

User Management

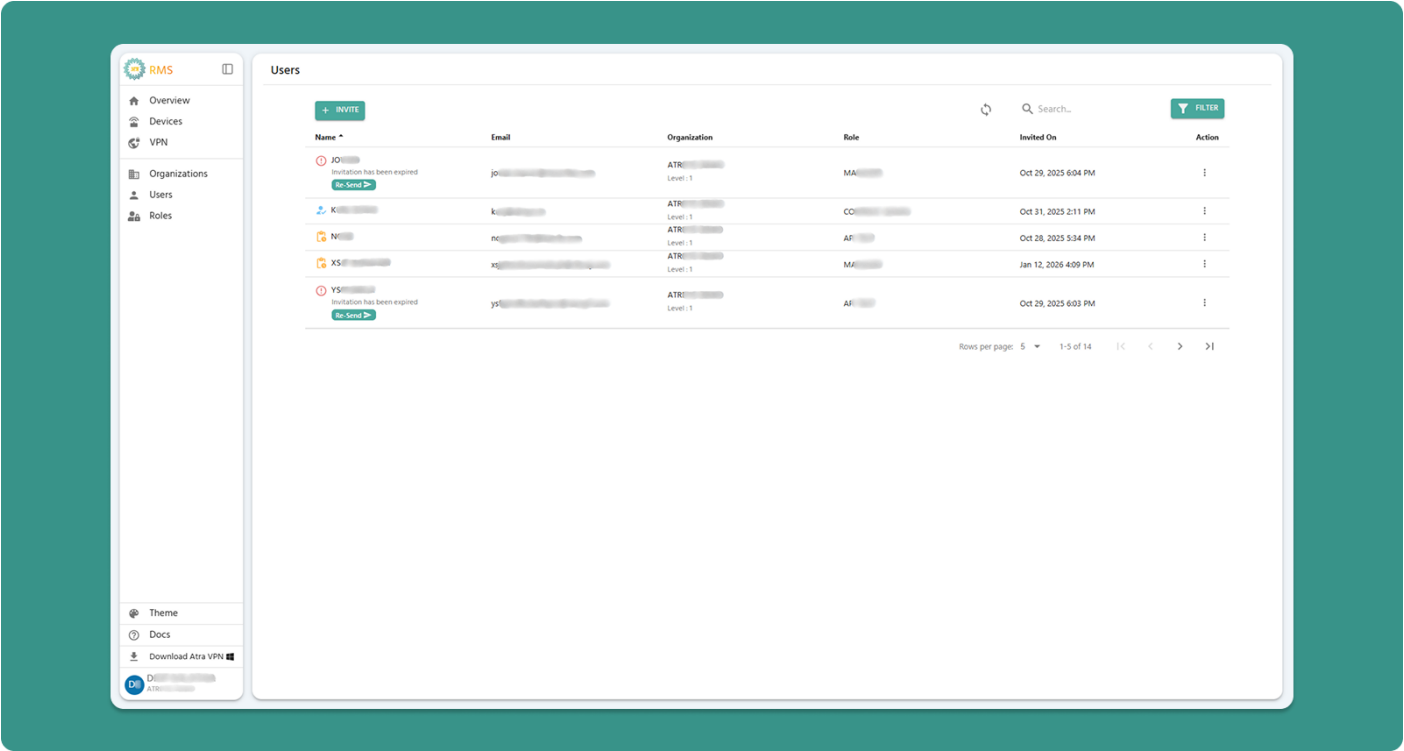
The **Users** section enables complete user lifecycle management: inviting new users, assigning roles, editing user information, and managing access to **Atra RMS**.

Key Capabilities:

- Invite new users to join Atra RMS
- Assign users to specific organizations
- Define user permissions through roles
- Edit user names and roles
- Remove users from the system
- [View and Manage Users](#)
- [User Invite Guide](#)

View and Manage Users

The main Users interface provides a comprehensive view of all users in your organization and immediate child organizations.



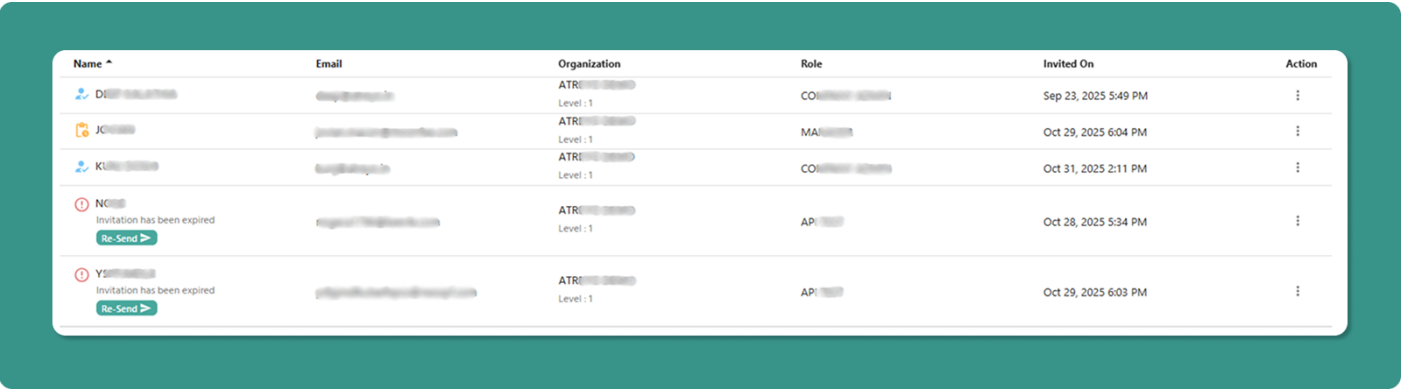
Interface Actions



Action	Location	Purpose
+INVITE Button	Top-left (Teal)	Invite new user to Atra RMS

Action	Location	Purpose
Refresh Button	Top-right	Manually update user list
Search Bar	Center	Filter by name, email, organization, or role
Filter	Top-right	Filter users by invitation status, role, and organization

Table Columns



Column	Description	Example
Name	User's name with status icon	🟢 Jane Doe, 🟡 John Smith, 🔴 Mike Johnson
Email	User's login email address	jane.doe@company.com
Organization	Org name with level	ATREYO Level-1
Role	Assigned permission set	COMPANY ADMIN, MANAGER
Created On	Invitation date/time	Dec 20, 2025, 3:45 PM

Scope: Data includes users from your current organization and all immediate child organizations.

Name Column with Status Icons

The **Name column** displays user status through visual icons alongside the user's name.

Icon Types and Meanings

Icon 1: Account Active (✓ User Icon - Blue)

Appearance:

- Blue user icon (👤)
- User name displayed normally
- No additional text below name

Meaning:

- User successfully created their account
 - Account setup completed
 - User can log in to Atra RMS
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Icon 2: Account Creation Pending (🕒 Clock Icon - Yellow)

Appearance:

- Yellow clock icon (🕒)
- User name displayed normally
- No additional text below name

Meaning:

- User has been invited
- Invitation email sent successfully
- User has NOT yet completed account setup
- Invitation link still valid (within 24 hours)

What Happens Next:

- User receives invitation email
 - User clicks "Set Up Password" link
 - User creates password
 - Icon changes to ✓ (Account Active)
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Icon 3: Invitation Expired (⚠ Warning Icon - Red)

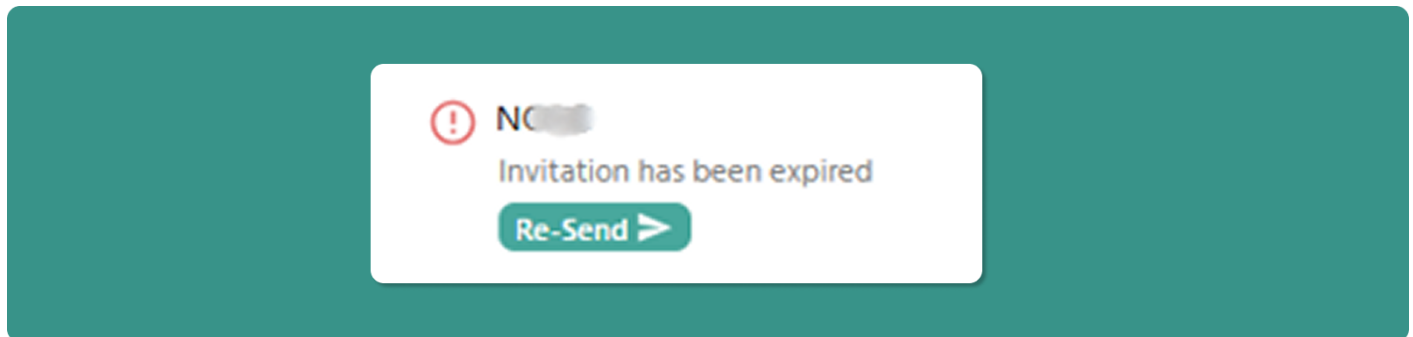
Appearance:

- Red warning icon (⚠)
- User name displayed
- Text below name: "Invitation has been expired"
- Re-Send button below caption (teal button with arrow →)

Meaning:

- User was invited but did not complete setup
- 24-hour invitation validity period has expired
- User cannot use old invitation link
- Administrator/User must resend invitation

Re-Send Button Functionality



When invitation expires, a **Re-Send** button appears below the user's name.

Button Details:

- **Label:** "Re-Send →" (with arrow symbol)
- **Colour:** Teal
- **Location:** Directly below "Invitation has been expired" text
- **Purpose:** Send new invitation email to user

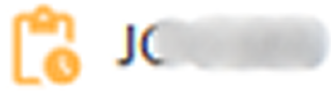
How to Resend Invitation

Steps:

1. Locate Expired User

- Find user with ⚠ warning icon
- Look for "Invitation has been expired" text
- **Click Re-Send Button**
- Click the "**Re-Send** →" button below user name
- **System Processing**
- New invitation email sent to user's email address
- New 24-hour validity period starts
- User status updates in table
- **Visual Update**
- Icon changes from ⚠ (expired) to ⏳ (pending)
- "Invitation has been expired" text disappears
- Re-Send button disappears

- User now shows as "invited, pending account setup"



What Happens After Resending

User Receives:

- New invitation email with fresh link
- Subject: "Invitation to Join Atra RMS"
- New 24-hour validity period

Old Invitation Link:

- Previous invitation link becomes invalid
- User cannot use old link even if they still have the email
- Only new link will work

User Must:

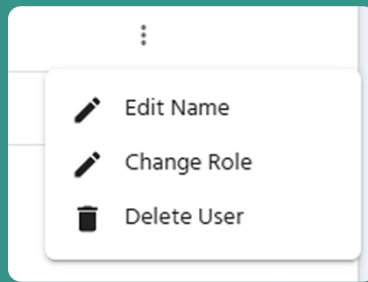
- Check email for new invitation
- Click "Set Up Password" button in new email
- Complete account setup within 24 hours
- Create password and activate account

If User Completes Setup:

- Icon changes to ✓ (Account Active)
- User can now log in
- Invitation system complete

Individual User Actions

Each user row has an Action button (three vertical dots :) that opens a menu with management options.



Action	Purpose	Permission Required
Edit Name	Modify user's display name	Users Update
Change Role	Assign different role	Users Update
Delete User	Permanently remove user	Users Delete

Action: Edit Name

Modify a user's display name (does not affect email/login).

Steps:

1. Click **Action button** (:) next to user
2. Select **"Edit Name"**
3. Dialog opens with current name
4. Type new name
5. Click **SAVE** to confirm or **CLOSE** to discard

Input Rules:

- **Length:** 3-40 characters
- **Allowed:** Letters, numbers, spaces, periods (.), underscores (_), hyphens (-)

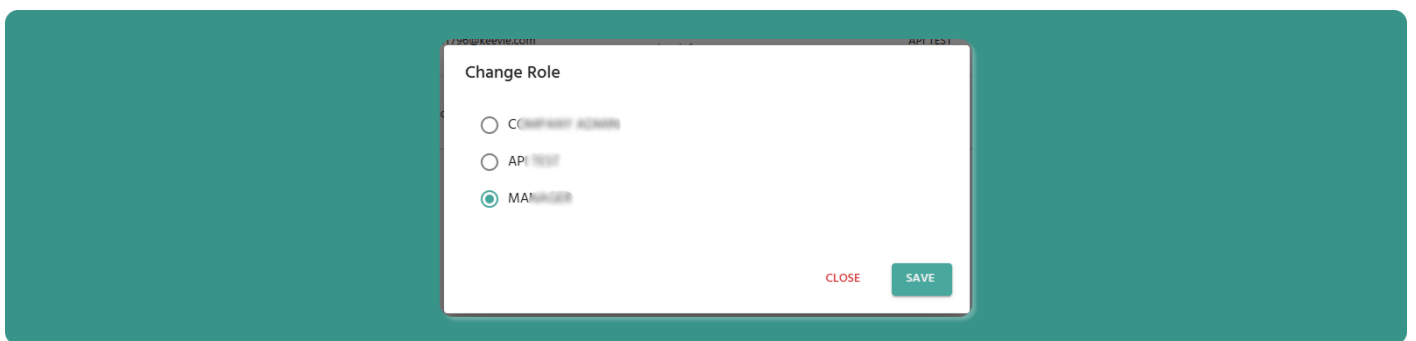
- **Not allowed at start/end:** Period, underscore, hyphen
- No consecutive special characters

Examples:

- ☐ Jane Doe
- ☐ Product-Manager
- ☐ User_123
- ☐ _Jane (starts with underscore)
- ☐ User..Name (consecutive periods)

Action: Change Role

Assign a different role to modify user's permissions.



Steps:

1. Click **Action button** (;) next to user
2. Select **"Change Role"**
3. Dialog displays available roles as radio buttons
4. Select new role (only one can be active)
5. Click **SAVE** to apply or **CLOSE** to abort

Available Roles:

- Displays all roles created for the user's organization
- Examples: ADMIN, MANAGER, VIEWER, custom roles

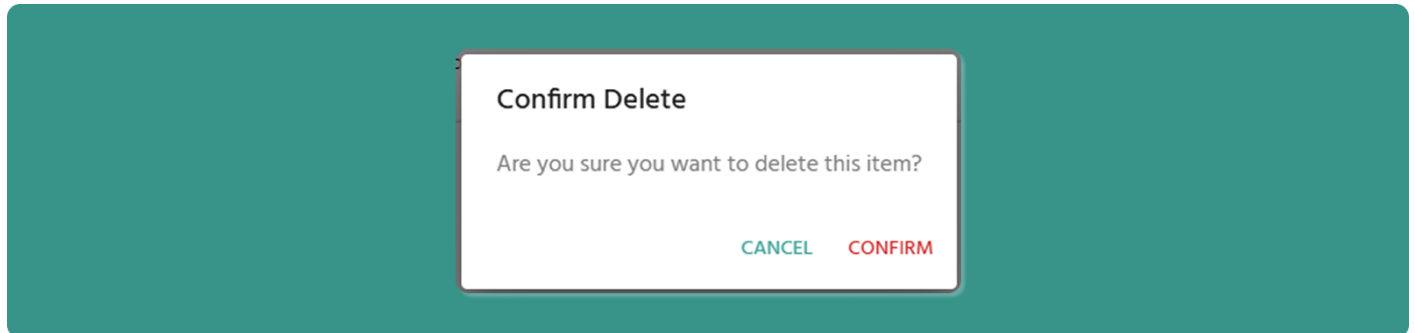
Effect:

- User's permissions immediately update
- User may need to refresh browser to see new capabilities
- Previous role's permissions are revoked

⚠ **Caution:** Changing a user's role affects their access to devices, VPN, and other resources. Verify the new role has appropriate permissions before saving.

Action: Delete User

Permanently remove a user account from Atra RMS.



Steps:

1. Click **Action button** (;) next to user
2. Select "**Delete User**"
3. Confirmation dialog appears
4. Click **CONFIRM** to delete or **CANCEL** to abort

⚠ Critical Warnings:

Deletion is Permanent:

- User account is immediately deleted
- User cannot log in after deletion
- Action cannot be undone
- User must be re-invited to regain access

VPN Tunnel Restriction:

- Cannot delete users currently in any VPN tunnel
- Must first remove user from all VPN tunnels
- Then deletion will be allowed

Audit Trail Preserved:

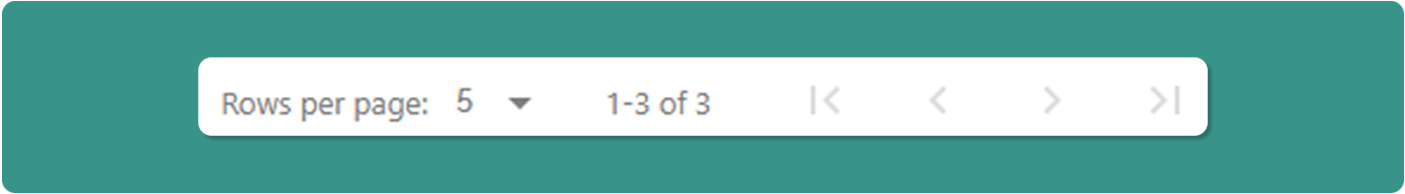
- User's name remains in "Created By" and "Registered By" fields

Self-Management Prevention:

- Logged-in user cannot delete their own account

- Logged-in user cannot change their own role
- Prevents accidental self-lockout

Table Navigation



Control	Purpose	Options
Rows per page	Adjust visible users	5, 10, 15, 20,25
Total Count	Display total users	"Showing 1-5 of 25"
Page Navigation	Move between pages	Previous, Next, Last, First

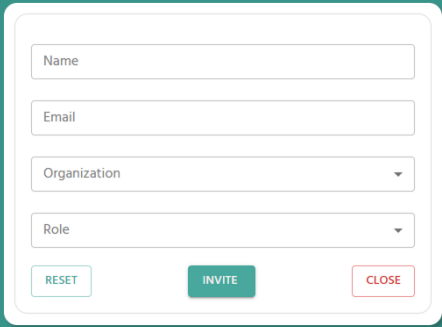
User Invite Guide

Invite new users to join your Atra RMS organization through a secure email invitation process.

Step 1: Navigate to Invite Form

1. Click "Users" in left sidebar menu
2. Click "+INVITE" button (Teal, top-left corner)
3. "Invite New User" page loads

Step 2: Complete Invitation Form

A screenshot of a user invitation form. The form is white with rounded corners and is centered on a teal background. It contains four input fields: "Name", "Email", "Organization" (a dropdown menu), and "Role" (a dropdown menu). Below the fields are three buttons: "RESET" (light blue), "INVITE" (teal), and "CLOSE" (red outline).

[INSERT SCREENSHOT: User_Invite_Form.png]

Fill out all required fields:

1. Name (Required)

User's full name (can be edited later).

Input Rules:

- **Length:** 3-40 characters
- **Allowed:** Letters, numbers, spaces, periods (.), underscores (_), hyphens (-)
- **Not allowed at start/end:** Period, underscore, hyphen
- No consecutive special characters

Examples:

- ☐ Jane Doe
- ☐ Rajesh Kumar

- ☐ Product-Manager
 - ☐ User_123
-

2. Email (Required)

User's email address (used for login and communication).

Input Rules:

- Must be valid email format
- Must include @ symbol and domain
- Case-insensitive

Examples:

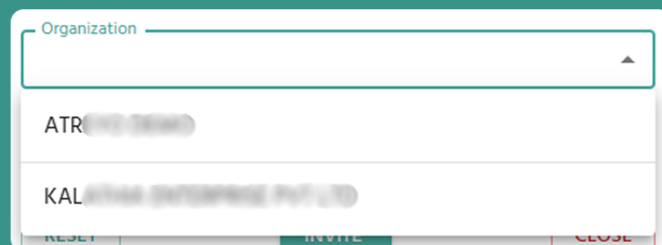
- ☐ user@company.com
- ☐ jane.doe@organization.co.in
- ☐ admin@example.org
- ☐ usercompany.com (missing @)
- ☐ user@ (incomplete domain)

⚠ Email Uniqueness:

- Email must be unique across entire Atra RMS platform
 - Cannot invite user with email already in system
 - If email exists, system shows error: "Email already registered"
-

3. Organization (Required)

Select the organization this user will belong to.



[INSERT SCREENSHOT: Organization_Dropdown_Invite.png]

Dropdown Options:

- Your current organization
- All child organizations under your management

Organization Impact:

- User's access scope limited to assigned organization
 - User inherits organizational hierarchy visibility based on role
 - User can only manage resources within their organization
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4. Role (Required)

Select the role that defines user's permissions.

Important: Role dropdown only activates after organization is selected.

Why?

- Roles are organization-specific
- Different organizations may have different available roles
- System must know organization to display correct role options

Available Roles:

- All roles created for the selected organization
 - Examples: ADMIN, MANAGER, VIEWER
-

Step 3: Submit Invitation

Button	Color	Action
INVITE	Teal	Send invitation email
RESET	Teal outline	Clear all form fields
CLOSE	Red outline	Cancel and return to User List

Step 4: Invitation Email Sent

After clicking **INVITE**:

1. System generates secure invitation token
2. Email sent to provided address containing:
 - Invitation message
 - "Set Up Password" button/link
 - User appears in Users List with "Invited" Yellow clock icon (🕒)
 - You are redirected back to Users List

Email Delivery Time: Usually instant, but may take up to 5 minutes.

⚠ If User Doesn't Receive Email:

- Check spam/junk folder
 - Verify email address was entered correctly
 - Wait 10 minutes, then resend the invitation. To do this, delete the user and re-invite them via the "Invite User" form. Only perform this process if the user needs an account but the email address was entered incorrectly, or if they haven't received the email within 10 minutes.
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