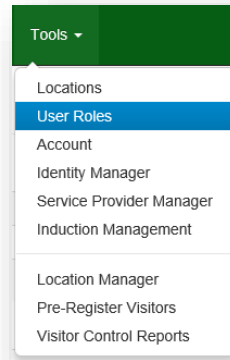


How to Grant Service Provider Manager User Role rights

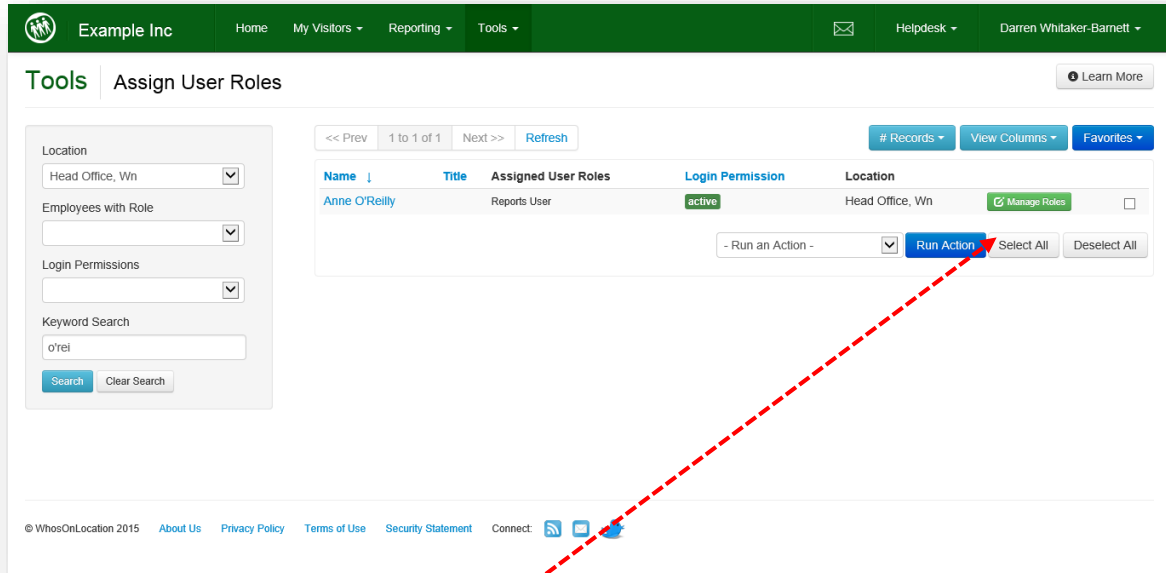
In this article we show you how to grant a user Service Provider Manager User Role rights. The act of granting user roles rights can only be done by a WhosOnLocation Account Administrator.

GRANTING USER ROLE RIGHTS

1. Navigate to **Tools** > User Roles

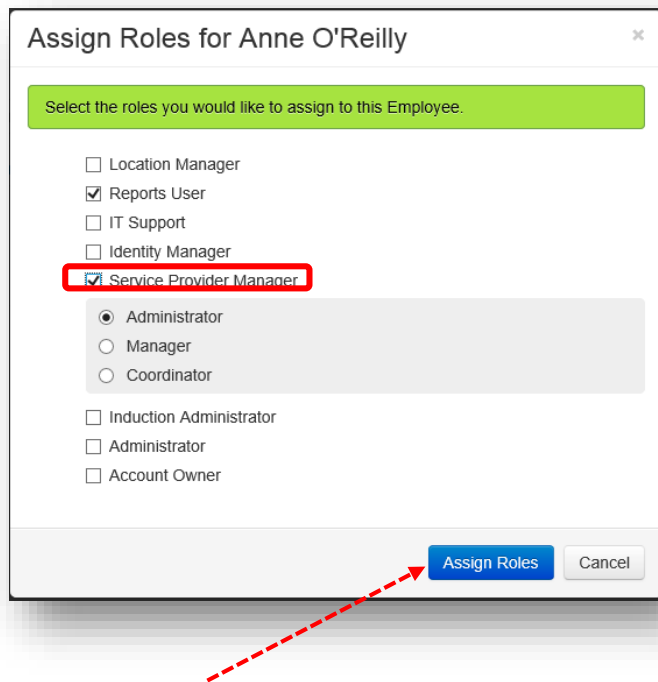


2. Search for the employee you wish to assign the Service Provider Manager role to.



3. Select the green **Manage Roles** button beside their name

4. Select the respective Service Provider role and...



There are 3 levels of User Rights:

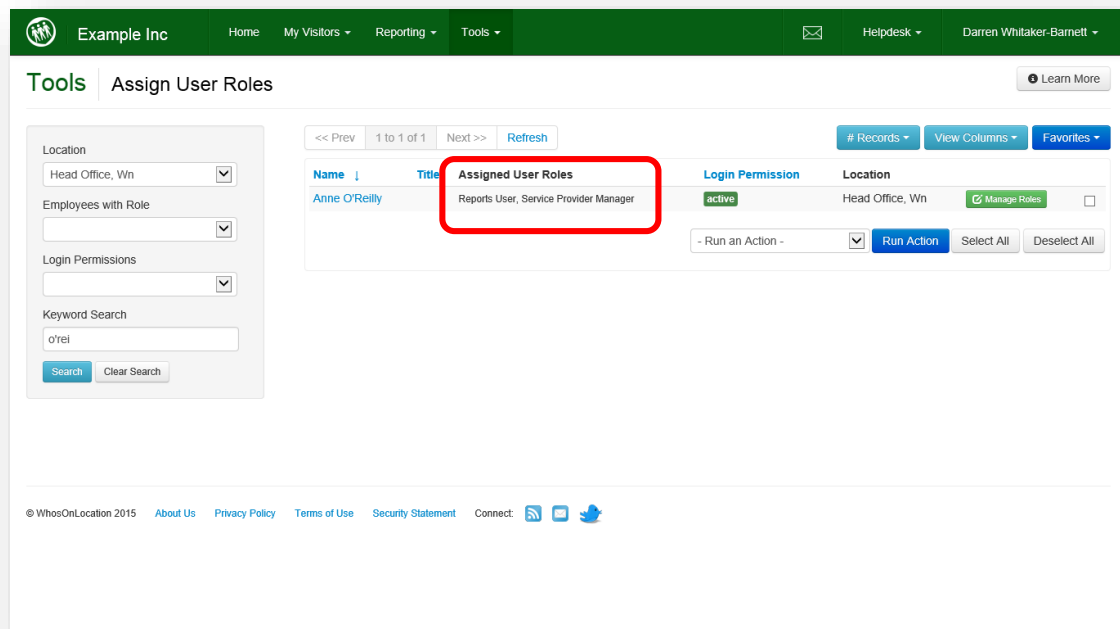
Administrator: The same rights as a Service Provider Manager plus this user can manage Settings.

Manager: This user can manage any Service Provider Organization or member and make them Active.

Coordinator: This user can only manage Service Provider Members that are part of the same Internal User Access Group as the Coordinator

5. Select **Assign Roles**

The Role will now appear in the users assign roles list. The next time they login to WhosOnLocation they will be able to access the Service Provider Manager functions based on Role level you granted them.



How does the User sign in to WhosOnLocation to start managing Service Providers?

It is easy to determine if the user that you granted Service Provider User Role rights to has logged into WhosOnLocation before.

Beside their name is their '**Login Permission**'...

The screenshot shows the 'Tools > Assign User Roles' page. On the left, there are filters for Location (Head Office, Wn), Employees with Role, Login Permissions, and a Keyword Search (o'rei). The main table has columns: Name, Title, Assigned User Roles, Login Permission, and Location. A red arrow points to the 'Login Permission' column for the user 'Anne O'Reilly', which is set to 'active'. Below the table are buttons for 'Run Action', 'Select All', and 'Deselect All'.

....and it will either be:

- **New:** Employee has not yet been sent activation email
- **Incomplete:** Employee is missing email address and cannot be sent activation email
- **Pending:** Employee has been sent an activation email but has not yet logged in
- **Active:** Employee has activated their account and has successfully logged in

If the user's Login Permission is 'New'

- Select the tick-box beside their name
- Scroll to Footer of screen
- Select the 'Send Login Permission Email' from the dropdown list
- Select the blue Run Action button
- This will send the user an email asking them to create a password and activate their account login

If the user's Login Permission is 'Incomplete'

- Go to Tools > Locations > View (the location they are based at)
- Select Employees option on left of screen then find their name in the employee list
- Select the green View Button beside their name
- Add their email address and select Save and Close
- Then return to Tools > User Roles and follow the above steps for 'New' above.