

Take Five

Administrator's Guide

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1 Managing Users

All user management functions are under the 'User Administration' section in the dashboard app.

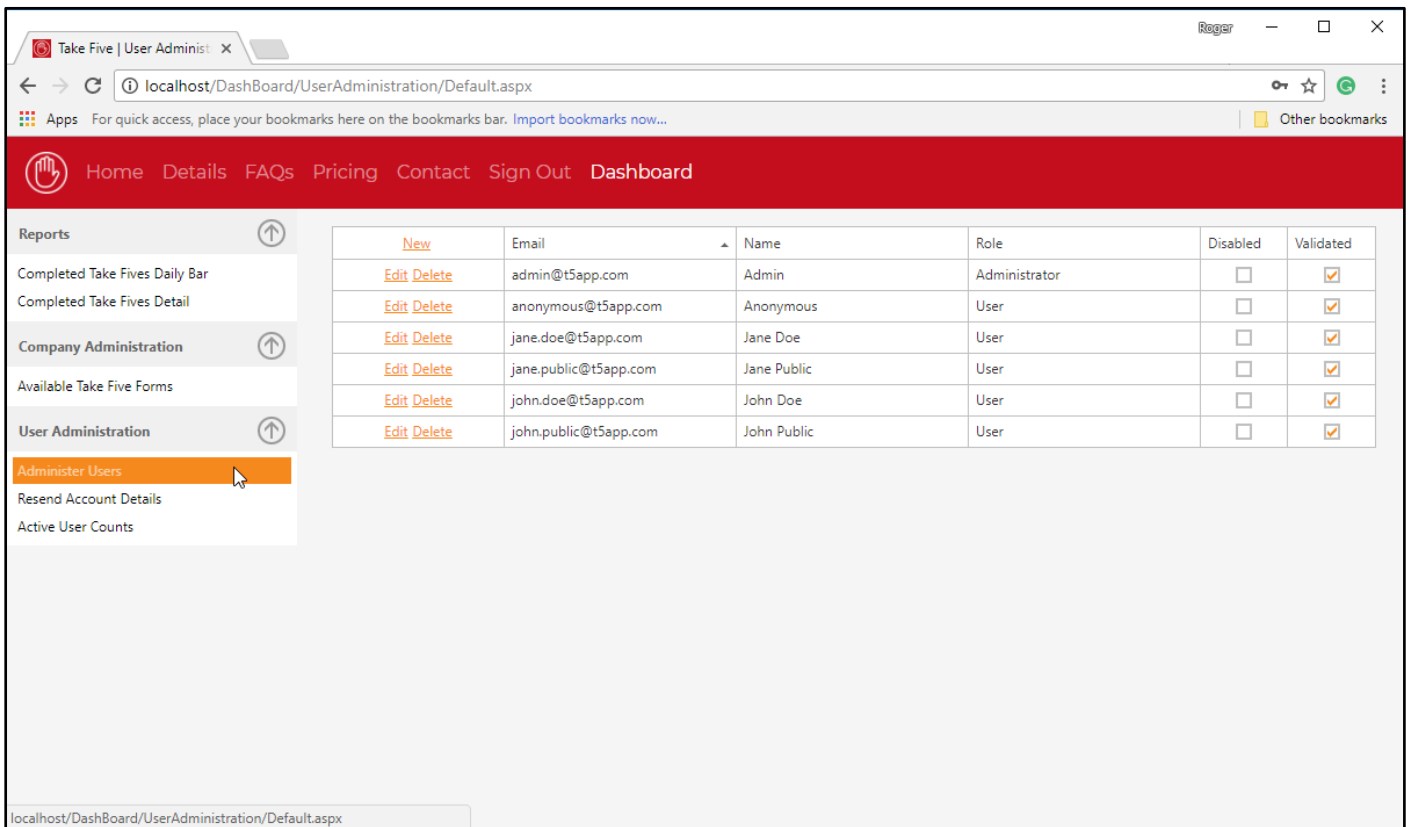


Figure 1 Managing Users

1.1 Creating New Users

To create new users navigate to the 'Administer Users' section.

To create a new user click 'New', enter a unique email address, a name, and the user's role. Typically the role will be 'User'. This will allow the user to log into the mobile app and submit 'take fives', but will not allow them to log into the dashboard app. A password for the new user will automatically be generated and their account details sent to the email address entered.

Multiple administrator accounts can be set up if required by creating a user with the 'Administrator' role.

1.2 Editing Users

To edit a user click 'Edit' and change the required information. Then click 'Update' or 'Cancel' as required.

1.3 Deleting Users

Users can be deleted, but deleting them will also delete any associated 'take fives' which will affect historical reports such as 'take fives' over a date range. The best approach is to just disable the user, this will disable the account on any mobile devices and the user will no longer be able to submit new 'take fives'.

1.4 Disabling Users

To disable a user click 'Edit' and check the disabled field, then click 'Update'. An account can later be re-activated if required.

1.5 Resending Account Details to User(s)

To resend account details to a user navigate to the 'Resend Account Details' section, select the required users, and click 'Resend Account Details'. Alternatively a user can be directed to <https://t5app.com/Reset.aspx> where they can enter their email address and receive a link to reset their password.

1.6 Active User Counts

To view the number of active users configured in the system over any time period navigate to the 'Active User Accounts' section. These are the numbers that will be used for billing, this is not the number of users submitting 'take fives'.

2 Assigning Take Five Forms

To assign 'take five' forms navigate to the 'Company Administration' -> 'Administer Take Five Forms' section. Available forms can be added or removed and the selection will automatically be updated on every mobile device. There is no way to assign forms on a per user basis.

3 Reporting

All reports are under the 'Reports' section in the dashboard app.

If you have specific reporting requirements then contact us and we will see how we can help.

3.1 Exporting Reports

Reports can be exported to various formats including, but not limited to, pdf, excel, and csv. Use the toolbar on the report viewer.