main page, where you can enter a password for them (this will appear as dots until you tick the 'Show password' box).

You will also need to repeat the password in the password box below it. Then click on 'Save'.

## Create New Security User

**Status**

**Profile** Status: Approved  
Application: MCS2

**Basic Details**

**Person** Monk, Latel  
496462

**Username**: l.monks@nfwl.org.uk

**Password**:

**Show Password**

**Password**:

**Password Expiry Date**:

**User Expiry Date**:

After you have saved the user, you need to scroll down to 'Roles' in order to assign their roles. This is where you can allow/provide them access to their WI or their Federation

**Roles**

**Profile**: [Please select...]

**National**:

**Federation**: Buckinghamshire

**WI**: [Please select...]

For the first example I am assigning a WI MCS Rep for a WI called 'Test Latel Test'

Click on the Profile dropdown menu, and choose 'WI: Manager (MCS Rep)'

**Roles**

**Profile**: WI :Manager (MCS Rep)

**National**:

**Federation**: Buckinghamshire

**WI**: [Please select...]

Your Federation will automatically be selected.  
Then select the WI from the WI dropdown menu

**Roles**

**Profile**: WI :Manager (MCS Rep)

**National**:

**Federation**: Buckinghamshire

**WI**: [Please select...]

**Administrator Use Only**

**Admin?**: Test\_Latel\_Test

Then click on 'Add Role'

Roles

Profile	WI:Manager (MCS Rep)
National	
Federation	Buckinghamshire
WI	Test Late Test



After that you will need to confirm the password again, in the second Password box (you can tick the 'Show Password' box to see this)  
 Then click on 'Save' at either the top or bottom of the page.

This is the MCS Rep now set up with access to her WI.

If you wanted to assign a Federation MCS Rep you will repeat as above but when you select the profile from the dropdown menu, you will choose either 'Federation: Manager' (this enables them to make amendments to any member in the federation) or 'Federation: User (read only)', which does as it says and just gives them Read Only access to the federation's members

Roles

Profile	WI:Manager (MCS Rep)
National	[Please select...]
Federation	Federation: Manager
WI	Federation: User (read only) WI:Finance User (Treasurer) WI:Manager (MCS Rep) WI:User (Member)

This is the only thing you need to choose. The federation will automatically be selected and you do not need to choose a WI.

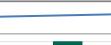
Roles

Profile	WI:Manager (MCS Rep)
National	
Federation	Buckinghamshire
WI	[Please select...]

Then click on 'Add Role', as described above.

When you have clicked on 'Add Role', if you scroll down to 'Security Profiles', you will see the selections which have been saved

This is showing a WI MCS Rep

Security Profiles			
No items to display			
Organisation	Group Name	Role Name	
Test Late Test	WI	Manager (MCS Rep)	
Showing 1 to 1 of 1 entries			

 This is showing they have WI level access  
 This is showing the WI they have access to

This is showing they are the MCS Rep and have full access

This is showing a Federation Rep

Security Profiles		
All <input checked="" type="checkbox"/>	records per page	Search: <input type="text"/>
Organisation	Group Name	Role Name
Buckinghamshire	Federation	Manager

Showing 1 to 1 of 1 entries

Previous 1 Next

This is showing they have full access at Manager level

This is showing they have Federation level access

This is showing the Federation they have access to

## THINGS TO CHECK

In the event that a user has been blocked from accessing the MCS for any reason:

Search for her ‘Security Profile’ and check to see if it has anything other than ‘Approved’ under the ‘Status’ when you search for her username. If it has anything else, go in and change it to Approved.

Security User Search Results								
All <input checked="" type="checkbox"/>	records per page	<input type="text"/> i Help	<input type="button"/> Copy	<input type="button"/> CSV	<input type="button"/> Excel	<input type="button"/> Print	Search: <input type="text"/>	
SecurityUser	FirstName	Surname	Lastlogon	Passwordexpirydate	Userexpirydate	Loginattempts	Lastfailedlogin	Status
i.monk123@nfw.org.uk	Latel	Monk						De-Activated

Showing 1 to 1 of 1 entries

Previous 1 Next

Search Again  Create New

A blue arrow points to the 'Status' column header, and another blue arrow points to the 'De-Activated' status value.

You can also change the status from ‘Approved’ to ‘De-Activated’ if you wanted to block someone from accessing the MCS.

If you have any problems assigning a member or finding their ‘Security profile’, make sure that their email address in their members record is correct and double check whether they have been assigned as an ‘MCS Rep’. If both of these are correct they should either automatically be assigned a login with details sent directly to them via email or you should easily be able to find them to assign them a security profile yourself.

PLEASE REMEMBER: You cannot assign someone a security profile (user login) unless they have an email address listed under their member record, or their staff record for a federation staff member.