

Manage users

Everything about managing user accounts in your organisation.

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How to create a new user

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A new user can be added to an organisation by an organisation owner or admin.

- 1 Click on your initials in the top right corner.
- 2 Select Settings besides your Pascal environment's name.
- 3 Navigate to the Users page in the Organisation section.
- 4 Select the Add user button.
- 5 Fill in the required information and select Apply.

Once the new user has been created Pascal will send an email to that user that will allow them to activate their account.

Additional information, such as user role, can be added to the account by clicking the Pen icon.

It is also possible to import multiple new users at once via [bulk importing](#).

How to disable a user account

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It may be necessary to temporarily disable the account of a user. This can be done by an administration Owner or Admin.

- 1 Click on your initials in the top right corner.
- 2 Select Settings besides your Pascal environment's name.
- 3 Navigate to the Users page in the Organisation section.
- 4 Select the Deactivate icon in the Actions field of the user. If cases are assigned to this user, a popup will show up to ask what should happen to these cases:
 - Select Reassign to reassign these cases to another user, thereafter the new assignee can be selected.
 - Select Delete to delete the cases currently assigned to this user, thereafter confirm that you indeed want to delete the cases.
- 5 Select the Deactivate button.

The user's account has now been deactivated. This means they will no longer be able to perform any actions within an active session. Additionally, once they log out, they will not be able to log in again. The user can be enabled again in this page at any time.

How to delete a user account

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The account of a user can be deleted by an organisation owner or admin.

- 1 Click on your initials in the top right corner.
- 2 Select Settings besides your Pascal environment's name.
- 3 Navigate to the Users page in the Organisation section.
- 4 Select the Bin icon in the Actions field of the user. If cases are assigned to this user, a popup will show up to ask what should happen to these cases:
 - Select Reassign to reassign these cases to another user, thereafter the new assignee can be selected.
 - Select Delete to delete the cases currently assigned to this user, thereafter confirm that you indeed want to delete the cases.
- 5 Select the red Delete button.

The user has now been deleted and optionally, assigned cases have been reassigned to another user or group.

If needed, the user can be restored from the recycle bin within 28 days. After 28 days the user will be permanently deleted. If the cases related to the user have been deleted, these can also be restored from the case recycle bin within 28 days.

How to restore a deleted user account

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When a user account is deleted, the account is moved to the recycle bin. It is stored there for 28 days after deletion and can be restored by an organisation owner or admin during that time.

- 1 Click on your initials in the top right corner.
- 2 Select Settings besides your Pascal environment's name.
- 3 Navigate to the Users page in the Organisation section.
- 4 Click on Filter at the top right of the Users page.
- 5 Turn on the slider next to Deleted. This will show all deleted users.
- 6 Select the Undo icon in the Actions section of the user.
- 7 Then confirm the user should be restored.

The user's account has now been reactivated.

Cases that were originally related to this user will not be automatically restored or assigned back to the user.

Users that are in the recycle bin can also be permanently deleted by clicking on the blue trash bin. Mind that it is no longer possible to recover a user once it is permanently

deleted.

How to bulk import users

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Multiple users can be added to an organisation at once by using the bulk import functionality. This feature is only available to an organisation owner or admin.

To import the users:

- 1 Click on your initials in the top right corner.
- 2 Select Settings besides your Pascal environment's name.
- 3 Navigate to the Import users page in the Organisation section.
- 4 Upload a CSV or JSON file which contains the following information:
 - First name.
 - Last name.
 - Company email address.
- 5 A preview of the file content and any errors will be shown. Fields can be edited if needed.
- 6 Select the Import button when all data is correct.

Once the new users have been created Pascal will send an email to each user that will allow them to activate their account.

CSV file format

The CSV file should be formatted according to the requirements and examples below. An example file can also be downloaded during the importing stage.

The CSV file requires the first row to contain the names which describes the content of each column (first_name, last_name, email). Each subsequent row contains the

information that is specific to each user.

The CSV file can be created in Microsoft Excel or a plain text editor such as notepad. When working in Excel, each value should be entered in a separate cell. When entering the data through a text editor, each value should be separated by a comma or semicolon. Once all data has been added the file should be saved as a .csv.

```
first_name,last_name,email  
John,Doe,john.doe@example.com  
Jane,Doe,jane.doe@example.com  
Harry,Doe,harry.doe@example.com
```

Editing a CSV file

To open and edit a CSV file in Excel, the following steps should be followed:

- 1 Open a new Excel document.
- 2 Navigate to the Data tab.
- 3 Click on From Text/CSV.
- 4 Navigate to the CSV file you would like to open and open it.
- 5 Click on Transform Data.
- 6 Under the tab Transform select Use First Row as Headers if the column names are displayed as Column1, Column2 and Column3. If the column headers are already first_name, last_name and email this step should be skipped.
- 7 Select the File tab in the left upper corner and click on Close and Load.

JSON file format

The JSON file should be formatted according to the requirements and examples below. An example file can also be downloaded during the importing stage.

A JSON file is a format in which the information for each user is stored within an object. This object consists of a property, which is comparable to a column name, coupled to a value. In this case, the properties are first_name, last_name, and email. The values are the specific details of each user.

```

[
  {
    "first_name": "John",
    "last_name": "Doe",
    "email": "john.doe@example.com"
  },
  {
    "first_name": "Jane",
    "last_name": "Doe",
    "email": "jane.doe@example.com"
  },
  {
    "first_name": "Harry",
    "last_name": "Doe",
    "email": "harry.doe@example.com"
  }
]

```

[Start of JSON file
 { Start of the object
 "first_name": "John",
 "last_name": "Doe",
 "email": "john.doe@example.com" One user's data
 }, End of the object and comma to separate from the next object
 {
 "first_name": "Jane",
 "last_name": "Doe",
 "email": "jane.doe@example.com"
 },
 {
 "first_name": "Harry",
 "last_name": "Doe",
 "email": "harry.doe@example.com" Separation with a comma of the user's properties
 Column name
 Value for this user of column 'email'
 }
] End of JSON file

A maximum of 100 users can be imported at once. Please split your data into smaller files if you want to import more than 100 users.

It is not possible to create multiple accounts using the same email address. Please note, that this also includes email addresses of users in the recycle bin.

What roles are available in Pascal

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Pascal offers specific user roles to users who need additional permissions. Multiple roles can be assigned to a single user.

The available roles are:

- **Owner** - has all available permissions and can edit billing information.
- **Admin** - has all available permissions, except assigning user roles. They cannot edit or see billing information.
- **Team manager** - can view the Team activity Statistics page and see statistics of all users in the environment, but does not have any additional permissions.
- **Billing manager** - can edit billing information but does not have any additional permissions.

Permissions that are available to owners and admins include:

- Change policies.
- Bulk import cases or users.
- Invite users.
- Change services.
- Change the risk.
- Change the organisation defaults.

Permissions that are only available to owners include:

- Assign or change roles of users.

An organisation is required to have at least one owner.

How to change the roles of a user account

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The role of a user determines which permissions they have. Only an organisation owner can change the role of a user.

- 1 Click on your initials in the top right corner.
- 2 Select Settings besides your Pascal environment's name.
- 3 Navigate to the Users page in the Organisation section.
- 4 Select the Pen icon in the Actions field of the user.
- 5 Update the Roles information as needed.

Changing roles of users is only possible for users with the role Owner.

What are groups

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An organisation can consist of multiple groups. Groups can be used to clearly divide different departments or lines of defence within an organisation.

By assigning certain read and edit rights to a group and its users in the policies users might be able to see or edit cases from other users in the same group. Additionally, a case may be assigned to a group rather than a specific user.

An overview of all groups within the organisation is shown in the Groups page in the Organisation section in the Settings. If there are multiple users in a group, they can be viewed by clicking on the assigned users block in the Users column.

How to create groups in Pascal

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An organisation owner or admin can create groups for their organisation.

- 1 Click on your initials in the top right corner.
- 2 Select Settings besides your Pascal environment's name.
- 3 Navigate to the Groups page in the Organisation section.
- 4 Select the Add Group button.
- 5 Fill in the group name and add the users of that group.
- 6 Select the Apply button.

A new group has now been created.

How to edit groups in Pascal

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An organisation owner or admin can edit groups for their organisation.

- 1 Click on your initials in the top right corner.
- 2 Select Settings besides your Pascal environment's name.
- 3 Navigate to the Groups page in the Organisation section.
- 4 Select the Pen icon in the Actions section of the group.
- 5 The name and related users can now be edited.
- 6 Select the Apply button.

The group has now been edited.

How to delete groups in Pascal

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An organisation owner or admin can edit groups for their organisation.

- 1 Click on your initials in the top right corner.
- 2 Select Settings besides your Pascal environment's name.
- 3 Navigate to the Groups page in the Organisation section.
- 4 Select the Pen icon in the Actions section of the group.
- 5 Select the red Delete button.

This action will open a side dialogue which will give you the option to delete all the cases associated with that group by checking the Delete cases checkbox or to Assign the cases to another user or group.

If the cases related to the group should be deleted:

- 1 Check the Delete cases checkbox.
- 2 Select the red Delete button.

The group and all cases related to this group have now been deleted.

A deleted group cannot be recovered. If the cases related to the group have been deleted, these can be restored from the case recycle bin within 28 days.

If the cases related to the group should not be deleted:

- 1 Do not check the Delete cases button.**
- 2 Select the person or group you want to assign the cases to.**
- 3 Select the red Delete button.**

The group has now been deleted and all cases have been reassigned to another user or group.

When the group of a user is changed, all cases of that user will be migrated to the new group.

How to create user functions

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In Pascal, functions can be created, edited and assigned to users. The set-up functions can also be used to create approval templates which define the order in which functions must approve an onboarding client.

Please note that approving an onboarding client is only available to environments with access to Pascal Onboarding.

To create functions, follow the steps below:

- 1 Click on your initials in the top right corner.
- 2 Select Settings besides your Pascal environment's name.
- 3 Navigate to the Policies page in the Organisation section.
- 4 In Organisation functions, press the Add function button.
- 5 Fill in the function name and click on Create.

You can also edit an existing function by pressing the pencil button beside an existing function. Or delete an existing function by pressing the bin icon beside a function.