

## Step 2. Users setup

User editing panel

“Users” is a general term for all personal profiles entered in the system. That includes admins, crew, ground staff, etc. Each user’s details need to be entered manually. To add a new user, go to Settings > Users and click the button **+NEW USER** at the bottom of the page.

There are two ways of adding user details:

1. You can fill in the information in the User Edit pop-up window, which allows entering the most crucial user data.
2. Go for the full edit located at the bottom left corner of the window, where additional information can be inserted. For the basic requirements, the initial pop-up window is good enough.

The mandatory fields are as follows:

- **Name**
- **Surname**
- **Known as** (this field will fill itself automatically when the above are entered, but you can change it if needed)
- **Code** – crucial for all crew members as they will be used to assign crew to flights
- **Homebase**
- **Permission group** – the list includes pre-defined groups which allow different levels of access for particular roles across the Company
- **Sex**
- **Login** – that will be used to log into the system

### IMPORTANT!

The field “Email” - if filled in at the initial user installation, will trigger the password to be sent to this user along with the rest of login details. To avoid this situation at this stage, leave this field blank. The email can be added later when you decide it is the time for this user to receive their password to the system.

## Passport information

You can add as many passports as needed for each user – simply click the button NEW PASSPORT as many times as needed. The country, passport number and expiry date are mandatory. In case there is more than one passport, the checkbox “Default” will determine which passport is selected automatically for a crew member when assigning that crew member to a flight.

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## Ratings

It is crucial for the crew member to be assigned at least one rating in order for him/her to be visible in the system as most aspects regarding crew throughout the system are controlled by their ratings, ie. flights, duties, crew documents etc.

To add a rating simply click on the box next to the aircraft type and select the rating from the list. You can add as many as necessary for this particular user. The list consists of the ratings that were previously defined in the fleet setup. The colour coding is as follows:

- Green – Cockpit positions
- Blue – Cabin positions
- Grey – Maintenance and Ground positions

All crew members are assigned positioning functions by default so there is no need to add them for each particular crew member. Users who do not need to be processed throughout the system (ie. added to flights, assigned duties, assigned various documents) do not need to have ratings assigned.

When all users are added, it is time to start generating access details to those who should be able to log into the account.

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## Generating new password

Once the user is set up and you decided to give out passwords after the installation is done, instead of straight away when creating the user, you can now go through the list and issue login details for the users who should have them.

Steps to generate the password:

- Click on the user on the list of users
- Go to OPEN FULL EDIT in the bottom left corner
- Enter the user’s email address in the “Work email” field in the first column (this will be the email to which all Leon correspondence will be sent – password, notifications, etc.)
- Tick the box “Generate new password” in the second column, in the last section – “Change password”
- Click “Update” at the bottom of the page.

The email containing login details (operator code, login and password) is now sent out to this user. It is possible to have those emails end up in the SPAM folder, so make sure the users check there if the

email does not come within few minutes. Also, please remind the users they can change the automatically generated password in their profile when they log in.

The same process applies when you want to generate a new password for a user who already has access to the system. In such case, there is no need to enter the email again, only tick the box "Generate new password" and click „Update“. An email with a new password will be sent out straight away.

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## Deleting/deactivating users

In the user's profile, in the section "Account restrictions" there are two options:

- **Can log into Leon** – unticking this box will prevent the user from logging into the system
- **Active** – this checkbox activates/deactivates the user in the system. If the box is unticked the user is not visible in the filters, cannot be assigned to flights, etc. but the historical data for this user will be available at all times.

To permanently delete a user, untick both of the above checkboxes, click Update, come back to this section and you will see that the option "Permanently delete & anonymise data" has appeared at the bottom of the page. This will remove the user and erase their details in all historical data. Please make sure this option is used carefully as the changes cannot be reverted afterwards.

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Click below for a mini tutorial on the above instructions including the basic user setup.

[video]

Alternatively, for full information and all available options in the area of the user setup, you can visit our main manual (link) or a full tutorial video.

[video]

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<https://wiki.leonsoftware.com/> - **Leonsoftware Wiki**

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<https://wiki.leonsoftware.com/getting-started/step-2.-users-setup?rev=1523518539>

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