

Users List

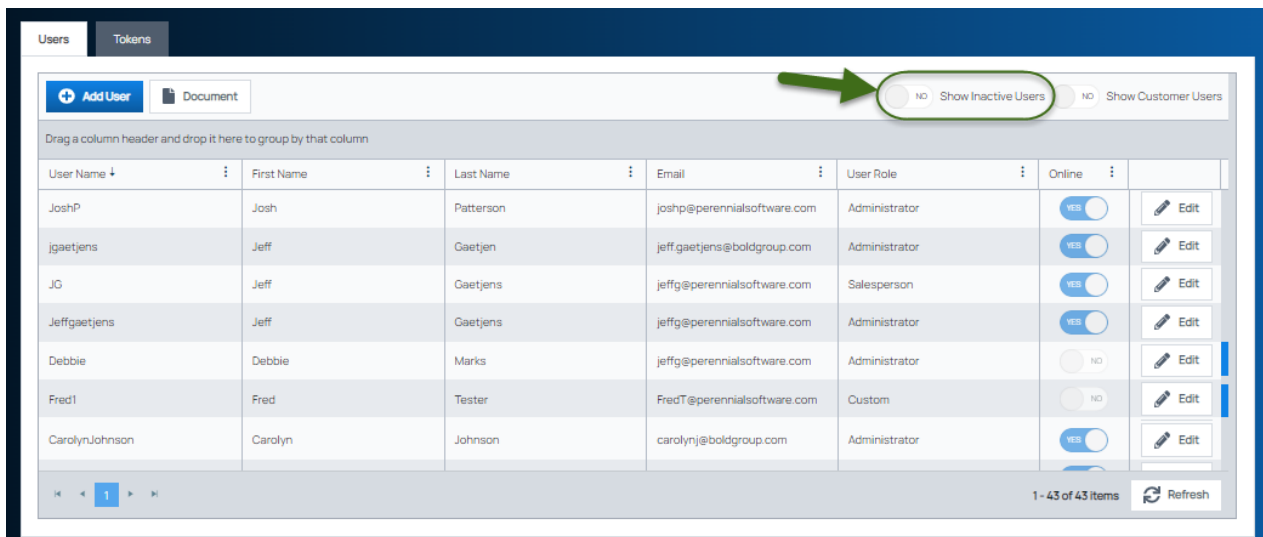
Last Modified on 01/17/2023 4:16 pm EST

There are several tools available to manage the list of users.

- Filter by active or inactive users
- Filter by internal users or customer users
- Sort by any column in the grid
- Column grouping
- Arrange grid column order by drag and drop
- Open the menu (to the right of the column name) to sort, hide, show columns, or filter

Filter by Active or Inactive

At the upper right of the list is a toggle button that you can use to show active only or inactive only records.

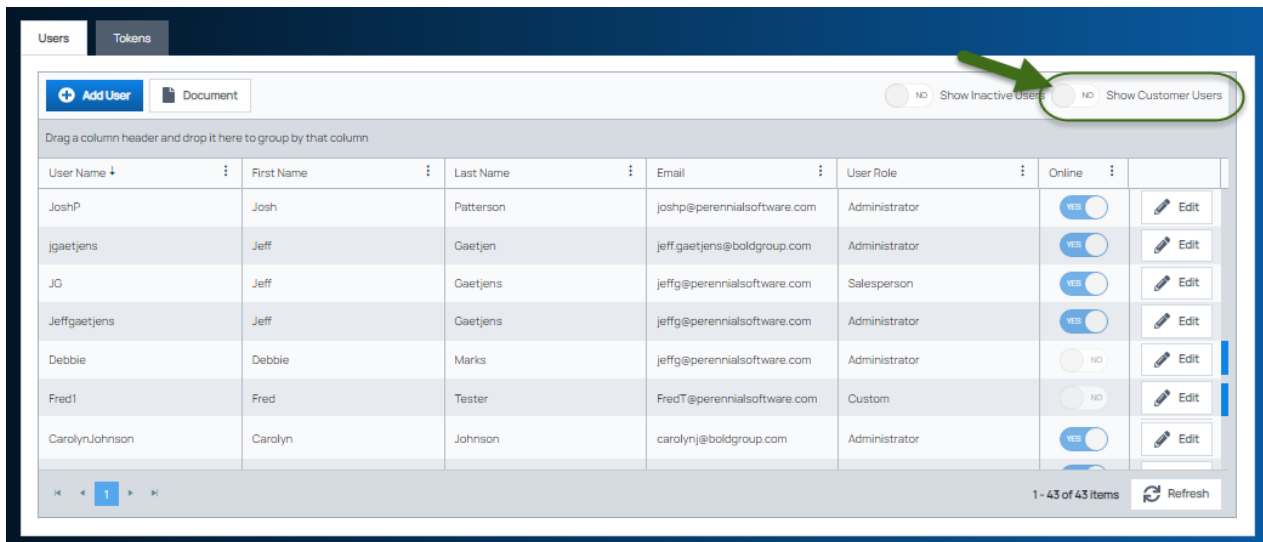


The screenshot shows a web application interface for managing users. At the top, there are tabs for 'Users' and 'Tokens'. Below the tabs, there are buttons for 'Add User' and 'Document'. A green arrow points to a toggle switch labeled 'NO Show Inactive Users'. Below this, there is a table with columns: User Name, First Name, Last Name, Email, User Role, Online, and an 'Edit' button. The table contains several rows of user data. At the bottom right, there is a 'Refresh' button and a status indicator '1 - 43 of 43 items'.

User Name	First Name	Last Name	Email	User Role	Online	
JoshP	Josh	Patterson	joshp@perennialsoftware.com	Administrator	YES	Edit
jgaetjens	Jeff	Gaetjen	jeff.gaetjens@boldgroup.com	Administrator	YES	Edit
JC	Jeff	Gaetjens	jeffg@perennialsoftware.com	Salesperson	YES	Edit
Jeffgaetjens	Jeff	Gaetjens	jeffg@perennialsoftware.com	Administrator	YES	Edit
Debbie	Debbie	Marks	jeffg@perennialsoftware.com	Administrator	NO	Edit
Fred1	Fred	Tester	FredT@perennialsoftware.com	Custom	NO	Edit
CarolynJohnson	Carolyn	Johnson	carolynj@boldgroup.com	Administrator	YES	Edit

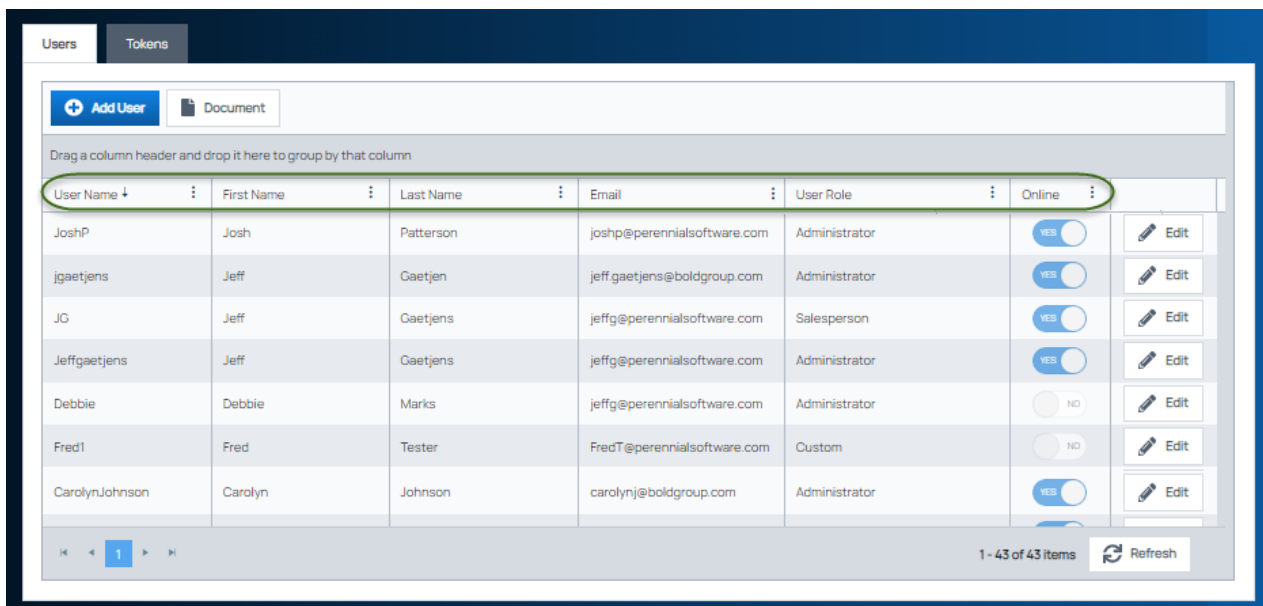
Filter by User Type

At the upper right of the list is a toggle button that you can use to show internal users only or customer users only.



Sort by Column

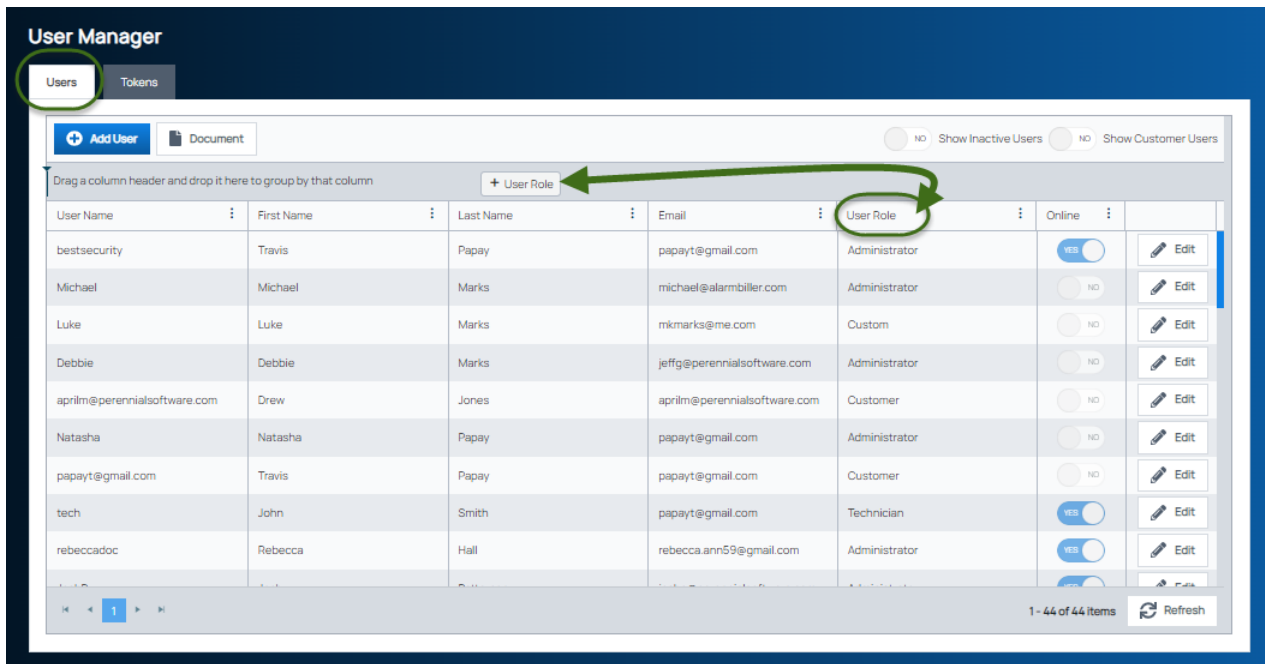
Clicking on any column header within the user list re-sorts the information displayed in the grid. When first accessing the user list, the information displayed in the grid shows each user in the order in which they were created. Clicking on a column header sorts the list in ascending order. Clicking a second time sorts in descending order, and clicking a third time returns to the initial view.



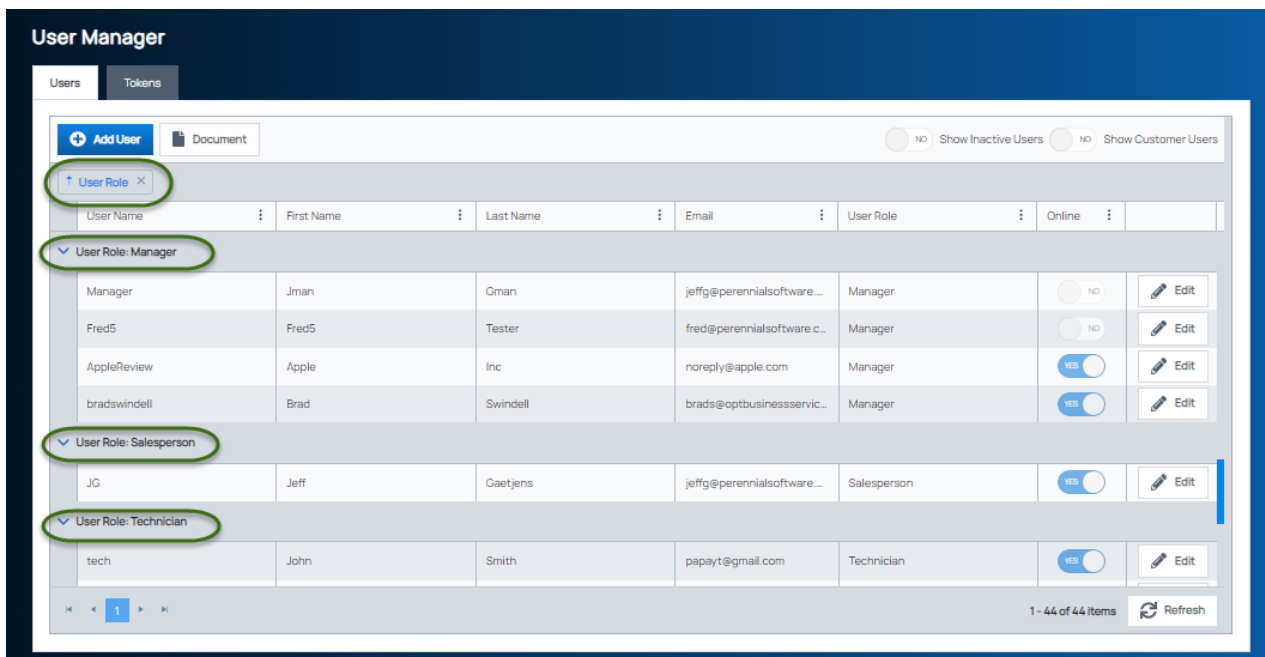
Column Grouping

Users can group the data displayed in the grid by one or multiple columns within the grid.

To group the data, hold the left mouse button down on the column you want to group by, and then drag up into the grouping bar and release the mouse button.



In the example, we are grouping by User Role. When you want to remove the grouping, click the “X” of the grouping column name on the grouping bar.



Arrange Grid Columns

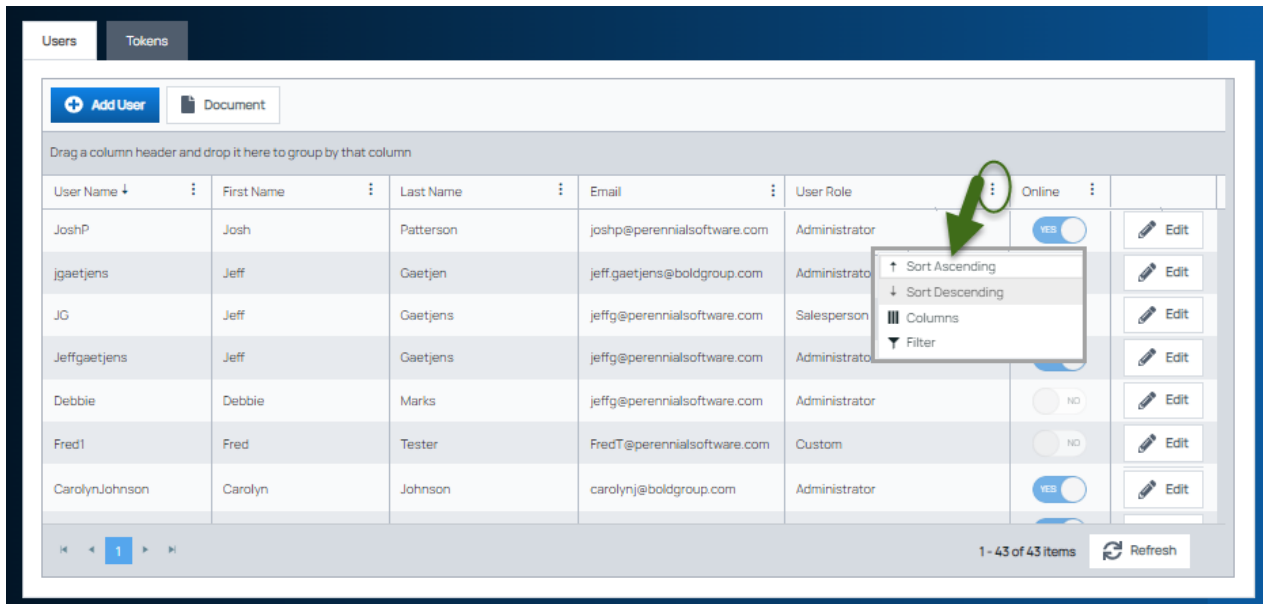
Users can rearrange the columns in the desired order by using drag and drop. To move a column: on the column you want to move, hold down the left mouse button, and then drag to the new location and release the mouse button.

Note: If you leave this page and return again, the columns will revert to the default order.

Column Options

Clicking on the ellipse button to the right of any column header displays a list of four options: Sort Ascending, Sort

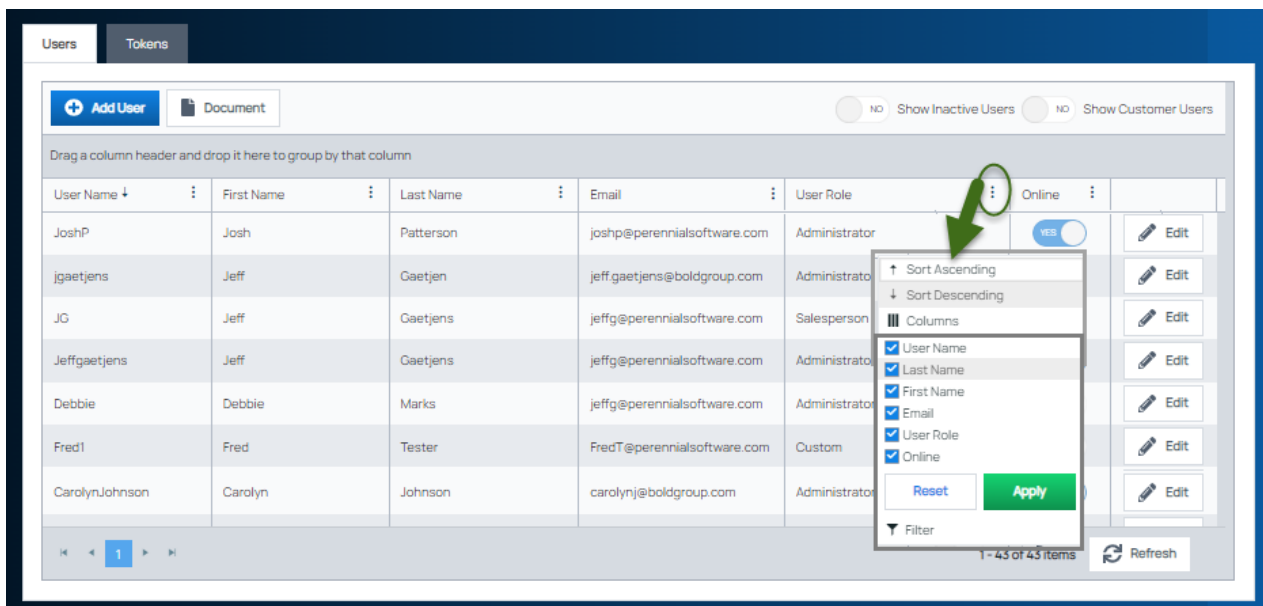
Descending, Columns, and Filter.



Columns

When selecting this option, a list of all available columns is displayed. If you do not want certain columns displayed in the grid, clear the checkbox to the left of each field. Click the Apply button when finished.

Note: If you leave this page and return again, the columns will revert to the default view.



Filter

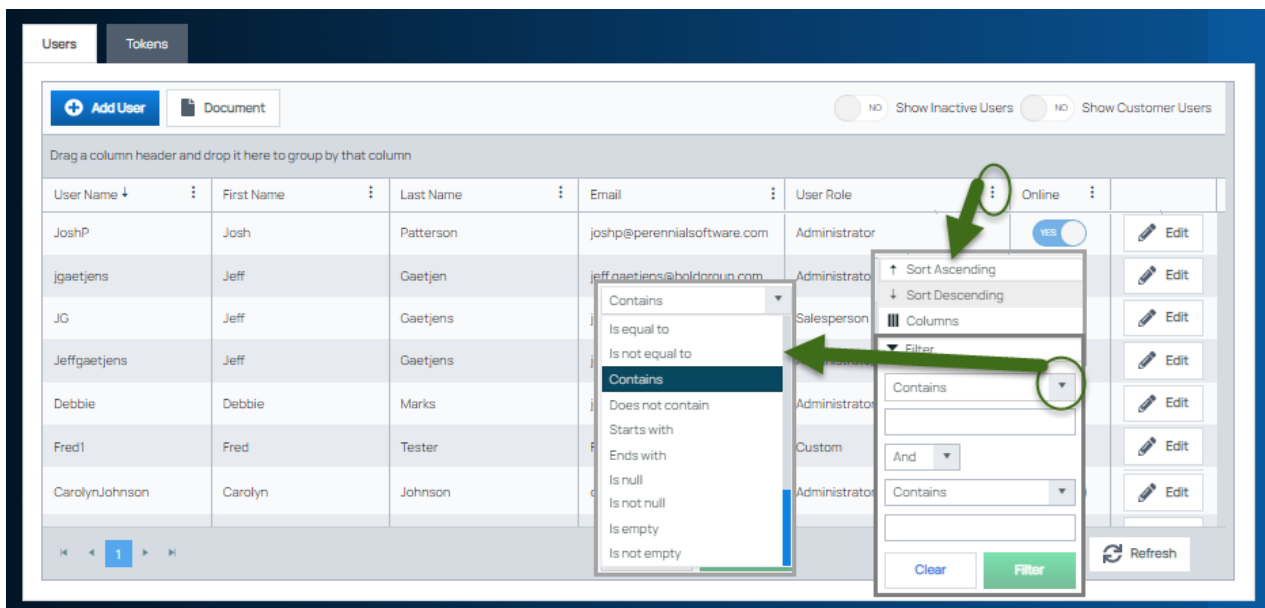
Use this option to refine the list displayed in the grid. When clicking on Filter, a dialog box will be displayed for entering criteria to find the records you want to display. The first field contains a drop-down list from which to select an operator. The list of available operators is:

- Is equal to
- Is not equal to

- Contains
- Does not contain
- Starts with
- Ends with
- Is null
- Is not null
- Is empty
- Is not empty

Select the desired operator, and then enter the criteria into the field below it. Click Filter when finished. The list will refresh based on the filter criteria entered.

Note: If you leave this page and return again, any filters created will be removed.



Tokens

Listed on the Tokens tab, are API tokens that log activity made by users while using integrations. This information is typically used by our support staff to troubleshoot any errors from the use of an integrated product.

User Manager

Users

Tokens

User Id	User Name	Client	Expires	Status	
4	bestsecurity	sedonaonemobile	Mar 3, 2022, 8:16:46 PM	Expired	Revoke
4	bestsecurity	sedonaonemobile	Mar 25, 2022, 5:43:42 PM	Active	Revoke
4	bestsecurity	sedonaonemobile	Mar 26, 2022, 12:25:41 AM	Active	Revoke
4	bestsecurity	sedonaonemobile	Mar 9, 2022, 2:44:32 PM	Expired	Revoke
4	bestsecurity	sedonaonemobile	Mar 2, 2022, 1:40:30 PM	Expired	Revoke
4	bestsecurity	sedonaonemobile	Feb 22, 2022, 6:46:41 PM	Expired	Revoke
4	bestsecurity	sedonaonemobile	Mar 10, 2022, 5:37:17 PM	Expired	Revoke

1 - 100 of 5820 items Refresh