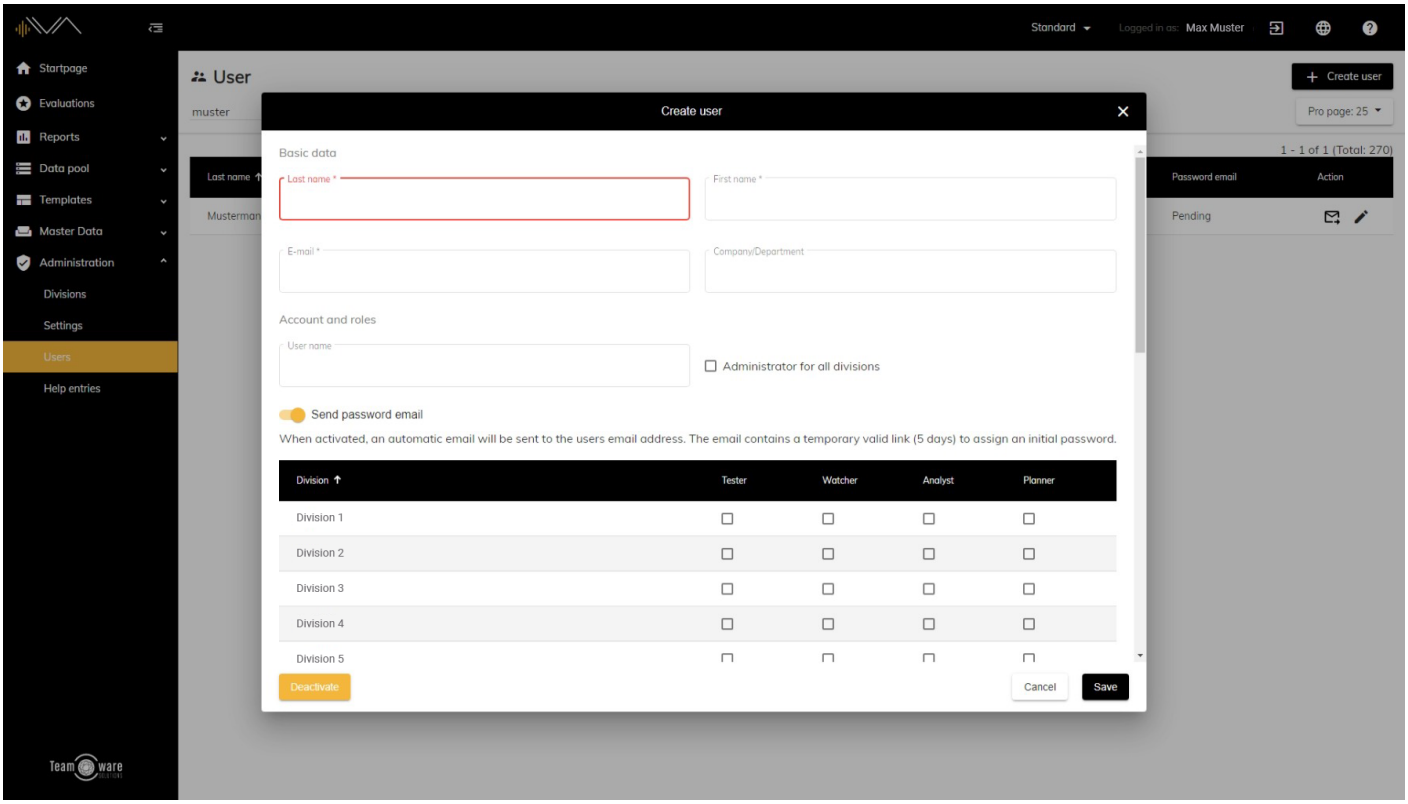
Users

- How do I create a new user?
- How can I edit a user?
- How do I delete a user?
- How do I resend the password email?
- Roles and rights

How do I create a new user?



In order to create a new user, you must first navigate to the corresponding navigation point. To do this, click on "Administration" in the left navigation and then on "Users". You will now see an overview with all users. Now click on the button "+ Create user" in the upper right corner and a new pop-up window will open. Here you can enter the following data:

- **Name** (mandatory field)
- **First name** (mandatory field)
- **E-mail** (mandatory field)
- Company/Department (optional): If you have several users with the same name, this information is useful.
- User name (mandatory field): By default, the e-mail address is used as the user name. However, an individual user name can also be selected.
- Administrator for all divisions (optional): Check the box if the user should be given administrator rights.
- Send password emails: Upon activation, an automatic email will be sent afterwards. The email contains a link that is valid for a limited period (5 days) to assign an initial password. Deactivate the toggle if the user should be able to be selected by other testers as an alternative assessor, but does not require their own account and individual login data.
- Permission matrix: In this matrix you can select per division if the user is Tester, Planner, Analyst, Watcher or none. Multiple selections are possible here.

Now click on "Save" to save your entries.

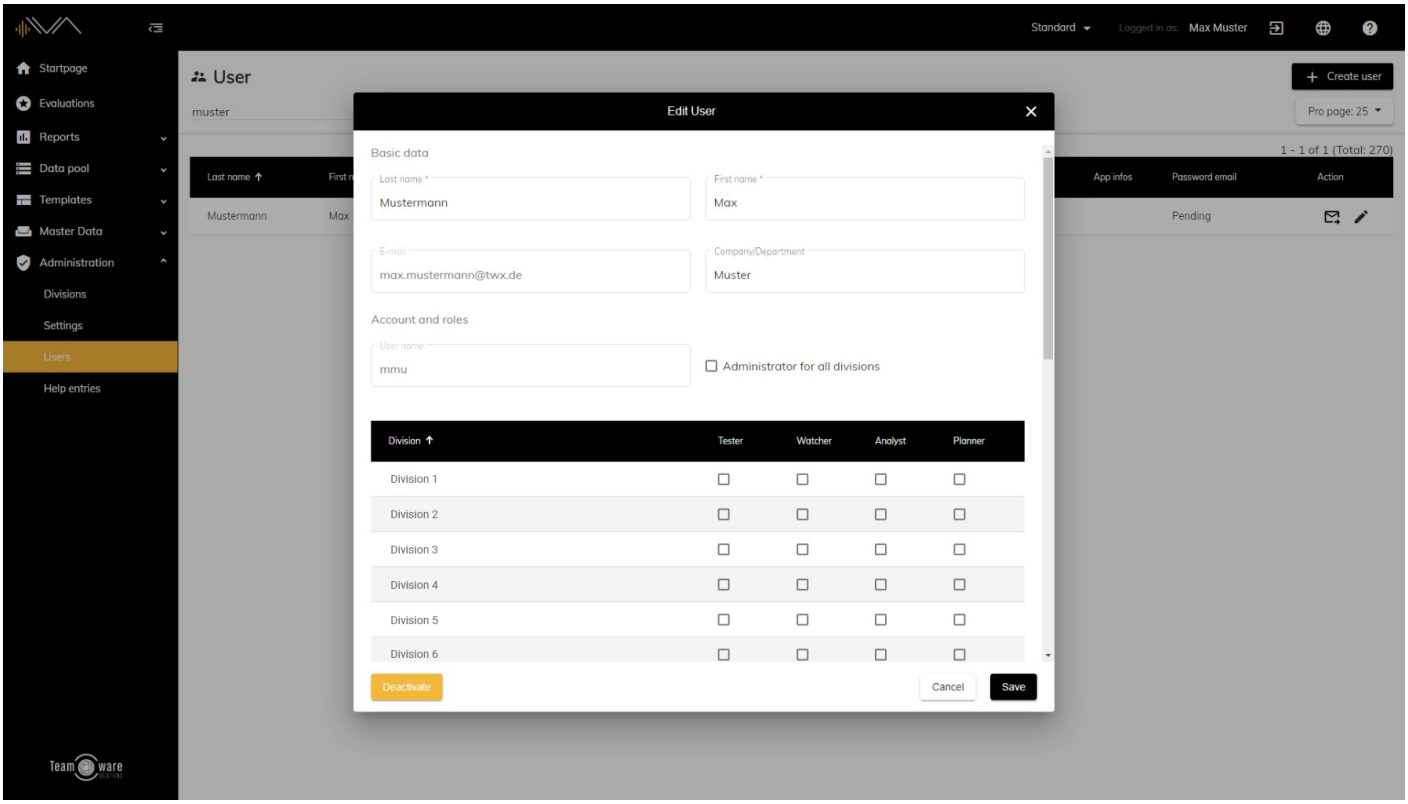
The planner, the administrator and anyone who has organizer roles, can create a "New tester" under "Master data" in the "Tester overview" submenu and configure the following settings:

1. Determine username
2. Enter e-mail address
3. Via the toggle create a
    1. user account with login -> then the checkbox "Role tester in an division" is automatically selected and cannot be changed
    2. choose to not create a user account with login
4. "Archive" or
5. "Delete" if no tester results are available

For changes of: Last name, first name, e-mail and company only the administrator is authorized. Only an administrator can deactivate users.

If a new user is created under “administration” and at the same time authorized as a tester for a specific division, the tester is automatically added to the corresponding division under "Master data" in this case too.

How can I edit a user?



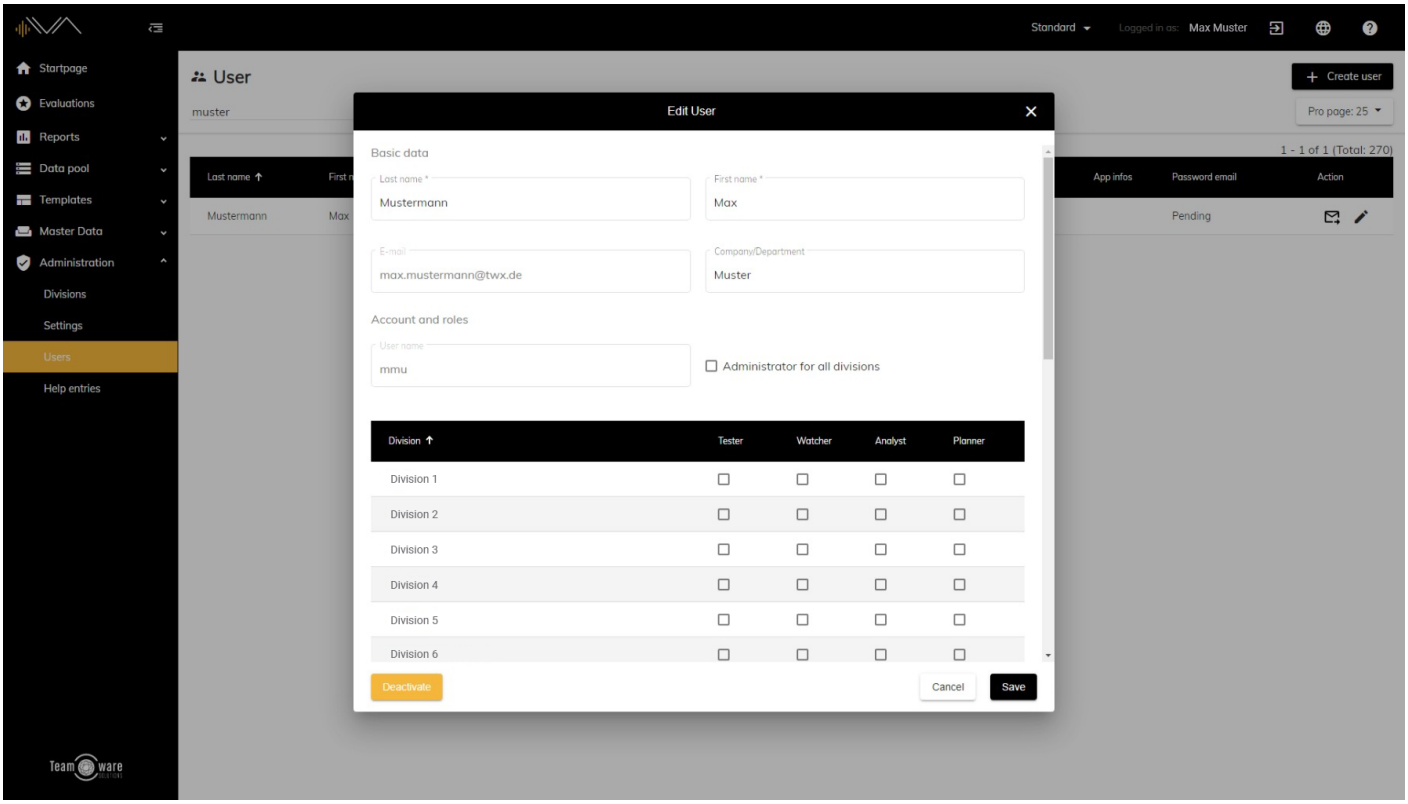
To do this, you must first navigate to the "Administration" -> "Users" page. Now you will see an overview of all created users. You can now search the list for the corresponding person further up the page or scroll through the list. The list has the following columns: Last Name, First Name, Email, Department, Roles, Administrator, Username, App Infos, Password email and Action. Each of these columns (except Administrator, App infos, password email and Action) can be sorted alphabetically in ascending or descending order. To do this, click on the column label.

To edit an existing user, double-click on the corresponding row or on the pencil icon on the right side under "Action". A new window will open. There you can edit the following data:

- Last Name
- First name
- E-mail (must be unique)
- Department
- Username (must be unique)
- Checkbox for administrator rights
- Permission matrix for the divisions

When you have edited the user, click the Save button at the bottom right.

How do I delete a user?



To do this, you must first navigate to the "Administration" -> "Users" page. Now you will see an overview of all created users. You can now search the list for the corresponding person further up the page or scroll through the list. The list has the following columns: Last Name, First Name, Email, Department, Roles, Administrator, Username, App Infos, Password email and Action. Each of these columns (except Administrator, App infos, password email and Action) can be sorted alphabetically in ascending or descending order. To do this, click on the column label.

To deactivate an existing user (deletion is not possible), double-click on the corresponding row or on the pencil icon on the right side under "Action". A new Pop-up will open. Now click on the "Deactivate" button at the bottom left. The user is now deactivated. If you want to reactivate it in the future, simply click on the "Activate" button, which now appears in the place of the deactivate button.

How do I resend the password email?

To do this, you must first navigate to the "Administration" -> "Users" page. You will now see an overview of all created users. You can now search the list further up the page for the relevant person or scroll through the list. In the Action column there is an email icon that you can click to resend the password email to the relevant person.

Roles and rights

IVA works with a simple role and rights concept.

There are a total of five roles, which in turn are assigned to each division.
A user with a role for division A has no access to the data in division B.

The authorizations for the two web applications "Web Planner" and "Web Tester" and the iOS Tester app are differentiated and are permanently assigned to the respective roles.

Roles in IVA:

1. **Tester**
   The tester has access to the web tester and iOS tester app and can participate in tests and use all functions of both applications.

   The planner can change the test configuration in terms of the range of functions on a test basis and activate or deactivate the "instructions", "free feedback" and "question/test catalogues" functions.

   Additional functions can be activated/deactivated for "Free Feedback":
   - Allow audio recordings
   - Allow photo/video recording
   - Capture GPS location

   For the testers, the tests are divided according to the following types:
   - Only tests with the status "Published", "Stopped" and "Meeting Break" appear for testers
   - For "Closed Tests" the user needs the role "Tester" for the assigned division AND must be included in the list of testers assigned to the test
   - For "Internal Tests" the "Tester" role is sufficient for the assigned division

   Users with the role "Tester" do not have access to the web planner and are rejected and redirected to the web tester when they try to log in.

2. **Watcher**
   The "Observer" role has access to the web planner and has read-only access to the reports of instructions, feedback and questionnaires from the tests in a division.

   The rights are limited to the "Evaluations" menu item and the creation of reports on the results of tests in the assigned division.

   For web tester and iOS tester app, the role "Observer" has no permission.

3. **Analyst**
   The "Analyst" role has access to the web planner, has access to the reports of instructions, feedback and questionnaires for the tests in a division and can make changes as part of the feedback validation.

   In addition to the analyst, this includes the rights for the following functions:
   - Read, edit, validate, comment and forward feedback
   - Reading and evaluating the questionnaires

   The rights are limited to the "Evaluations" menu item and the creation of reports on the results of tests in the assigned division.

   For web tester and iOS tester app, the role "Observer" has no permission.

4. **Planner**
   As an administrator and organizer of tests, the "Planner" role has access to all menu items of the Web Planner (except for the "Administration" menu item), access to the Web Tester and the iOS Tester app.

   In the web tester, planners have full access (CRUD) to the following functions in the assigned division:
   - Evaluations and tests
   - Evaluations
   - data pool
   - Templates
   - Base data

   Planners can create a "New tester" and authorize them as a "Tester" for a division at any time. The authorization as a tester can be granted or revoked at any time.

   Please note that a planner needs the basic data:
   - Last name (mandatory field)
   - First name (mandatory field)
   - E-mail (optional)
   - Company/Department (optional)

   when creating a new tester. However, these can no longer be changed after saving. Only an administrator can change the basic data of a tester retrospectively.

   When creating a new tester, the planner can use the "Generate user account with login data" toggle to decide whether the new user:
   - gets their own account with access to the tester platforms
   - does not need their own access to the tester platforms and should only be able to be defined as an alternative assessor by other users

   The planner can use the "Send E-Mail" toggle to immediately send the tester an e-mail with the necessary access data to the tester platforms

Planners can also participate in tests using the Web Tester application or the iOS Tester app and see tests already in "Draft" status.
This function is used by the planner for a "trial run" of a test, since all test data created are removed again after the status has changed to "Published".

5. **Admin**
   The Admin role has access to the functions in the "Administration" menu item and is intended for managing the system.

   The assignment of the roles "Planner", "Analyst" and "Watcher" can only be assigned by the role "Admin".

   New divisions can also only be created by "Admin".

   The rights for these functions are accordingly cross-divisional.