

People and units

Another Check-In · A05

Before the demonstration

Bertland Hope

- Your assigned responsibility
- The correct training record
- Evidence of the result

Today's outcome

Account identity and operational reporting scope are correctly distinguished.

Account and staff links

Bertrand Hope

- Open Admin > Users and create/edit the approved training account with active status, role and linked staff IDs

In this step

Review the account identity, active status, assigned roles and linked Staff IDs as separate fields. A staff link affects whose work the account represents. It should match the approved onboarding record.

Account changes

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- Review identifiers and roles before saving
- reset password or deactivate only with authority

In this step

Check the proposed changes before saving. Password reset and deactivation belong to authorized account administration. Existing users should not become disposable training examples just because their records are convenient to open.

Bulk onboarding

Bertrand Hope

- For bulk onboarding export/use the supported CSV format, upload and inspect preview, then confirm validated training rows

In this step

Use the supported format and inspect every preview error before confirmation. Duplicate identities and invalid links need correction at the source. Confirm only validated fictional rows in the approved exercise.

Unit relationships

Bertland Hope

- As organization.manage holder open Admin > Units, create/edit the unit and assign members and eligible supervisors/managers

In this step

Unit membership and supervisor or manager relationships help determine visibility. Those assignments require eligible roles and organization-management authority. Account-security administration alone does not automatically grant unit administration.

Visibility verification

Berland Hope

- Inspect visibility preview and verify representative allowed/denied report access with training accounts
- deactivate referenced units rather than deleting them

In this step

Use the visibility preview and representative sessions to verify the result. Test an allowed report and a boundary the account should not cross. Keep referenced units in their supported lifecycle rather than deleting history to simplify the exercise.

Common problems

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- Treating display name as staff ID
- assigning a role without unit relationship
- changing canonical units through attendance free text
- deleting a referenced unit

A useful support report

The task and record

The expected result

The actual message

The authorized next step

Guided practice

Berland Hope

- Onboard a fictional account with one staff link and verify it; admin additionally assigns the unit relationship and checks visibility preview
- Demonstrate duplicate/invalid import as an exception

Evidence to show

The correct training case

The result or permitted decision

Your explanation of the next step

Practice debrief

Bertland Hope

- Correct context and permitted action
- A result you can trace
- A clear next step if blocked

Expected result

Account identity and operational reporting scope are correctly distinguished.