Scholarship Management System

Training Guide

Module 2 – Managing Users Accounts and Role Types

Ver 7.5

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Prepared by:

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Module 2 - Managing User Accounts and Role Types

This module covers setting up users based on role types. This feature will allow the administrator to create user profiles; manage their profile account; create role types allowing access to specific areas in the system based on role types; and create a password policy.

1. Managing Role Types

- A **Role Type** is used to describe the level of access a user will be given to be able to login and use various areas within your site.

- Before setting up your user accounts, you will first want to determine what types of roles your users will have in the use of the system and create role types based on that access.

- When creating these role types think about who will be accessing your site, and what level of access they will need to perform the specific tasks assigned to them. Then determine what areas of the site each role type will need to access, to be able to perform that task.

- There are three standard role types that come with your site: (these role type's access cannot be modified however you can change the name and description to better fit the needs of your organization). These are as follows:

  Global Admin
  Reviewer
  Applicant

  Important: The additional role types that are pre-loaded are suggested role types only, therefore you will want to review each ones access prior to using and create a meaningful definition for your organization's needs.

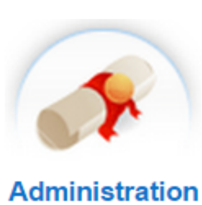
1.1 Accessing Manage Role Types

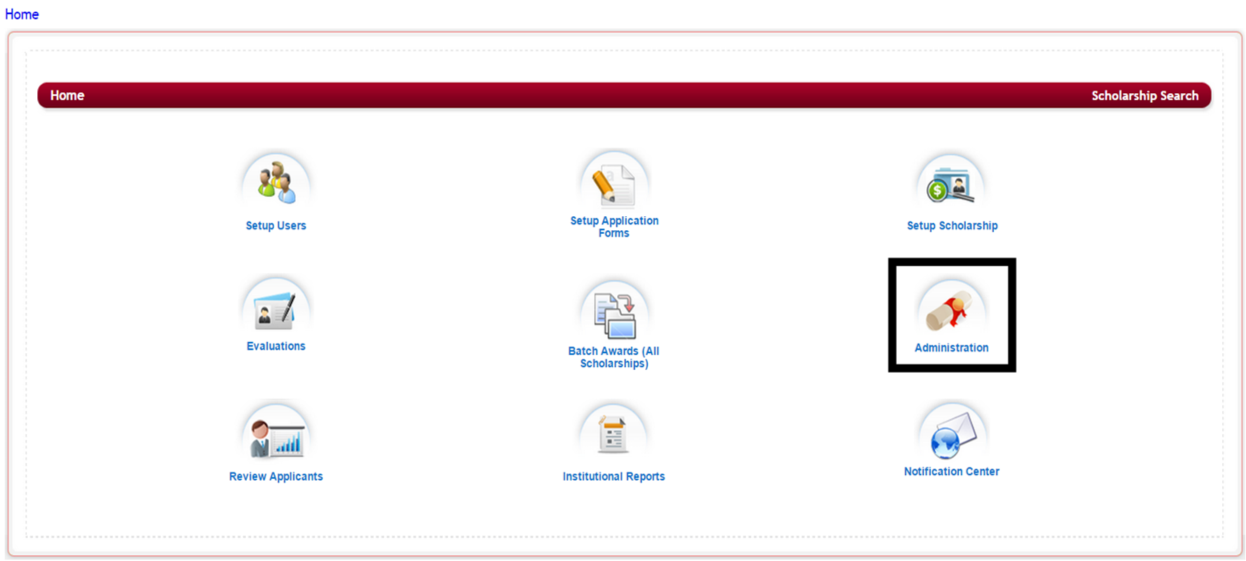
- Role types are created in the **Administration Dashboard** and can only be accessed by the Global Administrator(s).

  Important: *You cannot add additional licensed users to the system. These role types and the access given them are licensed users which cannot be randomly added. You also cannot add additional role types and give them the same access, as this will require additional licensing to be purchased.*

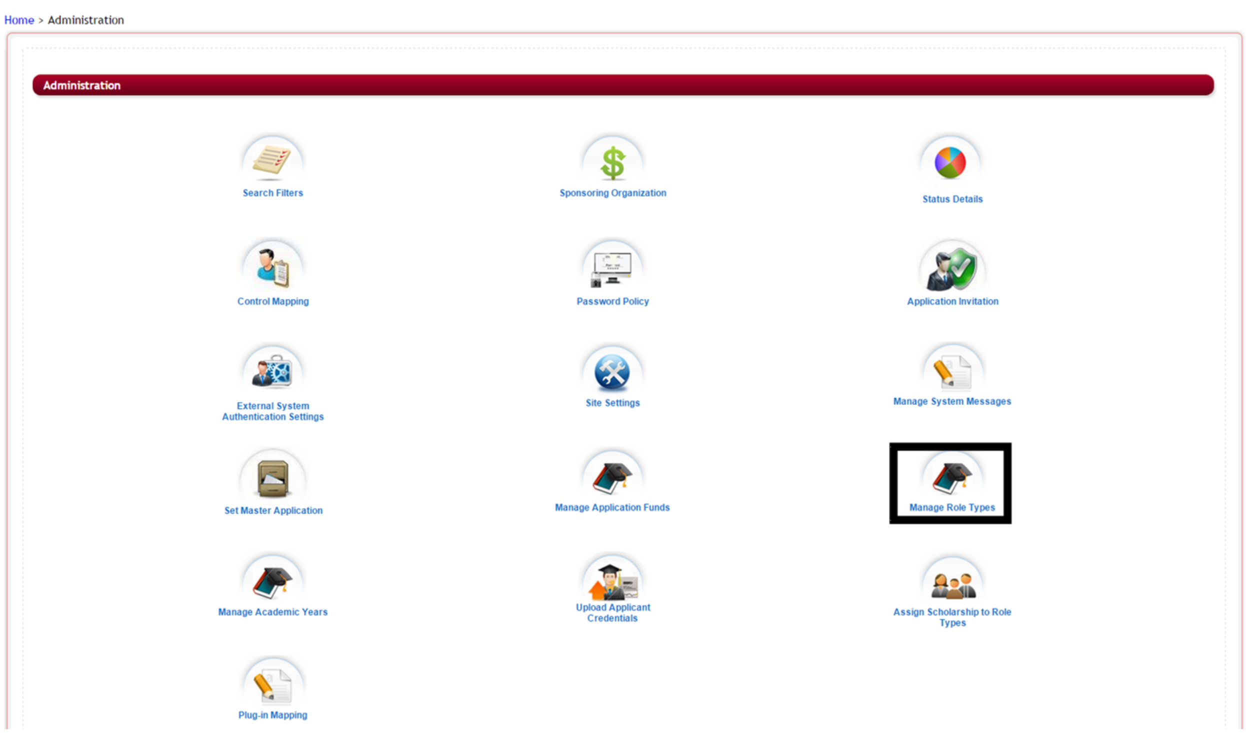
Exercise 1

- **Step 1:** From the *Home* Dashboard select the **Administration** Icon to be directed to the Administration Dashboard.





➢ **Step 2:** In the Administration Dashboard select the **Manage Role Types** icon



- This will open the Manage Role Types page, where you can create a new role type or edit an existing one.

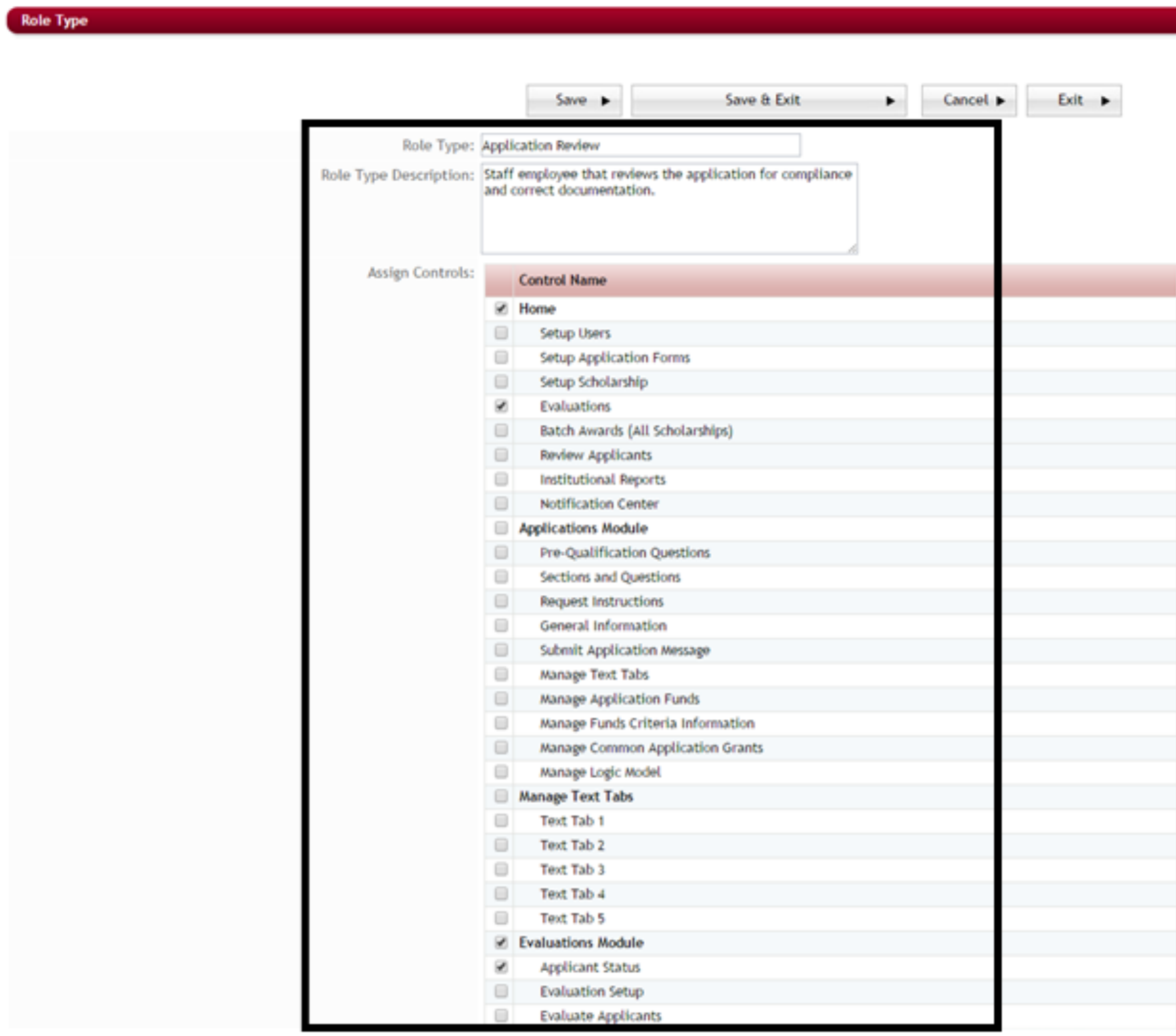
1.2 Adding a New Role Type

- You can add an unlimited number of role types to fit the needs of your organization. However, you will find that you are not able to create a role type that gives the same access as a licensed user as this will require additional licensing to be purchased. (i.e., Global Admin).

Exercise 1

- **Step 1:** From the Manage Role Type page select the *Add New Role Type* button

- This will open the Role Type setup page.



- **Step 2:** *Role Type*: Enter the name you want to give the Role Type.

- **Step 3:** *Role Type Description*: Enter a description for the role type in the Role Type Description.

- **Step 4:** *Assign Controls*: Select all the areas that you want that role type to have access to by putting a check mark in the box next to that access area.

- **Note:** when selecting access to an area you will need to give access to the entire dashboard paths it takes to get to that area starting from the Home dashboard.

    - **Example 1:** The illustration above is giving a user access to view only the Applicant Status screen so that they can access the applicant's applications and verify the completeness of that application. The following access has to be given:
        - **Home Dashboard >Evaluations** (allows the user to access the Evaluations Dashboard)

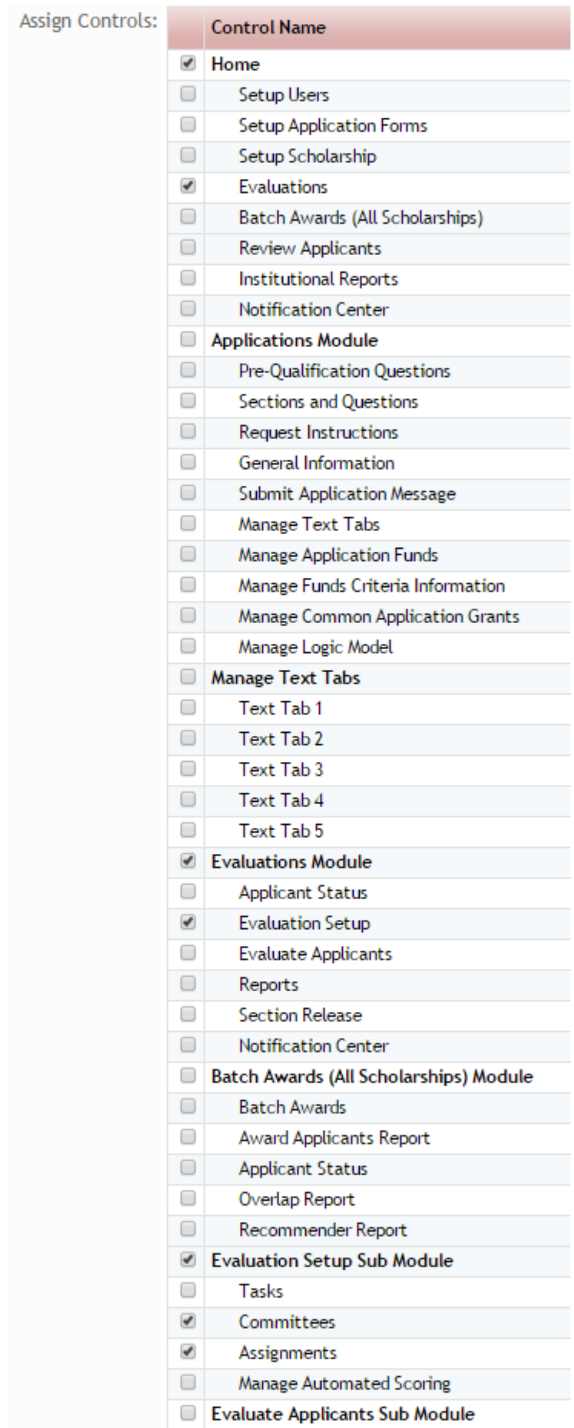
- **Evaluations Module>Applicant Status** (Once the user is at the Evaluations Dashboard, this allows the user to access only the Applicant Status icon)

- **Example 2:** Gives an employee access to be able to assign the applicants to the committees.

  - **Home Dashboard >Evaluations** (allows the user to access the Evaluations Dashboard)

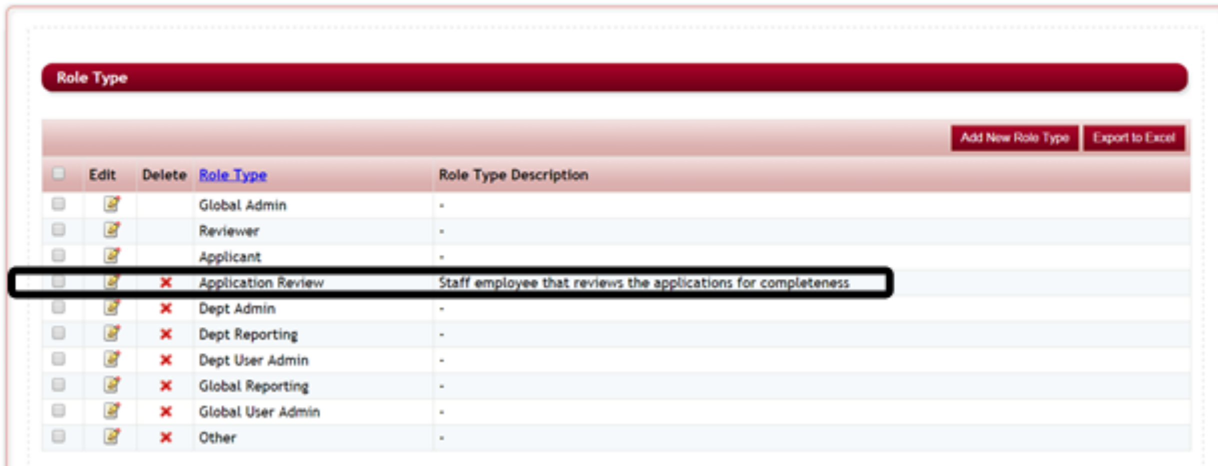
  - **Evaluations Module>Evaluation Setup** (Once the user is at the Evaluations Dashboard, this allows the user to access only the Evaluation Setup icon which directs them to the Evaluation Setup dashboard).

  - **Evaluation Setup Sub Module>Committees** and **Evaluation Setup Sub Module>Assignments** (Once at the Evaluation Setup dashboard, this allows the user to only acces the Committees setup icon to set up the committees, and the Assignments icon to be able to assign applicants to those committees for review).



- **Step 5:** Once you have made your selections click *Save & Exit* to save the role type and return to the role type listing. Your new role type will now appear alphabetically in the listing.

Home > Administration > Role Type



1.3 Editing a Role Type

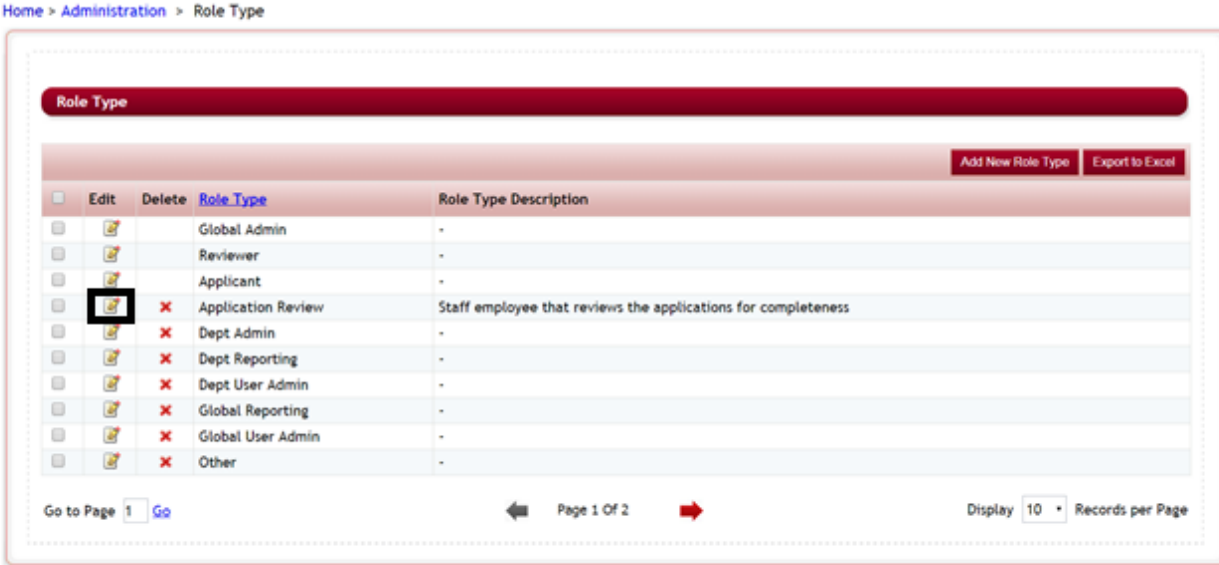
- There are three role types that are standard and their access cannot be changed, however you can change their name or description to better fit the needs of your organization. They are as follows:

  Global Admin
  Reviewer
  Applicant

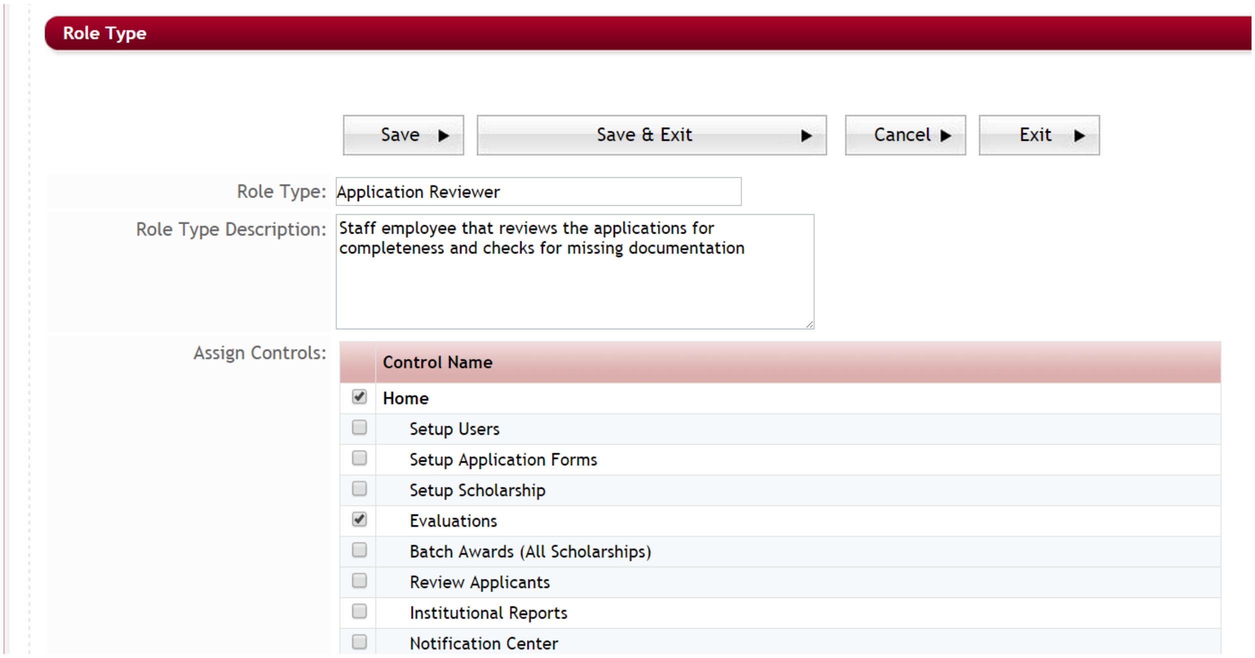
Exercise 1

- **Step 1:** From the Manage Role Type page select the *Edit* icon next to the role type you want to modify.

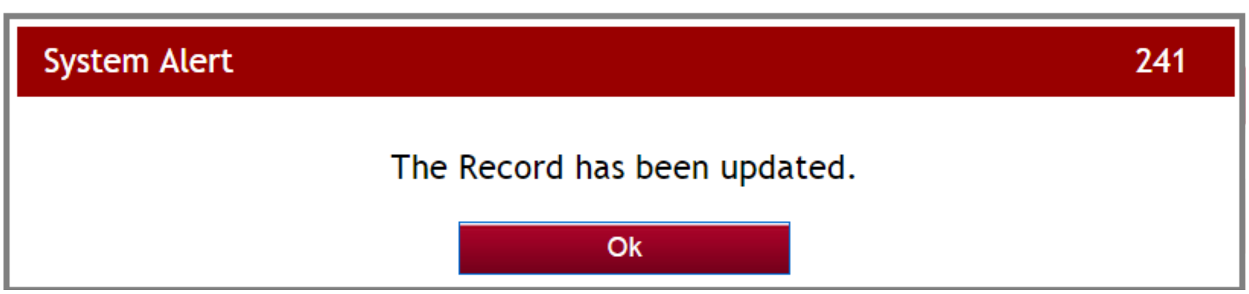
Home > Administration > Role Type



- This will open the Role Type setup page for that role type.



- **Step 2:** Change the Name of the Role Type by clicking in the Role Type field and modifying the name that is already there.
- **Step 3:** Change Role Type Description by clicking in the Role Type Description field and modifying the information already there.
- **Step 4:** Select or unselect the access assignments in the Assing Controls. Be sure to remember to remove the entire dashboard module path if you do not want them to have any access to that dashboard.
- **Step 5:** Click Save & Next to save your changes and return to the Role Type listing page.
- You will receive a System Alert message notifying you that your record has been updated



- **Step 6:** Click Ok in the system Alert.

1.4 Deleting a Role Type

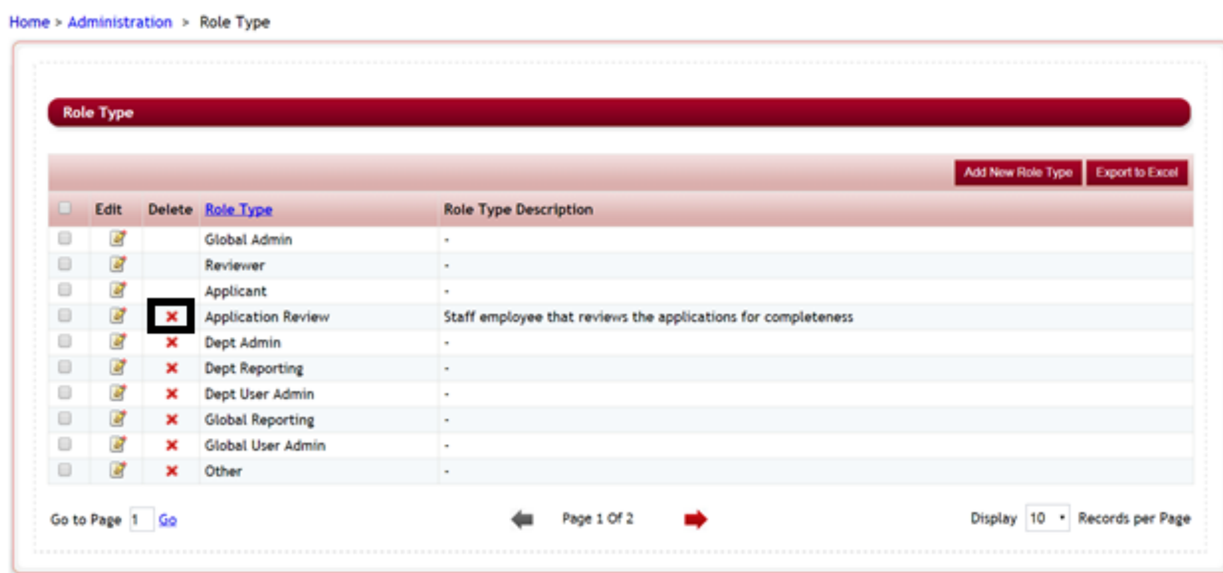
- You can delete any role type other than the first three standard role types.

  Global Admin
  Reviewer
  Applicant

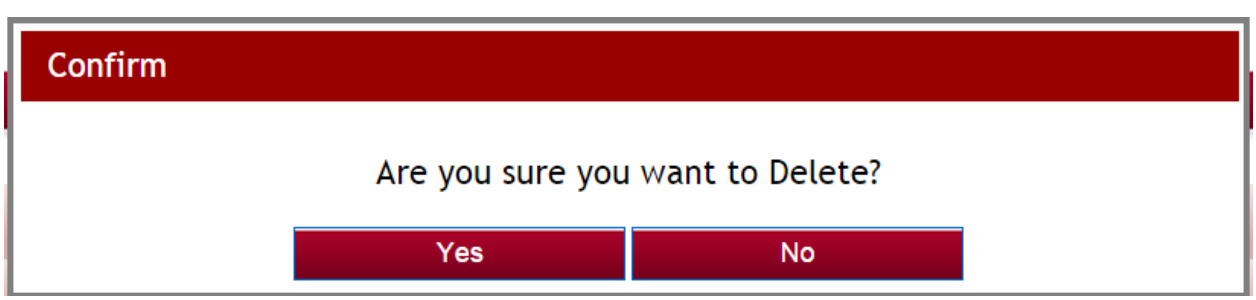
  *****Important:** Deleting an existing role type may cause you to lose any data entered by a user with that role type. Therefore, before deleting a role type, make sure that you have not used that role type or that you have gone in and changed all users that had that role type to a new role type prior to deleting. (Changing a user's role type from one to another may cause loss of data as well, for further explanation see Editing a User Profile.)

Exercise 1

- **Step 1:** From the Manage Role Type page select the *red X* next to the role type you want to delete.

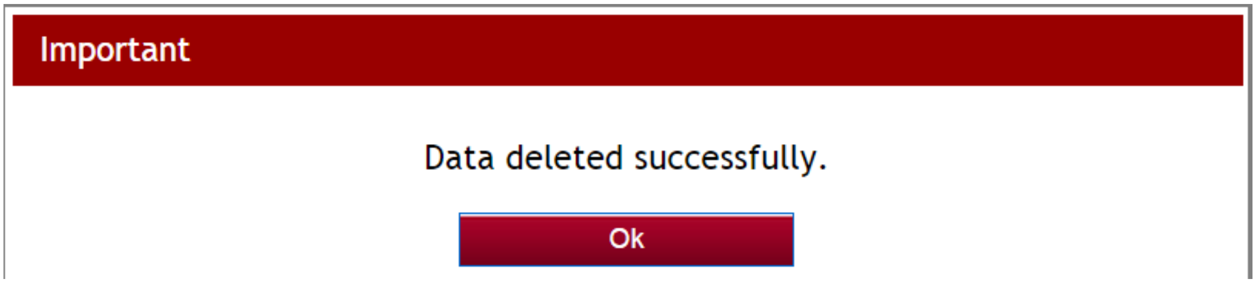


- A Confirmation message will appear confirming the deletion.



➢ **Step 2**: Click **Yes** to confirm or **No** if you do not want to delete the role type.

➢ If you click **Yes** a new message will appear verifying the deletion was successful.



➢ **Step 3:** Click OK and the role type will now be removed from the listing.

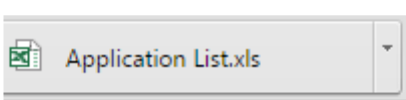
1.5 Creating an Export List of Role Types

When creating and editing Role Types it is recommended that you create an export listing of those Role Types so that you have it easily accessible when creating Users in the system.

Exercise 1

➢ **Step 1:** While in the Manage Role Types click on the *Export To Excel* button.

This will show up on your computers task bar as an Excel Document to be opened.



➢ **Step 2:** Click this item to open the listing in Excel. This will open on your local computer using your Excel program to open it.

	RoleTypeX	Description
1	**RoleTypeX**	**Description**
2	Dept Admin	-
3	Global Admin	-
4	Global Reporting	-
5	Dept User Admin	-
6	Reviewer	-
7	Proposal Admin	-
8	Dept Reporting	-
9	Applicant	-
10	Global User Admin	-
11	Other	-

- **Step 3:** Save this Role Type listing so that you have it to refer back to when creating Users in the system.

2. Setup Users

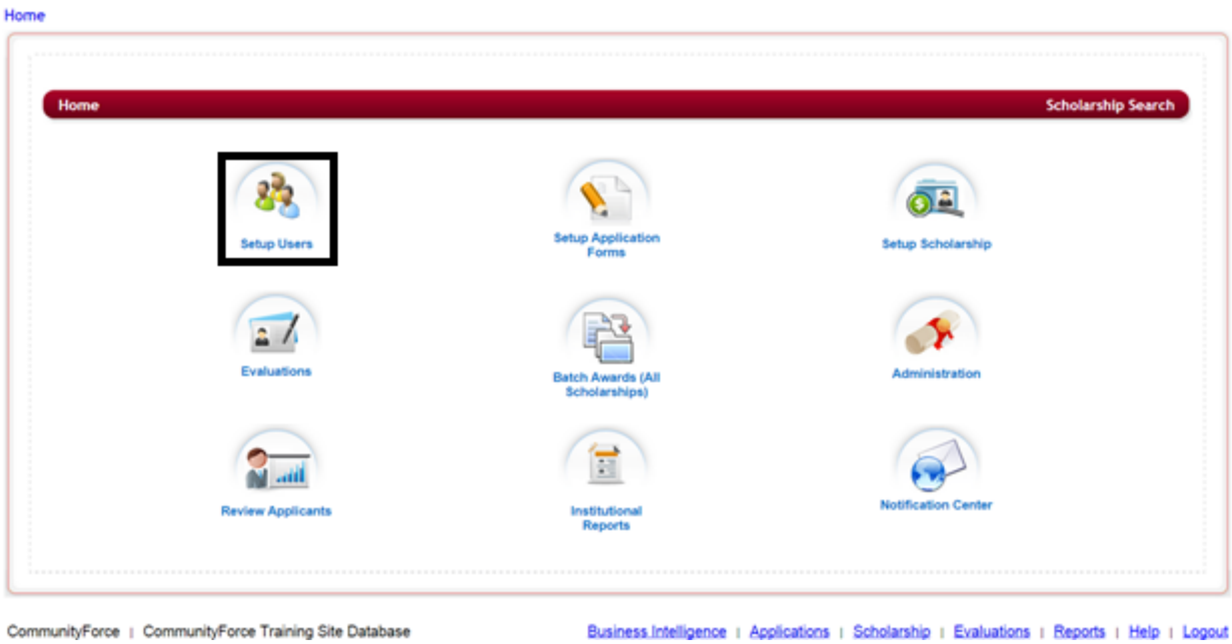
- This function will allow the administrator to create users and manage their accounts. To maintain the security of your site, it is recommended that User accounts only be created or edited by the Global Administrator(s) or if necessary another role type with a high level of administrator authority.

2.1 Accessing Setup Users

Exercise 1

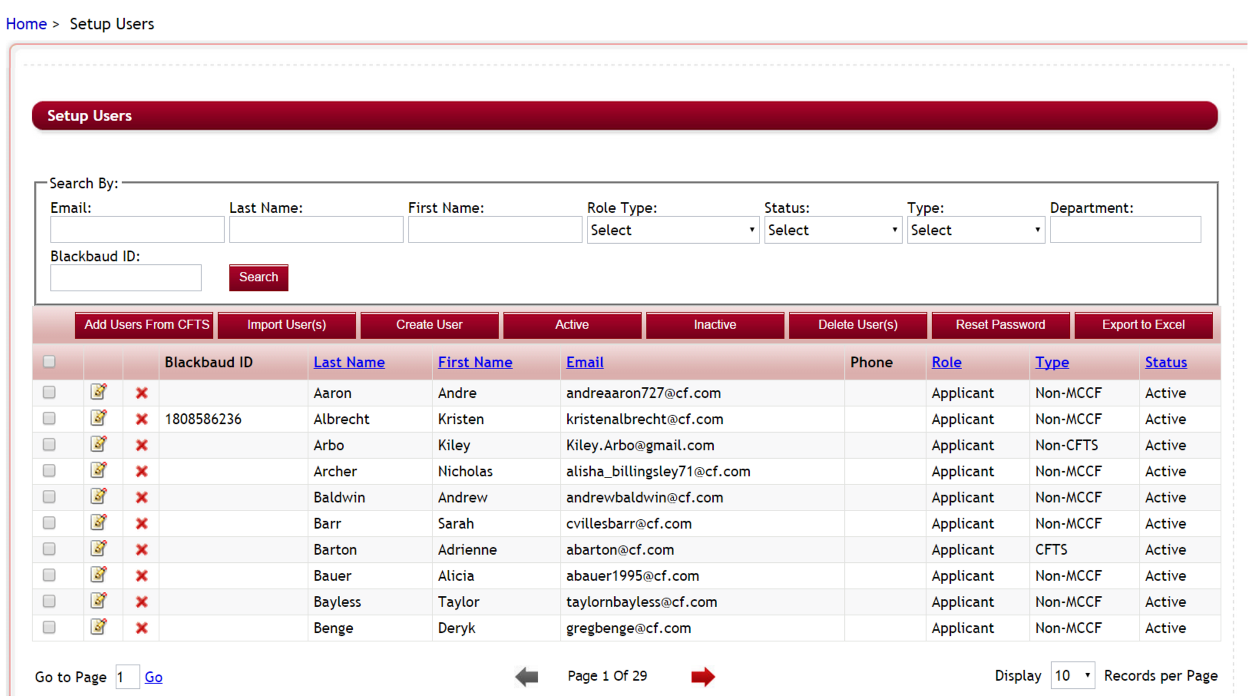
- **Step 1:** From the *Home* Dashboard select the **Setup Users** Icon.

Note: If the **Setup Users** icon is not available on your Home dashboard, your role type does not grant you access. If this is a function that you need to be able to perform, please see your Global Administrator to allow you access to this functionality.



➢ The following screen will open:

<u>Note:</u> for illustrative purposes this screen shows all the items available on the Setup Users screen. However, if you have not purchased integration with an external program you will not see the *Add Users from….* button or the *ID column* on your Setup Users page.



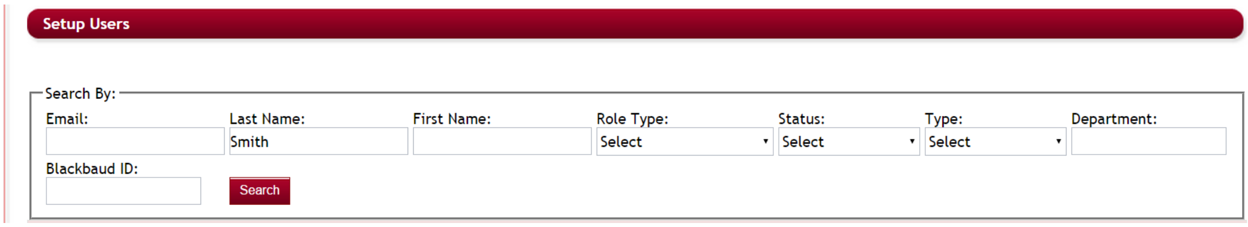
			Blackbaud ID	Last Name	First Name	Email	Phone	Role	Type	Status
				Aaron	Andre	andreaaron727@cf.com		Applicant	Non-MCCF	Active
			1808586236	Albrecht	Kristen	kristenalbrecht@cf.com		Applicant	Non-MCCF	Active
				Arbo	Kiley	Kiley.Arbo@gmail.com		Applicant	Non-CFTS	Active
				Archer	Nicholas	alisha_billingsley71@cf.com		Applicant	Non-MCCF	Active
				Baldwin	Andrew	andrewbaldwin@cf.com		Applicant	Non-MCCF	Active
				Barr	Sarah	cvillesbarr@cf.com		Applicant	Non-MCCF	Active
				Barton	Adrienne	abarton@cf.com		Applicant	CFTS	Active
				Bauer	Alicia	abauer1995@cf.com		Applicant	Non-MCCF	Active
				Bayless	Taylor	taylornbayless@cf.com		Applicant	Non-MCCF	Active
				Benge	Deryk	gregbenge@cf.com		Applicant	Non-MCCF	Active

2.2 Searching for Existing Users

Exercise 1

➢ The top section of the Setup Users page is the **Search By**: section where you can search for an existing user. You can search by the users Email, Last Name, First Name, Role Type, Status, Type, and by Department.

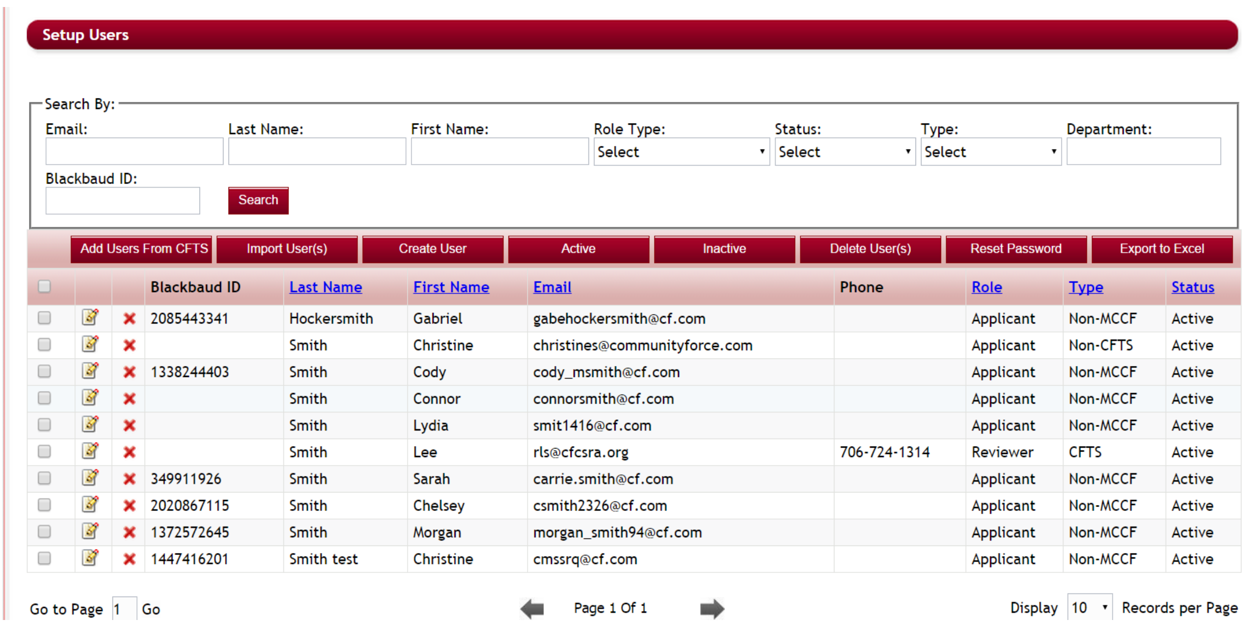
➢ To search for a user, enter one or more search criteria



➢ **Step 1:** Enter your Last Name in the Last Name Field.

➢ **Step 2:** click the *Search* button to search for your user account

➢ All the users matching your search criteria will appear below in the Users table.



Blackbaud ID	Last Name	First Name	Email	Phone	Role	Type	Status
2085443341	Hockersmith	Gabriel	gabehockersmith@cf.com		Applicant	Non-MCCF	Active
	Smith	Christine	christines@communityforce.com		Applicant	Non-CFTS	Active
1338244403	Smith	Cody	cody_msmith@cf.com		Applicant	Non-MCCF	Active
	Smith	Connor	connorsmith@cf.com		Applicant	Non-MCCF	Active
	Smith	Lydia	smit1416@cf.com		Applicant	Non-MCCF	Active
	Smith	Lee	rls@cfcsra.org	706-724-1314	Reviewer	CFTS	Active
349911926	Smith	Sarah	carrie.smith@cf.com		Applicant	Non-MCCF	Active
2020867115	Smith	Chelsey	csmith2326@cf.com		Applicant	Non-MCCF	Active
1372572645	Smith	Morgan	morgan_smith94@cf.com		Applicant	Non-MCCF	Active
1447416201	Smith test	Christine	cmssrq@cf.com		Applicant	Non-MCCF	Active

2.3 How to Create a New User

➢ There are three different ways to create user profiles using the Setup User function.

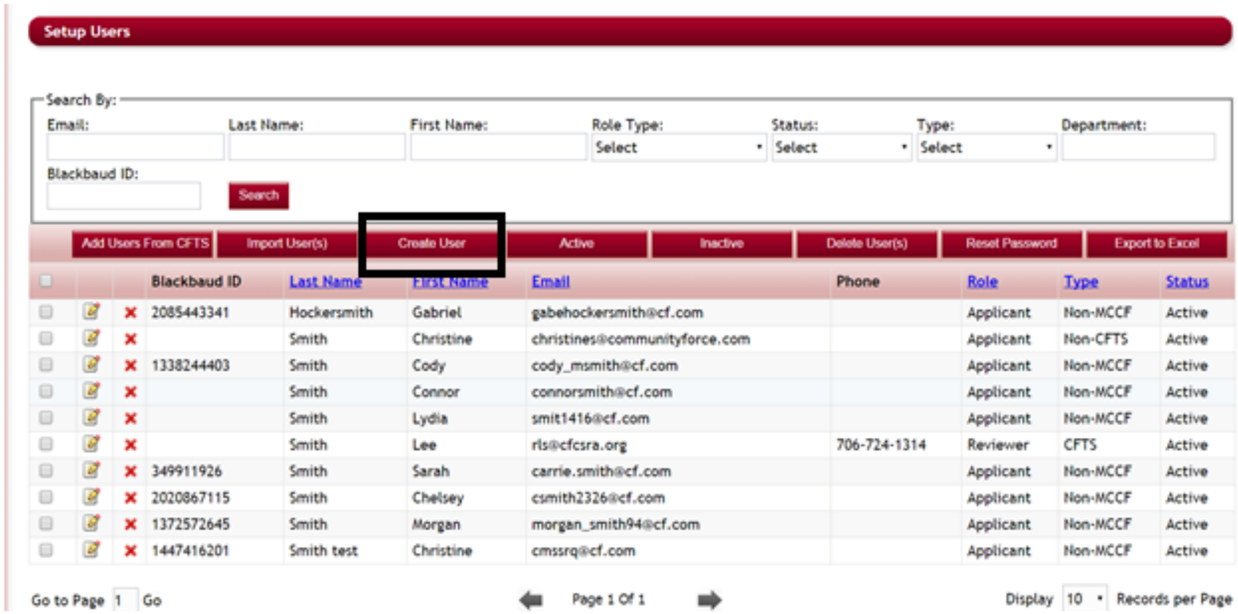
- **Create individual User Profiles manually–** allows you to manually create individual profiles by completing the create user form for each individual user you want to created.

- **Creating User Profiles from Excel File –** Useful if you have multiple user accounts to add to the CommunityForce site. Allows you to input multiple user data into an Excel spreadsheet and upload the Excel file to create multiple User Profiles.
- **Create individual User Profiles from an external site –** used if you have purchased integration and allow profiles to be created from the CommunityForce site.

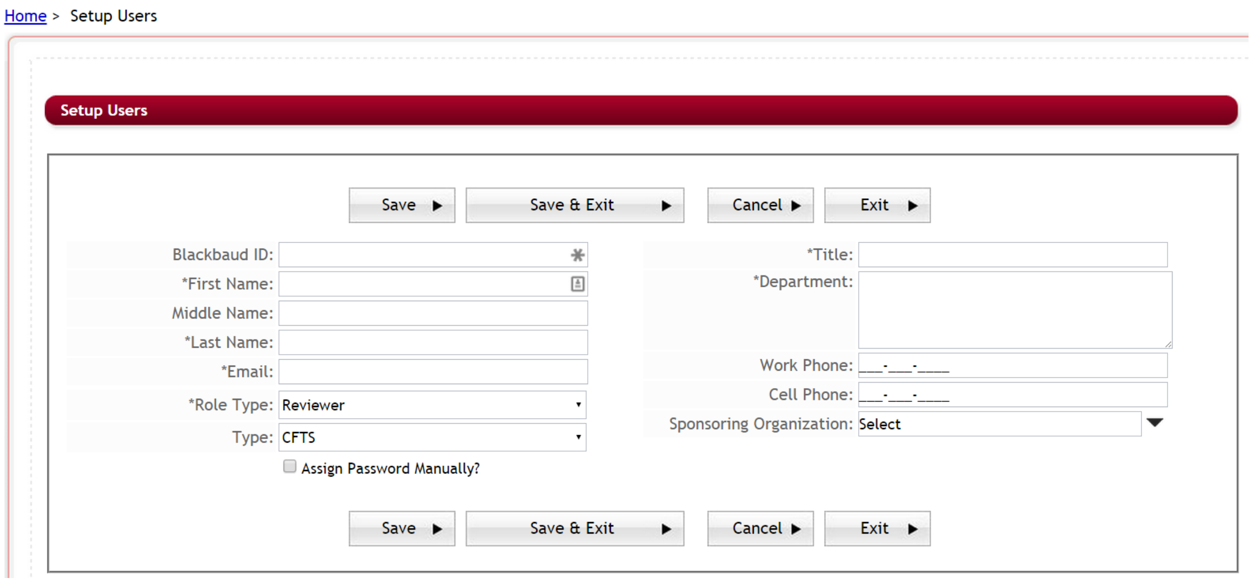
2.3.1 Creating Individual User Profiles Manually

Exercise 1

➢ **Step 1:** From the Setup Users page select the ***Create User*** button



➢ The following page will open:



- **Step 2:** Review the fields below to get acquanted with the options available before setting up a user account.

- Fields marked with an * are required fields and must be populated.

    - ***** ID** (External System ID code) – This is needed if integrating with an external system. This is the number that is assigned by the external system to identify this user's profile in that external system. (If you're not integrating with an external system this field will not be present.)

    - **First Name (*required field)** – Enter the User's First Name

    - **Middle Name –** Enter the User's middle name or middle initial

    - **Last Name – (*required field) -** Enter the User's Last Name

    - **Email Id (*required field) –** This is the user's email address. This will be their login ID.

    - **Role Type (*required field)** – Select the user's Role Type. Role Types are client defined Roles that allow the User to have access to specific areas of the site depending on the role type selected. The system comes standard with three pre-created role types. For a definition of your additional Role Types please see your Global Administrator. The three standard are as follows:

        - <u>**Global Admin**</u> – Has **full** administrative rights within the CommunityForce application program to view, make changes, and delete items. *You are only allowed to have Global Admin accounts for the number of licensed you have purchased. Therefore, when creating users you cannot create additional Global Admin accounts unless additional licensing has been purchased.*

- **Reviewer –** This is a committee member that would be reviewing an applicant in the evaluation and scoring process. The Reviewer has access to Review applicants using the Review Applicants Icon on their Home Dashboard. They can only view applicants that have been assigned to them in the Evaluation Assignment Process.

- **Applicant** – Applicant profile has access to the Applicant's Dashboard only.

- **Type –** Organization Code created in the Administration Dashboard/Site Settings. Used when creating profiles for external site integration and to identify profiles as members of that external site or non-members of that site. If not using integration the default will always be the type that is your organization's abbreviated acronym and not the NON-***.

- **Title (*required field) –** Enter the user's professional title, if applicable.

- **Department (*required field) –** Enter the company that they work for or the Department within your organization that their profile is to be associated with. If unknown then enter N/A.

- **Work Phone –** Enter the User's contact phone number

- **Cell Phone –** Enter the User's cell phone number

- **Sponsoring Organization** – If your organization has separate sponsoring organizations that they maintain applications and funding sources for, choose the sponsoring organization that the user profile needs to be identified with. When creating applications/funding sources that are connected only to those specific organizations, that user will only have access to those connected items. This will limit their access to other organizations application/fund information, only allowing access to their specific sponsoring organization.

- **Assign Password Manually?** – Select this box if you are going to create a password manually for the user.

  - **If not checked** the system will generate a temporary password for the user and automatically send them an email notifying them that an account was created and give them their login credentials. To view the email that is sent to them **See Notification Center - Email Template: Password: New Account Confirmation**, **It is important to edit this template before setting up your Users**

  - **If checked** a field will open up to enter their **Password**. Type their password there. This will not send them an email. Therefore, you will be responsible for remembering what you entered as their password, and notifying the user separately regarding their login credentials.

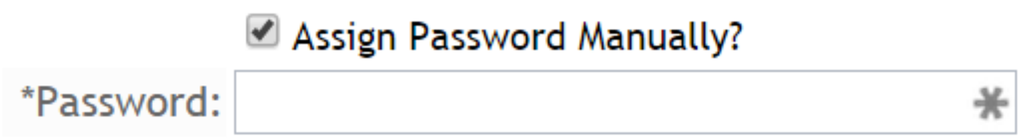
  - **Note:** Once passwords are created, you will not be able to see this password or have access to any of the passwords listed in the data grid.

- **Step 3:** Now after reviewing the fields you are ready to create a user account. Fill in each section with information regarding the User profile you are creating. Items marked with **an * are required fields** and must be filled in. (**do not click the Assign Password Manually yet**)

- **Step 4:** Determine if you want to have the system generate the password for them and send them an automatic email or if you want to *Assign it Manually* and let them know in a separate email what those credentials are.

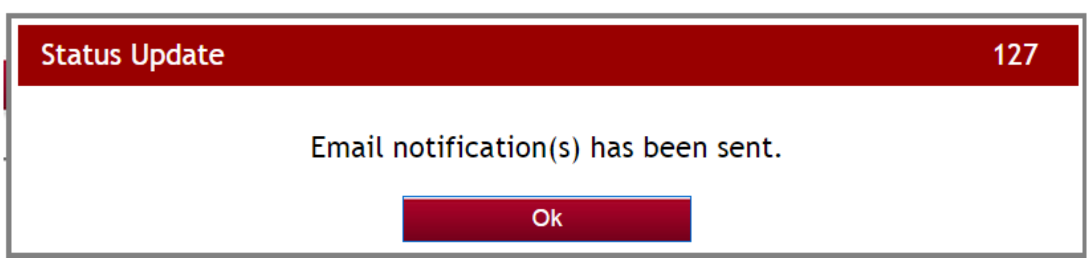
    - **Have system automatically generate** – If you choose this option ***do not select the Assign Password Manually item.*** However, before creating the user account it is suggested that you notify the user that you are creating accounts for them, so that they are not alarmed when they receive the email with the login information. As soon as you hit the Save to save the user, the email will go out.

    - **You want to Assign it Manually** – If you choose this option put a check in the Assign Password Manually box. A new box will open where you will enter there password information. It is important that you remember what you enter for their password as you will not be able to retrieve it or review later.



- **Step 5:** Once you have entered all the required information. If you have more user accounts to create, Click Save and Exit to save the user account and return to the Setup Users Listing.

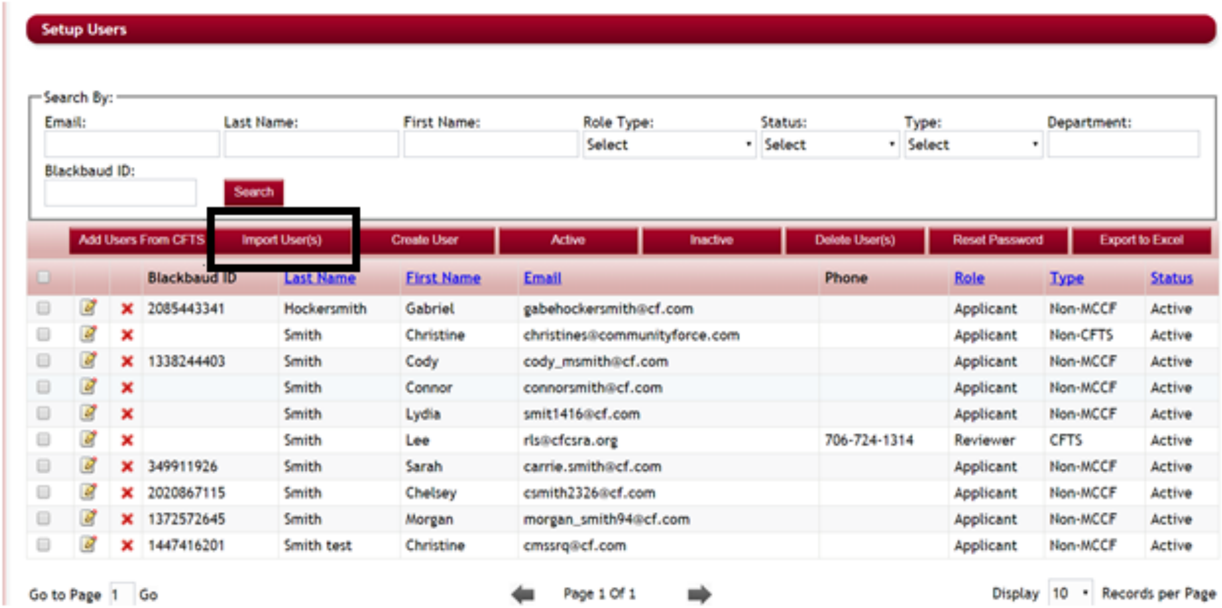
- **Step 6:** If you **did not select** the Assign Password Manually the following Status Update will appear notifying you that the email notification has been sent. Click OK.



2.3.2 Creating User Profiles from an Import File

<u>**Exercise 1**</u>

- **Step 1:** While in Setup Users select the *Import Users(s)* button.



Blackbaud ID	Last Name	First Name	Email	Phone	Role	Type	Status
2085443341	Hockersmith	Gabriel	gabehockersmith@cf.com		Applicant	Non-MCCF	Active
	Smith	Christine	christines@communityforce.com		Applicant	Non-CFTS	Active
1338244403	Smith	Cody	cody_msmith@cf.com		Applicant	Non-MCCF	Active
	Smith	Connor	connorsmith@cf.com		Applicant	Non-MCCF	Active
	Smith	Lydia	smit1416@cf.com		Applicant	Non-MCCF	Active
	Smith	Lee	rls@cfcsra.org	706-724-1314	Reviewer	CFTS	Active
349911926	Smith	Sarah	carrie.smith@cf.com		Applicant	Non-MCCF	Active
2020867115	Smith	Chelsey	csmith2326@cf.com		Applicant	Non-MCCF	Active
1372572645	Smith	Morgan	morgan_smith94@cf.com		Applicant	Non-MCCF	Active
1447416201	Smith test	Christine	cmssrq@cf.com		Applicant	Non-MCCF	Active

- The following Import User(s) page will open.

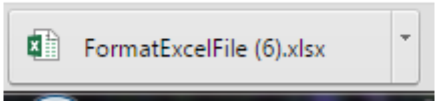
- **Step 2:** Select the format Type of the download file. Excel or XML. Select the Excel option.

- **Note:** If you don't have a properly pre-formatted document with the correct mapped fields it is suggested that you select the **Excel option** and then **click on the Click here to download the format of the file.**

- **Step 3:** (If you already have a completed Excel or XML document skip to Step 7) Click on the **Click here to download the Format of the File** – this will give you a pre-formatted excel document that contains all the required mapped fields to create the User accounts.

  Click here to download the format of the file

- This will download a pre-formatted Excel File on your computer



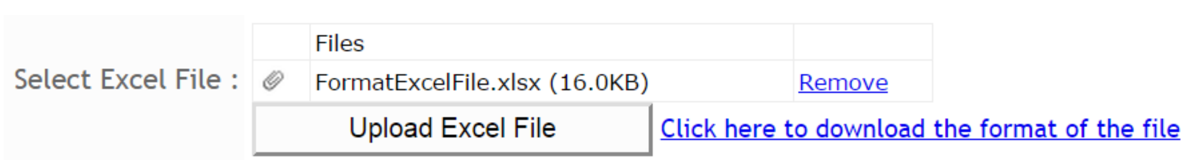
- **Step 4:** click the download file to open it in Excel.

	A	B	C	D	E	F	G	H	I	J
1	FirstName	MiddleName	LastName	EmailAddress	Password	Title	Department	CellPhone	ApplicantID	RoleType
2	Joe	M	Moore	joe@cf.com		IT	IT	7189087656	1212	Applicant
3	Maggie	S	Pugh	maggie@cf.com		Eng	Civil	9087654783	1213	Reviewer
4										
5										
6										
7	NOTES									
8	Role Type should only be Applicant or Reviewer									
9	First Name, LastName, EmailAddress are required fields									
10	If Single Sign is configured on your site, then ApplicantID is Required as well									
11	If Password column is blank, the system will put a default password for the user									

- **Step 5:** Complete the downloaded document adding each separate user account and completed all the required field columns. Before saving your copy delete the "Notes" section in red at the bottom of the documet. Save a copy of this document to your computer as an excel document (xlsx).

- **Step 6:** Upload the saved Excel file by clicking on the Upload Excel Button in the Import User(s) and selecting the newly created document to upload.

- The uploaded file will then appear above the Upload Excel File button. Make sure you have selected the correct document. If you uploaded the wrong file you can click the **Remove** button and upload the correct file.



- **Step 7:** Click Save to start the Import. Once the import is complete the new Users will now show in the Setup Users table.

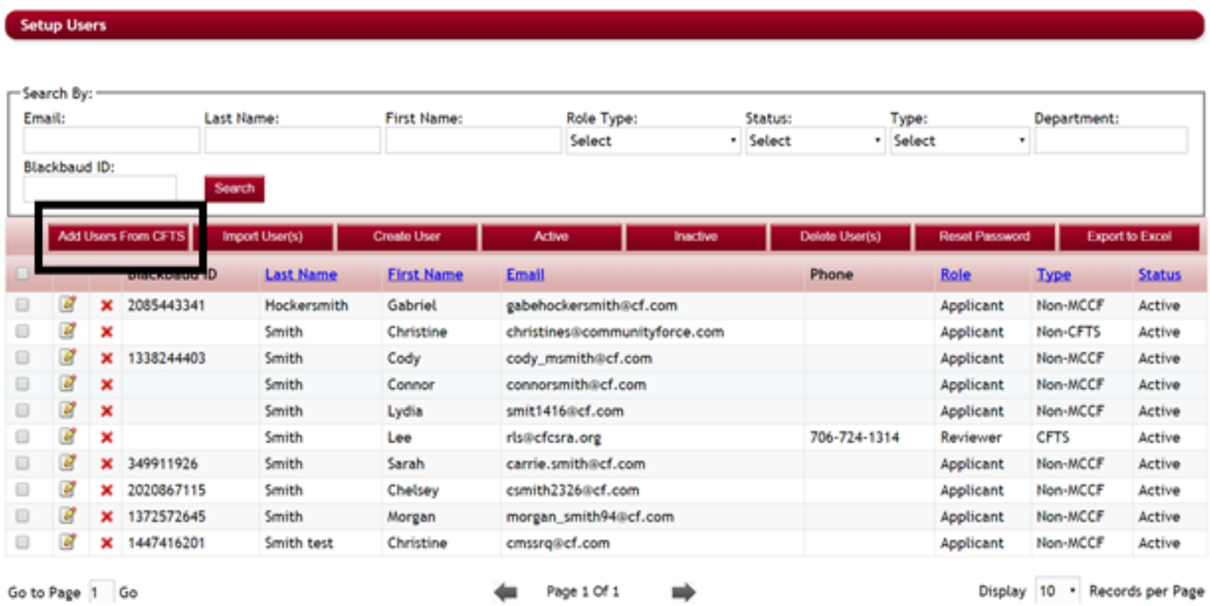
2.3.3 Creating User Profiles from an External site Directory (w/Integration)

- This is used only if you have purchased integration and allow the User account to be created from the CommunityForce site. Before using this feature the integration mapping must be completed by the development team.

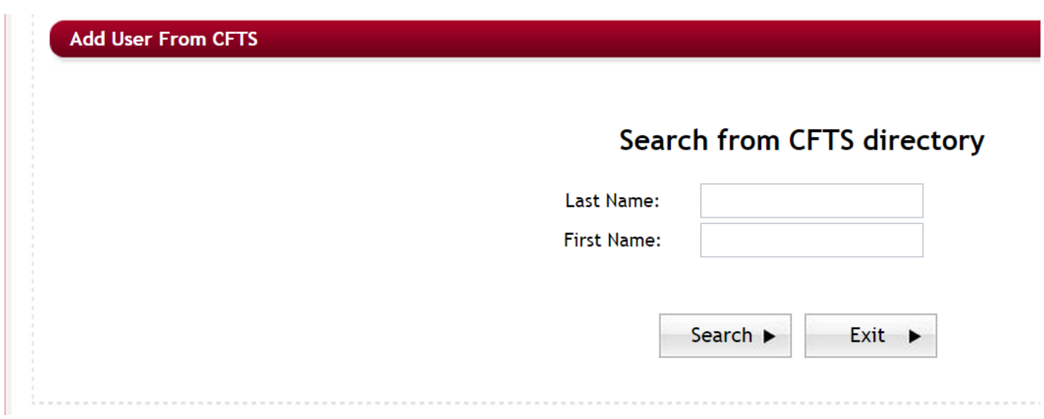
- This feature will search for the name you enter in the directory of the External program. Once it is found it will automatically create the profile in Setup Users.

Exercise 1

- **Step 1:** While in Setup Users select the *Add Users From **** button.



- The following screen will open



- **Step 2:** Enter the Last Name and the First Name of the user you want to search the external directory for.

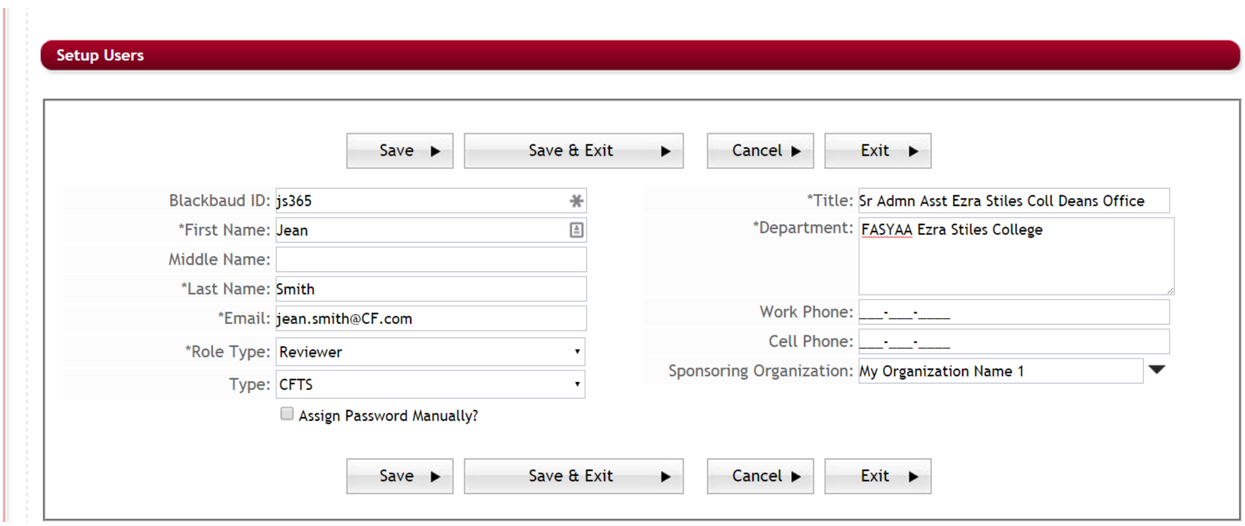
➢ **Step 3:** Click Search to search that directory for the user.

➢ The directory will return the matching results:

	Last Name	First Name	Title	Department
Add	Freebairn-Smith	Laura	Lect Sch of Drama	DRASCH Drama Salaries/Wages
Add	Smith	Jean	Sr Admin Asst Ezra Stiles Coll Dean's Office	FASYAA Ezra Stiles College

➢ **Step 4:** Click the Add button next to the individual you want to add.

➢ Once the user is located an account will be created using the data from the external directory.



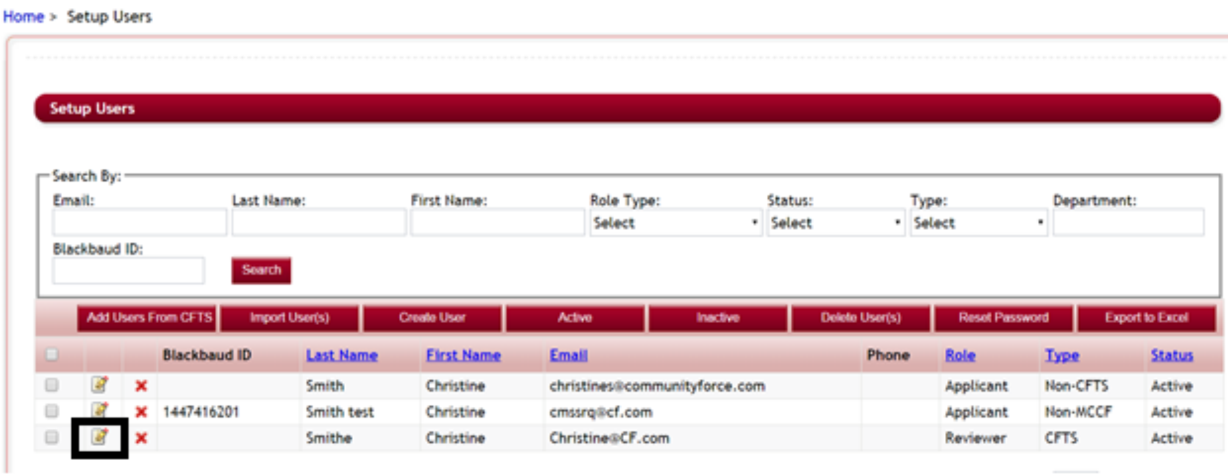
➢ **Step 5:** Fill in any of the missing information, assign a role type, and select one or more sponsoring organization if necessary.

➢ **Step 6:** Click on **Save or Save and Exit** to create the new user.

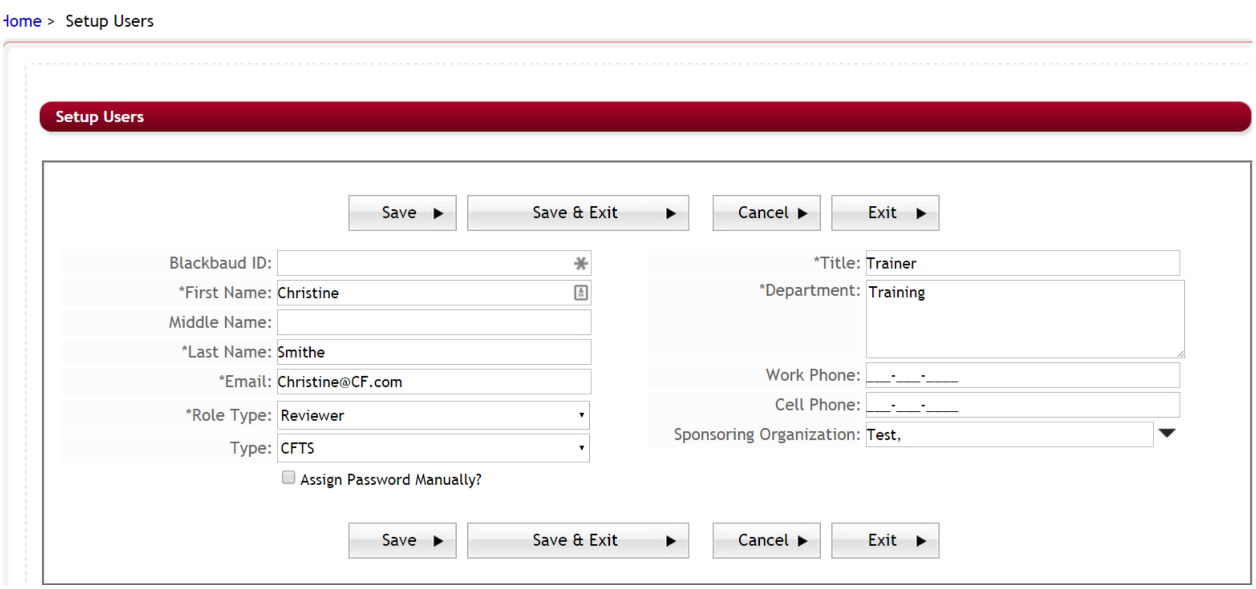
2.4 How to Edit a User

Exercise 1

➢ **Step 1:** While in the Setup Users Section search for the User that you want to edit and click the edit icon next to their account.



➢ This will open up the Setup User for that individual account.

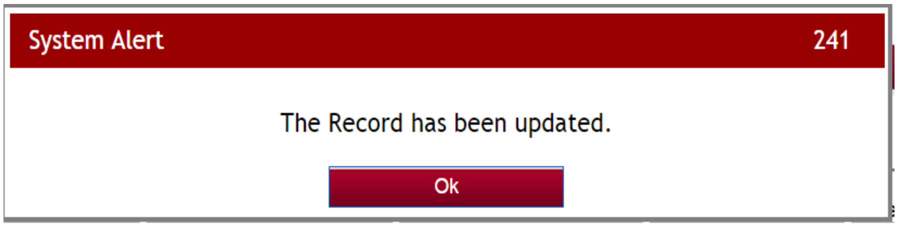


➢ **Step 3:** Make the necessary edits to the account and click Save or Save & Exit to return to the User Setup table.

➢ **Note** if making an edit to a user role type **use extreme caution** as you may lose data if their new role type gives them less access then previously. In this instance it is better to make a user account Inactive and create a whole new account with the new role type.

➢ **Important**: If you have a user with a Global Admin, Reviewer, or Applicant account you will never want to change their role types, always in this instance Inactivate the account and create a whole new account for them.

➢ **Step 4:** After you click save you will get the System Alert that the record has been updated click Ok to continue.

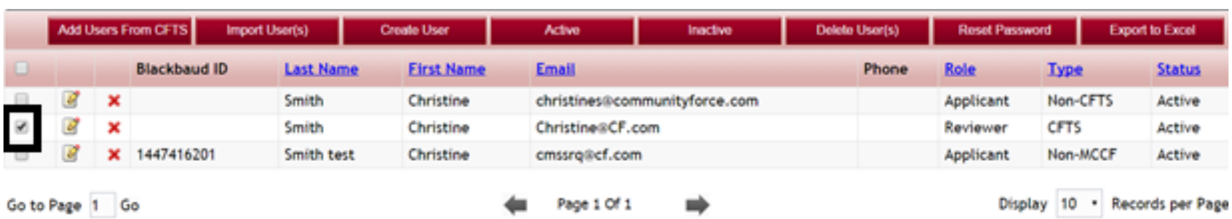


2.5 How to Inactivate or Activate a User

If a User leaves your organization or their role type has changed it is best to make their previous account inactive. If an inactive user returns you can then make the account active again, keeping all their prior data available.

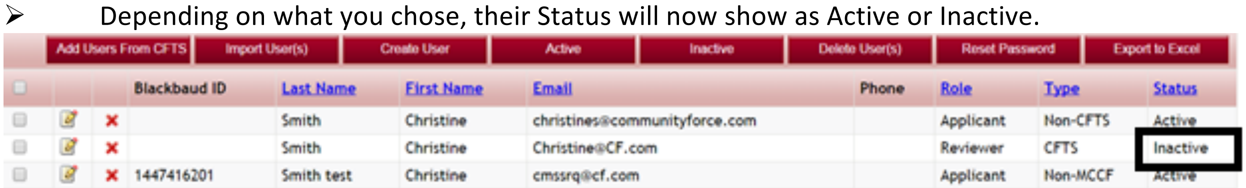
Exercise 1

- **Step 1:** While in the Setup Users Section search for the User that you want to make Inactive or Active and check the box next to their account.



- **Step 3:** Click either the Inactive button to make the account inactive or the Active button to make them Active again.

- Depending on what you chose, their Status will now show as Active or Inactive.

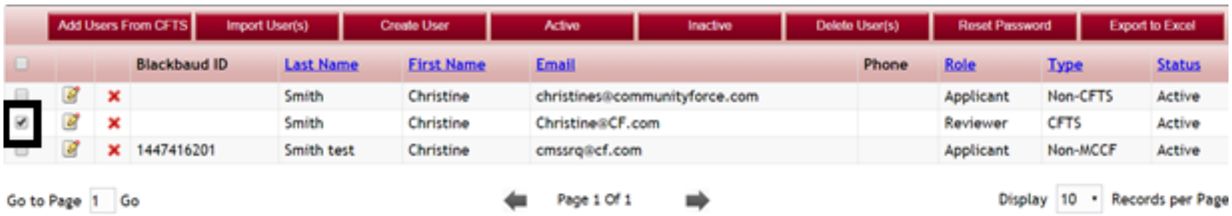


2.6 To Reset a User password

- When resetting a User's password an email will automatically be sent to them notifying them that the password has been reset and give them a new password that they can use to login with.

Exercise 1

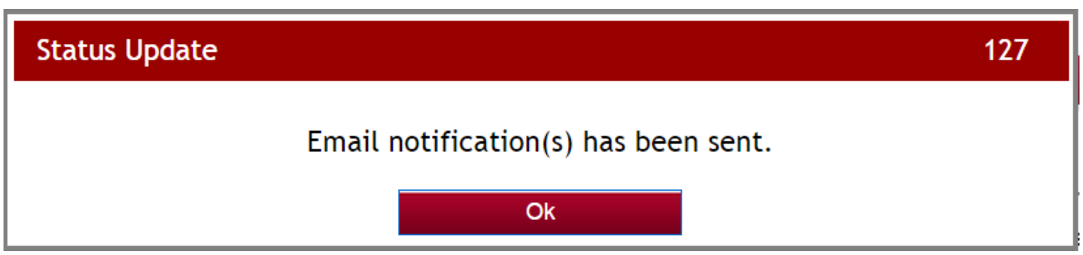
➢ **Step 1:** While in the Setup Users Section search for the User that you want to Reset the password for and put a check in the box next to their account.



			Blackbaud ID	Last Name	First Name	Email	Phone	Role	Type	Status
				Smith	Christine	christines@communityforce.com		Applicant	Non-CFTS	Active
				Smith	Christine	Christine@CF.com		Reviewer	CFTS	Active
			1447416201	Smith test	Christine	cmssrq@cf.com		Applicant	Non-MCCF	Active

➢ **Step 3:** Click the Reset Password button

➢ **Step 4:** Click Ok when the Status Update appears notifying you that the email has been sent.



➢ The following email message is sent to the user with a new password they can use to login to their account.

You are receiving this e-mail message as the Admin has reset the password for you. Kindly use the below password to login into the system.

New Password: a8be6cb3

Please click here and login with the new password.

Thank you,
CommunityForce Scholarship Application Portal

2.7 How to Delete a User

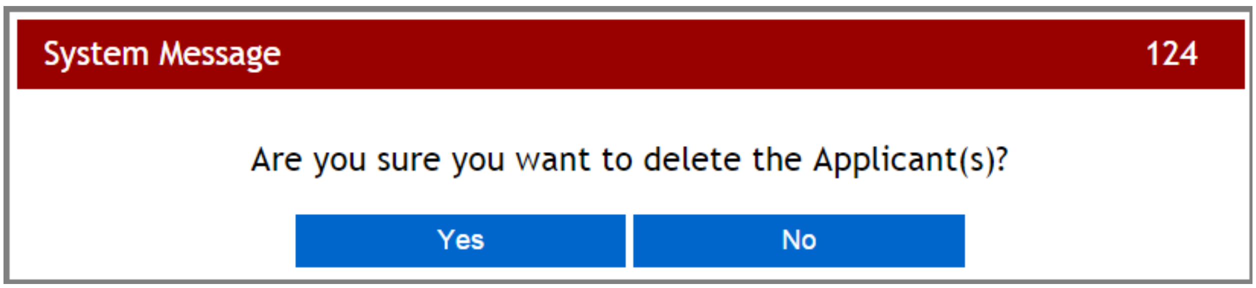
*****Caution:** Deleting a user removes the user and any data associated with their account. Therefore, use extreme caution when deleting accounts. It is recommended to delete an account only if it has never been used to login with. If the account has activity it is best to make it inactive instead of deleting.

Exercise 1

- **Step 1:** While in the Setup Users Section search for the User that you want to Delete

- **Step 3:** Click the red  before the user you want to delete.

- A confirm message will display to make sure you want to delete the user.



- **Step 4:** Click **Yes** on the message to delete the user or click on **No** to return you back to the search results screen.

3. Changing Password Policy

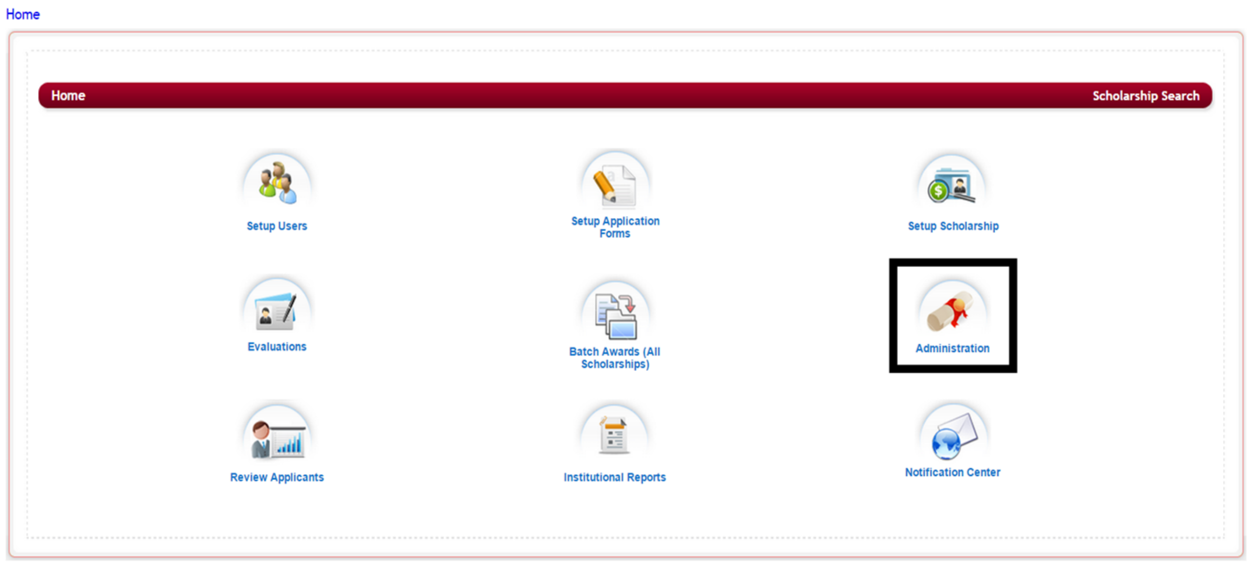
- Only the Global Administrator has access to change the Password Policy; they can activate the policy based on the needs of the entire organization

- Password policies are used to set specific rules on how an applicant creates their password as well as how long that password is to remain active before requiring the applicant to change their password on the CommunityForce site. The Password Policy only needs to be set once and applies to all users entering the site. If you do not have policy rules to establish, you will not need to set a password policy, as the site will automatically default to not activate a policy.

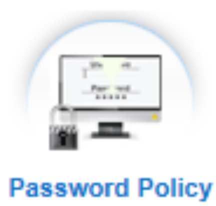
- This feature helps the Global Administrator to set a few rules for creating a password for different User Account ID's. This policy only needs to be set once and applies to all users.

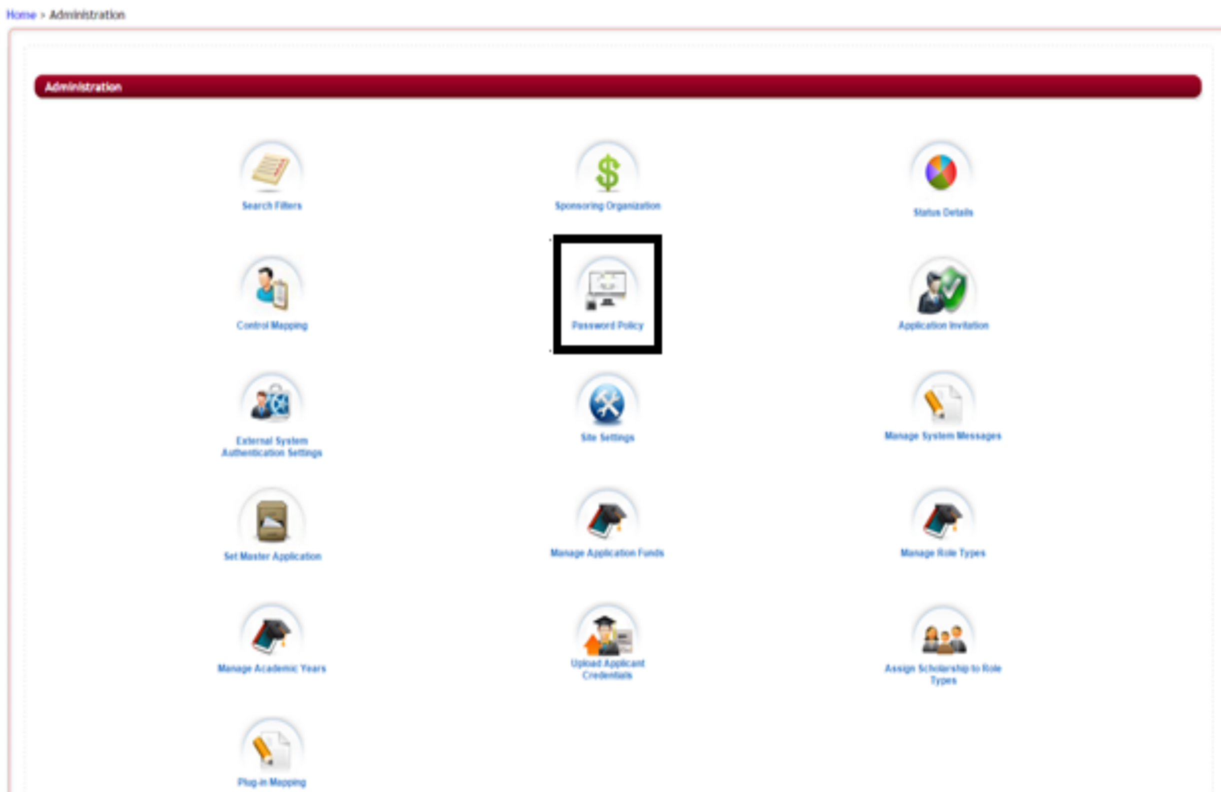
Exercise 1

- **Step 1:** From the *Home* Dashboard select the **Administration** Icon to be directed to the Administration Dashboard.

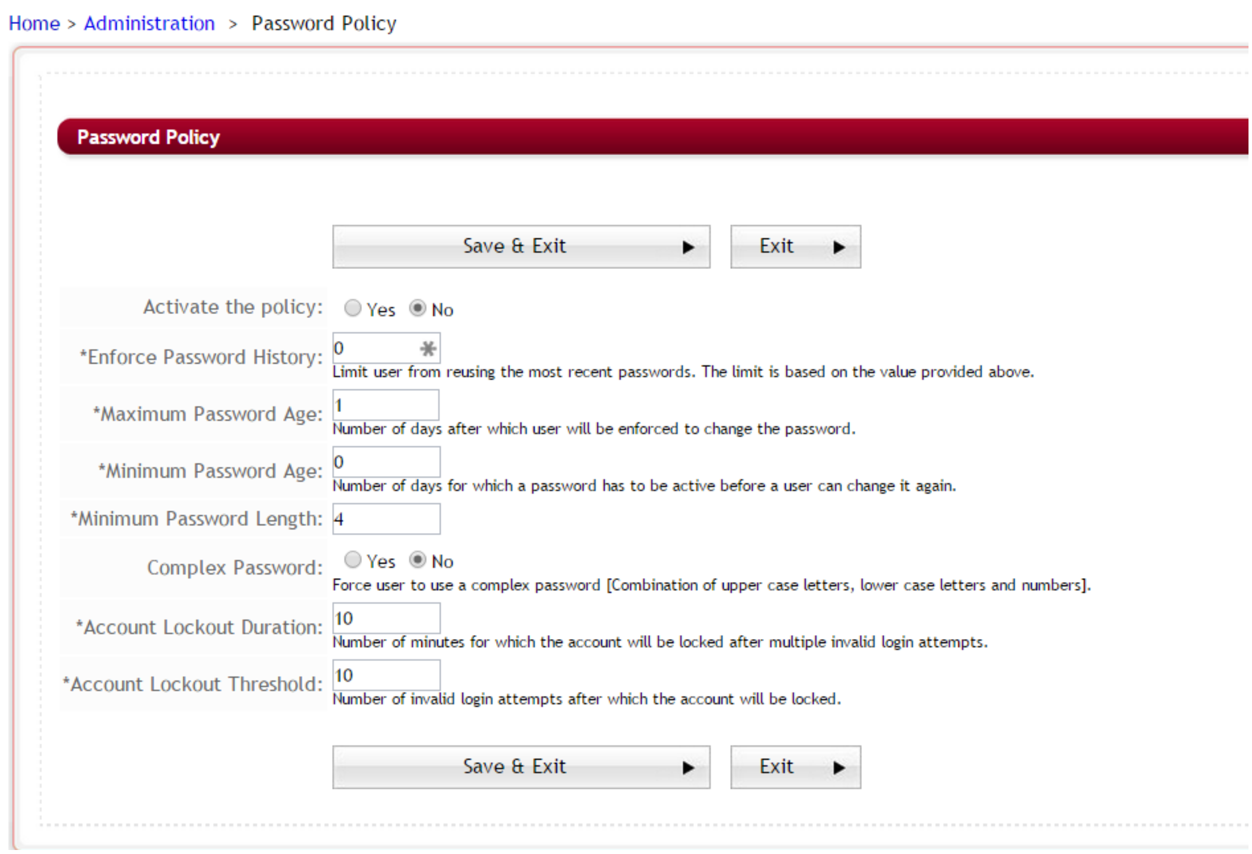


➢ **Step 2:** In the Administration Dashboard select the **Password Policy** icon





- The following screen will open. This setting helps you to activate the policy using several options.



Step 3: Review all the items below and select each field according to the policy you want to set for your organization.

Items marked with an (*) are required and must be filled in.

Activate the Policy: This is used to activate the password policy. If the administrator clicks on "Yes", this policy is displayed to the User, while he is creating his/her password. If the administrator clicks on "No", this policy is not active.

****Enforce Password History:*** This feature enables the administrator to decide how many previous passwords cannot be reused by the user when resetting his/her password. For example, if the Enforce Password History says "5", the user cannot use any of his last 5 passwords.

****Maximum Password Age:*** This describes the maximum duration for which the password will be active to log into an account. For example, if the Maximum Password Age is 60 days, then it means that the password after a maximum of 60 days will expire and needs to be reset or changed to a new one.

****Minimum Password Age:*** This describes the number of days for which a password has to be active before a user can change it again. For example, if the Minimum Password Age is 5 days, then it means that the user can change the password only after a minimum of 5 days have passed.

Minimum Password Length: This feature sets the minimum number of characters the password can have. For example, if the Minimum Password Length is 4, it means that the password given cannot have less than 4 characters.

Complex Password: If this is clicked "Yes", it then forces the user to use a complex password. This is a combination of uppercase and lower case letters and numbers.

Account Lockout Duration: This gives the number of minutes (time limit) for which the account will be locked after multiple invalid login attempts. For example, if the Account Lockdown Duration is given as 60 minutes, then if there have been multiple invalid login attempts, the account will be locked for 60 minutes and will not allow the user to attempt to login again until after that time has passed.

Account Lockout Threshold: This feature gives the number of invalid login attempts allowed before the account is locked out. For example, if the Account Lockout Threshold is given as 3, the account will be locked after 3 invalid login attempts.

- **Step 4:** Once you have entered the data to set the policy click the Save & Exit to save the information and return to the Administration dashboard.