

User-Management Guide

Moneta.[®]

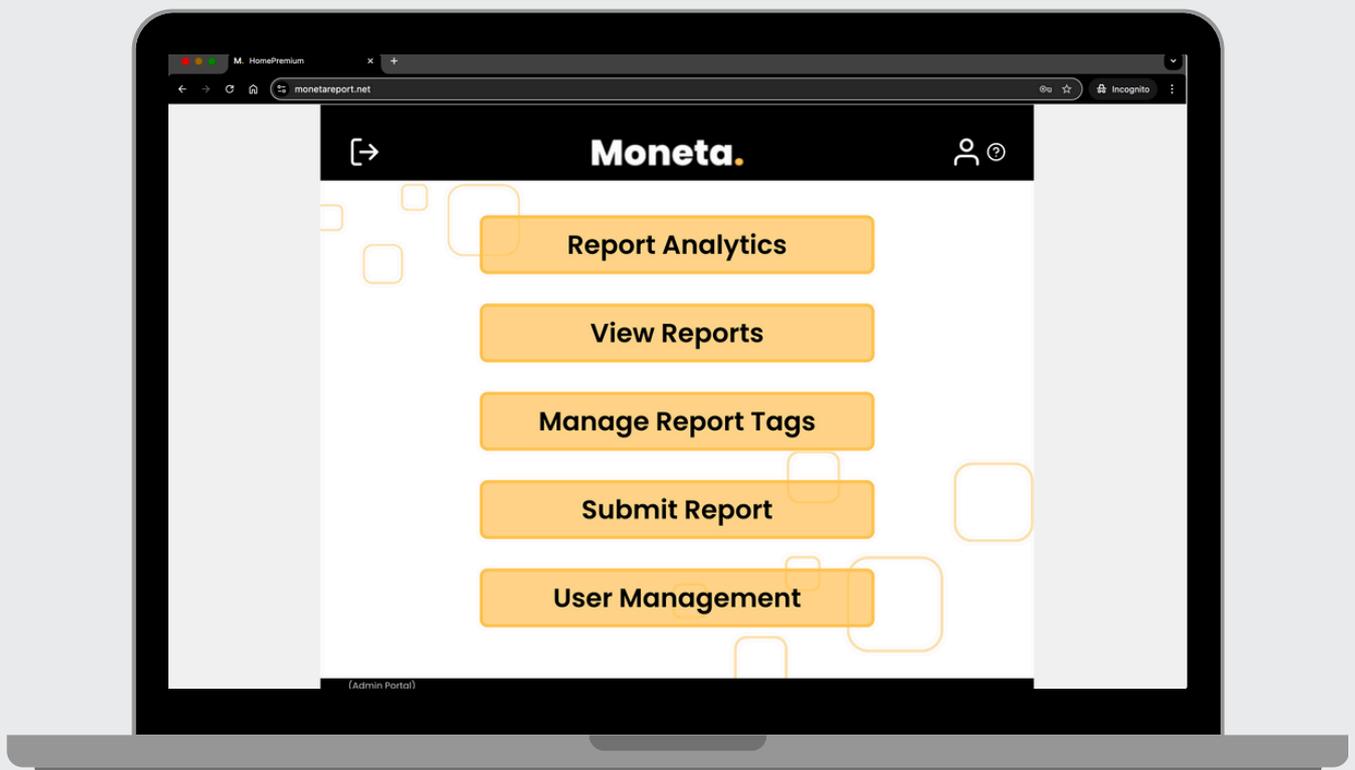


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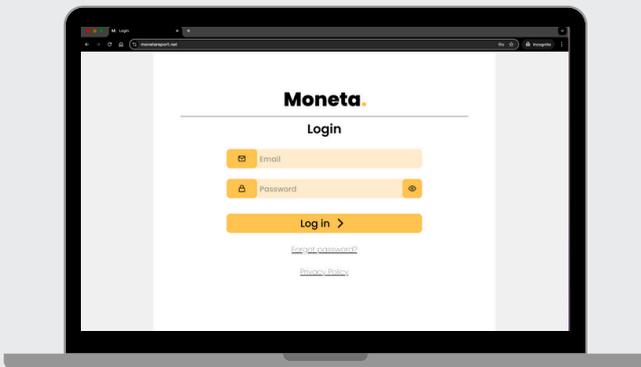
1. Getting Started

1.1. Accessing Moneta

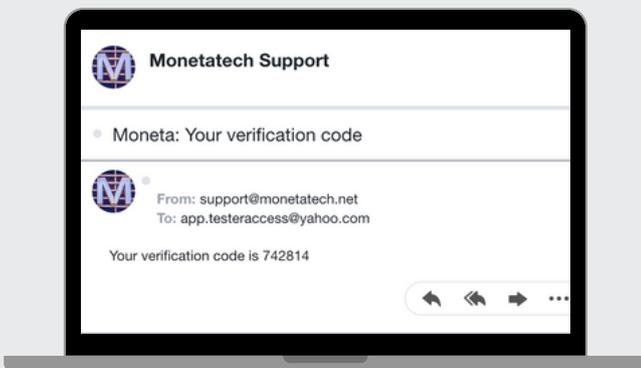


The user management feature of Moneta can only be accessed through a web browser at www.monetareport.net. Simply click on the link to the left to get started.

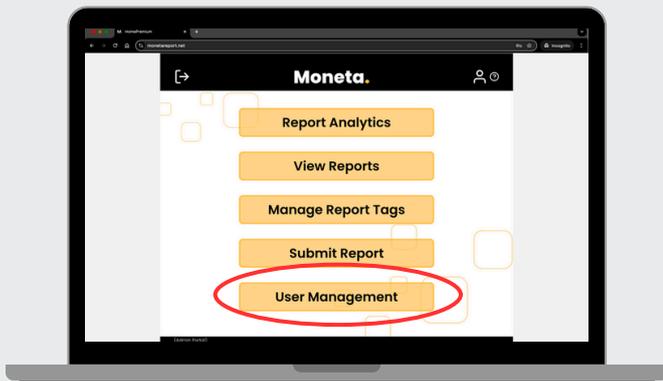
1.2. Logging In for the First Time



Since you are the user manager for your organization, your account will be created by us at Moneta. When you log in to Moneta for the first time, use your email address as your username and enter the temporary password sent to you from support@monetatech.net. If you don't see the email, be sure to check your spam folder. You'll be prompted to change your password to something easy to remember.

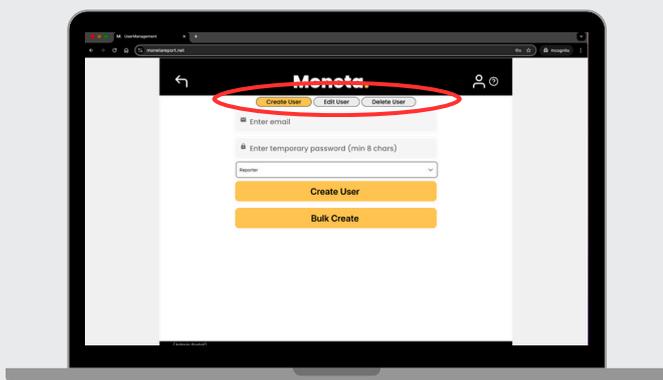


2. Main Page



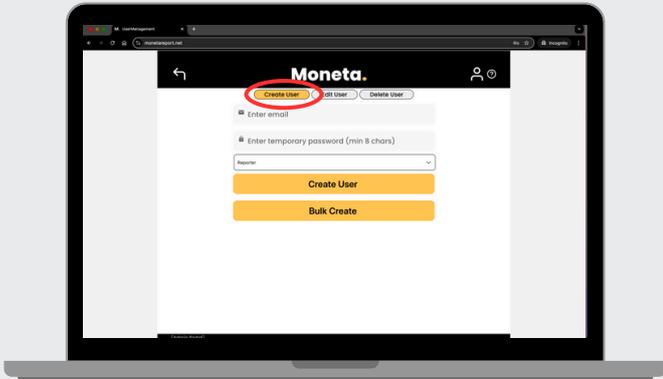
After logging in, you will find five buttons on the main page. The first four buttons have the same functionality as an administrator account, and we refer you to that guide for detailed information on their functionality. In this guide, we will focus on the last button: **User Management**.

2.1. User Management Page



Clicking on the **User Management** button will take you directly to the **Create User** page, which opens by default. You can navigate to the **Edit** or **Delete User** pages by clicking on their respective tabs in the page header.

3. Create User(s)

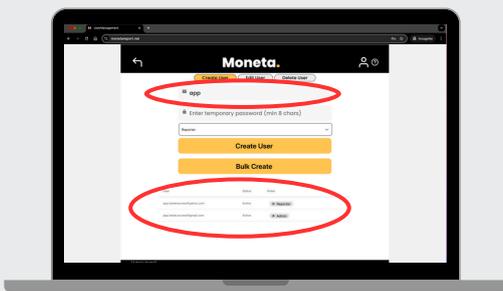


The Create User page allows you to add users in your organization to the Moneta database, either as reporters or administrators. You can add individuals one at a time or in bulk.

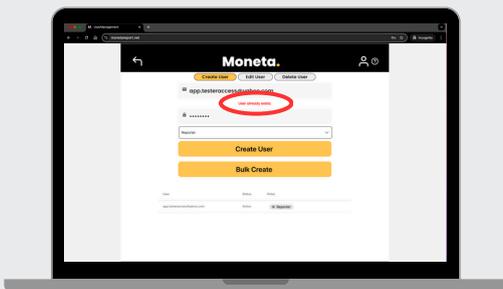
3.1. Create a Single User

The process for creating a single user involves typing in the individual's email, creating a temporary password, and selecting their role. We'll cover each of these steps in detail below.

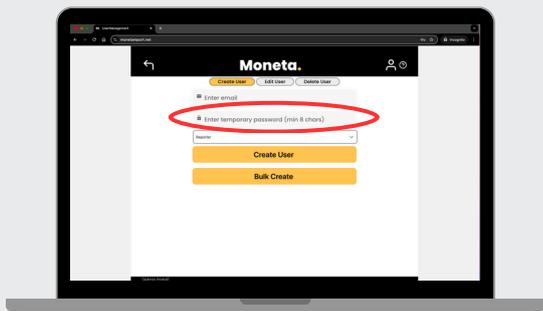
3.1.1. Enter their Email



Enter the individual's email, typically the one associated with your organization (e.g. John.Doe@organization.com). As you start to type, the Moneta database will autosuggest emails that are already in the database. If you try to create a user that already exists in the database, you will get an error message.

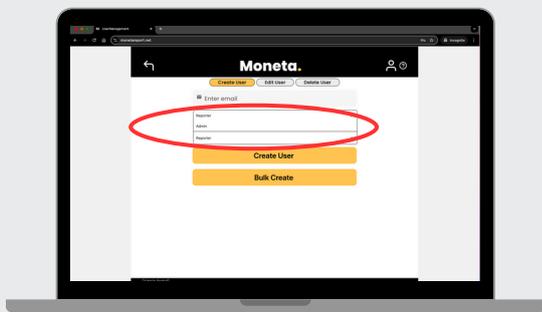


3.1.2. Create a Temporary Password



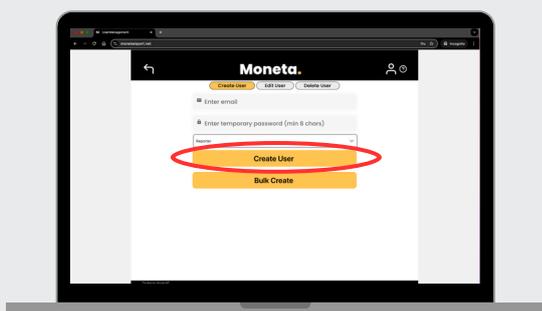
Enter a temporary password for the user. The only requirement is that it must be at least 8 characters long. For those in your organization who may not be very tech-savvy, you might want to choose a password that is easy for them to remember.

3.1.3. Assign their Role

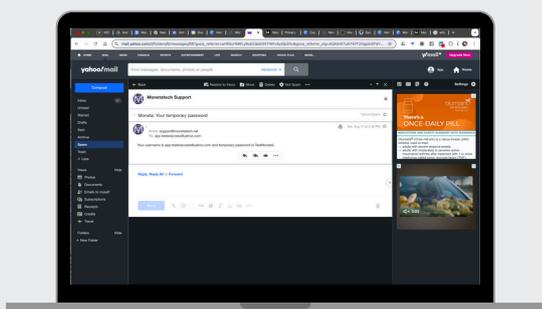


Select the individual's role from the drop-down menu, either Reporter or Administrator. You cannot assign the role of another User Manager through this menu. If your organization would like to add another User Manager, please contact us at support@monetatech.net.

3.1.4. Click the Create User Button



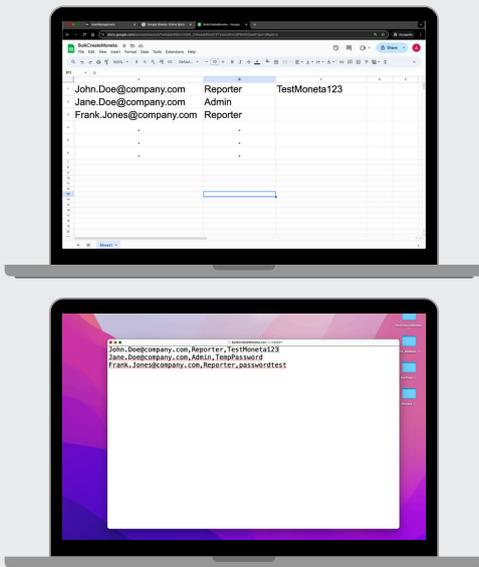
When you click the Create User button, an email will be sent to the individual from support@monetatech.net with their username and temporary password. It's a good idea to also email the individual yourself to alert them about this and remind them to check their spam filter if they don't see the email in their inbox.



3.2. Creating Users in Bulk

The process for creating multiple users at once involves creating a CSV file that includes their emails, temporary passwords, and roles, which is then uploaded into Moneta. We'll walk you through each of these steps below.

3.2.1. Creating the CSV file

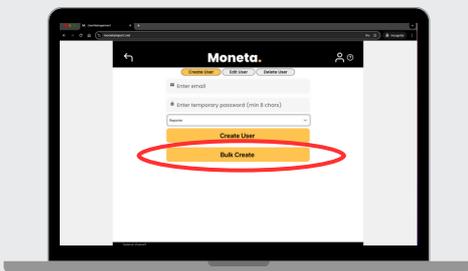


The CSV file should have three columns with the following format:

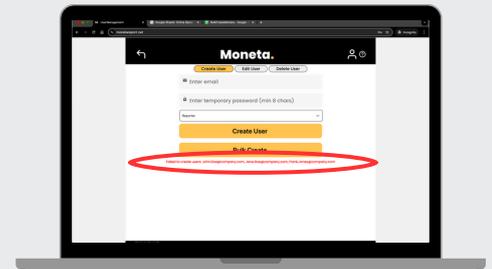
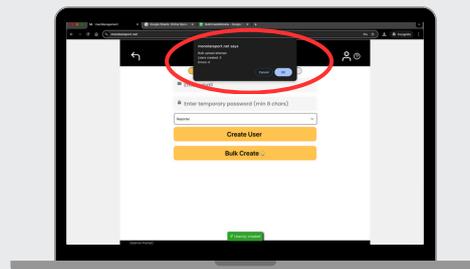
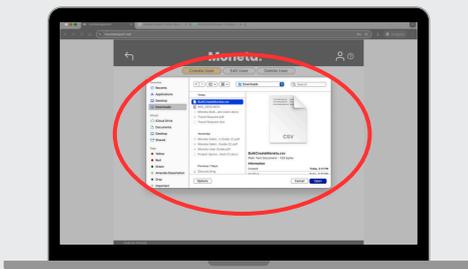
- Column A: The individual's email
- Column B: The individual's role (Reporter or Admin)
- Column C: A temporary password

If you want to apply the same temporary password to all new users, just enter it in the first row and leave the remaining rows in Column C blank. If you prefer a different temporary password for each user, you can type in a unique value in Column C for each row.

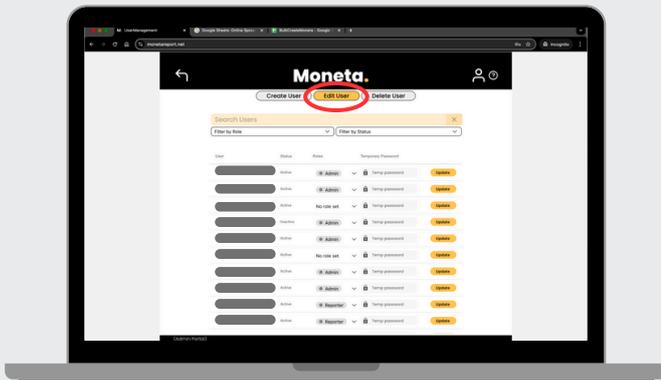
3.2.2. Uploading the CSV file



Click the Bulk Create button and select the CSV file from the pop-up window. After the users are created, a pop-up alert message will show how many users were created and how many failed. Users that failed to create are likely due to already existing in the database, and these will show up in red below the Bulk Create button.

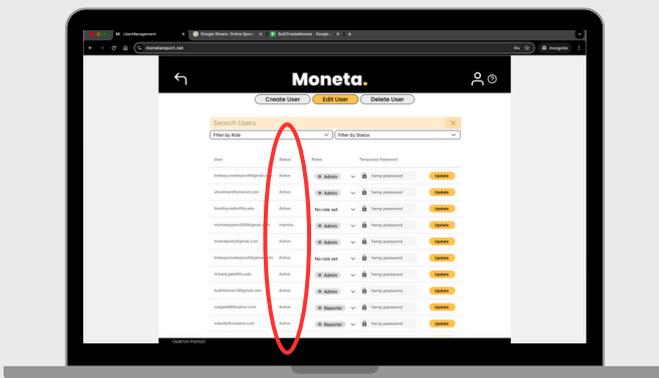


4. Edit User



The Edit User button brings up a list of all users in your organization. Here, you can search for users by various criteria, change their role in the organization, and send a new temporary password. Keep in mind that a temporary password will expire after two weeks if not used.

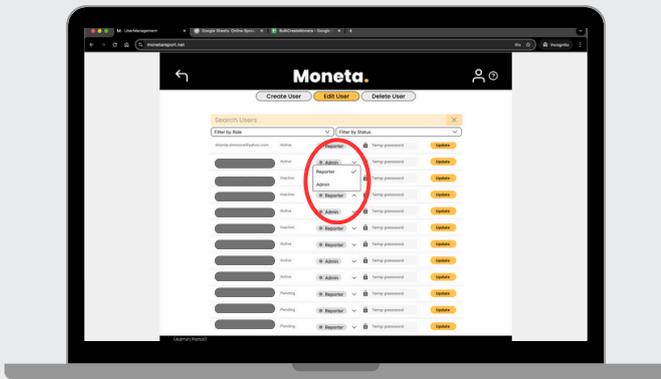
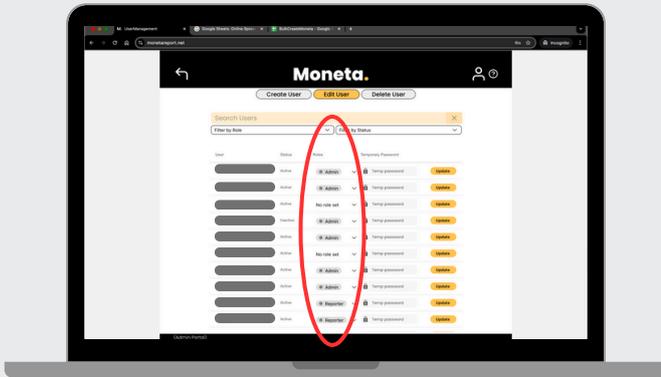
4.1. User Status



Users may be in one of three states:

- **Active:** The user has logged into Moneta at least once.
- **Pending:** The user was sent a temporary password within the past two weeks but hasn't logged in yet.
- **Inactive:** The user was sent a temporary password, but more than two weeks have passed without logging in.

4.2. User Roles

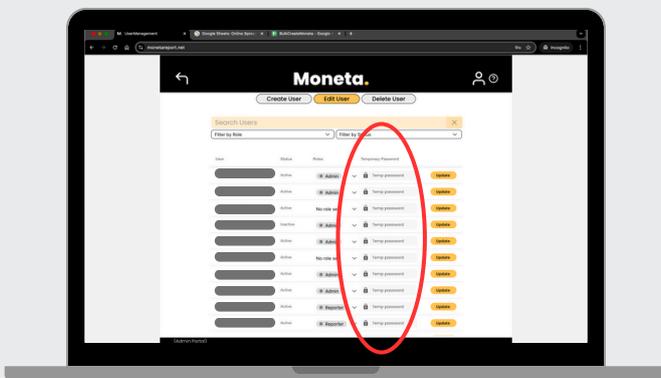


Users may be assigned one of the following three roles:

- Reporter: End-users of Moneta.
- Admin: Users with access to the role of safety administrator within Moneta.
- No Role Set: Users without an assigned role but who are eligible to receive push and email notifications.

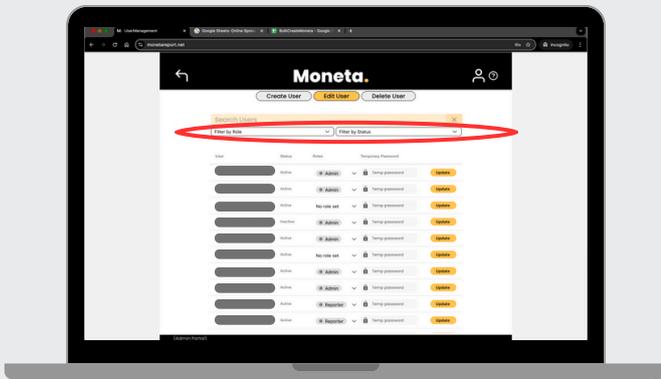
An individual's role can be changed by clicking on the drop-down arrow next to their assigned role. Click on the yellow **Update** button to save the change.

4.3. Temporary Passwords

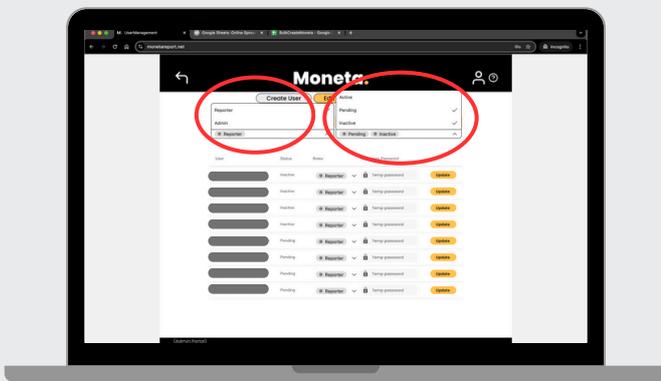


A new temporary password may be entered in this field. The password must meet the requirements of being 8 characters long. Click on the yellow **Update** button to save the change and trigger an email from support@monetatech.net being sent to the user with the temporary password.

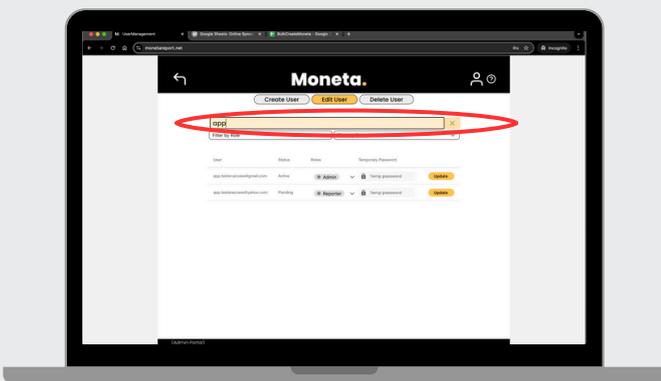
4.4. Filtering by Role and Status



The list of users can be filtered by user role or status by clicking on the respective dropdown at the top of the page. You can select more than one status and role at a time when filtering.

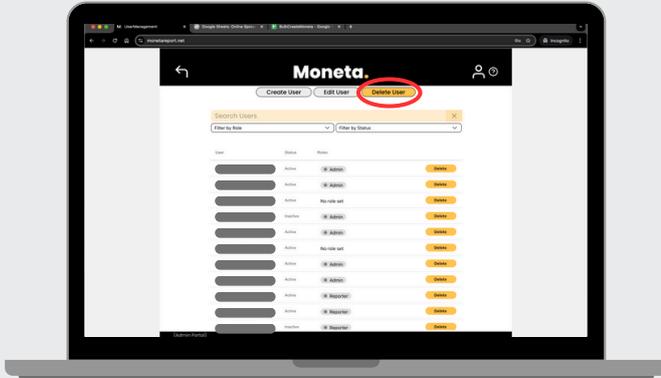


4.5. Search by Email

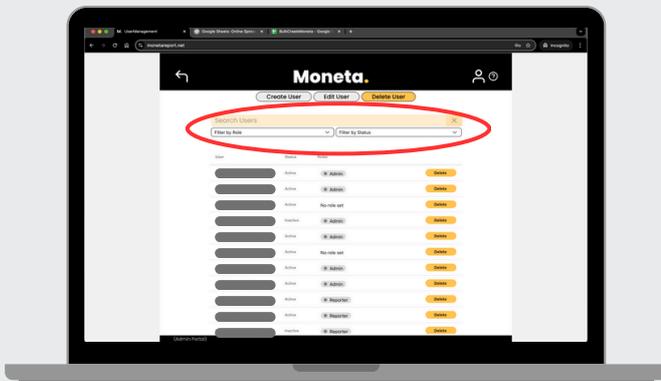


Users can be searched by their email address. The Moneta app will automatically suggest potential matches as you type.

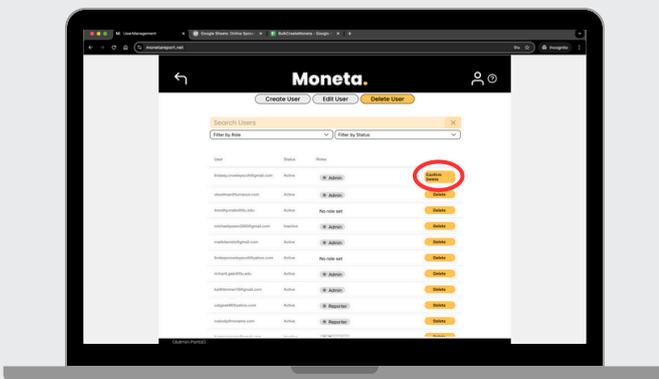
5. Delete User



The Delete User button brings up a list of users in the database who are eligible for deletion. You can filter and search this list to find the specific user you want to delete. Users may only be deleted one at a time, they cannot be deleted in bulk.



4.1. Confirm Delete



Deleting a user requires two steps. First, click the **Delete** button next to the user, which will bring up a **Confirm Delete** button. Upon clicking this button, the user will be permanently deleted..

5. Contact Us

Have questions? We're here to help! We respond to emails within one business day, often in less than an hour. You can also reach out to us directly through the Moneta app.

- **Phone**

 +1(806) 853-7160

- **Message**

 support@monetatech.net

- **Website**

 www.proactivesafety.ai

- **Address**

 3911 4th St, Lubbock, TX 79415

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