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Administrator Dashboard Guide

You may see a slightly different configuration or content when accessing the Administrator dashboard depending on any bespoke requirements that have been applied to the account. This guide covers the most commonly used elements.

Logging into the Admin dashboard

Log into using the URL provided at set up stage. If you are not sure what this is, please contact support@sslpost.com.

Then click on USER ADMIN in the top right of the screen to view the new Admin dashboard.

On all pages you will find a Search/Filter option. There is also an advanced option accessible by clicking on the down arrow to the right-hand side of the search box. You can use this to select those falling into specific categories, including times, dates, registered, not registered etc. by entering your requirements here.

Using the burger menu on then top left-hand side, open the drop-down menu.

Users:

This menu displays a list of Users by their User name. You can also view:
- what Group they belong to
- whether they are enabled (live)
- the date they were created
- the date they registered
- their last login date

Click on the User name to display more detail about the User (if this has been provided).

At the end of the table, there are three vertical dots. Click this to open up the actions for the User:
- deactivate User – use this where you want to prevent access to the employee portal for that User.
- schedule deactivation – Use this when you want to schedule a future deactivation for the User. Most commonly set at 3 months for a leaver, for example.
- resend welcome email – use this to resend a User's welcome email.
- change password – Users may contact you asking you to change their password for them. They have a function that provides self-service for password resets; this is a secondary option.
- promote to – use this to promote a User to Admin.
- impersonate – use this to masquerade as the User and see what they see their portal content.

Groups: **We recommended you do not alter this section without contacting support@sslpost.com beforehand – for information only**

Users can be assigned to Groups. You can set up a Group of Users to receive a specific document or message, for example.
Group page display includes:
- *User name,*
- *last created date*
- *last registered date*
- *last login date*

At the end of the table, there are three vertical dots. Click this to open the actions for the Group:
- *disable Group – this disables access to the portals of those in the Group*
- *create User – creates User within the Group*
- *import Users – bulk import Users to a Group*

Document:

This page is about the documents themselves. Page display includes:
- created – date the document was first created on the system.
- User – the person document belongs to
- Group – document owner Group
- type – the generic type of document description; payslip, contract, for example.
- identifier – the document name.
- timestamp – (used for payslips - pay date)
- last accessed – the date the document was last accessed by a User

At the end of the table, there are three vertical dots. Click this to open up the actions for the Document:
- edit – edit the document summary
- disable – disable all access to the document
- download – download the document

Emails:
This page provides details of emails sent. The page includes:
- Timestamp; when the email was sent
- User; who it was sent to
- Group; what Group that User is part of
- Bounce; a tick shows a successful send, anything else shows a bounce
- Subject Line; the subject line of the email

You can click on the linked text to show a summary of that email.

Bounces can be checked by going into the linked text on the page and checking the detail. Bounces rejected due to incorrect email, for example, are called Hard Bounces. Corrective measures must be taken to resolve the issue and resend the email if it is critical. Bounces caused by an out of office message or a delayed send, for example, are called Soft Bounces. The email should be delivered to the valid email address. The returning message is shown in the detail.

Events:
This page details all the activity around the use of the portal. The page displays all activity and can be filtered by using the search options. The page includes:
- timestamp of event
- Event description
- Event Success
- who carried out the Event
- whether any impersonation was carried out and by whom

Common actions & reporting

List of those registered/not registered
Use the User page and enter your selection in the Search facility. Alternatively, for a more detailed view of their status, you can view via the Contracts option.

To impersonate a User
In the Users menu, at the far-right hand side of each User name, you will see three vertical dots. Click on this and select "impersonate". You can then go into their document/portal and view documents. When you are finished, click logout on the top right corner of the screen and you will return to the admin dashboard.

To disable a User account
Go to the Users menu. On the far-right hand side, you will see three vertical dots. Click this and select Deactivate. This will prevent further access into their portal.

FAQ for Internal Support Personnel

The portal is very User intuitive. However, we understand that sometimes a User may encounter issues. This FAQ is to answer the most common queries you may receive.

I have lost my password.

Go to your login page and in the top right corner and middle of the screen is the "forgotten password" link. Click and follow the on-screen instructions.

Which browser works best?

Chrome or any of the latest fully supported, evergreen browsers are best for accessing the portal.

I have seen a CSRF error on my page.

You have been logged out automatically due to a time-out. Close your browser session and reopen a new session. Log back in and re-enter your login credentials.