Activating An Employee and Adding Roles in Finex

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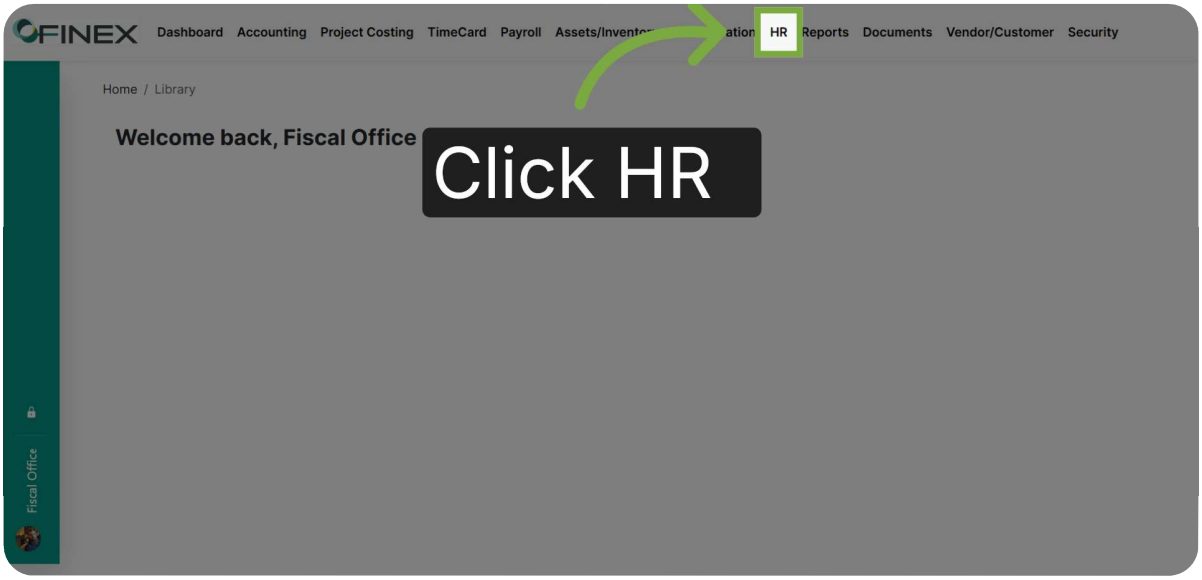
This tutorial guides you through activating an employee and adding their roles in Finex.

Go to www.finexweb.com

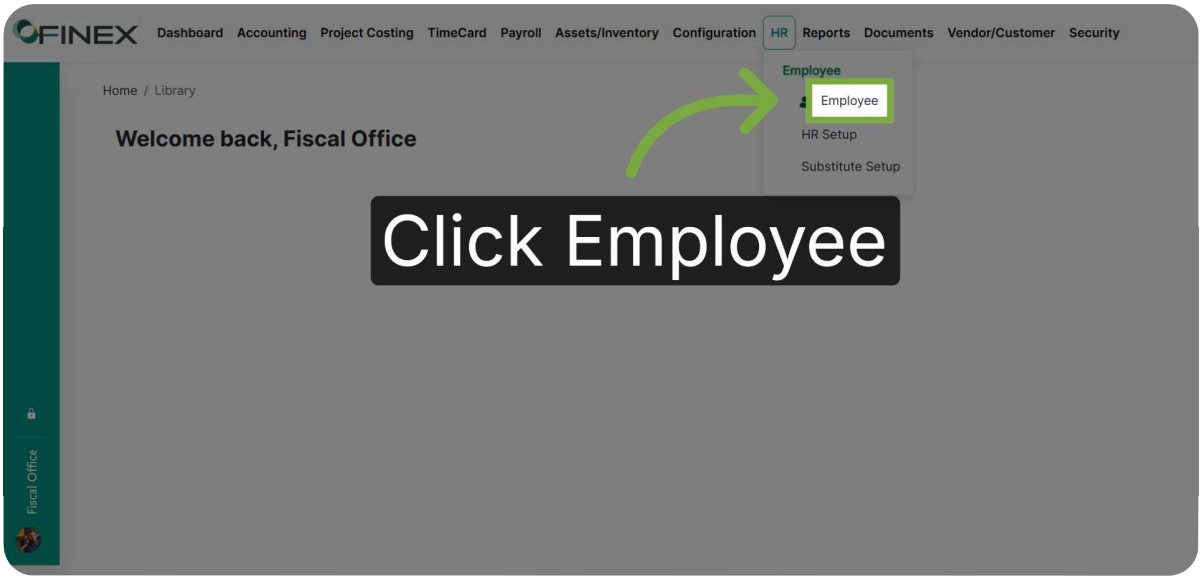
01 Access HR Section

Click HR to access the Human Resources section of Finex.



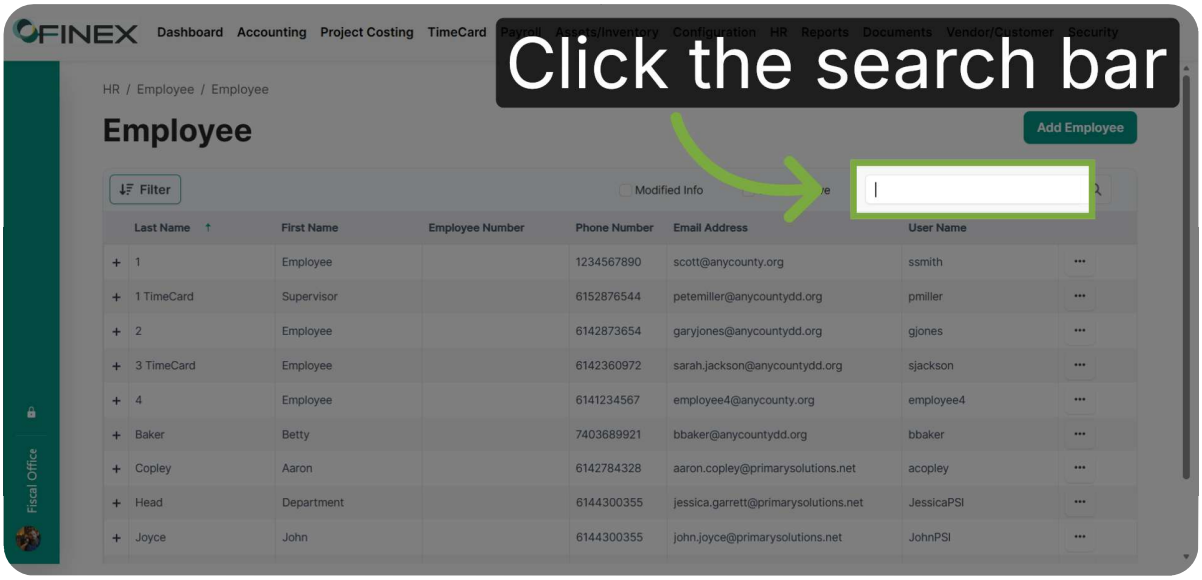
02 Open Employee Management

Click Employee to access the employee management section of Finex.



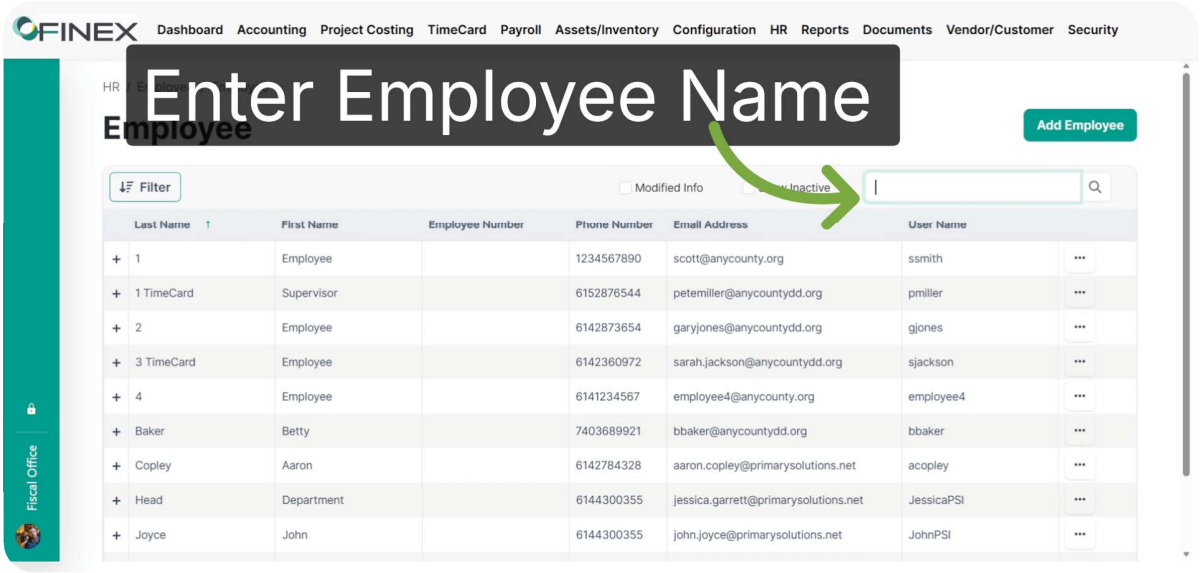
03 Select Search Bar

Click the search bar to start the process of finding the Employee that you want to activate.



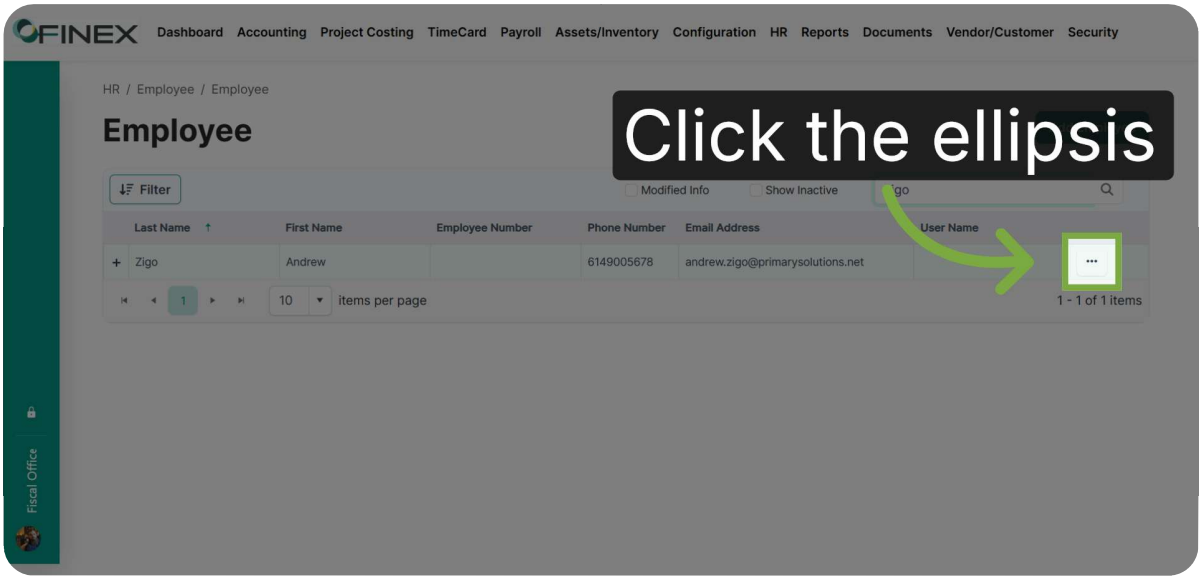
04 Enter Employee Name

Enter the employee's name in the search bar.



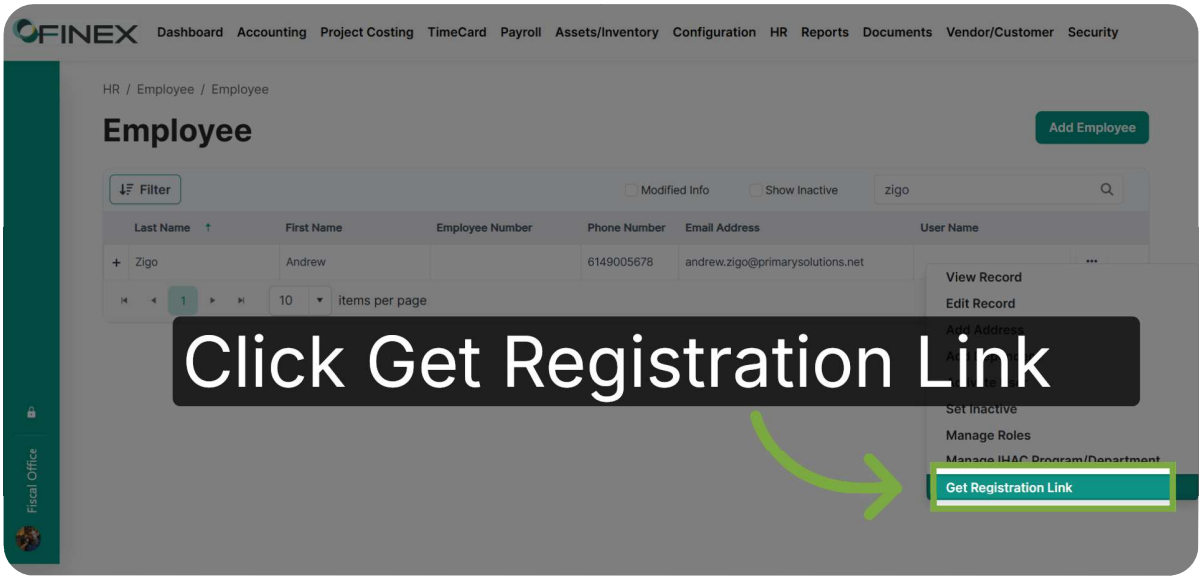
05 Select Ellipsis To Access The Menu

Click the ellipsis to access the menu of options.



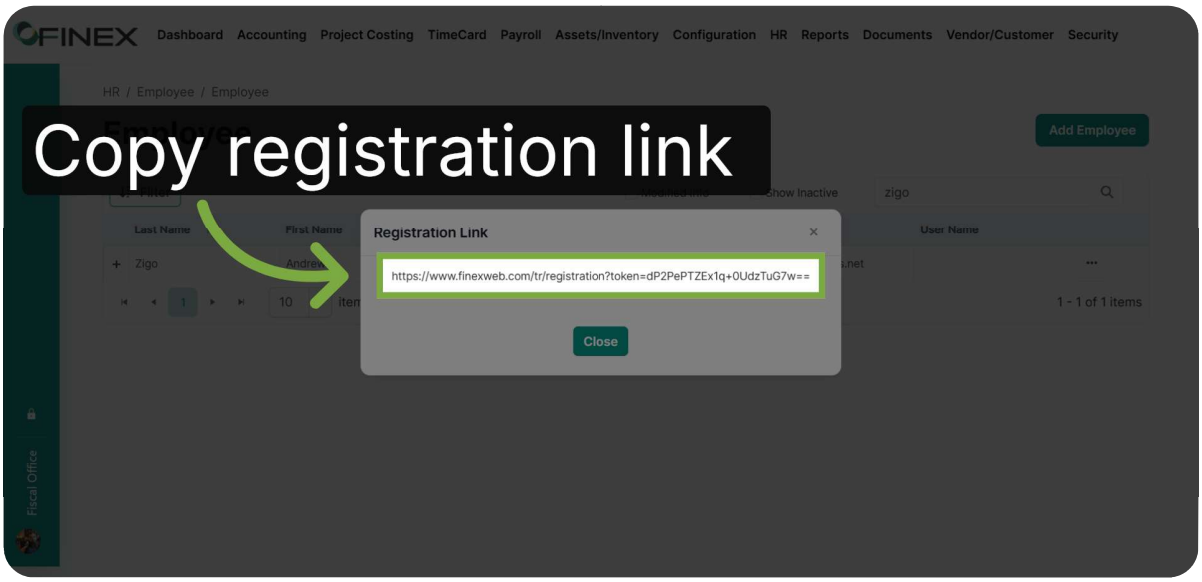
06 Select Get Registration Link

Click Get Registration Link.



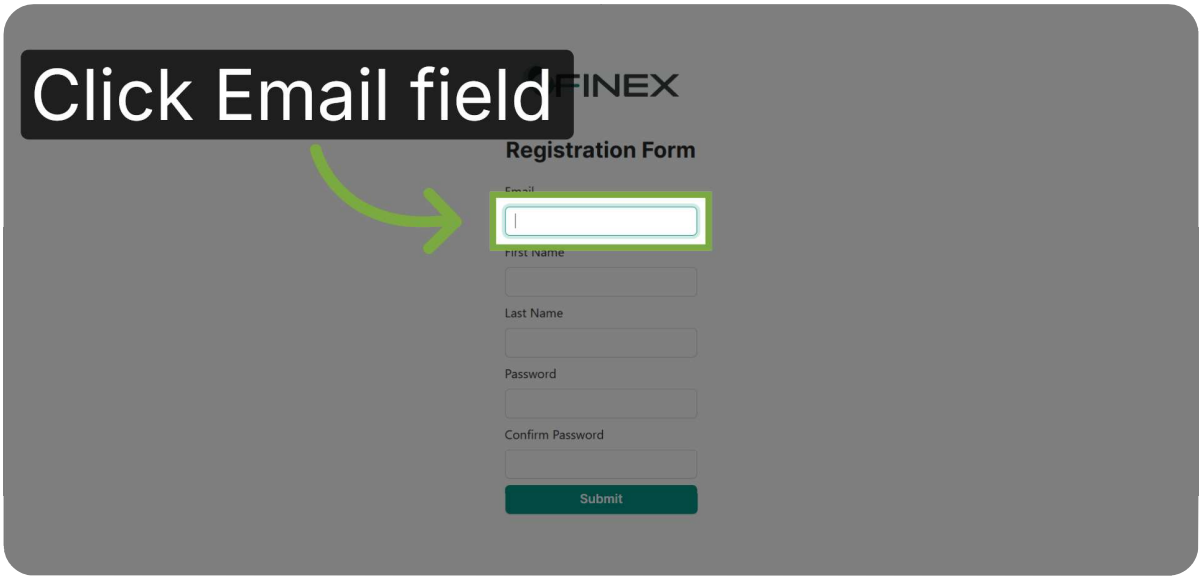
07 Copy Registration Link

Copy the registration link and paste it into a new internet browser tab.



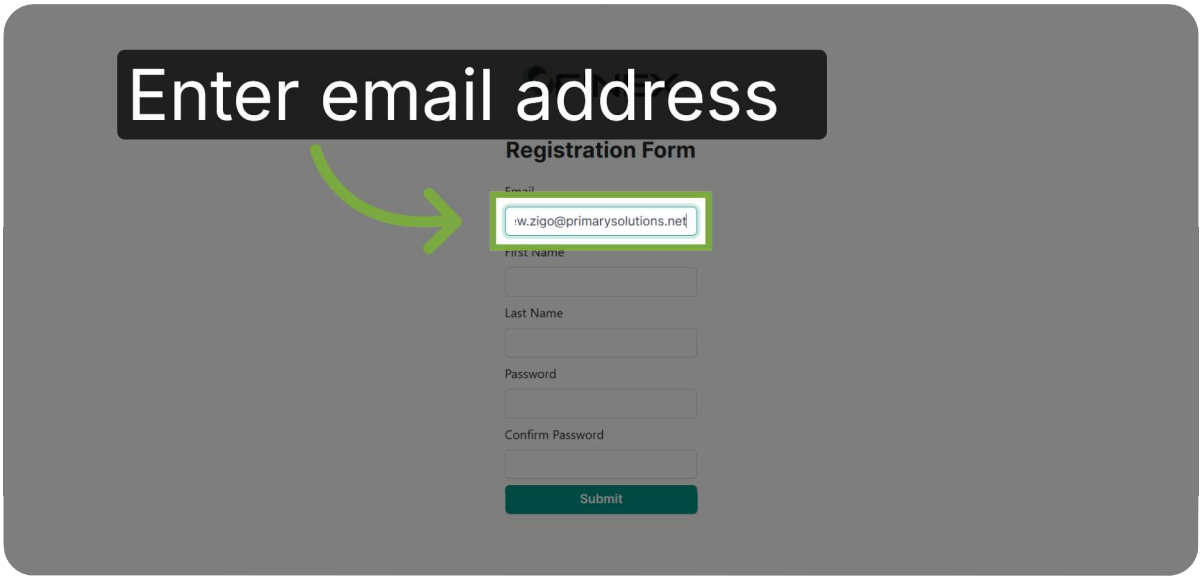
08 Select Email Field

Click the Email field.



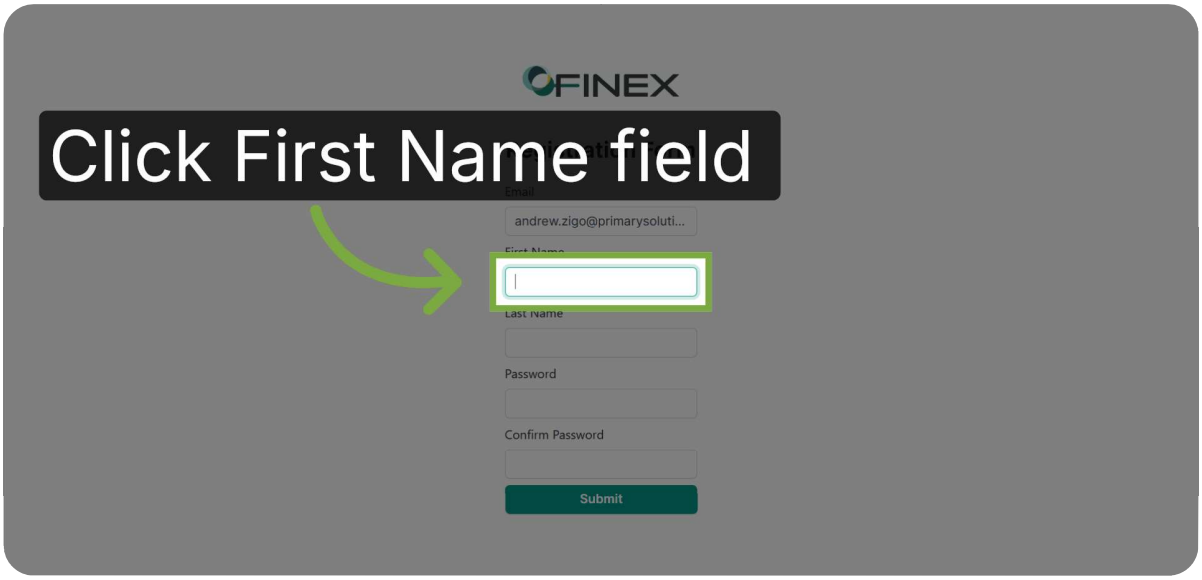
09 Enter Employee Email

Enter the email for the employee that you are activating.



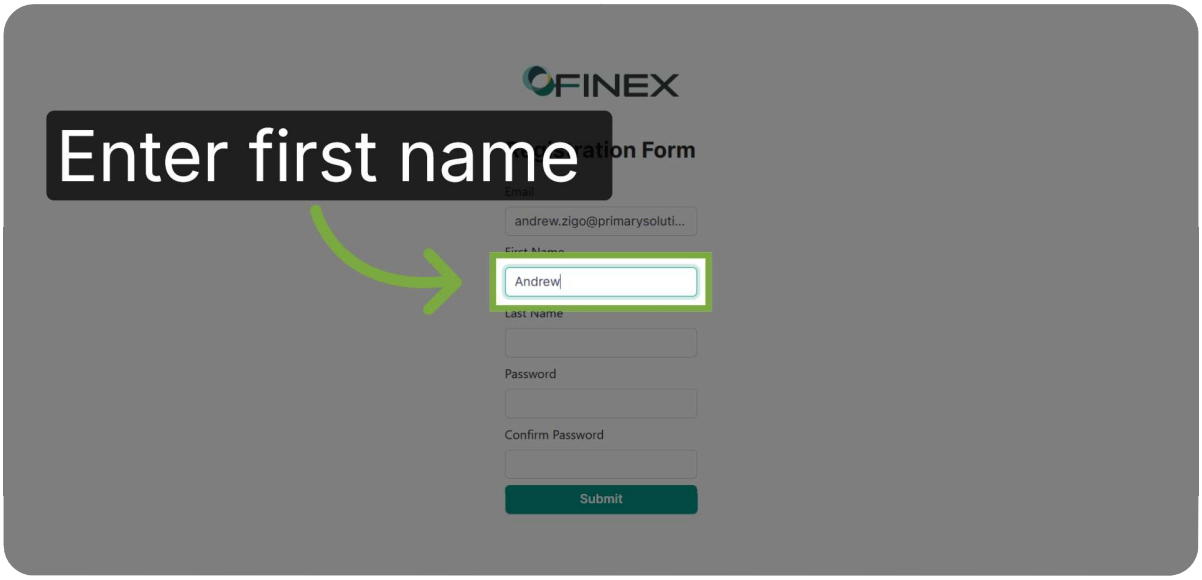
10 Select First Name Field

Click the First Name Field.



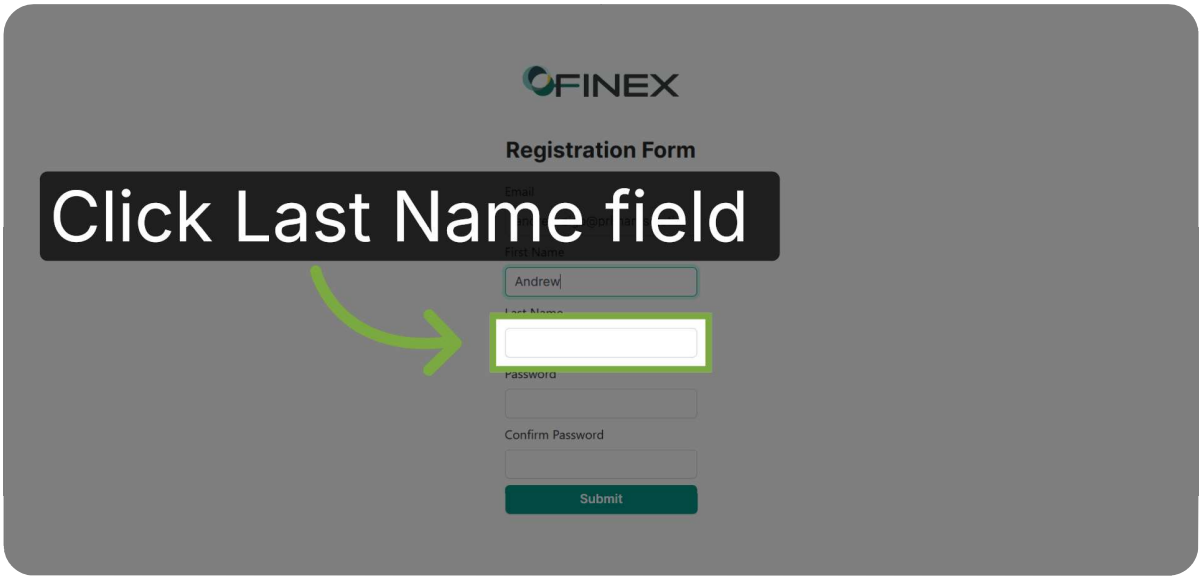
11 Enter First Name

Enter the Employee's first name.



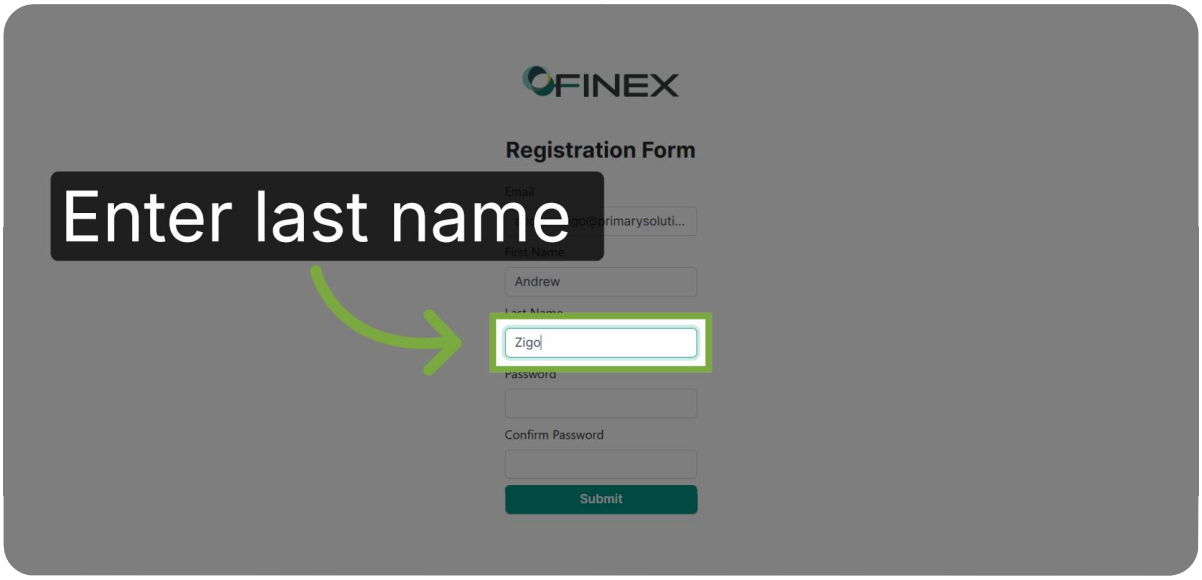
12 Select Last Name Field

Click the Last Name field.



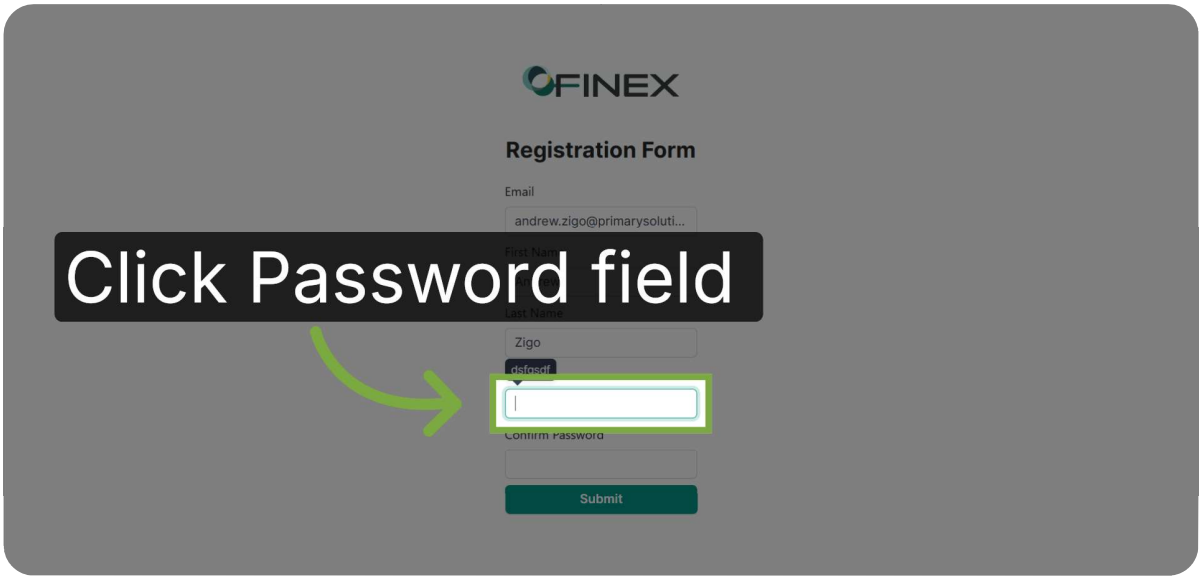
13 Enter Last Name

Enter the employee's last name.



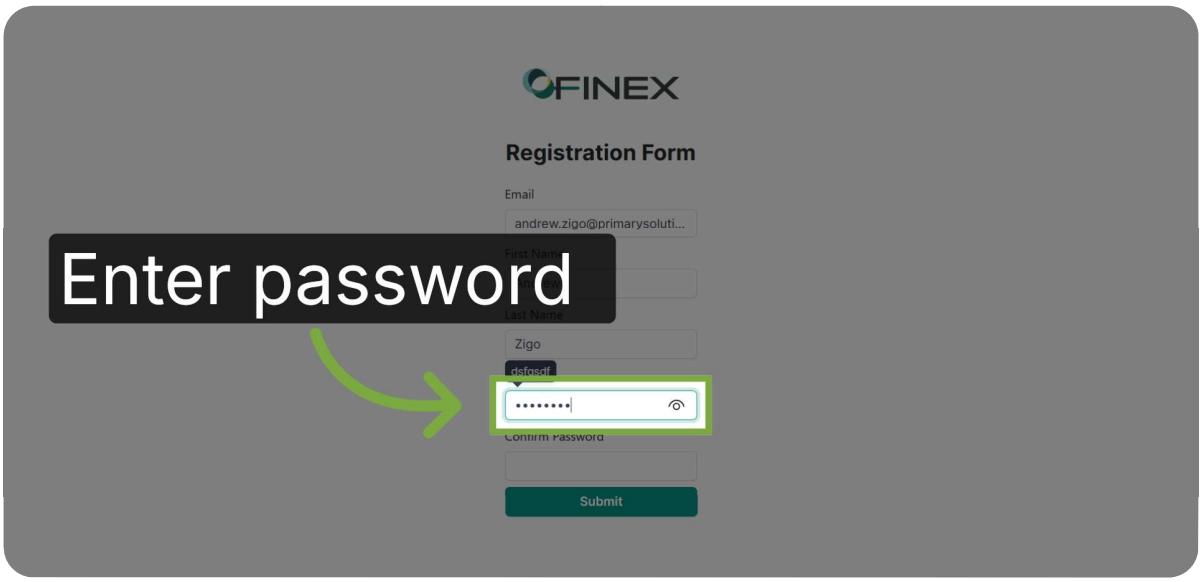
14 Select Password Field

Click the Password field.



15 Enter Password

Create a new password for the employee.

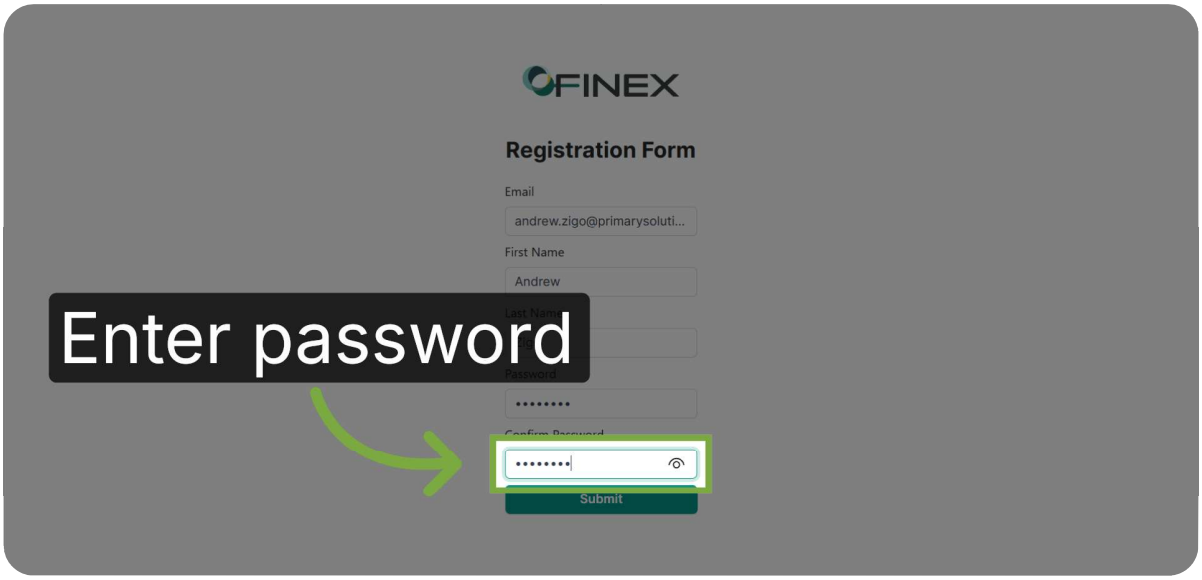


16 Select Confirm Password Field

Click the Confirm Password field.

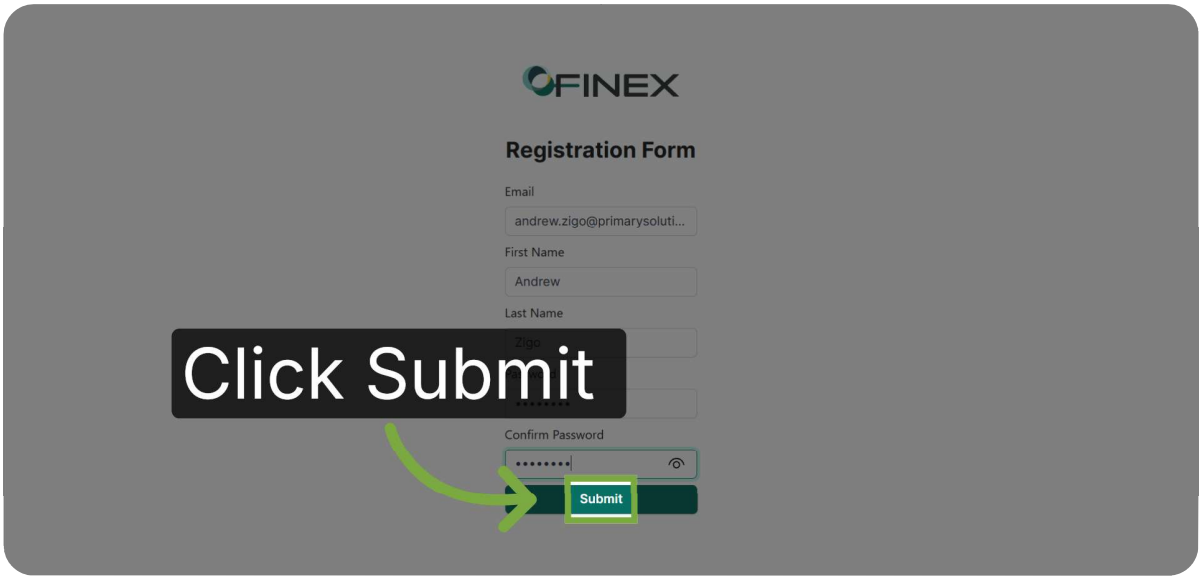
17 Confirm Password

Enter the password for the employee again to confirm the password.



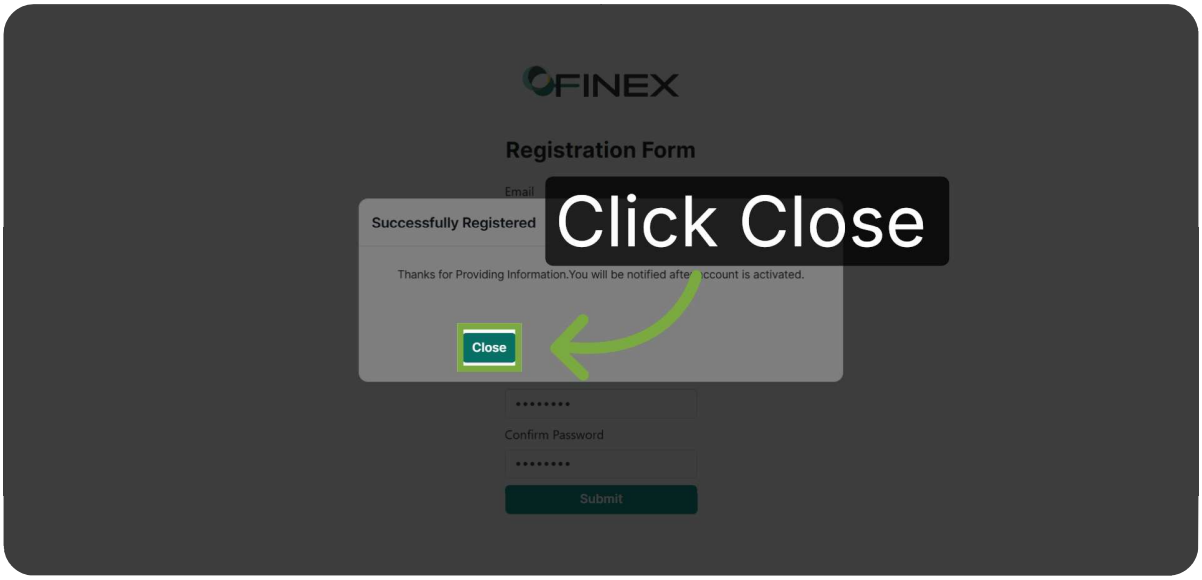
18 Submit Registration Form

Click Submit to complete registering the employee.



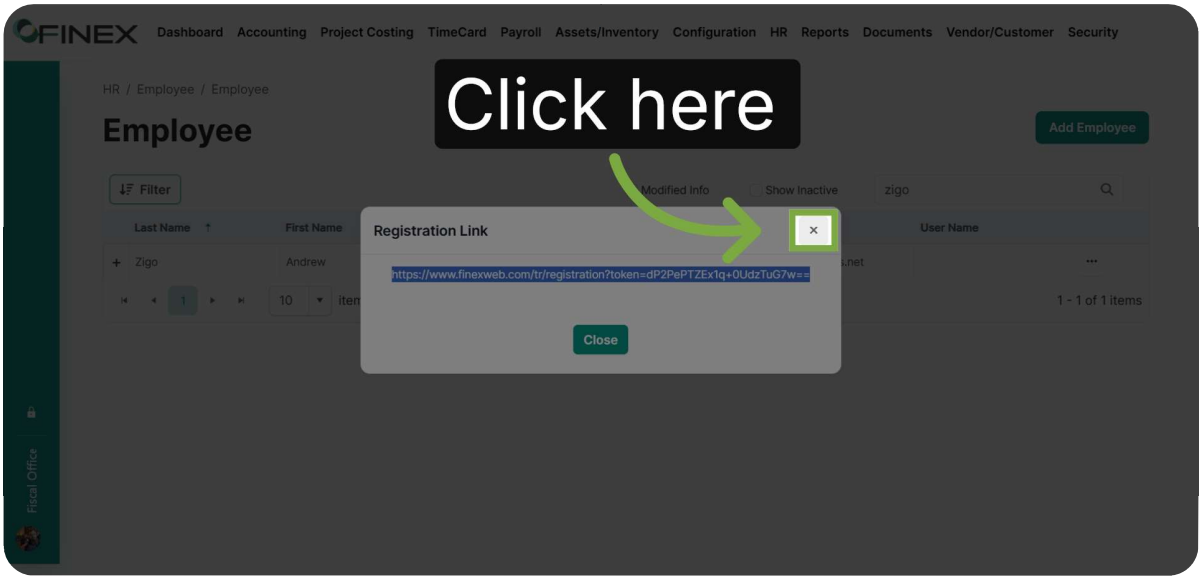
19 Confirm Registration

Click close on the Employee Registration Confirmation button to complete the registration.



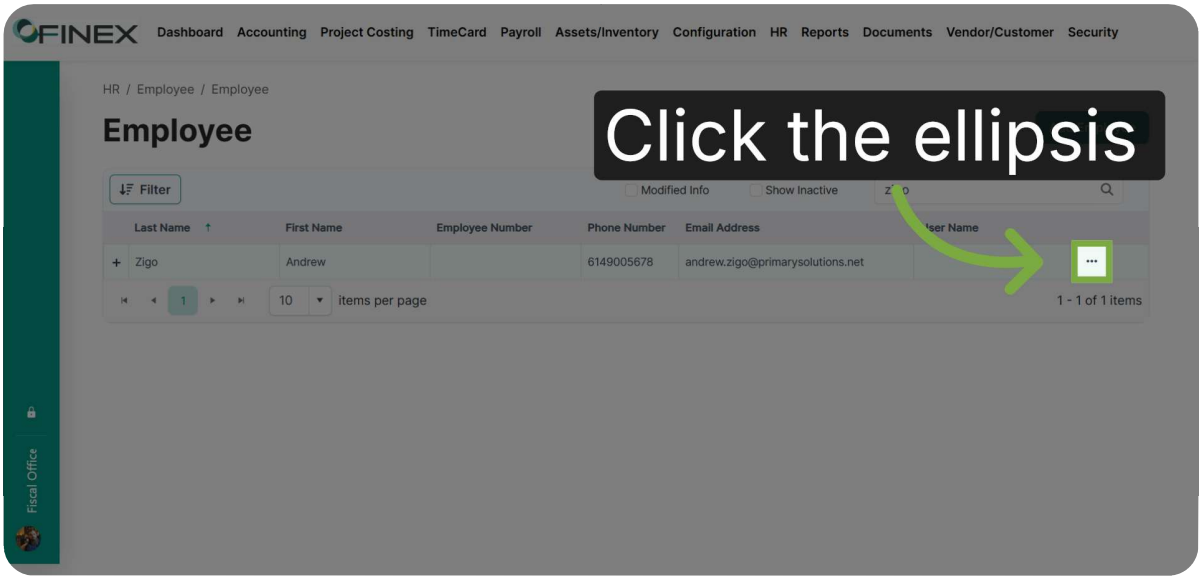
20 Proceed Back To Finex

Return to original Finex tab and close the registration link.



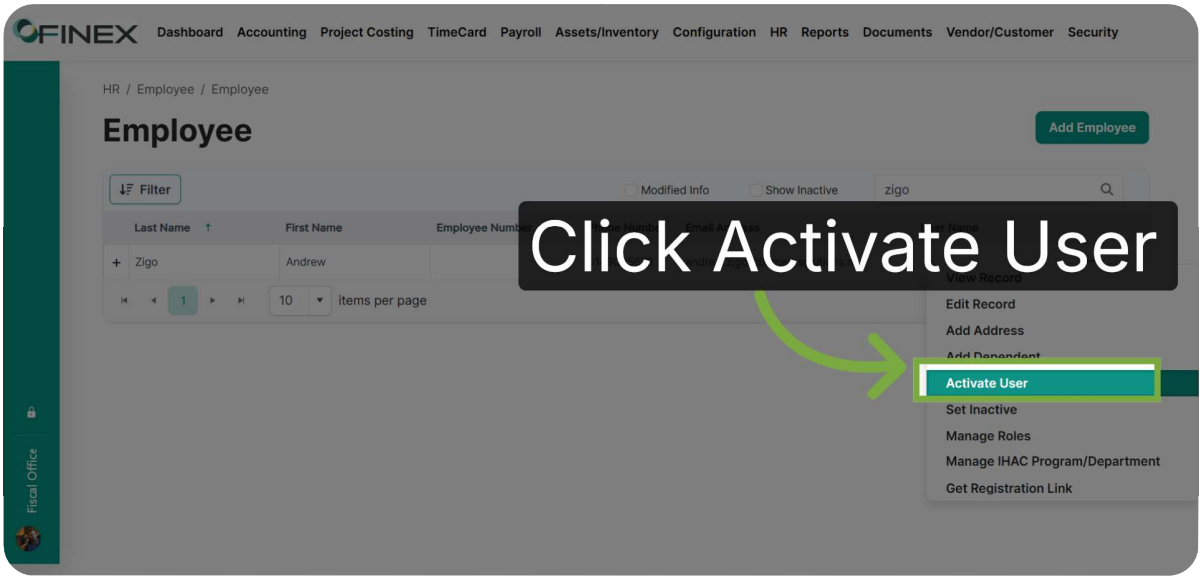
21 Select Ellipsis To Access Menu Again

Click the ellipsis to access the menu of options again.



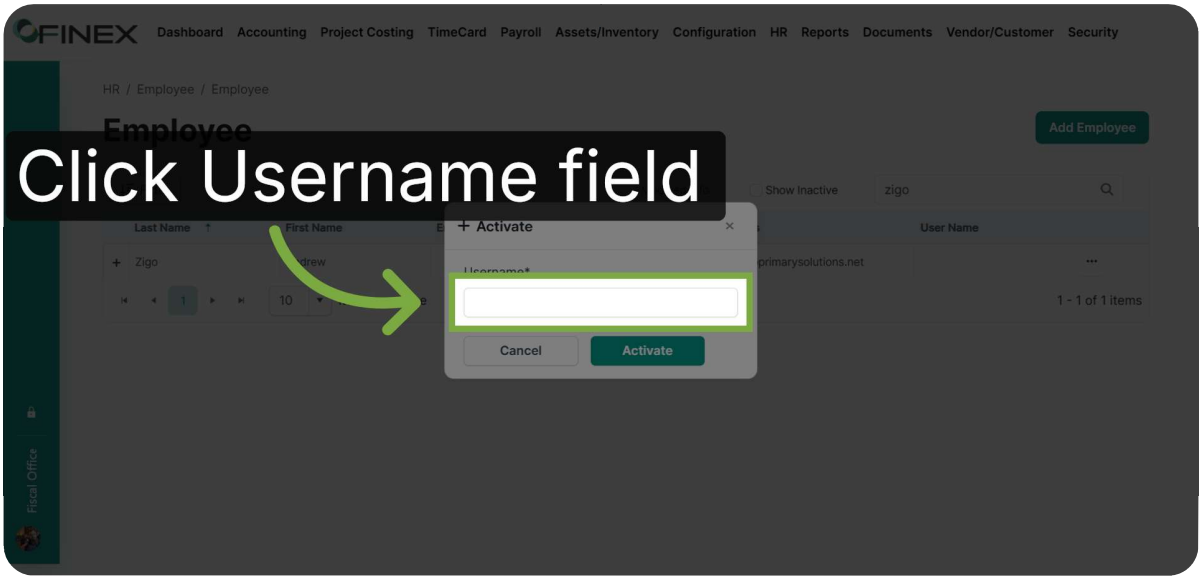
22 Select Activate User

Click Activate User.



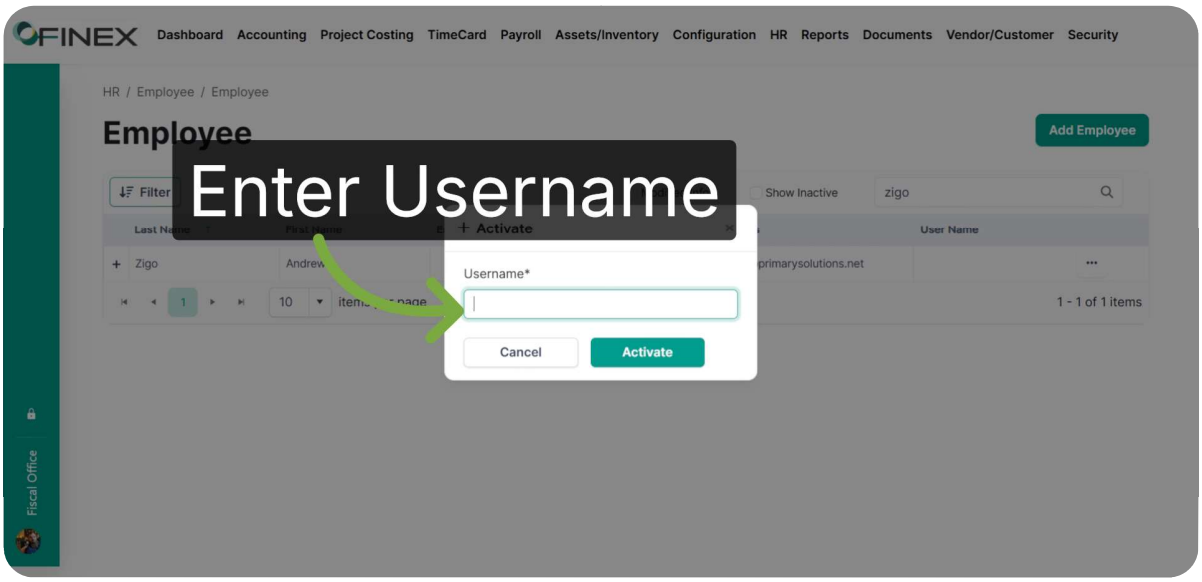
23 Select Username Field

Click the Username field.



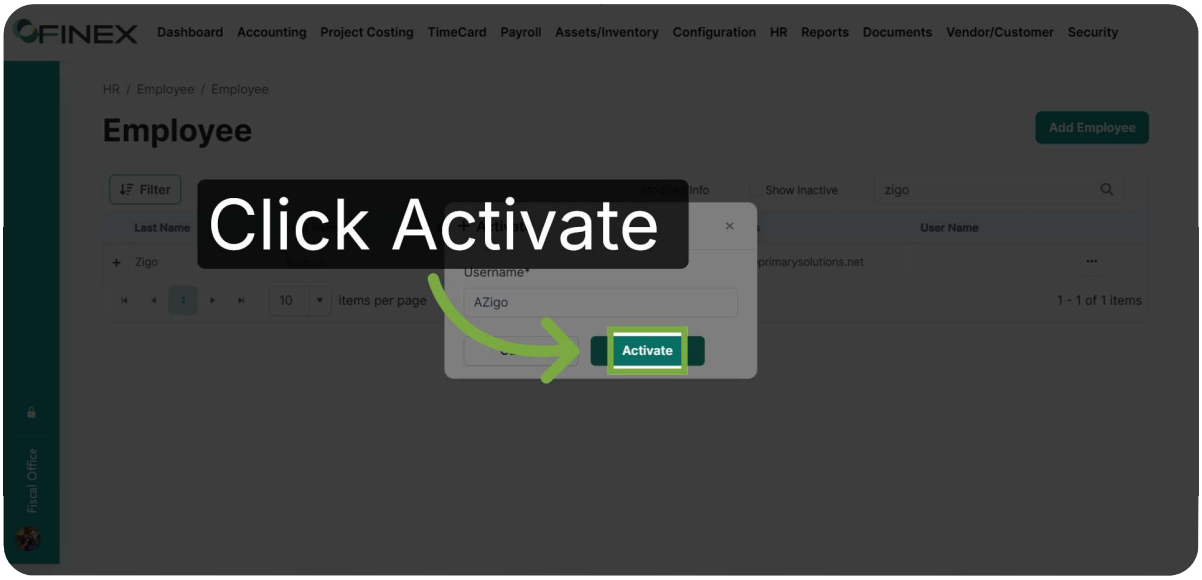
24 Enter Username

Enter a username for your employee.



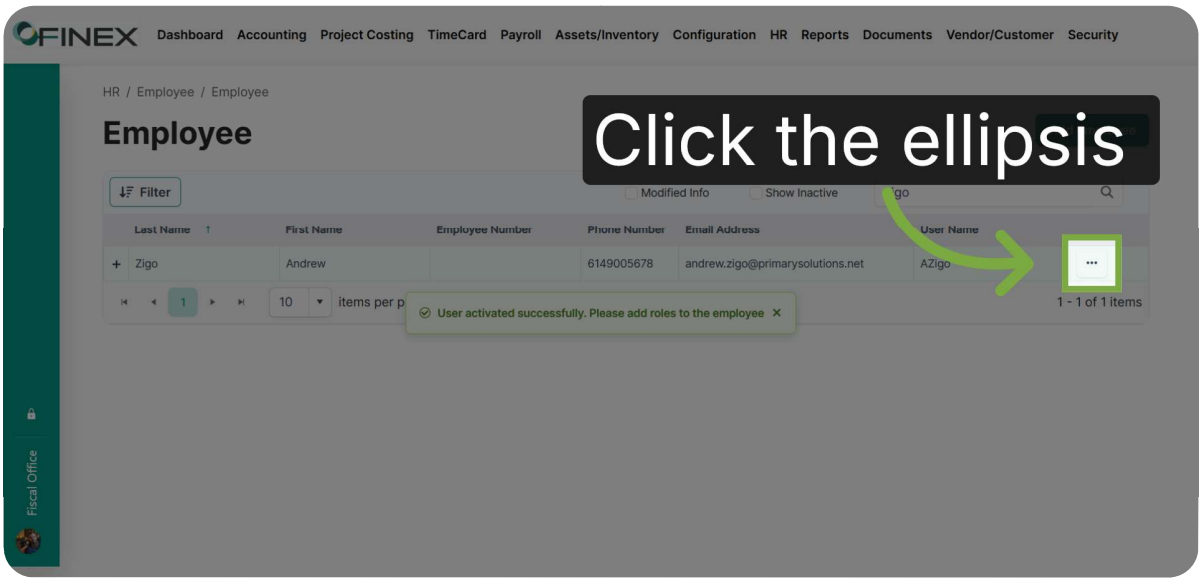
25 Confirm Account Activation

Click Activate to confirm the username and to finish the process of activating the user.



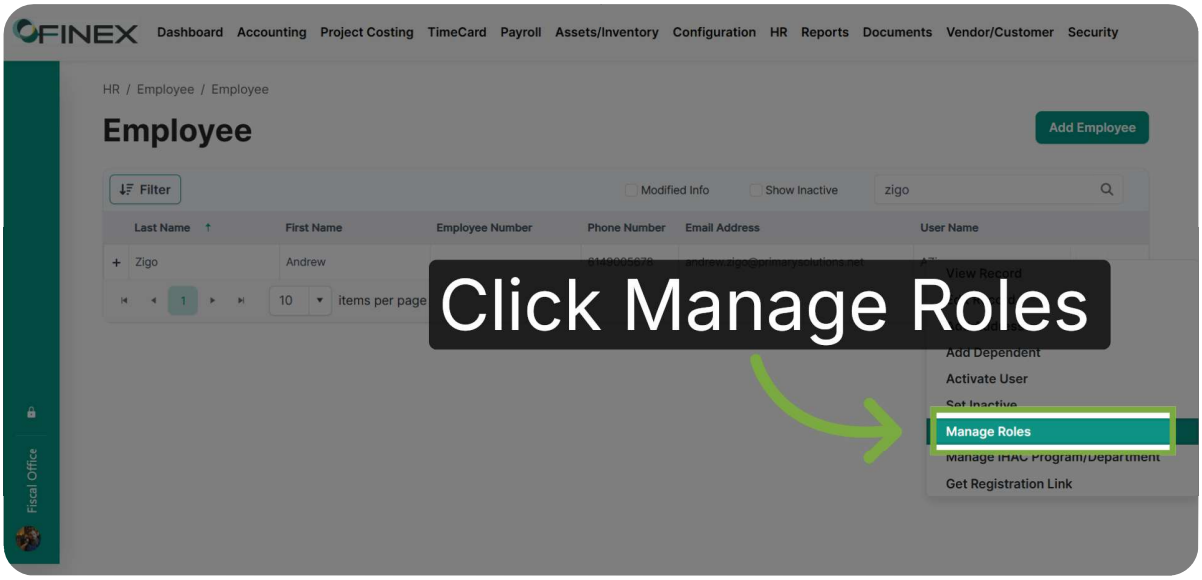
26 Select Ellipsis To Access Menu Again

Click the Ellipsis to access the menu of options again.



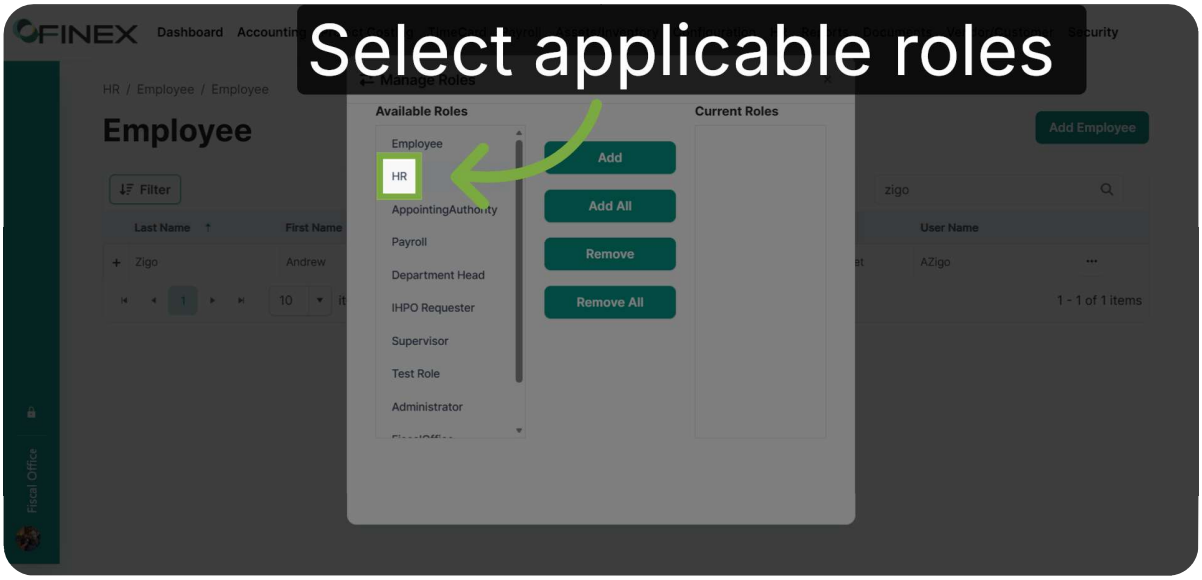
27 Select Manage Roles

Click Manage Roles.



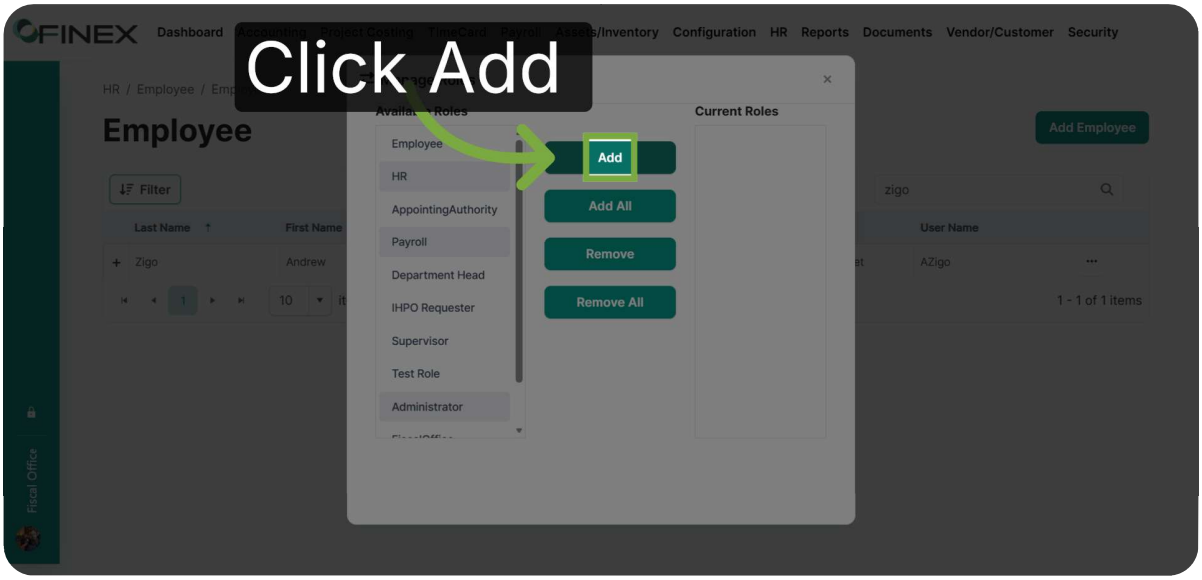
28 Select Role(s) for User

Click on all the roles that apply to the user.



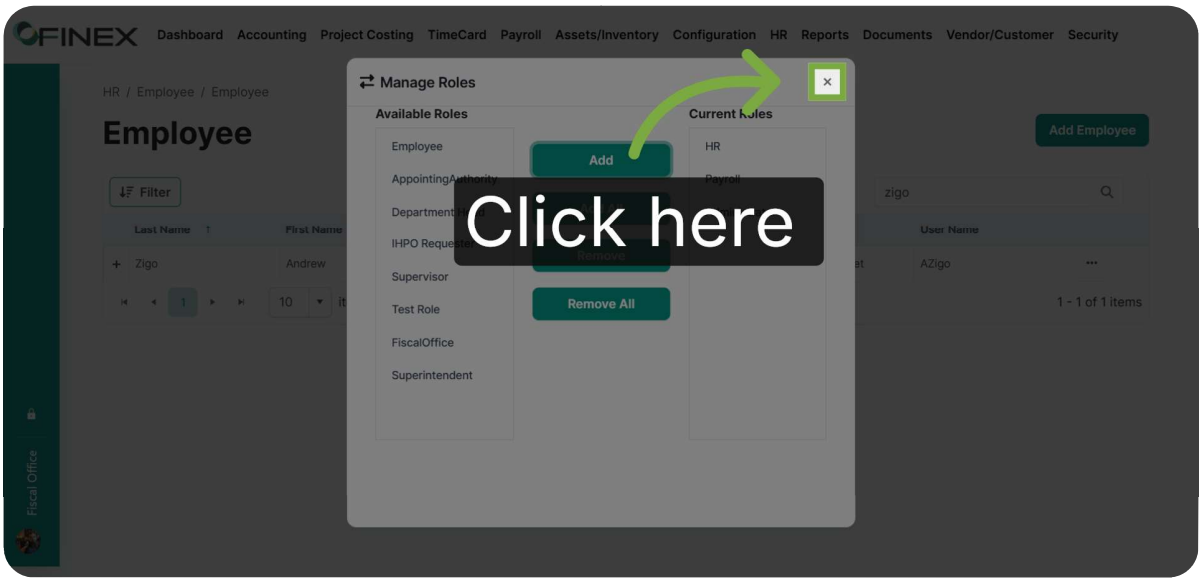
29 Add Role(s) to User

Click Add to assign the roles to the user.



30 Complete Role Assignment

Click the X to complete the process of assigning roles to the user.



You have now successfully activated a user and assigned them the appropriate roles in Finex.

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