

# Using the Identity Manager

The Identity Manager allows you to **access PTS and manage different settings** based on your assigned role:

- Users with a **basic role** (students) can:
  - Configure their **user profile**
- Users with the **administrator** role can:
  - Configure their **user profile**
  - Manage **users**
  - Manage **users accounts**
  - Manage **roles**
  - Manage **permissions**
  - Customize the **PLS (IM +Learning Locker)**

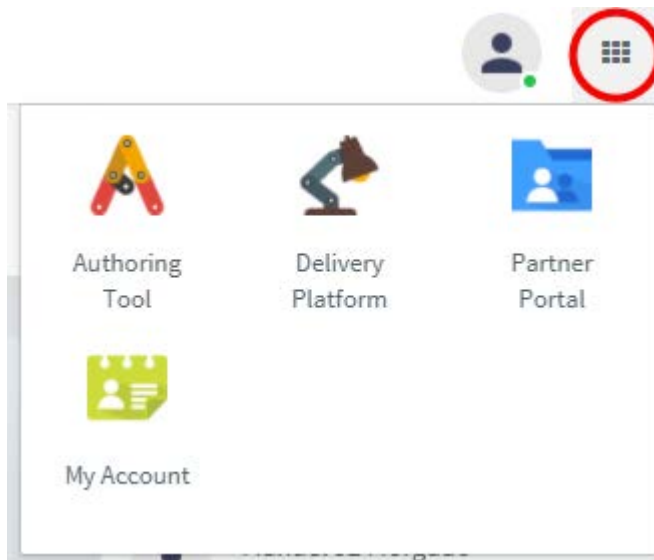
The Identity Manager also allows you to **switch between the apps**, so you do not need to login again.

## Homepage

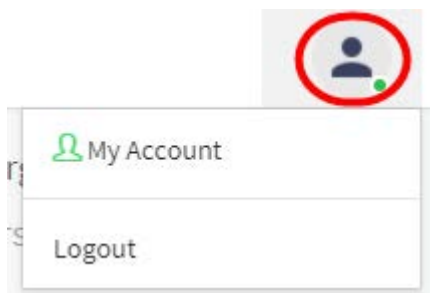
The screenshot displays the 'User Account' management interface. On the left, a dark sidebar contains navigation links for 'User Account', 'Roles', 'Users', and 'Organizations'. The main content area features a header with the 'User Account' title and a user profile picture. Below this, there are four tabs: 'General' (selected), 'Contact info', 'Delivery Platform', and 'Accessibility'. The 'General' tab contains several input fields: 'Username' (with a yellow highlight), 'Email', 'New Password' (with a yellow highlight), 'Confirm Password', 'Name', 'Last Name', and 'Languages' (a dropdown menu set to 'English'). A 'Save' button is positioned at the bottom right of the form. The footer of the page shows '© 2017 Copyright' and '1.0 |'.

You can **hide** the menu by clicking the ☰ icon.

You can **navigate between apps** by clicking the 3x3 grid icon.



You access your account or logout by clicking the user icon.



You will get a different view of the page **based on your assigned role**.

## Students view

Students are only able to access the **User Account**.

User Account

General Contact Info Delivery Platform Accessibility

Username

New Password

Name

Email

Confirm Password

Last Name

Languages  
Select your favorite language  
If the chosen language is not available for any of the applications, the default language will be used.

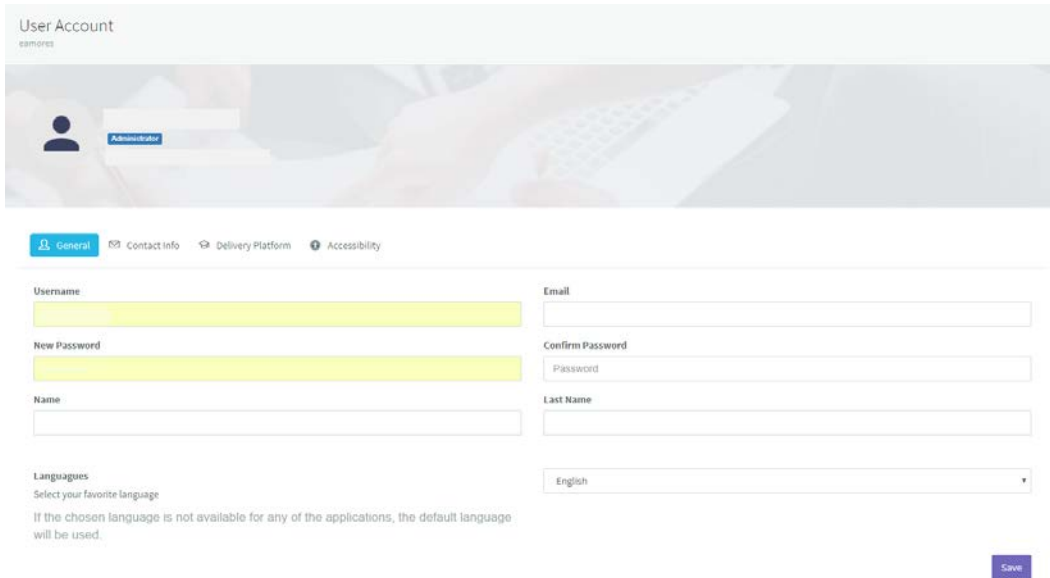
English

Save

You can navigate through **four different tabs** to configure options related to your **account**, **profile** and **delivery platform**.

Below, you can see the information included in each tab.

## General

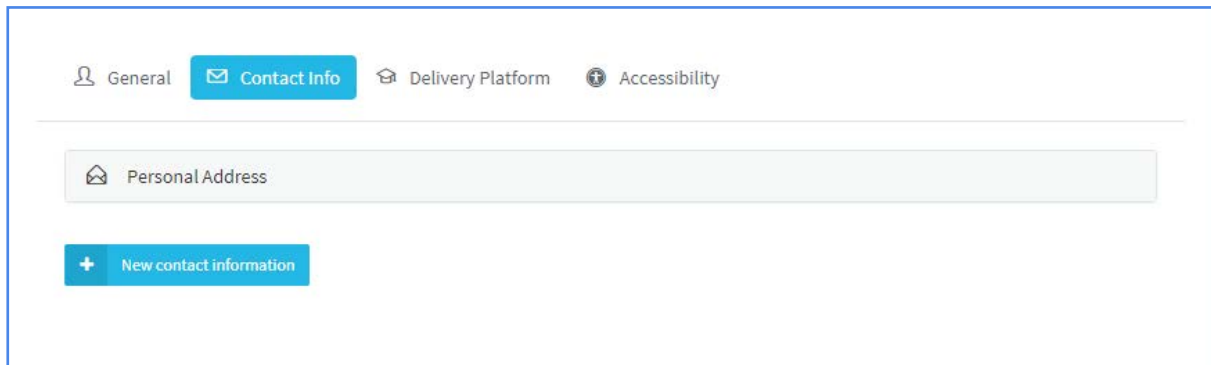


The screenshot shows the 'User Account' settings page for a user named 'samores'. The 'General' tab is selected, showing fields for Username, New Password, Name, Email, Confirm Password, Last Name, and Languages. The 'Save' button is visible at the bottom right.

Here, you can edit your **username**, change your password, email address, name, surname, and even select your **favorite language**.

If you want to **change your password**, you must enter your **new password** into the New Password field. Then, you must type it again in the **Confirm Password** field and click **Save** to save the changes.

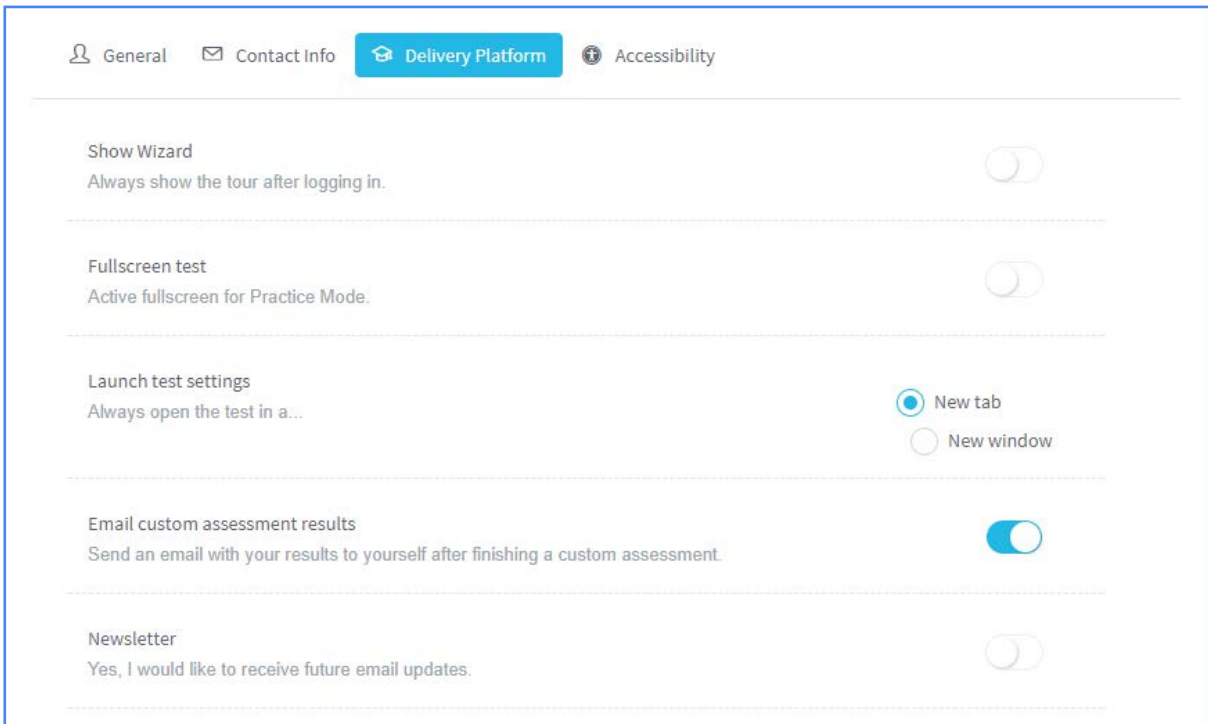
## Contact Info



The screenshot shows the 'Contact Info' tab selected in the Identity Manager. It displays a 'Personal Address' field and a '+ New contact information' button.

In this tab, you can **add or modify your address and phone number**, or **add a secondary address or phone number**. Once you have entered the information, click **Save changes**. You can delete any previously saved information by clicking **Delete**.

## Delivery Platform



The screenshot shows the 'Delivery Platform' settings page. At the top, there are four tabs: 'General', 'Contact Info', 'Delivery Platform' (which is highlighted in blue), and 'Accessibility'. Below the tabs, there are five settings, each with a label, a description, and a control element:

- Show Wizard**: Always show the tour after logging in. (Toggle switch is off)
- Fullscreen test**: Active fullscreen for Practice Mode. (Toggle switch is off)
- Launch test settings**: Always open the test in a... (Radio buttons: 'New tab' is selected, 'New window' is unselected)
- Email custom assessment results**: Send an email with your results to yourself after finishing a custom assessment. (Toggle switch is on)
- Newsletter**: Yes, I would like to receive future email updates. (Toggle switch is off)

Here, you can edit the following:

**Show Wizard**: you can choose to always **show** or **not show the tour** when logging in.

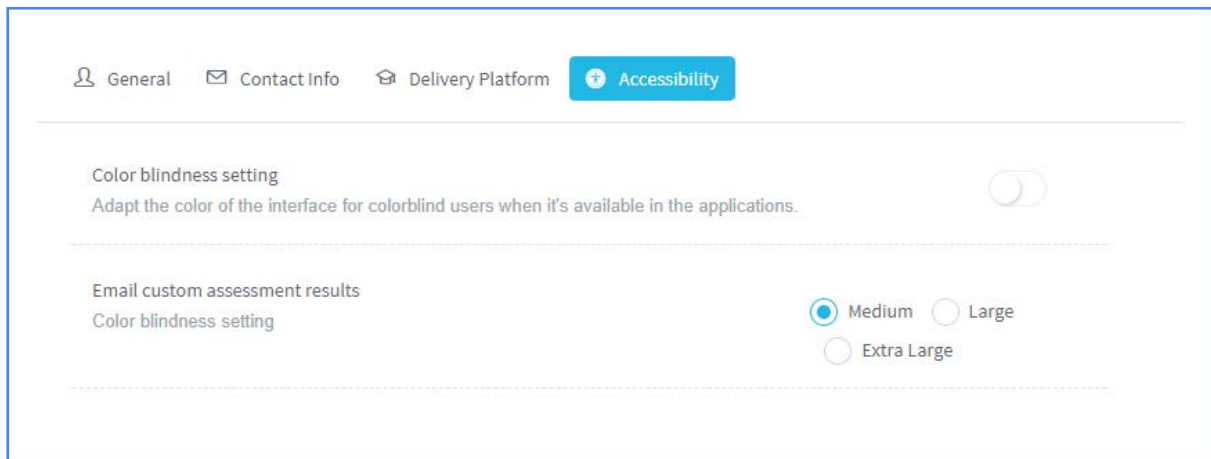
**Fullscreen test**: turn this setting on if you want to **activate the full screen** when you launch the practice tests.

**Launch test settings**: you can choose to open the test in a **new tab** or a **new window**.

**Email custom assessment results**: you can choose if you want to send a message with your results to your email address once you complete a **custom assessment**.

**Newsletter**: this option allows you **to subscribe** to our newsletter.

## Accessibility



Accessibility allows people with disabilities or impairments to customize their access and to make the most of their study. The following features can be enabled:

**Color blindness setting**: this setting adapts the user interface to color-blind mode, improving the use and identification of the elements for these users.

**Font size**: it allows the user to enlarge or reduce the font size displayed in their practice tests.

## Administrator view

It displays the aforementioned **User Account** section with the following options: Roles, Users and Organizations.

## Roles

This screen displays all the **roles** which belong to **your organization**.

### Change roles list view mode

The screenshot shows the 'Roles' management page. At the top left, there is a '+ New role' button. Below it, there are 'Print' and 'Show 10 entries' options, with a red circle and arrow labeled '1' pointing to the 'Show 10 entries' dropdown. The main table has columns for 'Roles', 'Description', and 'Actions'. A red circle and arrow labeled '4' points to the 'Actions' column header. At the bottom left, there is a 'Showing 1 to 9 of 8 entries' indicator with a red circle and arrow labeled '3' pointing to it. At the bottom right, there are 'Previous', '1', and 'Next' navigation buttons, with a red circle and arrow labeled '2' pointing to the 'Next' button.

1. You can select from **10, 25, 50 or 100 entries** to be displayed on the roles list. You can **navigate** through the pages clicking **Previous** or **Next**.
2. The **number of roles displayed** on that page always appears here.
3. You can **order the list** by the **role name** or **description**.

### Create a new role

A **role** is a label to which assign a **set of permissions** is assigned. These permissions can be **related to** any of the **four applications** (IM, B2B, Delivery and AT).

To create a new role, click .



The following window opens:

To create a role, these **three fields** are required:

- **Name:** enter the **role name**.
- **Description:** describe the **role functions**.
- **Permissions:** choose the **permissions** from the list. When you select a permission, this will be added to the permissions field and will disappear from the list. This functionality prevents a role from having duplicate permissions.

Once you have added all the information, click **Save changes** to save your new entry.

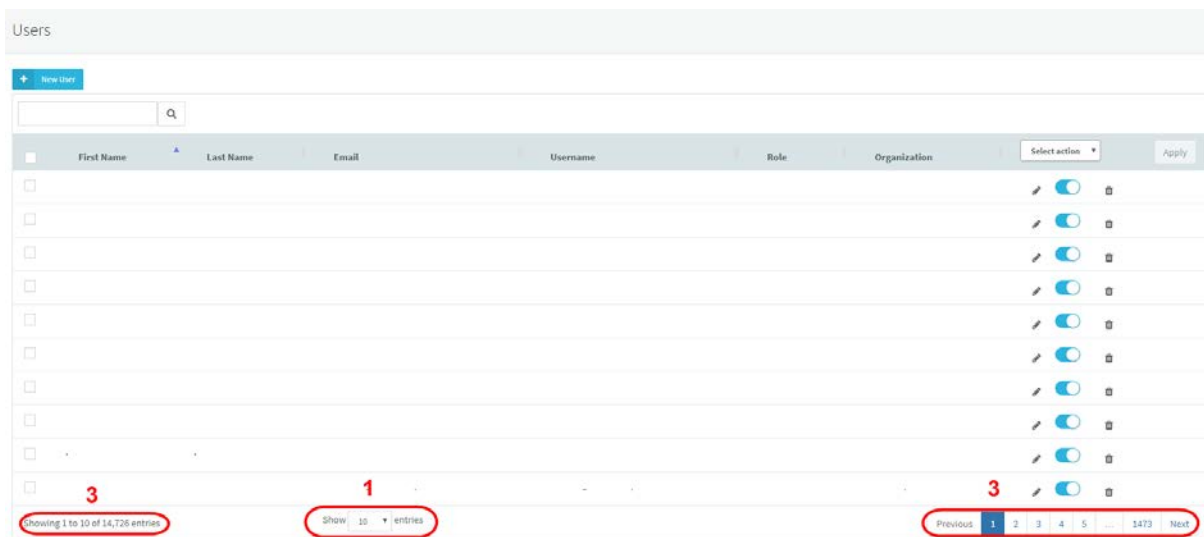
You can also **edit the role** later by clicking the **role name** in the main list.

You can also **delete the role** by clicking the **delete** icon.

## Users

This section displays a list of users which belong to your organization, as well as those that exist in organizations under yours.

### View and search for users



The screenshot displays the 'Users' management interface. At the top left, there is a '+ New User' button. Below it is a search bar with a magnifying glass icon. The main area is a table with columns: First Name, Last Name, Email, Username, Role, Organization, and Select action. The 'Select action' column contains icons for edit, status toggle, and delete. At the bottom, there are three red circles with numbers 1, 2, and 3. Circle 1 highlights the 'Showing 1 to 10 of 14,726 entries' text. Circle 2 highlights the 'Show 10 entries' dropdown menu. Circle 3 highlights the pagination controls, including 'Previous', '1', '2', '3', '4', '5', '1473', and 'Next' buttons.

1. You can **select** from 10, 25, 50 or 100 entries to be displayed on the user list.
2. You can **navigate** through the pages by clicking Previous or Next.
3. The number of users displayed on that page always appears here.

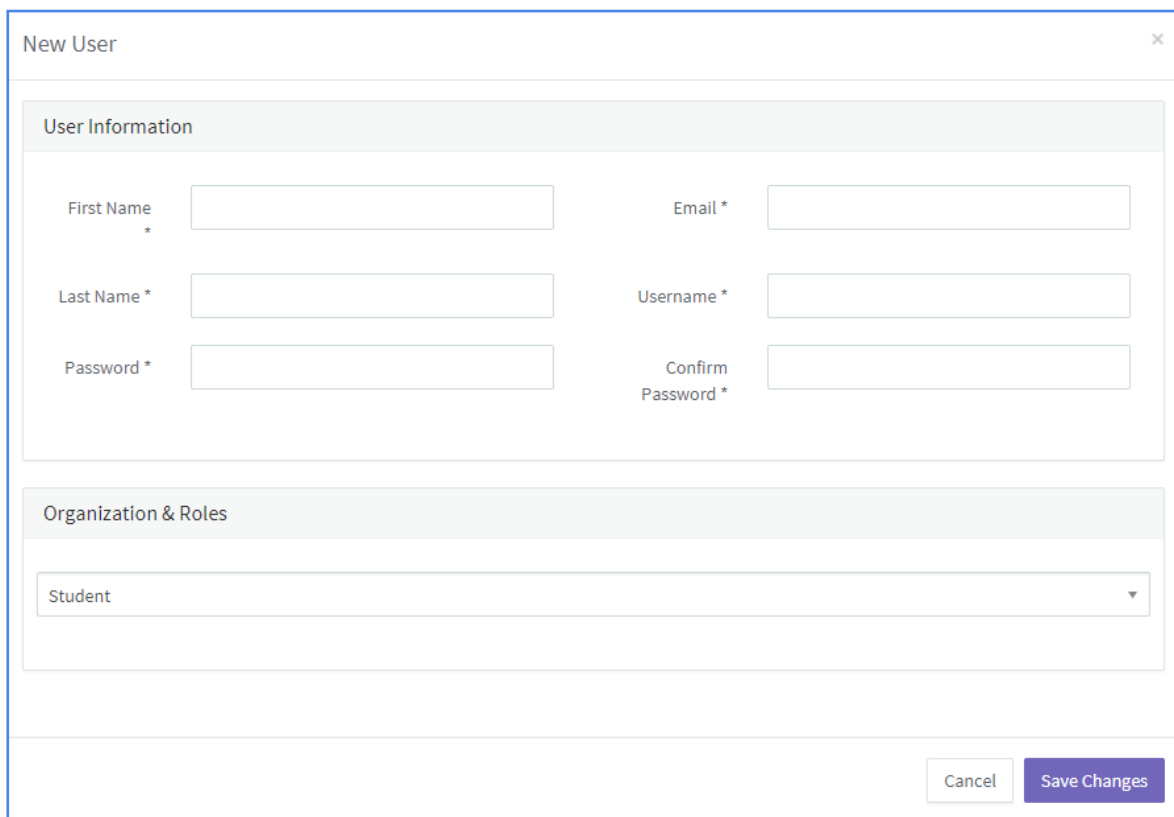
You can order the list by first name, last name, email address, username, role and organization.

Users can be searched by using the search button. You can use any of the following fields: first name, last name, email, username, role, organization.

## Add a new user

You can create a new user by clicking .

The following window opens:



The image shows a 'New User' dialog box with two main sections: 'User Information' and 'Organization & Roles'. The 'User Information' section contains six input fields: 'First Name \*', 'Last Name \*', 'Password \*', 'Email \*', 'Username \*', and 'Confirm Password \*'. The 'Organization & Roles' section contains a dropdown menu with 'Student' selected. At the bottom right, there are 'Cancel' and 'Save Changes' buttons.

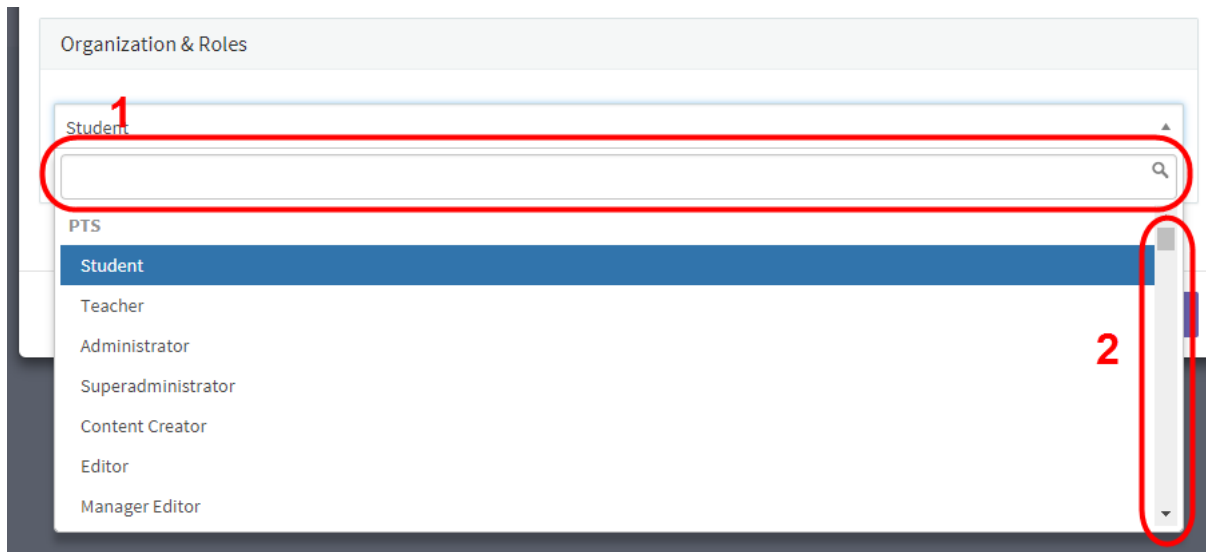
User Information	
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Password *	<input type="password"/>
Email *	<input type="text"/>
Username *	<input type="text"/>
Confirm Password *	<input type="password"/>

Organization & Roles
Student

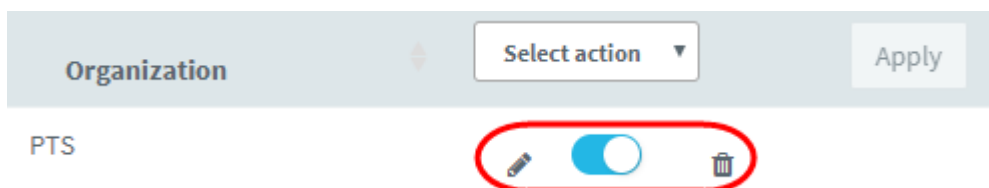
Cancel Save Changes




To assign a role within an organization of your choice, you can use the **search bar (1)** and enter the name of the new organization. Alternatively, you can **scroll down** until you see the organization name on top of the roles **(2)**.



Note that only **one role can be assigned to each user**. Once you have created the new user, click **Save Changes** to save your entry.

## Edit, deactivate and delete users



	<p>You can edit a user by clicking this icon. It allows you to change all the field features except the password (only users can reset or change their own password).</p>
	<p>Users can be deactivated/activated by clicking this icon (this can also be done in the user information window). Users which have been deactivated <b>will not have access to PTS</b> but will remain in the database. They can be activated again.</p>
	<p>Users can be deleted by clicking this icon. Note that this is a non-reversible action and the user will be permanently deleted from the database.</p>

If you want to delete, activate and deactivate several users at the same time, you should mark the corresponding checkbox, select the action in the drop-down menu and click Apply.



## Organizations

You can manage your organization here. You can organize your users in different levels or categories. A user can only belong to one organization. Your organization and all the child organizations are displayed, although parent organizations are not visible.

If you click one of the organizations, the details appear on the right. If you have sufficient permissions, you can edit these details.

The screenshot shows the 'Organizations Management' interface. On the left, there is a list of organizations with columns for 'Authoring Tool', 'Delivery Platform', and 'Partner Portal'. On the right, there is a form for editing organization details. The form has tabs for 'INFO', 'SERVICES', 'USERS', 'CONTACTS', and 'PLS'. The 'INFO' tab is active, showing fields for Name, City, Phone, State, Country, Address 1, Address 2, Category, Post Code, and Account Rep. A red arrow points to the 'Phone' field.

## Info tab

This window shows the **organization details** (as seen above).

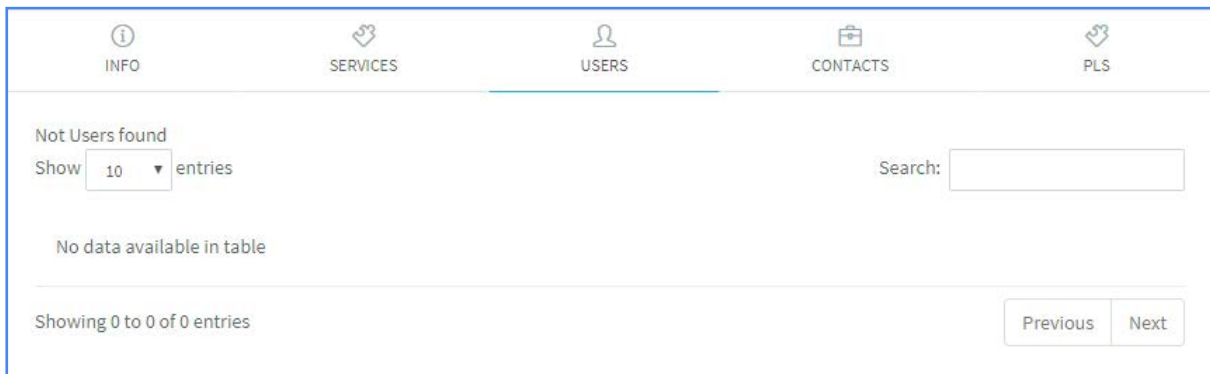
## Services

The screenshot shows the 'SERVICES' tab in the 'Organizations Management' interface. It displays a list of services with toggle switches for each:

Service	Toggle
Authoring Tool	Off
Delivery Platform	Off
Partner Portal	Off

You can **configure the users access to the organization's applications**. Those applications to which the user has access to display when you click the icon.

## Users



The screenshot shows a web interface for managing users. At the top, there are five navigation tabs: INFO, SERVICES, USERS (which is highlighted with a blue underline), CONTACTS, and PLS. Below the tabs, the main content area displays the message "Not Users found". To the left of this message is a "Show" dropdown menu set to "10" entries. To the right is a "Search:" text input field. Below the message, it says "No data available in table". At the bottom left, it indicates "Showing 0 to 0 of 0 entries". At the bottom right, there are two buttons labeled "Previous" and "Next".

It displays the **list of users which belong to an organization** which you have previously selected, along with their username, photograph and email. Here, you can also **search** for a **specific user**.

## Contacts

In this section, we can **add contact information** related to an organization.

By clicking the **New Contact Information** button, you can open new windows with several fields that can be filled to add new details.

New contact information

Type	Primary Contact
First Name	Primary Contact
Last Name	Sales Manager
Email	Operations Manager
	Key Creator
	Accounting
	Technical
	Key Creator/Everything
	Everything
	Administrator
	Ordering Contact

Cancel Save changes

+ New Contact Information



PLS

Only available for partner accounts.

You can activate or deactivate the following options:

INFO	SERVICES	USERS	CONTACTS	PLS
Subdomain *	<input type="text" value="generic"/>			
Logo	<input type="text" value="https://preim.performancetestingsolution.com/img/logo.png"/>			<a href="#">Choose file</a>
<b>Delivery Platform</b>				
Upload Results	User can upload results from offline test attempt			<input checked="" type="checkbox"/>
View Cart Icon	User can access to shopping cart			<input checked="" type="checkbox"/>
Extend Product	User can extend your product license.			<input checked="" type="checkbox"/>
View History	User can access to history section			<input checked="" type="checkbox"/>
Register Keys	User can register keys.			<input checked="" type="checkbox"/>
Create Assessment	User can create assessments			<input checked="" type="checkbox"/>
View Knowledge Base	User can access to knowledge base			<input checked="" type="checkbox"/>
View Tour	User can access to the application tour.			<input checked="" type="checkbox"/>
View Test Details	User can view details from tests			<input checked="" type="checkbox"/>
View Distributor	User can view distributor details related to a key.			<input checked="" type="checkbox"/>

- Upload Results
- View Cart Icon
- Extend Product
- View History
- Register Keys
- Create Assessment
- View Knowledge Base
- View Tour
- View Test Details
- View Distributor
- Edit Profile
- Show Logo
- Logo Alternative Text
- Logo Alternative Text
- View Demo button
- View For Assessments
- Firsts Pages Tutorial
- Back to locker

To save the changes, click Save.

**View For Assessments**  
Users only can see four assessments associated.

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**Firsts Pages Tutorial**  
Users will see first page of the common tutorial.

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**Back to locker**  
Users can back to locker.

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