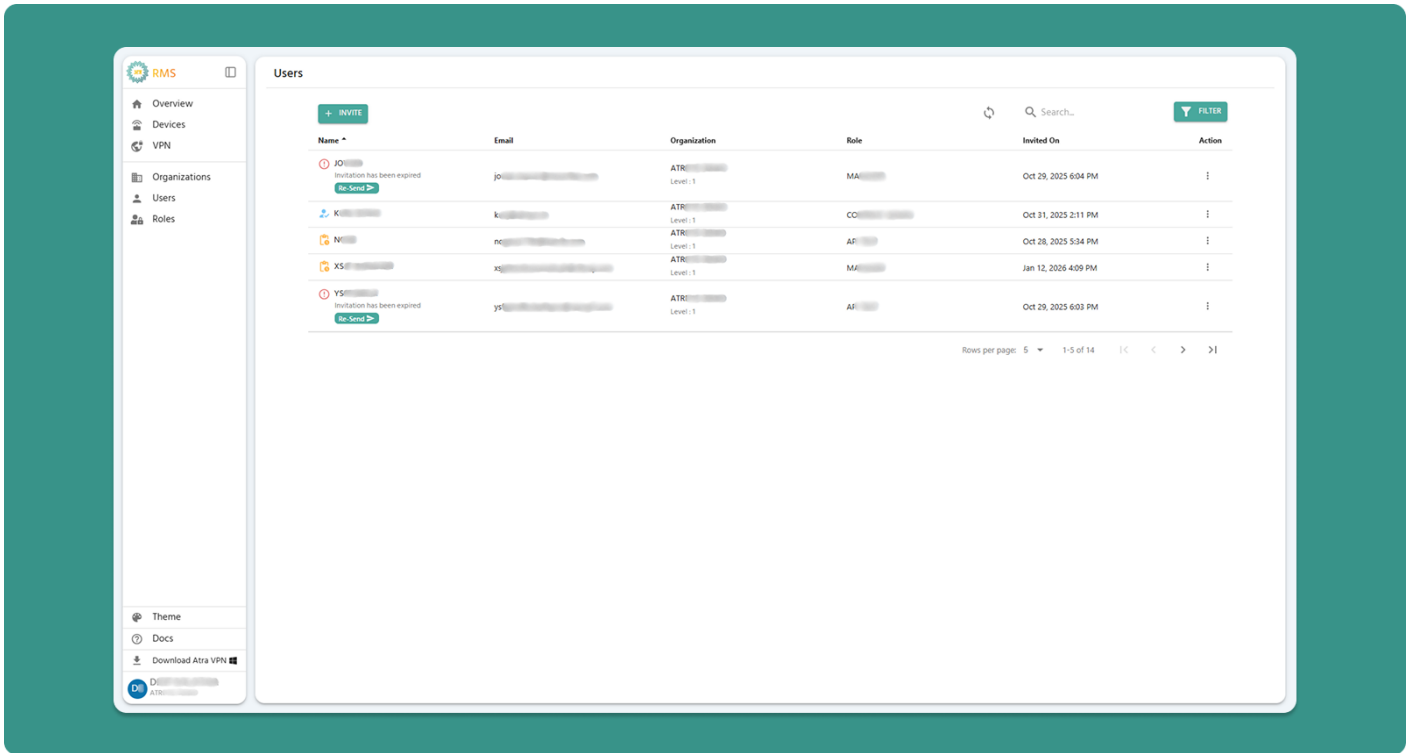


# View and Manage Users

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



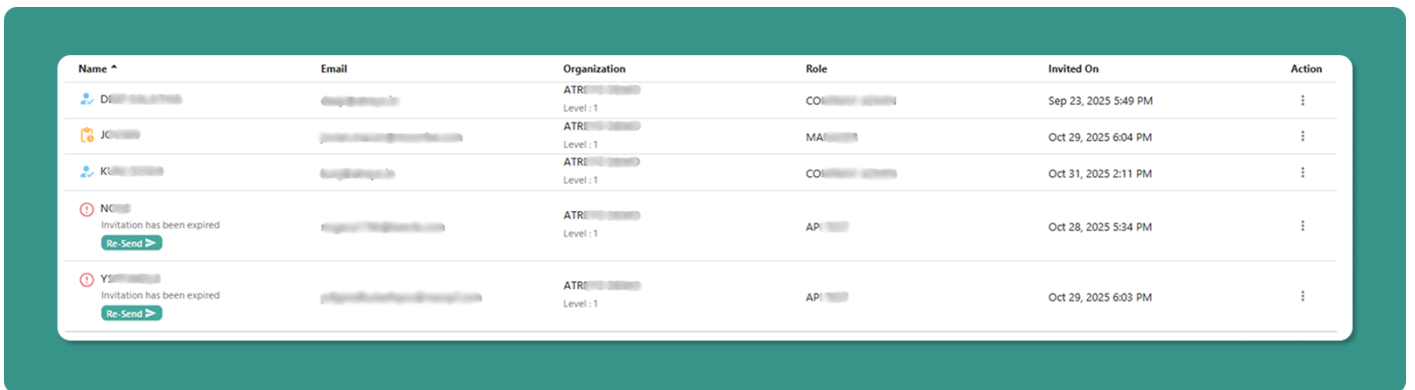
## Interface Actions



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
- 

## 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)
- 

## Icon 3: Invitation Expired (⚠ Warning Icon - Red)

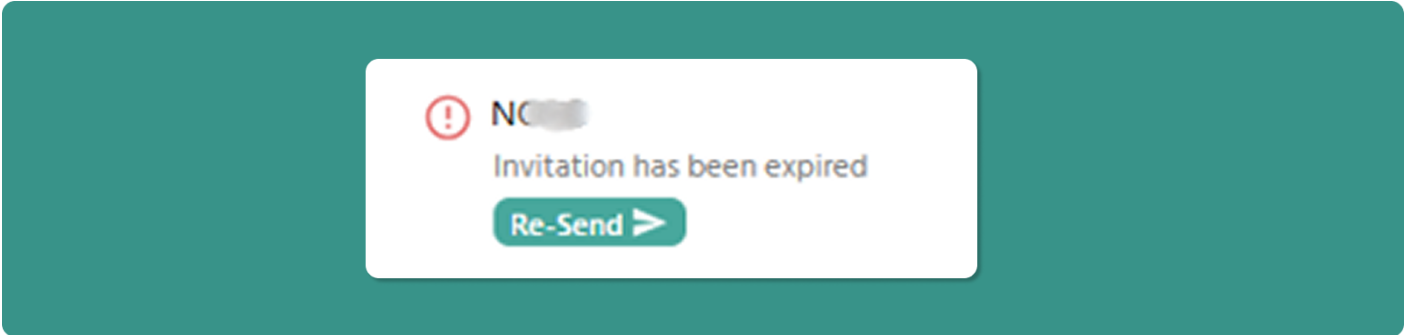
### Appearance:

- 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"



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## 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

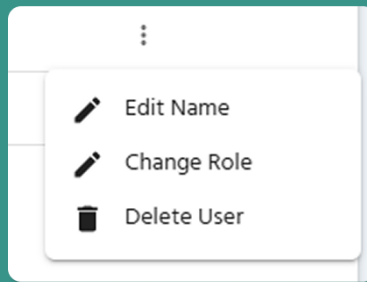
### If User Completes Setup:

- 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).

A white dialog box titled 'Edit Name' is shown against a teal background. Inside the dialog, there is a text input field with the label 'Name' and the text 'John Doe' entered. At the bottom right of the dialog, there are two buttons: a red 'CLOSE' button and a teal 'SAVE' button.

### 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

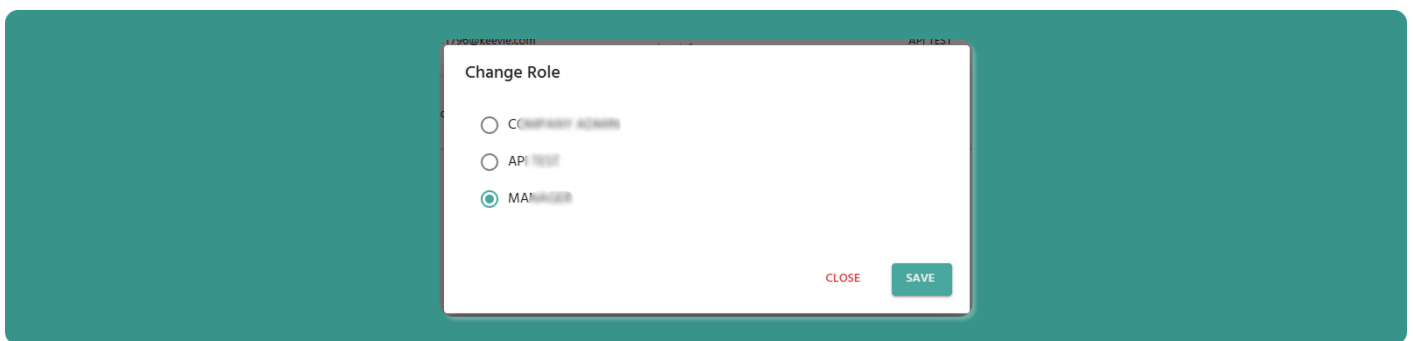
Examples:

- Jane Doe
- Product-Manager
- User\_123
- \_Jane (starts with underscore)
- User..Name (consecutive periods)

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## 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:

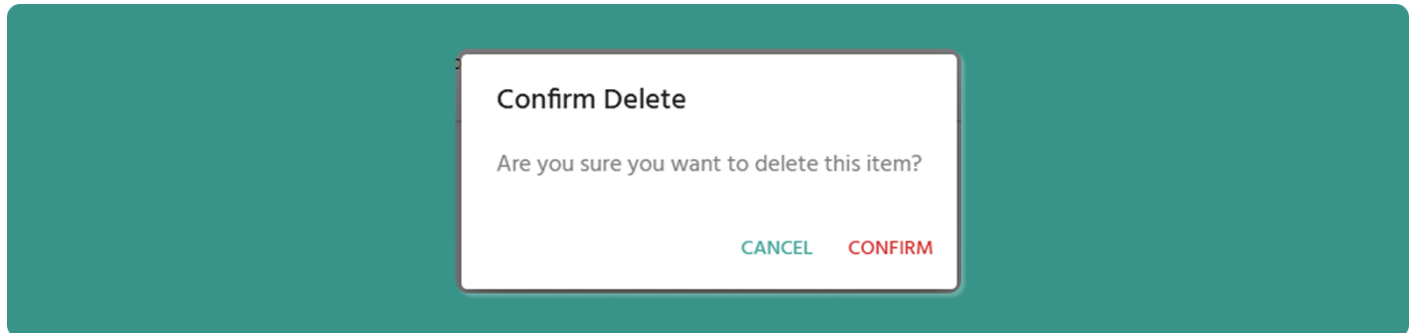
- User's permissions immediately update
- User may need to refresh browser to see new capabilities
- Previous role's permissions are revoked

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

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## 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

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## Table Navigation



Rows per page: 5 ▼ 1-3 of 3 |< < > >|

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

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Revision #5

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