

System Admin Module – Add New Project User

System Admin Menu

If you are a **Superuser**, you will be able to access the **System Admin** area of Tractivity through your normal login.

1. To access System Admin; at the very top of your Tractivity page. Please click into 'System Admin'.

2. Once within System Admin; you can find the menu on the left-hand side.

3. To access any areas of System Admin, click the red link of the option you wish to edit/view or amend.

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System Admin | [Help Center](#) | [Archive](#) | [My Settings](#) | [Log-out](#)

Logged-in as: Dan Page | Last log-in: 14:11 on 27/10/2023

You are currently viewing: Training

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CALENDAR

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ORGANISATIONS & CONTACTS

ENQUIRIES

ISSUES

STAKEHOLDER MAPPING

STRATEGY PLANS

SURVEYS

LAND PARCELS

LIBRARY

DISTRIBUTION LISTS

EVENTS

EMAIL

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REPORTS

System Admin: View Client

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Add New:

[Add User](#)
[Add Project](#)

Client:

[View Client](#)
[Edit Client](#)

Communication:

[Send Preferences Email](#)

Stakeholders:

[Import Stakeholders](#)
[Merge Stakeholders](#)
[Share Stakeholders](#)

Configuration:

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[Field Configuration](#)

Name	Client Name
Allow Project Tiering?	Yes
Address	Systems House Ashford Road Bakewell Derbyshire DE45 1GT
Multi-Factor Authentication ?	Optionally apply per user

Users (54)

Projects (41)

Title	Last Access	Account Status	System Admin	Edit	Remove
Adamson, Vicky	26/10/2023	Active	Yes	Edit	Remove

Overview of Current Users & Projects

View all your projects & users on the halfway navigation bar.

1. View all current Tractvitiy Users
2. View all current Projects
3. Add new Projects & Users, and don't worry if you exceed your contract limit, as your Account Manager can provide detailed costs, to extend.
4. Edit & Delete a User or Project

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WORKFLOW

System Admin: View Client

3

Add New:

Add User

Add Project

Client:

View Client

Edit Client

Communication:

Send Preferences Email

Stakeholders:

Import Stakeholders

Merge Stakeholders

Share Stakeholders

Configuration:

Field Configuration

Global System Data

Project System Data

Email Configuration

Email Servers

Subscription Preferences Configuration

Event Configuration

External Forms

Stakeholder Mapping Attributes

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Users (54)

Projects (41)

Project Name

Parent Project

Child Project(s)

Automatic Share?

Edit

Delete

1. Sandwell Council

Edit

Delete

2. Hull

Edit

Delete

6.3 Deployment

Edit

Delete

AE Test Project

Edit

Delete

All Fields

Edit

Delete

BBC

BBC TV Licensing

Edit

Delete

BBC Test

Kate's Project

Yes

Edit

Delete

4

Project Settings

To view a project, click on the **project name**. Inside the **View Project Screen**, view all the project information, to edit any of the information.

1. Click **Edit Project**

System Admin: View Project



Add New:

- Assign User
- Add Profile
- Add Team

Project:

- View Project
- Edit Project
- Edit Subscription Preferences
- Clone Project
- Delete Project

Client:

- View Client

Communication:

- Send Preferences Email

Stakeholders:

- Import Stakeholders
- Merge Stakeholders
- Share Stakeholders

Configuration:

- Field Configuration
- Global System Data
- Project System Data
- Email Configuration
- Email Servers
- Subscription Preferences Configuration
- Event Configuration
- External Forms
- Stakeholder Mapping Attributes
- SMS Configuration
- IP Configuration
- Manage API Credentials
- SSO - Identity Providers

Project Name	Customer Success Team Training	<div>Logo</div> <div> </div> <div>Drag a file here or click to select.</div>
Address		
Postcode	st5 8ht	
Latitude	53.03720	
Longitude	-2.23800	
Telephone		
Email		
Website		
Default Dashboard	Standard	
Preferred Language	English	
Default Survey/Event Primary Colour	<input type="checkbox"/> #000000	
Default Survey/Event Primary Text Colour	<input type="checkbox"/> #FFFFFF	
Privacy Policy Url	https://www.tractivity.co.uk/privacy-policy/	

Access Profiles (5)

Teams (5)

Assigned Users (7)

Subscription Preferences Details

Name	Edit	Delete
General		Delete
Marketing And Comms Team		Delete



1. **Access Profiles**, define which module(s) each user can access.
2. **Teams**, group users together, allowing you to allocate, share and assign records easily.
3. **Assigned Users**, displays all users who are currently assigned to the project.
4. **Subscription Preferences Details**, view the default setting for Organisation & Contact subscription preferences and the preview of the send subscription preferences email.

Each tab, displays the information relating solely to this project.

Add New:

- Assign User
- Add Profile
- Add Team

Project:

- View Project
- Edit Project
- Edit Subscription Preferences
- Clone Project
- Delete Project

Client:

- View Client

Communication:

- Send Preferences Email


Stakeholders:

- Import Stakeholders
- Merge Stakeholders
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Address		
Postcode	st5 8ht	
Latitude	53.03720	
Longitude	-2.23800	
Telephone		
Email		
Website		
Default Dashboard	Standard	
Preferred Language	English	
Default Survey/Event Primary Colour	<div style="background-color: black; width: 20px; height: 20px;"></div>	#000000
Default Survey/Event Primary Text Colour	<div style="background-color: white; border: 1px solid black; width: 20px; height: 20px;"></div>	#FFFFFF
Privacy Policy Url	https://www.tractivity.co.uk/privacy-policy/	



Drag a file here
or click to select.

1
2
3
4

Access Profiles (5)	Teams (5)	Assigned Users (7)	Subscription Preferences Details
Name			<div>Edit</div> <div>Delete</div>
General			<div>Delete</div>
Marketing And Comms Team			<div>Delete</div>

Access Profiles

Profiles in Tractivity help you define permissions/access for a set of users. For instance, the permissions required for a marketing team may differ from the permissions needed for a stakeholder manager.

Each user requires a profile and is changeable on a project by project basis.

Create/View Profiles

1. Click on the **Access Profile Name**.
2. In the View Profile page, **Edit** a Module permissions.
The Three permissions levels:
 - **Edit Access**, full access to the module, both Edit and View rights
 - **Read Only Access**, only view the module, with no edit access.
 - **Off**, the module will be hidden.

Profile:

- View Profile
- Edit Profile
- Delete Profile

Project Name

1

Customer Success Team Training

Profile Name

General

Project:

- View Project

Client:

- View Client

Communication:

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Module

Security Level

3

Edit

Building, Organisations & Contacts

Edit Access

Edit

Enquiries

Edit Access

Edit

Email

Edit Access

Edit

Library

Edit Access

Edit

Events

Edit Access

Edit

Distribution Lists

Edit Access

Edit

Reports

Edit Access

Edit

Archive

Edit Access

Edit

Mailshots

Edit Access

Edit

Land Parcels

Edit Access

Edit

Surveys

Edit Access

Edit

Issues

Edit Access

Edit

Stakeholder Mapping

Edit Access

Edit

Strategy Plans

Edit Access

Edit

Workflow

Read Only Access

Edit

Additional Functionality

Security Level

Edit

SmartInbox

Edit Access

Edit

Instant Messenger

Edit Access

Edit

Dashboard

Edit Access

Edit

Teams

You can create multiple teams against any project.
Teams groups users together, and allows you to share enquiries and activities quickly.

Assign a user to multiple teams.

1. **Add** a New Team
2. **Edit** a Team
3. **Delete** a Team

Add New:

- Assign User
- Add Profile
- Add Team

Project:

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- Edit Project
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- Clone Project
- Delete Project

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Privacy Policy Url	https://www.tractivity.co.uk/privacy-policy/	

Access Profiles (5)	Teams (5)	Assigned Users (7)	Subscription Preferences Details	
Name	Default Team	Edit	Delete	
Communications Team	no		Delete	
Customer Success Team Training	yes			
Engagement Team	no		Delete	
Enquiry Team	no		Delete	
New Stakeholder Team	no		Delete	
Filter by : A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 All				

Creating a New User

You can add a new user on the left-hand side menu of System Admin under **Add new > Add user** and don't worry if you exceed your contract limit, as your Account Manager can provide detailed costs, to increase.

Enter the new user's details, including:

1. Create a **username**, try to keep the the same structure for all users.
2. **Welcome Emails**, include all login information and how to access support from inside Tractivity.
3. **Email Signature**, feel free to copy & paste your email signature.
4. **System Admin** would you like the user to be the nominated superuser?




Client Confidential

System Admin: Add user

Client:

[- View Client](#)

1

First Name*	<input type="text"/>
Last Name*	<input type="text"/>
Username*	<input type="text"/>
Email*	<input type="text"/>
Login Method *	Tractivity Username & Password ▼
Enable MFA * ⓘ	No ▼
Send Create Password Email Leave this option selected to send an automatic welcome email when the user is created	<input checked="" type="checkbox"/>
Email Signature	<div><div>B<i>I</i><u>U</u><div><div></div><div></div><div></div><div></div></div><div><div></div><div></div><div></div><div></div></div><div><div></div><div></div><div></div><div></div></div><div><div></div><div></div><div></div><div></div></div></div><div>Arial ▼12pt ▼A ▼</div><div><div></div></div></div>
Telephone	<input type="text"/>
Provide System Admin Access	<input type="checkbox"/>

4

OK

CANCEL

Tractivity

2

Hi Vicky Adamson...

Welcome to Tractivity.

An account has been created for you.

To start using the system, just follow the two simple steps below:



Step 1.

To log in and start using the system, please use the following credentials:

Username: victoragoo

Create your password

Step 2.

With your Username and new Password, you'll be able to log in using the following URL:

<https://stage-enhancements.tractivity.co.uk>

(we recommend you bookmark this so it's easy to find next time)

If you're new to Tractivity...

Don't worry, your system includes an integrated Support Hub packed full of useful resources including **Video Tutorials** and **User Guides** as well as access to a wide range of online free training sessions.

To access the Support Hub, click on the link in the top right-hand corner of your system.



If you have any further questions, please feel free to contact us.

Kind regards,

The Tractivity Team

01629 813961



www.tractivity.co.uk

Assign a User to Multiple Projects

Within the **Users** list (in the homepage of system admin), click into an existing user's name and it will take you through to **view user**.

1. Click **Unassigned Projects** tab, view all projects.
2. Click **Assign** to assign your user
3. Select access permissions, with **Access Profile**
4. Set a **Default project**
5. **Save**

System Admin: View User

User:

- View User
- Edit User
- Delete User
- Reset Password

Client:

- View Client

First Name	Dan
Last Name	Page
Username	daniel.page@tractivity.co.uk
Email	daniel.page@tractivity.co.uk
Login Method	Tractivity Username & Password
Enable MFA	No
Account Status	Active
Email Signature	
Telephone	
Provide System Admin Access	Yes

Assigned Projects (5) Unassigned Projects (36)

Project Name	Parent Project	Child Project(s)	Automatic Share?	2
1. Sandwell Council				Assign
2. Hull				Assign
6.3 Deployment				Assign
AE Test Project				Assign
All Fields				Assign
BBC		BBC TV Licensing		Assign
BBC Test	Kate's Project		Yes	Assign

Re-set Password for a User

1. Click the Users Name
2. On the left-hand menu select **Reset Password**
3. Click **YES** and an email will go direct to the user's inbox, allowing them reset their password

Please note: If you or your organisation use single sign-on when accessing Tractivity, you'll need to reach out to your internal IT team.

System Admin: View User



User:

- View User
- Edit User
- Delete User
- 1 - Reset Password

Client:

- View Client


First Name	Dan
Last Name	Page
Username	daniel.page@tractivity.co.uk
Email	daniel.page@tractivity.co.uk
Login Method	Tractivity Username & Password
Enable MFA	No
Account Status	Active
Email Signature	
Telephone	
Provide System Admin Access	Yes

Edit and Delete Users

You may wish to **edit** an existing users details or **delete** their account.

You can access this via the **view user** page.

1. **Edit User** – Change name, login email address, change signature or password.
2. **Delete User** – Removes user's account from Tractivity. You can choose to keep the former user as an account handler in Tractivity.

System Admin: View User 

1

2

User:

- View User
- Edit User
- Delete User
- Reset Password

Client:

- View Client

First Name	Dan
Last Name	Page
Username	daniel.page@tractivity.co.uk
Email	daniel.page@tractivity.co.uk
Login Method	Tractivity Username & Password
Enable MFA	No
Account Status	Active
Email Signature	
Telephone	
Provide System Admin Access	Yes



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