

Creating/Editing Users in Link2Feed

From the menu, select Administration then Users.

- For new users: On the top-right, select New User.
 - To edit existing users: Select the orange Edit button to the right of the user's name. From the menu on the top right, you can do the following:
 - Select Edit User to change their permissions.
 - Select Deactivate to deactivate a current user.
 - Select Change Password to reset/change a password (they will need to change their password again when they log back in).
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Details

- Owning organization: Select your agency's name
- First/Last name: the user's first and last name
- Email: the user's email
- Password/Confirmation: the temporary password the user will use to log in for the first time. They will be asked to change their password after logging in.
- Enabled: select YES.

Roles

- Super Administrator
- Administrator (Link2Feed Staff)
- National Manager
- Regional Manager
- Network Admin
- Network Manager
- Agency Manager
- Agency Intake
- Intake Anonymous
- Reporter
- Exporter
- Duplicate Checker
- Social Services
- Bulk Program Recorder
- CSFP Worker
- Donation Recorder
- Disposer
- Deliverer
- Reconciler
- User

NOTE: Not all roles listed in Link2Feed are relevant to our current system configuration.

The roles you can assign are as follows:

Agency Intake: Allows a user to perform client intakes, access client profiles, and visit information. Any user who needs to access client data must have this role. The access is customizable on a later page.

Intake Anonymous: Allows the user to create an anonymous visit.

Reporter: Allows the user to access the report system. The user is assigned the reports they can run on a later page.

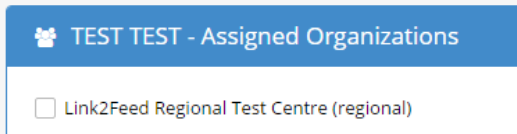
Messenger: Allows the user to send messages in the system.

Duplicate Checker: Allows the user to access the Client Duplicates list to merge and dismiss pairs of possible duplicates.

User: This box is automatically checked and must remain so when creating a user. It is required for all permissions to function normally.

Select SAVE AND NEXT

Assigned Organization



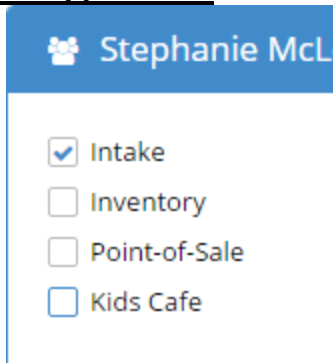
TEST TEST - Assigned Organizations

Link2Feed Regional Test Centre (regional)

- Select the name of your agency.

Select SAVE AND NEXT

Assigned Applications



Stephanie McL

Intake

Inventory

Point-of-Sale

Kids Cafe

- Select INTAKE. Other Applications are not currently available at this time.

Select SAVE AND NEXT

Intake, Programs, Reports, MISC.

Intake

- Intake Permissions: Select ALL or the specific items the user may add/edit on a client's profile.
- Additional Permissions
 - Attendance visits: Not a feature currently available.
 - Quick Click visits (if enabled): Allows user to use Quick Click visits. If you would like to learn more, please reach out to Anna Lisa.

Select SAVE AND NEXT

Programs

Select the type of service visit the user may record.

- Donated Pantry Visit: Client receives product donated to or purchased by the agency.
- TEFAP Pantry: Client receives product from TEFAP or a mix of donated and TEFAP products.

PLEASE NOTE: If your agency mixes donated and TEFAP products, always record the service visit as a TEFAP Pantry Visit. Do not record one of each, as it will count the individuals and household twice in your reports. Please reach out to Anna Lisa with any questions.

Select SAVE AND NEXT

Reports

Select which reports the user may generate. The reports applicable to client intakes are as follows:

- Pantry Report: Basic metrics of visits recorded.
- Heat Map Report: An aggregated visual distribution of clients who have visited in the report period.
- Interactive Household Report: Detailed overview about client demographics. Ability to pivot on various metrics.
- Statistics Report: Explore specific datasets from demographic and visit information collected.
- Time Series Report: Creates a line graph of individuals and/or households served using various increments of time and specific date ranges.

Select SAVE AND NEXT

Misc.

- Preferred site theme: default
- Preferred time zone: Eastern
- Preferred Time Format: 12h or 24h time clock
- Preferred client tab: This feature changes the first page you see of a client's profile. The default is the PERSONAL tab. Selecting SERVICES brings the user directly to the buttons to record TEFAP or Donated visits and reviewing visit records. If you select NEW VISIT PAGE, the form to record a service visit will automatically appear after searching for that client, eliminating the need to navigate to the Services tab and selecting either the TEFAP or Donated pantry visit buttons.
- Preferred visit page: This option only appears if you selected NEW VISIT PAGE above. It asks you to select the type of visit to record (either TEFAP Pantry or Donated Pantry visits).
- Preferred quick search: Selects the default method for searching for a client. The default is CLIENT NAME SEARCH. This option can also be changed from the dashboard.
- Show report dashboard: Allows the user to see Households/Individuals Served Over Last 6 Months graphs on their dashboard. The user must be assigned the role of REPORTER for these to work.
- Show dashboard service stats: Allows the user to see the Households/Individuals Served Today counts on their dashboard.

Select SAVE AND NEXT

You have now created/edited a user!