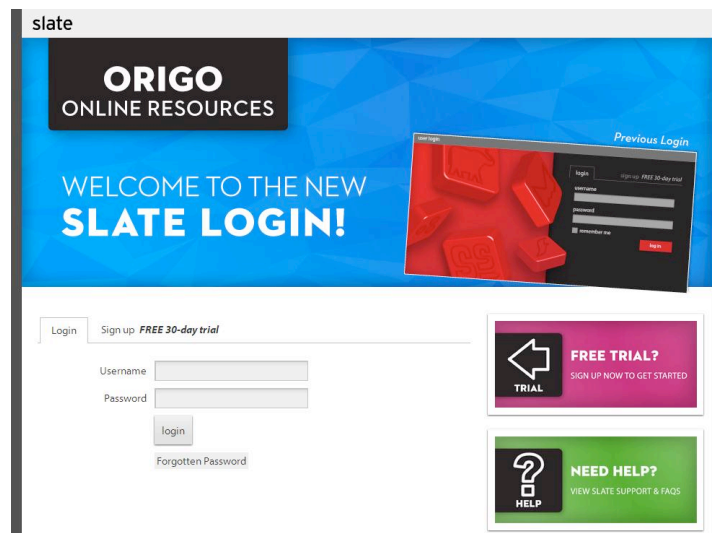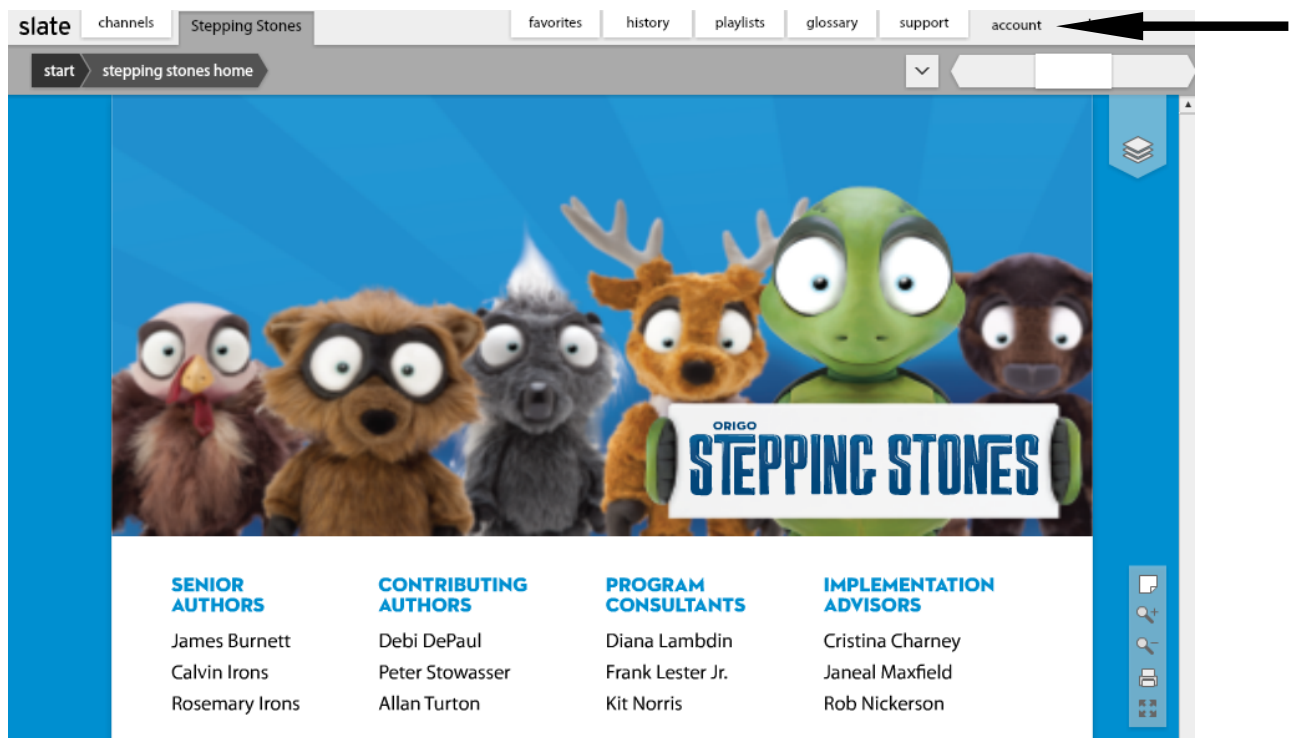# Slate User Management Guide

Welcome to the user management portion of our online delivery system, Slate.

In order to access both the resource and account management functions of Slate, please access the following web address: https://www.origoslate.com/

Enter your username and password, then click the '*login*' button. Access to Slate, including ORIGO Stepping Stones and other online resources will automatically load.

To review or update your Slate account select the '*Account*' tab on the top far right of the resource ribbon. You will be asked if you want to exit the resource session of Slate, select '*yes*'.

Account Management

At the top of the user management system there is a navigation ribbon. It includes the following tabs: *Slate, Account, Subscription, Support, and Logout*

Slate tab

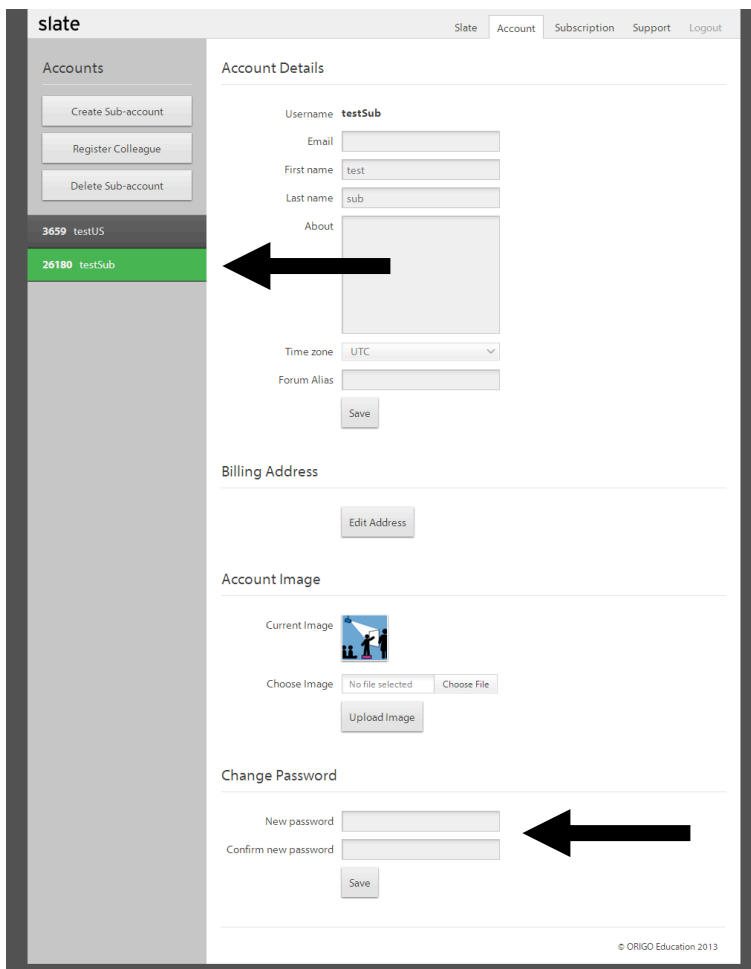Will return you to Stepping Stones and the ORIGO online resources.
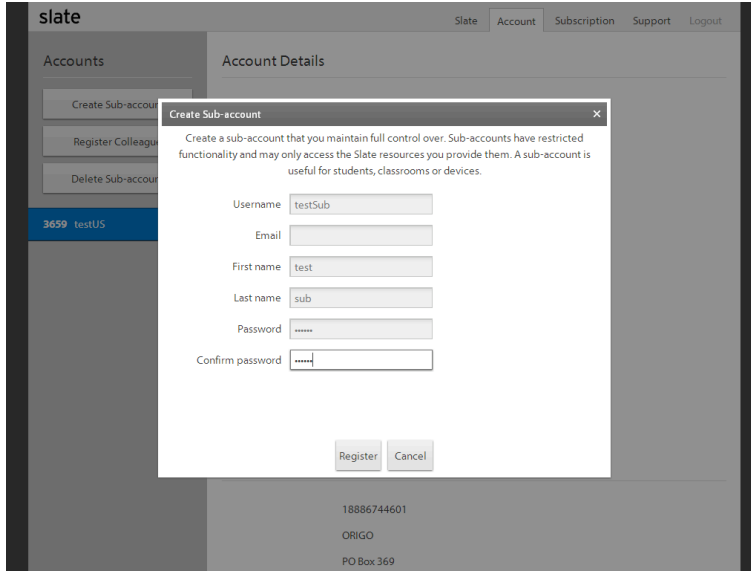
Account tab

This tab shows basic account information for your Slate username. This includes name, email, billing address, and the option to change your password. This tab also allows the registration of other usernames via the *'Create Sub-account'* and *'Register Colleague'* buttons. Deletion of sub-accounts through the *'Delete Sub-account'* button is also allowed.
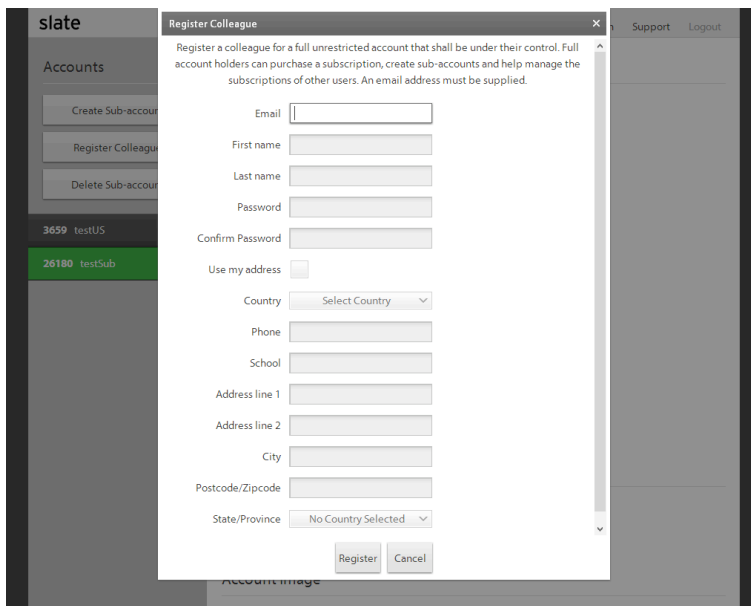
Create Sub-account

Used to add *'generic'* usernames (for example student1, student2 etc.). These are sub-accounts that can be assigned licenses if you are the owner of multiple licenses. The owner (Admin) directly controls sub-accounts and therefore has the ability to select a sub-account and change any account information including the password.
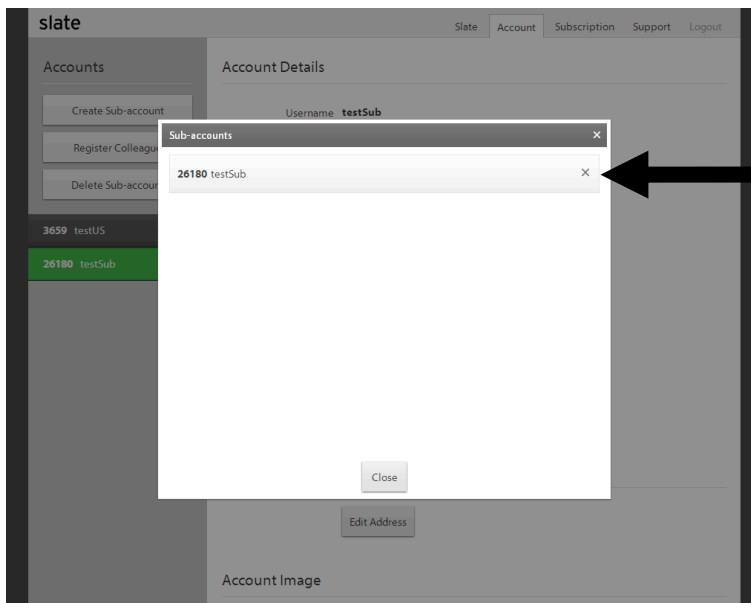
Register Colleague

Used to register a colleague with the Slate system.

Delete Sub-account

Used to remove a sub-account from the Slate system. All of the user's sub-accounts will be listed. Click the corresponding 'X' beside the username to be deleted.

Subscription tab

This tab lists the product licenses assigned to a username (by product icon) along with the expiration date of those licenses. Please note that there is one expiration date allowed for each set of licenses owned by a user.
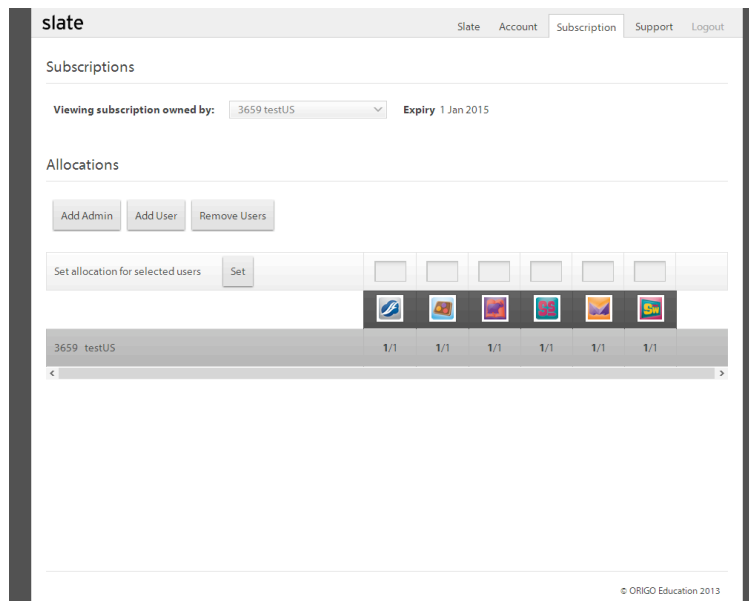
The license designation is 'Spare/Total'. Therefore a user showing '3/6' indicates they have been assigned 6 licenses total and still have 3 spare to allocate to others. Most users will see '1/1' for their licenses.

An Administrator of a group of licenses will see varying numbers. Please see the advanced section of the User Management description for more information

Support tab

The Support tab provides access to help videos.
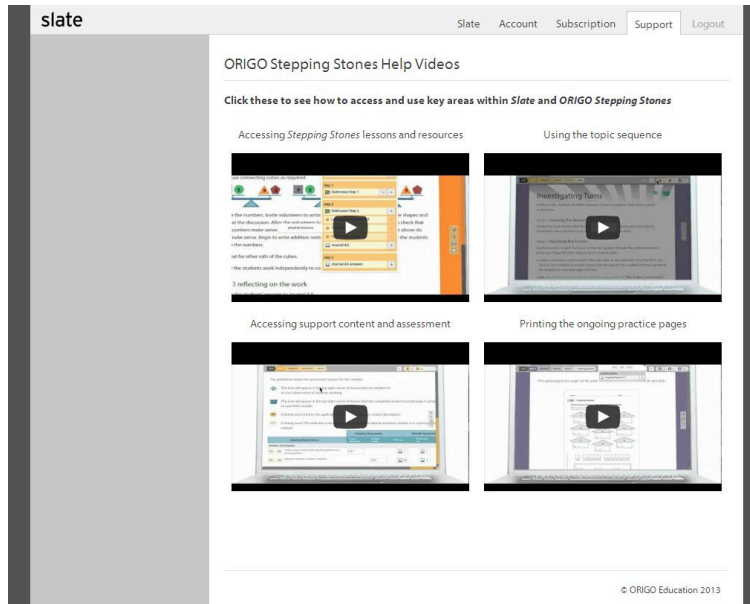
Logout tab

The Logout tab will end your Slate session and return you to the login page.

Advanced User Management Instructions
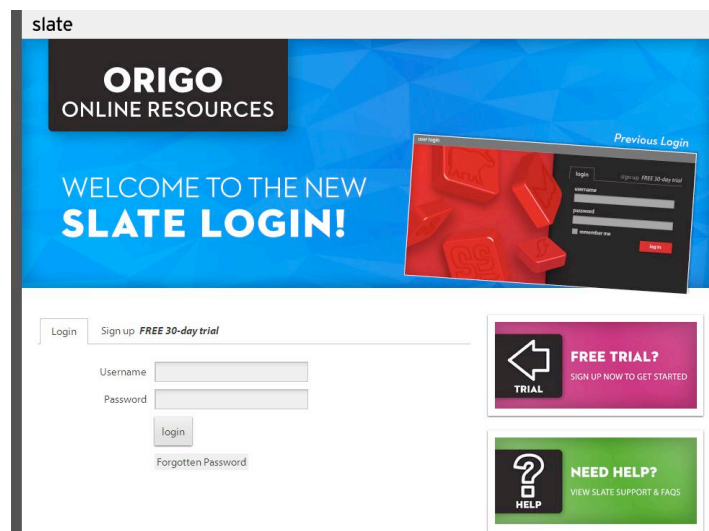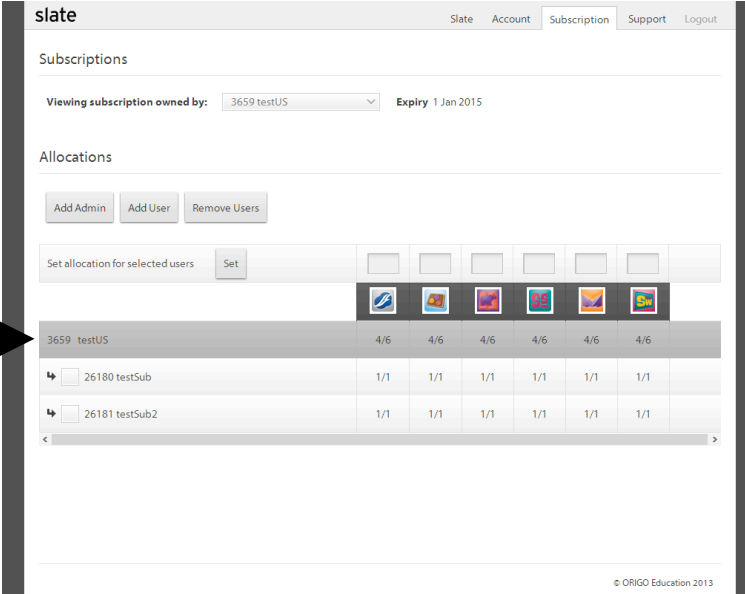
Subscription page details

Viewing Subscriptions portion of the page allows subscription information to be viewed that is assigned to a particular user and the owner of those licenses. The dropdown area will provide all of the Admins that have a license assigned to a particular user. The expiry date is specific to the licenses you are viewing**.**

Allocations portion of the page shows the licenses available for assignment and any users that have been assigned a license from the Admin.

For instance, a user may have 6 licenses but has assigned 1 to each of 2 sub-accounts as in the example below:

This test user has 4 left to assign of the 6 originally allocated as the Admin for the licenses.

Assigning licenses to a user

It is a 3-step process to assign licenses: *Create the Slate user*, *Connect the User (child) to the Admin (parent)*, and *Allocate the license*.

Step 1 - Create the Slate user

The destination users must already exist before a license can be assigned. This is accomplished for new users through the *Account Tab*, reference the instructions provided previously in the document. **If the user already exists in the Slate system, you must have that Slate username in order to assign that user a license.**

Step 2 - Connect the user to the admin

This is accomplished through the *Allocations* portion in the *Subscription Tab***.**

Add Admin Button allows the addition of users that will have multiple single product licenses assigned to them – an additional layer of parent/child – from which those will be further assigned to another layer of users. The child in this case must be an account user (email address username).

Add User Button allows the addition of users that will have a single product license assigned. The selection of the button provides a list of 'possible' users for an Admin and allows the Admin to select from the list or add a different username. The child in this case may be either an account user (email username) or a sub-account (generic username)
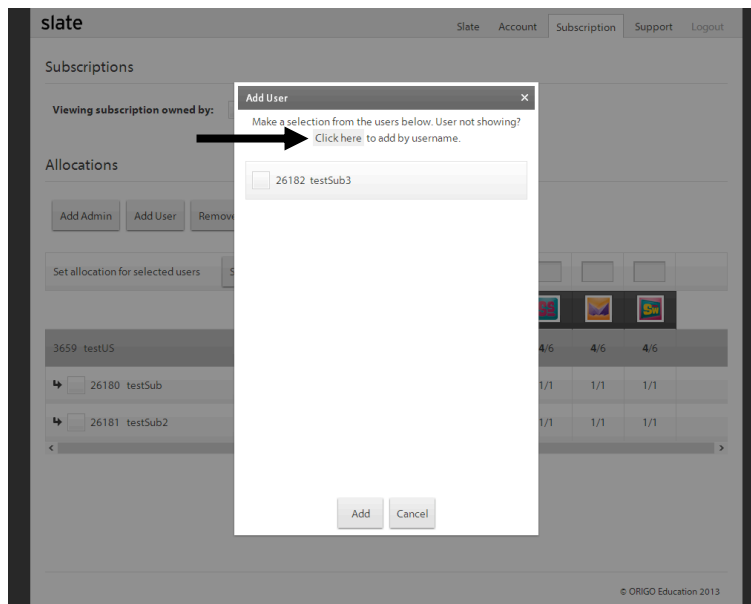
Delete User Button returns licenses back to the Admin and removes the user from the Admin license allocation list. **It does not delete the user from the Slate system.**

Note: User has been removed and the license returned to owner's spare license.

Step 3 - Allocate the license

As the owner of several licenses, an Admin (parent) has the ability to assign/allocate them to other specific users or to generic users (children). **Once users have been connected to the Admin (parent), licenses can be re-allocated to those users (child).** Select the appropriate users and indicate above each resource icon, the number of licenses that user should receive and choose the '*Set*' button.

The resulting allocation will be completed.