User Maintenance: Quick Tips

For School Administrators

To Add a New User

1. Login to the Faculty Search System. From the home page, click on the ADMIN menu.

2. Click on the Users tab. Search for the person first to make sure they are not in the system.

3. Click Actions, Create New User.

4. Enter Account Information
   a. For the Username and External Authentication Key, enter the person’s PennKey followed by ‘@upenn.edu’
   b. For the Password, enter something that no one would guess. The user will not use this password since they will log on via PennKey, but in the event that an outside person attempts to log in directly to the application we do not want them to successfully try password ‘123456’ for example.
   c. If the user has a common first and last name, enter a middle initial or middle name with the first name in the First Name field. The user will be easier to find in searches like the search committee chair search.
d. For the Org Unit Id, select the School with which the person is associated. Note that Schools do not have a code next to their name and are not indented

e. Click **Next** when done

5. **Assign to Groups**

   a. If they are a School Administrator, select ‘School Administrator’ and click the **Assign New Group** button.

   b. Check the box for the appropriate Organization unit (School)

   c. If they are a Department Administrator you will need to specify the department(s) to which they have access.

   d. The user will automatically be added to the Employee group.

   e. Click **Next** when done assigning groups.
6. Review the user account and make final adjustments
   a. **IMPORTANT**: When the user logs in, their view will default to a preferred role. You will need to set this role now. Click “Edit” on the User Details page.

   ![User Details](image)

   b. Now set her preferred role to ‘School Administrator’ (or Department Administrator if applicable) and click **Update User**.

   ![Preferred Group On Login](image)

   c. Take Action on User, **Update Status**

   ![Update Status](image)

   d. Approve the user account
To Edit and Approve a New User

1. A Department Administrator may request that a new account be created for a Search Committee Member when they create a posting, if they cannot find the faculty member when they are assigning the search committee.

2. As the School Administrator, you will receive an email when this request occurs. When you log into the system click the Users tab in your inbox.

3. Click Edit to add the Employee Id, edit the username to add @upenn.edu, and add the External Authentication Key. Click Update User.
4. Next you will be prompted to assign the user to one or more groups. Click on the Groups tab to assign the user to groups.

   a. See the instructions under **To Add a User** steps #5 and #6 to add groups and finalize the account.

   b. For new faculty members, add them to the system user list as both Search Committee Members and Search Committee Chairs. You only need to specify one department when they are added as a user. They may serve on a search committee anywhere in the University. They are assigned to the specific committee as either a chair or a member at the time the posting is created.
To Add a Group to an Existing User

1. Login to the Faculty Search System. From the home page, click on the ADMIN menu.

![ADMIN menu highlighted](image)

2. Click on the Users tab. Type any part of the person’s name in the Search field.

3. Find the appropriate record in the search results and click Actions, User’s Groups.

![User's Groups action highlighted](image)

4. Scroll to the bottom of the page, select a group from the drop-list, and click Assign New Group.

![Assign New Group button highlighted](image)

5. The group access can be applied to an entire School, to one Department or to selected Departments. Choose the appropriate organizations and click Assign to Group.
   a. Note that schools do not have numeric codes next to their names. The Departments are indented under each School.
To Change an Existing User’s Preferred Group

A user may be assigned to several groups in the system. When a user logs in, their current group is displayed at the top right. They may select a different group from the list and refresh the screen, but the group displayed on login should be the group that they prefer, or use the most.

1. A School Administrator may change a user’s preferred group by logging in to the Faculty Search System. From the home page, click on the **ADMIN** menu.
2. Click on the **Users** tab. Type any part of the person’s name in the **Search** field.
3. Find the appropriate record in the search results and click Actions, **Edit User**.
4. Go to the **Preferred Group On Login** drop-list and select the group that the person will use the most.
5. Click **Update User**.