Lighthouse Guide 5: Managing Users

Users are the people who have access to Lighthouse. Two users, called Super Users are appointed each year by each organisation to manage local access to Lighthouse.

These users can be appointed by an Officer of the local party emailing support@libdems.org.uk.

Super Users are then responsible for creating additional system users and controlling access locally.

In this guide, we'll talk through the process of managing users and how to decide what kind of access to give out.

Contents

Permissions Required

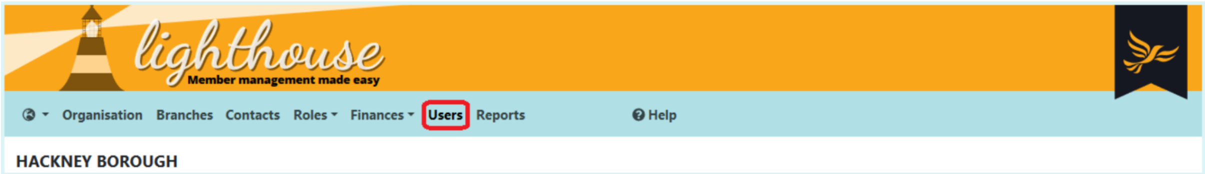
	View	Edit	Create
View Users	✔		
Edit Users		✔	
Create & Delete Users			✔

Lighthouse Guide 5: Managing Users

How to view a list of your local Lighthouse users

Step 1

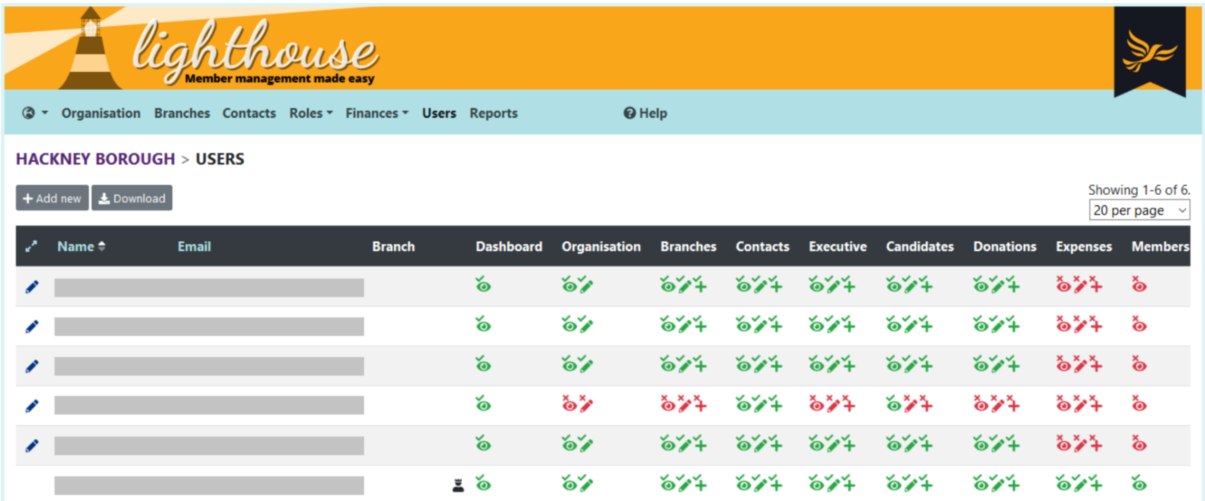
Log in to Lighthouse and click on “Users” in the navigation bar.



Step 2

The users tab will now load. This is where you can view a list of all Lighthouse users in your organisation, as well as their permission levels - i.e. which areas of Lighthouse they can view, which records they can edit, and whether they can create contacts, branches or other types of records.

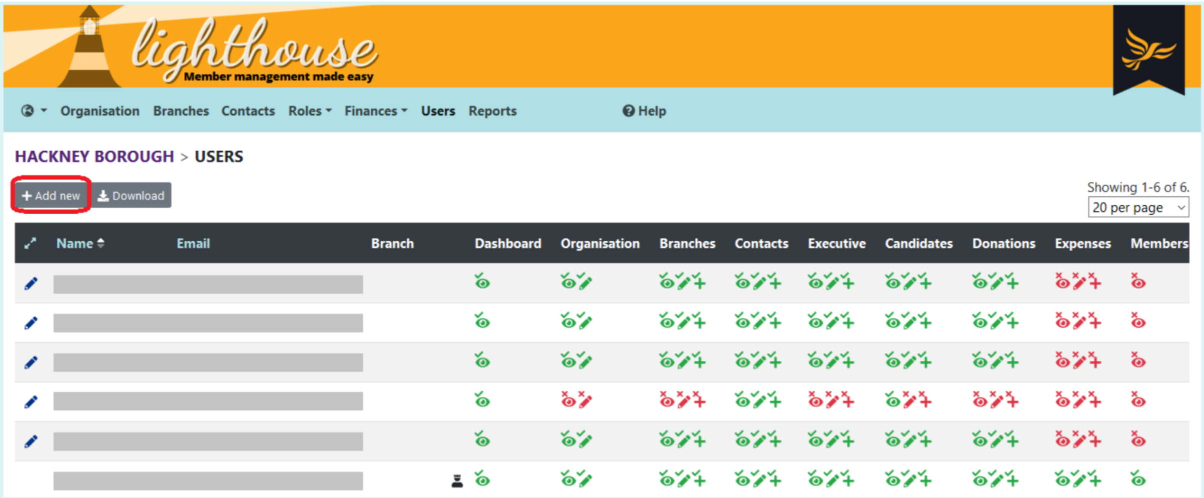
If you’d like to know more about what each of the different permission levels mean, and which levels are suggested for different types of Lighthouse users, click here.



How to add new Lighthouse users

Step 1

From the users page that we just accessed, to add a new user, click the “Add new” action button at the top-left of the page.

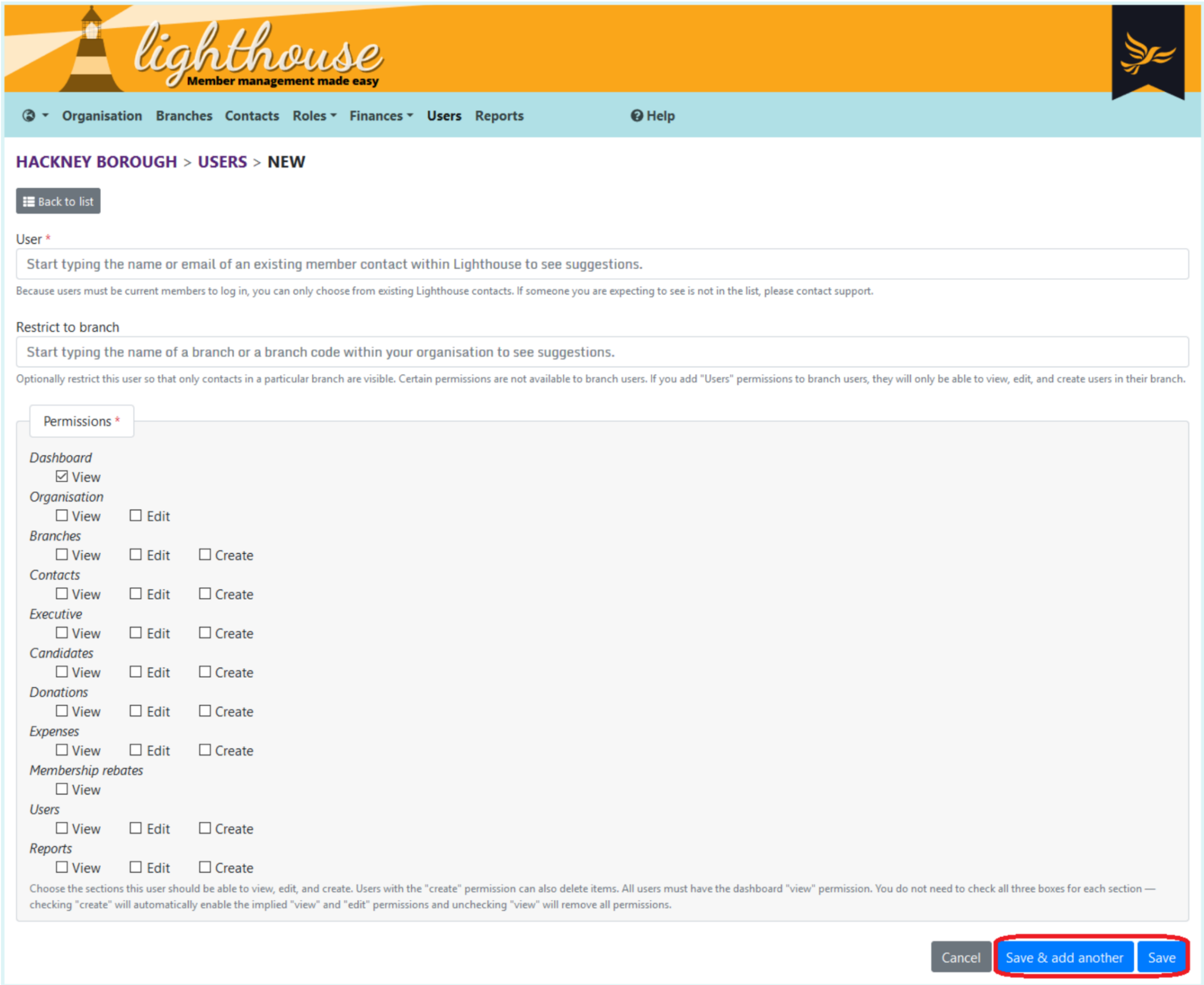


Step 2

You will be directed to the New User page. Start by typing in the name of the contact you want to add as a user into the first search box, and a list of options from your existing contacts will appear. Click on the correct contact, and their name, membership number and address will appear below the search box.

You can also follow this step to restrict the new user to viewing one or more branches. Type the name of the branch into the second search box, and click on the correct one.

You can then set the permissions for the new user using the checkboxes further down the page.



When you are finished, click “Save” at the bottom of the page.

Step 4

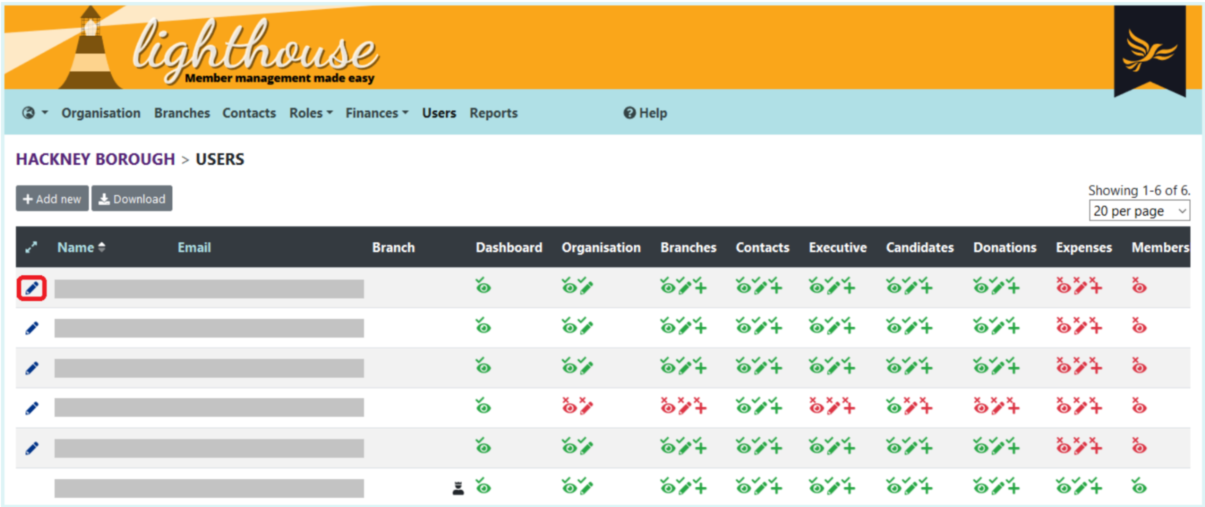
You will be returned to the Users page, where you can view your updated list. Your contact will soon receive an email welcoming them to Lighthouse and instructing them on how to log in.

How to edit your local Lighthouse users

If you ever need to change or remove someone’s Lighthouse access, you can do this by editing their user record.

Step 1

From the users tab that we accessed in the first step, to edit an existing Lighthouse user, click the pencil icon next to their name in the list.

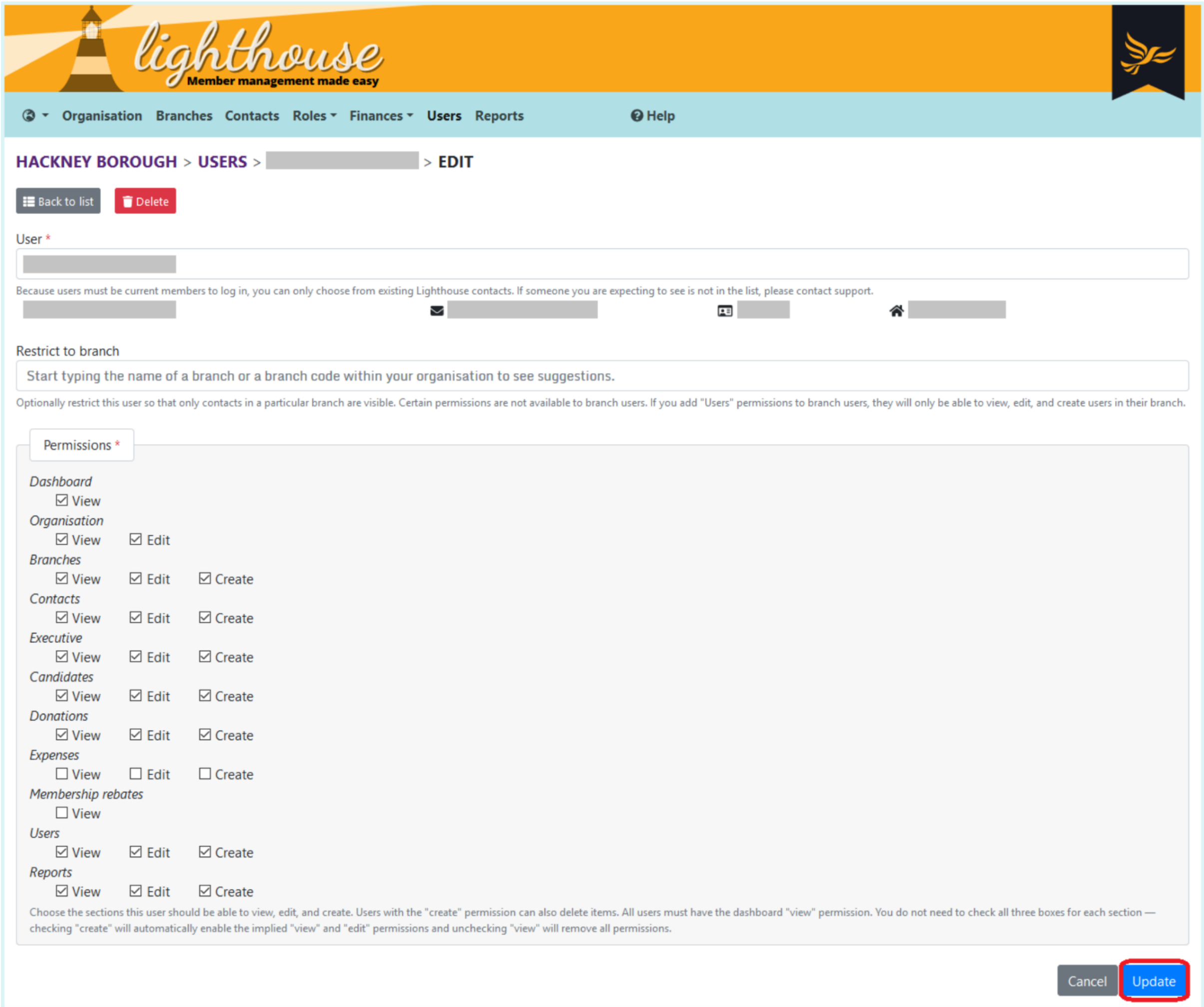


Note that you can also click on the name of the contact, and then click “Edit” at the top-left of the page.

Step 2

You will be directed to the Edit page, where you can restrict this user to a branch and amend their user positions.

This can be done in the same way as adding a user



Once you are happy with your changes, click “Update” at the bottom of the page. You will be directed back to the Users list.

Important: In order to edit a user you have to be in the same organisation as them. So if you’re logged in as a Regional Party, you will only be able to edit users for that Regional Party. If you want to edit users for an organisation below them in the hierarchy, you’ll need to use the Globe Switcher to change to that organisation.

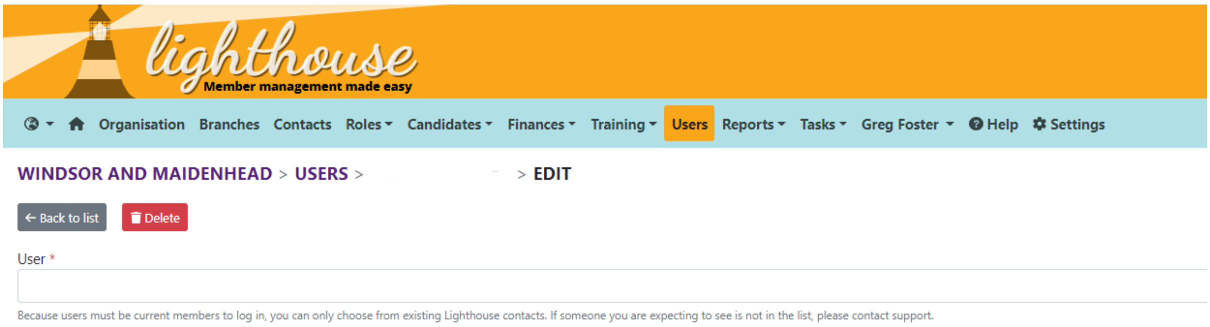
How to delete a Lighthouse user

Step 1

Follow the same steps as you did in the last step to edit a user.

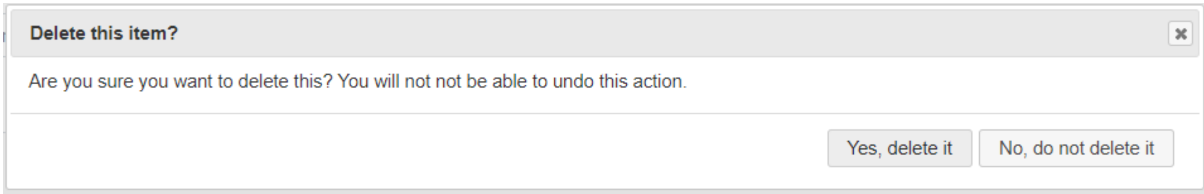
Step 2

Click on the delete action button.



Step 3

Confirm that this is the user you want to delete by clicking the “Yes, delete it” button.



Your user has now been deleted from Lighthouse. They’ll be sent an email notifying them of this.

Related guides and geek sheets

If you want to know more about user permissions, we recommend giving the following Geek Sheet a read:

- Geek Sheet 4: User Permissions