# Task 7 – User Management Setup Guide

# Step 1: Determine the Import Method

• For small orgs, use Admin > User Management > Add Agent or Requester.

• For large orgs, prepare a CSV with fields: Name, Email, Department, Location.

• Configure Directory Sync for Azure AD, Google Workspace, or LDAP if available.

• Enable Single Sign-On (SSO) and disable password login for security.

# Step 2: Assign Roles Thoughtfully

• Use or create roles (Agent, Supervisor, Admin, Custom).

• Define access scopes: tickets, admin, workflows, reports, etc.

• Apply the principle of least privilege for Admin roles.

# Step 3: Create and Structure Groups

• Create groups for each function: IT, HR, Facilities, etc.

• Assign Group Managers to escalate, approve, and monitor.

# Step 4: Define Departments and Locations

• Use Admin > Departments and Locations.

• Assign metadata for filtering, reporting, and automation.

# Best Practices

• Test with a few users per role before full rollout.

• Use dummy test users to simulate routing and automation.

• Document your user-role matrix and group-to-department alignment.