Lesson #2 - Manage Users

Review (Optional)

The second lesson in this Learning Series, Manage Users, is designed to get you familiar with understanding User IDs and how to manage them. You may wish to review the articles listed below before beginning.



The review articles in the bullet list below will open the Help article in a new tab. When you are finished reviewing the material, close the tab and return to this page to access the next article using the links below.

- Logging In and Out of your Database
- Jackrabbit User ID Passwords

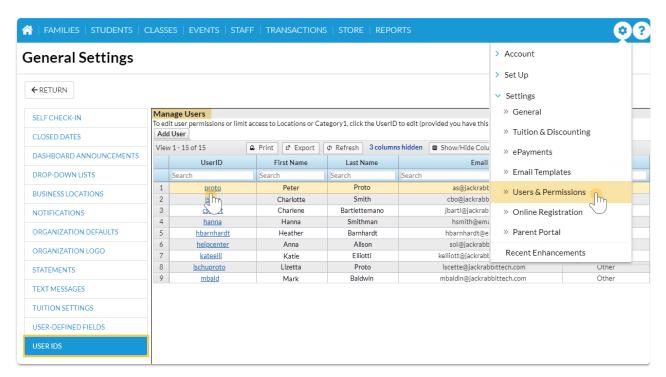
What is a Jackrabbit User ID?

A Jackrabbit User ID and password are the keys to your database; these credentials give a User the ability to log into your database. Each enrollment, drop, and transaction entered by a User will have their *User ID* associated with it.

- ★ A Jackrabbit database can maintain as many *User ID*s as needed. There is no limit to the number of Users that can be logged into the database at the same time (unlimited concurrent Users).
- Users can be limited as to what they can see and what they can do in Jackrabbit using User Permissions.

Example: You want your managers to have access to revenue reports, but would like to restrict those areas for all other Jackrabbit Users. This is done by removing the permissions relating to financial reports from all Users except management.

User IDs are managed under the Gear (icon) > Settings > Users & Permissions > User IDS (left menu).





A Jackrabbit User ID must be unique throughout Jackrabbit's entire application.

Example

- You have an employee named Dianne Smith who would like her User ID to be "dsmith".
- When you are adding her User ID to your database you receive an error messageUser ID not available.
- You do not have any User ID "dsmith" in your database.

Why is this User ID not available?

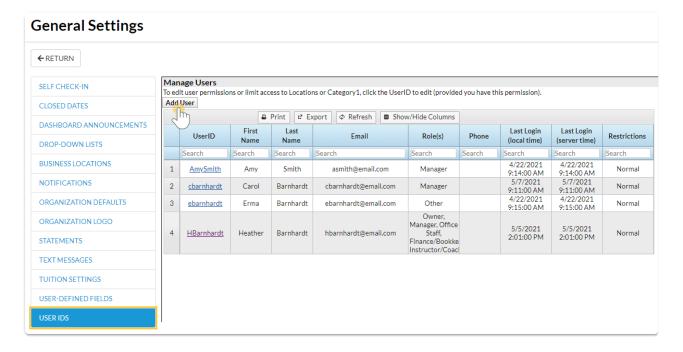
A studio down the street, which also uses Jackrabbit, has an employee named Deirdre Smith and her User ID is "dsmith". Deirdre has already taken the User ID "dsmith" and there can only be one in the 'Jackrabbit World'.

Add/Revoke a Jackrabbit User ID

A Jackrabbit database can maintain as many User IDs as needed. There is no limit to the number of Users that can be logged into the database at the same time (unlimited concurrent Users). However, each User ID must be unique throughout Jackrabbit's entire application, i.e., the User ID cannot be in

use by any other Jackrabbit customer.

User IDs are managed from the Gear icon > Settings > Users & Permissions > User IDs (left menu).



Add a User ID

- 1. Go to the Gear icon > Settings > Users & Permissions > User IDs (left menu).
- 2. Click Add User.
- 3. Enter a **User ID**. You will be alerted if that User ID is not available. If it isn't, enter another User ID until you are notified it is available. Note: Once added, the 'name' of the User ID cannot be changed. Instead, **clone the User ID** give it the new name and then revoke the origina **User ID**'s **login status**.
- 4. Enter a New Password and then Re-enter Password. For security, a password must contain:
 - 9 characters
 - 1 lowercase
 - 1 uppercase
 - o 1 number
- 5. Add a First Name, Last Name, and an Email for the User.
- 6. Identify the Role the User performs. Multiple roles can be selected.
- 7. Optionally, you can Match (the User) to a staff person. If you use the Staff Portal and this User will also work in the Staff Portal, you can match their User ID to their Staff record. This allows them to share one User ID/Password for both logging into your database and logging into the Staff Portal.
- 8. Click Save.

Once you have added the User ID, be sure to edit their User Permissions and add any User access restrictions (Locations or Category 1) that may apply to the User.



To quickly add another User ID that will have the same User Permissions as the User ID you've just added, save time and use the <u>Clone User</u> option to create the new User ID.

Revoke a User ID

When a staff member is no longer employed with you, we encourage you to revoke the User ID instead of deleting it. If you revoke the User ID you will still be able to search previous user activity on the account and the ex-employee will no longer have access.

- 1. Go to the **Gear** icon > **Settings** > **Users & Permissions** > **User IDs** (left menu).
- 2. Click the **User ID** you want to revoke.
- 3. Click the **Revoke User ID** button. The User will no longer be able to log into Jackrabbit.

If the User ID was matched to a staff member, revoking access from the database will also keep them from being able to log into the Staff Portal. Change the staff member's status to inactive on the *Summary* tab of the *Staff* record instead of deleting. Deleted staff members can be recovered by our Development Team, but there is a fee to recover information.



If you use Zapier with Jackrabbit, there are additional steps you must take tosecure your Zapier account when a staff member leaves.

Permissions for Jackrabbit Users

User Permissions and **Access Restrictions** allow you to safeguard your data by controlling what a Jackrabbit User can see, and what they can do, in your database.

- 🖈 Assign permissions to Jackrabbit User IDs based on job function
- ★ Limit a User ID's access so they see only the data related to specific Category1s
- rant access to your database by Location (if you have multiple Locations in your database)

Business Scenario

The facility offers two programs, Gymnastics, and Cheer. Each of these programs operates separately

but they share the database because they share the facility and have many families enrolled in both programs. If a Category 1 value has been added for each program, access to the database can be granted separately for the Gymnastics staff and the Cheer staff. Staff would then have access to only the data related to their program.

User Permissions and Access Restrictions are managed from within each individual User ID profile found under the *Gear* (*icon*) > *Settings* > *Users* & *Permissions* > *Click the link to open a User ID* > *User Permissions* (*left menu*).



Permissions

When you add a new Jackrabbit User ID, not all User Permissions are granted (checkboxes selected). This allows you to control who can perform sensitive tasks, or see certain areas of your database.



It is a Best Practice to select one or two Users to be you<u>6ystem Administrator</u>(s). Grant those User IDs with ALL permissions and they should be the only ones tasked with creating new User IDs.

User Permissions are grouped into categories based on the areas of the database they affect. Search fields help you to locate permissions related to the task of the User you are creating/editing.

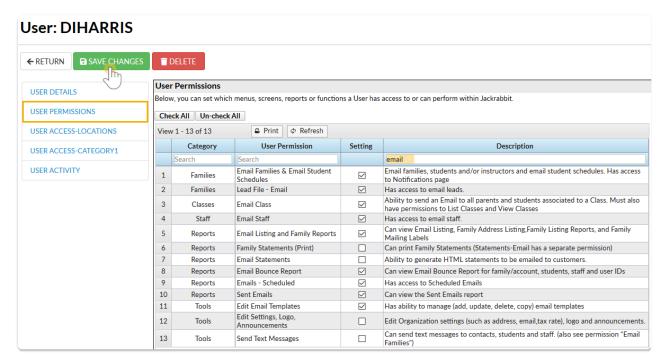
Check out **Protect Your Account - Guidelines for User Permissions** for a deeper dive into permissions including the identification of permissions related to financial information, the permissions that control areas of caution (sensitive information), and the permissions that should be

granted with extreme caution (delete records).

Example

You are creating a new User ID for Dianne Harris. She will be responsible for email correspondence for your organization.

To find all permissions related to emailing in Jackrabbit, enter the keyword "email" in the Description search field. Select the checkboxes for the tasks you want this User ID to have permission to do and Save Changes.





A User must log out and log back in again to see new permissions take effect.

Access Restrictions

- **⊙** User Access-Locations

Protect Your Account - Guidelines for User Permissions

A great way to protect your business data and confidential financial information is to be sure all sers have the right user permissions. Having the right permissions allows each User to access the parts of Jackrabbit they need to perform their tasks successfully.

Almost every permission will be checked off and activated when Jackrabbit first sets up a new account. This initial User ID is intended to be the account System Administrator. Once the System Administrator User ID has been completed, they can create additional User IDs as needed.



Create a template for different User ID staff roles. Once a template is created, you can select the template in the User ID column under *Manage Users* and click the *Clone User* button to duplicate a User ID and create a new User ID with the same permissions. This saves lots of time and you won't have to select the permissions each time.

We have indicated which User permissions are related to the following in the tables below:

- **Financial information** Credit card information, transactions, family balances, fees, and credits/payments fall into this category.
- Areas of caution These permissions are sensitive and may not be appropriate for general staff
 access.
- Areas requiring extreme caution Deleting data, classes, events, students, and leads. These
 permissions can significantly affect your account and should be assigned to the appropriate
 administrator.

NOTE: Permissions without a check mark must be checked off manually once a User ID is created. Contact the Support Team if you need help with User permissions.

| Legend: Financial Information | Use Caution | Use Extreme Caution | Financial Info & Use Caution |
|--------------------------------------|--------------------|---------------------|------------------------------|

Expand each section to view the permissions by category and see what the permission controls.

- **⊘** Families
- **⊘** Students
- **⊘** Classes
- **Events**
- Staff
- **⊙** Transactions
- Store

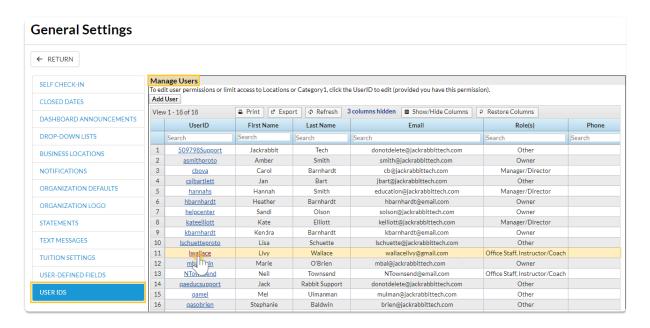
- **⊘** Reports
- **⊘** Tools
- Partners
- **⊗** Staff Portal
- Automation

Clone a User ID

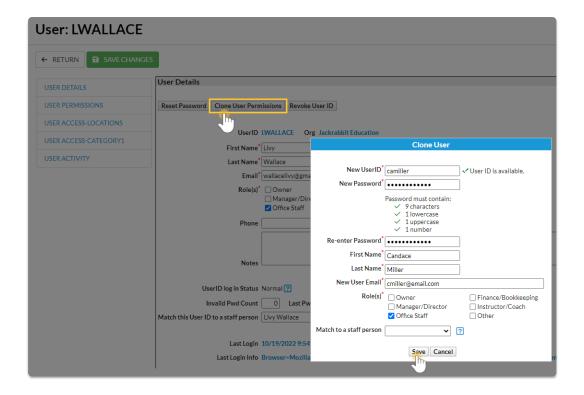
Cloning User Permissions is a great time saver!

Set up one *User ID* with permissions and click the **Clone User Permissions** button to create more users with the same permissions. For example, when a new Office Staff member is hired and you want to be sure they have the correct User Permissions, clone another Office Staff member's User Permissions.

- Go to the Gear (icon) > Settings > Users & Permissions (left menu) > select a User ID under Manage Users.
- 2. Click the User ID link to access the profile of the User ID whose permissions you want to clone.



3. Click the Clone User Permissions button.



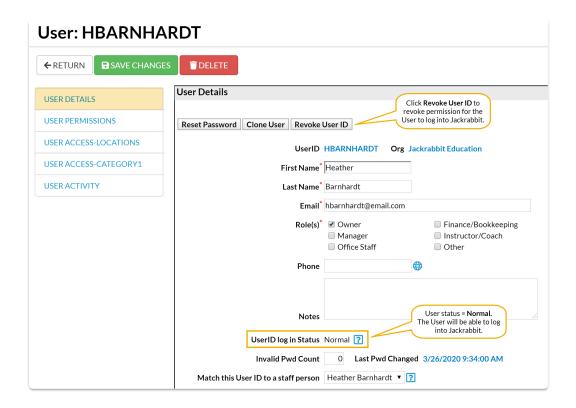
- 4. Enter the New UserID.
- 5. Enter a New Password and re-enter it.
- 6. Enter the First Name and Last Name of the User.
- 7. Add the **New User Email** for the user.
- 8. Select the Role(s) of the User in your organization and choose a Match to a staff person from the drop-down list if applicable.
- 9. Click **Save** and **OK** in the confirmation window.
 - The cloned user's *User Details* page opens, add additional information as needed.
- 10. Click Save Changes.

User ID Login Status

In the *User Details* section of a User ID profile (*Gear icon > Settings > Users & Permissions > User IDS > select a UserID*), the **User ID login Status** field indicates the 'health' of the User ID.

Normal Status

All clear! The User is able to log into Jackrabbit.



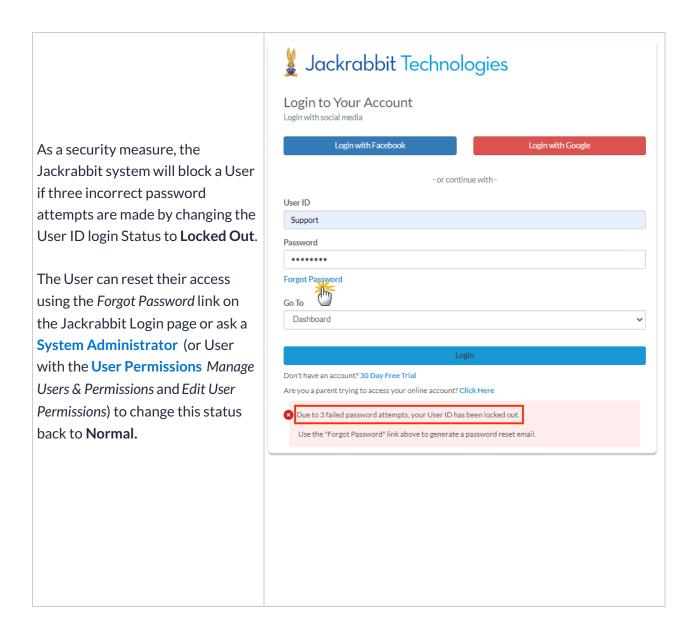
Permission Revoked

A **System Administrator** (or User with the **User Permissions** *Manage Users & Permissions* and *Edit User Permissions*) can revoke a User ID by clicking on the *Revoke User ID* button, for example if the employee was terminated.



A User ID who has been revoked is no longer able to log into Jackrabbit and they cannot reset their password to gain access.

User Locked Out



Reset a User ID

- 1. Go to the Gear (icon) > Settings > Users & Permissions.
- 2. Click on the User ID that has been locked out.
- 3. Click the **Restore User ID** button. This will change the Status back to Normal.
- 4. Click Save Changes.

Update a Jackrabbit User's Email Address

It is important that a *User ID* have an email address associated with it.

- If a user is logged in and sends a Support request (using the Support Button), the response will be sent to the email address associated with that user.
- If a user's password is locked out, a new temporary password can be sent to the email address associated with the User ID.

To add or edit a User's email address:

- 1. Go to the Gear (icon) > Settings > Users & Permissions.
- 2. Click the User ID that needs updating.
- 3. Enter the new email address.
- 4. Click Save Changes.

User ID Activity Tracking

Jackrabbit offers visibility into the activities of each User ID. You have the option to review a single User ID or run a report to see all User activity with the Search Activity report.

- optimize collaboration with the ability to see which User ID has performed a task.
- rovide an audit trail for transactions entered, deleted, or edited.
- * Track and review User actions when there is an issue.

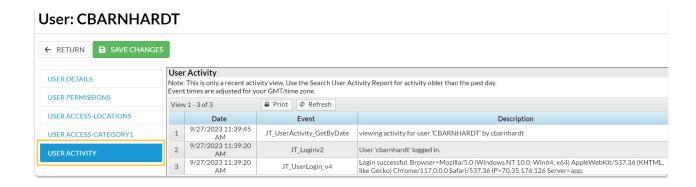
For each action a User takes in Jackrabbit, an 'event' is created and logged. These events are reported in the activity logs.

Examples of User actions and the corresponding event name:

| Action | Event Name |
|------------------------------|----------------------|
| Edit a transaction | JT_EditTrans |
| Delete a transaction | JT_DeleteTransaction |
| Create a payment transaction | JT_PmtTrans |

View a Specific User's Activity

You can view a User's recent activity from within their User ID profile, found under the **Gear** (icon) > **Settings** > **Users & Permissions** > select a **User** > **User Activity**, you are able to quickly access a log of their recent activity.



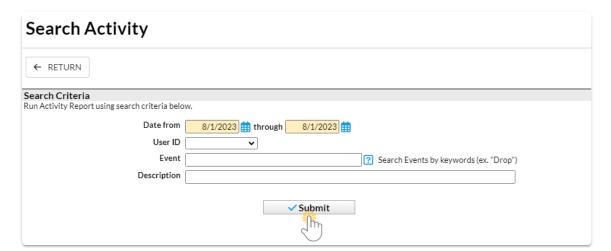


This is only a recent activity view, not all activity is logged and activity is only kept for a limited time. Older user activity may be preserved in offline database backups. Send a support request if you need an older activity.

Search Criteria - All User Activity

View the activity of all Users at once using Search User Activity.

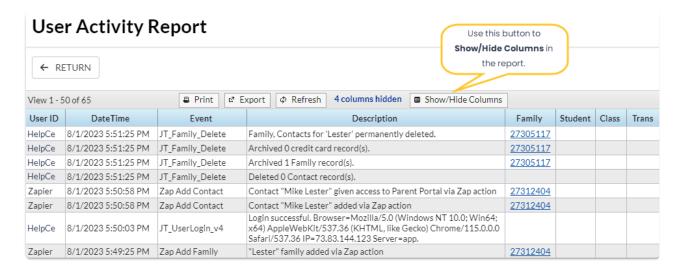
Get to this report from the **Reports** menu > **Find Reports** > enter **Search User Activity** in the Keyword Search field > **Search User Activity**. Use Search Criteria to search for a specific date range, User ID, Event, or Description.



Report Results

The results will display information including which User made the edit, what time the edit was done, a description of the changes made, and links to information about the Family, Student, Class, and Transaction.

There are many columns of information available in the report results. Customize your report with the **Show/Hide Columns** button; select only the information important to you.



Click on a link to see the **Detai**ls. For this example, it's a Family link.



Tips for Searching Activity

- Use a keyword to search with the Event criteria, for example, "edit" or "delete"
- To find out what the event name associated with an action is, a little testing can get you the
 answer. While logged into Jackrabbit, perform the action you are looking to search on and then
 head over to Reports menu > Find Reports > enter Search User Activity in the Keyword Search
 field > Search User Activity and search for the current activity of your User ID. Make note of the
 event name given to the action you performed.

Maximize Jackrabbit's Online Performance

Many of the factors that influence your Jackrabbit experience may be related to your computer. Speed and usage are impacted by internet connection, the age of the computer or device, the number of applications currently running on your computer, and more.

Be sure your internet setup includes broadband internet and an internet connection. We recommend having as much bandwidth as possible if you are sharing your internet connection with other devices. Ensure that cookies are enabled so Jackrabbit can work properly.

Before scrolling through the troubleshooting tips below we recommend you start with these two

tasks as they often fix the most common issues:

| Clear the Cache | Clearing the cache might seem like a minor thing to do but it can dramatically improve your Jackrabbit experience. This simple task can improve the speed of page loads, ensure the latest enhancements are loaded, protect privacy, and free up device memory. **Learn how to clear the cache in Chrome **Learn how to clear the cache in Microsoft Edge **Learn how to clear the cache in Firefox **Learn how to clear the cache in Safari |
|--------------------|--|
| Use Latest Browser | It is important to work in the most recent version of your web browser; you'll have access to the latest features and functionality, along with security fixes that can keep you safe online. We recommend using Chrome, Microsoft Edge, or Firefox when you are working in Jackrabbit. *** Learn how to update your Chrome browser *** Learn how to update your Microsoft Edge browser *** Learn how to update your Firefox browser *** Learn how to update your Safari browser |

Open each section for troubleshooting tips for the issue.

Expand/Collapse All

- **⊘** Jackrabbit Is Not Accessible
- **○** Nothing Happens After Clicking a Link
- **⊘** Information Isn't Saving
- **OVER SET OF STATE OF SET OF S**
- **⊘** Screen Is Too Small
- **⊗** Login Fields Don't Appear

- **⊘** Security Certificate Shows as Expired or Not Valid
- **⊘** Jackrabbit Is Running Slow
- **⊘** Traceroute Test for Latency
- **⊘** Contact Jackrabbit Support

QUIZ - Lesson #2 - Manage Users

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #2 Quiz where you can test your understanding of the concepts in this lesson. You will be asked to enter an email address for quiz results to be sent.

Quiz #2 - Manage Users

TAKE THE QUIZ

| Number | Total | Points Needed for an "A" | Points | Points |
|-----------|----------|--------------------------|------------|-----------|
| of | Possible | | Needed for | Needed |
| Questions | Points | | a "B" | for a "C" |
| 8 | 8 | 7 | 6 | 5 |

- Return to Supervisors and Managers Menu to continue to next lesson
- **○** Click here to provide feedback for this lesson