



# Quick Setup Guide

Self Registration (v2.11.02)

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*(This document was last revised on October 5, 2020)*

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## Self Registration – Initial Set up

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**Overview:** This document outlines the set up process to enable Self Registration within the Admin Tools. It also includes an overview of the Self Registration process for end-users who will use this functionality to create an account in iTacit.

Before Self Registration can be activated in the Admin Tools, your iTacit Representative must first complete set up in the back-end. If you are unsure if this work has been completed, please contact your iTacit Representative, or iTacit Help Desk:

[helpdesk@itacit.com](mailto:helpdesk@itacit.com)

1-855-246-5196, Option 1

# Admin Tools: How to setup Self Registration Notifications, Roles, and Business Units

**Objective:** This section is a quick reference guide on how set up Self Registration in the Admin Tools.

Once initial set up of Self Registration has been completed by your iTacit Representative, System Admins can access their Admin Tools to configure the required supporting elements:

- Self Registration Notification Recipient Groups – to alert named users or specific roles when someone has completed Self Registration and has created an account, to welcome the new user once they have Self Registered, etc.
- Roles – to designate specific roles that Self Registrants can choose from when creating their account
- Business Unit Configuration – to allow new users to Self Register within select Business Units

## SELF REGISTRATION NOTIFICATION RECIPIENT GROUPS

To create Self Registration Notification Recipient Groups, access your Admin Tools and select **Menu > Configuration > Organizational Structure – Self Reg. Notification Recipient Groups**

- From here, select the **New** button in the upper right-hand corner.
- Enter the desired **Name** for this group, and select **Apply**.
- Add in desired recipients using the **Permissions** dropdown menus on the left-hand side of the screen. You can choose from an existing Group, Business Unit, Job Classification, Role, or make your selection based on specific employee(s).

The screenshot shows the 'Self Registration Notification Recipient Group' configuration page. At the top, there's a navigation bar with 'Menu', 'Home', and 'Self Registration Notification Recipient Groups'. Below this, the group name is 'Sunshine State Corp - HR Self Registration Notification Recipient Group' and it's marked as 'Active'. On the left, there's a 'Permissions' section with dropdown menus for Group, Business Unit, Job Classification, Role, and Employee. The 'Role' dropdown is currently set to 'Human Resources Coordinator, Sunshine State Corporation (SS-C)'. In the center, there's a table titled 'Who will receive this notification?' with columns for 'Who does this include?'. The table lists 'Human Resources Coordinator, Sunshine State Corporation (SS-C)' and 'Sunshine State Corporation'. At the bottom, there's a section for 'Who can edit this permission?' and 'Who does this include?' with user profiles for 'Bradley, Milo' and 'Titusville - Sunshine State Corporation'.

- Once your selection has been made, select **Add** to confirm.
- To see which users will be included, select **Who does this include?**
- Select **Apply** to save your changes, and **Done** to close the tab.
- Repeat this process for as many Self Registration Notification Recipient Groups as needed.

Now that your Self Registration Notification Recipient Group has been created, you can enable Self Registration on desired roles.

## ROLES

To allow Self Registration on specific roles, go to **Menu > Configuration > Organizational Structure – Roles**

- Search for the desired role, select the checkbox to the left of the role to highlight it, and select **Edit**.
- Select the **Allow new users to self register in this role** checkbox.

The screenshot displays the 'Role' configuration interface. At the top, there are tabs for 'Menu', 'Home', 'Roles', and 'Role'. Below the tabs, there are navigation buttons: 'English', 'New', 'Delete', 'Apply', and 'Done'. The main form contains the following fields:

- \*Job Classification: Sales Consultant
- \*Name: Sales Consultant
- \*Business Unit: Ft. Lauderdale (SS-FL)
- Report To: Sales Manager
- Active: ☒
- Allow new users to self register in this role: ☒
- Role will display as: Sales Consultant, Ft. Lauderdale (SS-FL)

Below the form, there is a diagram showing the role 'Sales Consultant, Ft. Lauderdale (SS-FL)' reporting to 'Sales Manager, Ft. Lauderdale (SS-FL)'. The diagram includes a box for the role and a box for the manager, with an arrow indicating the reporting relationship. The manager box also includes a 'Manager' label.

- Select **Apply** to save your changes, and **Done** to close the tab.
- Repeat this process for as many roles as needed.

Now that the applicable roles have been configured to be used in Self Registration, you can apply both the Notification Recipient Groups, and Roles, to the Business Units you wish to allow Self Registrants to choose from when creating their account.

## BUSINESS UNITS

To enable Self Registration on a Business Unit, navigate to **Menu > Configuration > Organizational Structure - Business Unit**.

- Search for the desired Business Unit, and select the Business Unit to open its details.
- Select the **Self Registration** tab.
- Select the **Allow new users to self register in this business unit** checkbox.

- Enter the desired display name for the Business Unit. This is what the Self Registrant will see when they choose their location.
- In the section below, select the **New** button to add in the Roles enabled for Self Registration.

The screenshot shows the 'Business Units' management screen. On the left, a list of business units includes 'Four Village Health (FVH)', 'Trail Industries (VI)', 'Sunshine State Corporation (SS-C)' (highlighted), 'Ft. Lauderdale (SS-FL)', and 'Orange Isle (SS-OI)'. On the right, the 'Self Registration' tab is selected, displaying a 'New' button and a table of notifications.

The following notifications will be sent when a user self registers in this business unit.		
Subject	Message	Notification sent to
New Self-Registrant at SSCI	Check for the newest addition to SSCI	Specified recipients
Welcome!	Welcome to SSCI!	The user self registering

- Below the role section, select the **New** button to add in desired notifications.

The screenshot shows the 'Self Registration Notification' configuration window. The 'Specified Recipients' checkbox is checked, and the 'Recipient Group' is set to 'Self Registration Notification for Sunshine State Corporation'. The window also shows the subject and message fields, and a list of recipients.

\*Subject: New Self-Registrant at SSCI  
 \*Message: Check for the newest addition to SSCI

Notification sent to: ☐ The user who is self registering  
☒ Specified Recipients:

Recipient Group: Self Registration Notification for Sunshine State Corporation

Who will receive this notification?  
 Bradley, Milo  
 Titusville ~ Sunshine State Corporation

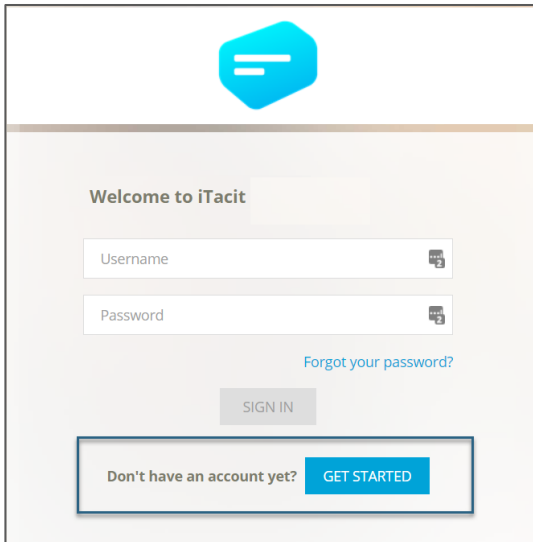
- You can set up notifications to be delivered to **The user who is self registering** and/or **Specified Recipients** by selecting the desired checkbox. When choosing **Specified Recipients**, select the dropdown menu to choose the Self Registration Notification Recipient Group(s) created earlier.
- Once your notification has been configured, select **Apply** and **X** to close the window.
- From here, select **Apply** to save all changes, and **Done** to close the tab.

## iTacit 2.0 - Self Registration Process

Now that the necessary configurations have been set up in your Admin Tools, Self Registration is ready to go!

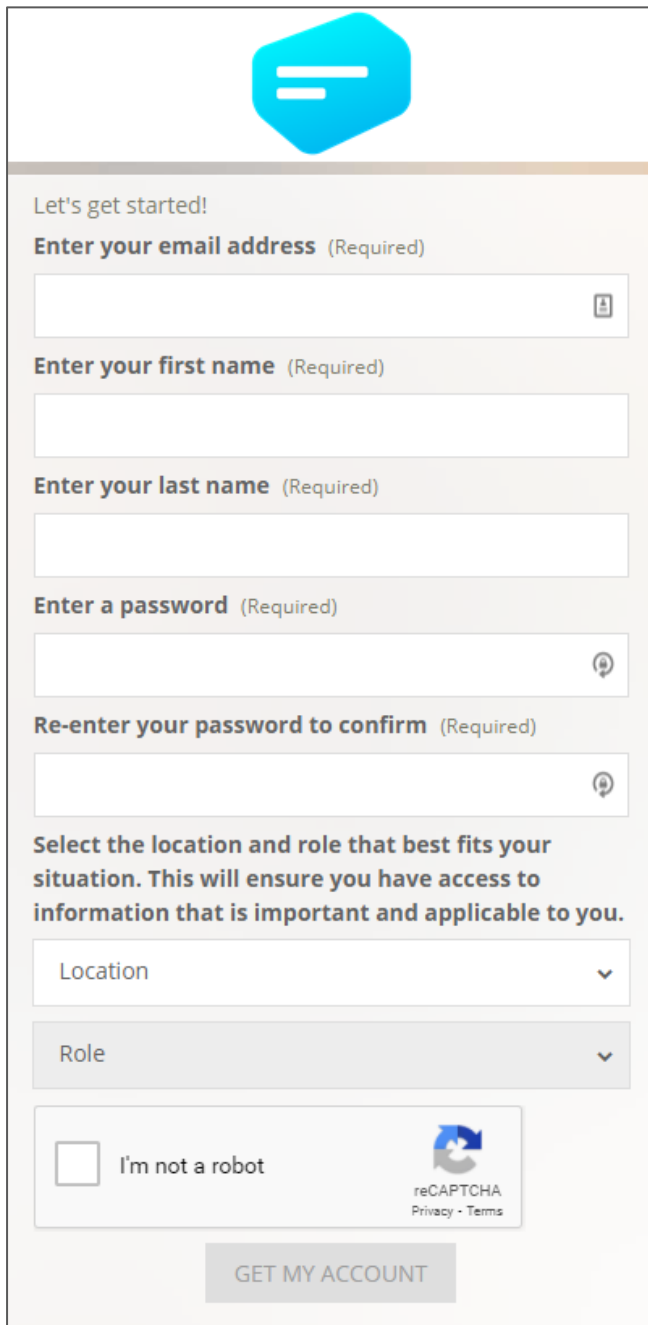
To create an account via Self Registration:

- Navigate to ***yourcompanydomain.itacit.com***.

The screenshot shows the iTacit login and registration interface. At the top is the iTacit logo, a blue hexagon with a white equals sign. Below the logo is a light gray box containing the text "Welcome to iTacit". Underneath this are two input fields: "Username" and "Password", each with a small icon to its right. Below the password field is a link that says "Forgot your password?". Below the link is a gray button labeled "SIGN IN". At the bottom of the box is a registration section with the text "Don't have an account yet?" followed by a blue button labeled "GET STARTED".

- Select the **Get Started** button below the Username and Password fields.
- The **Let's Get Started** screen will display, prompting the Self Registrant to enter the following information:





Let's get started!

**Enter your email address** (Required)

**Enter your first name** (Required)

**Enter your last name** (Required)

**Enter a password** (Required)

**Re-enter your password to confirm** (Required)

Select the location and role that best fits your situation. This will ensure you have access to information that is important and applicable to you.

Location

Role

☐ I'm not a robot

reCAPTCHA  
Privacy - Terms

GET MY ACCOUNT

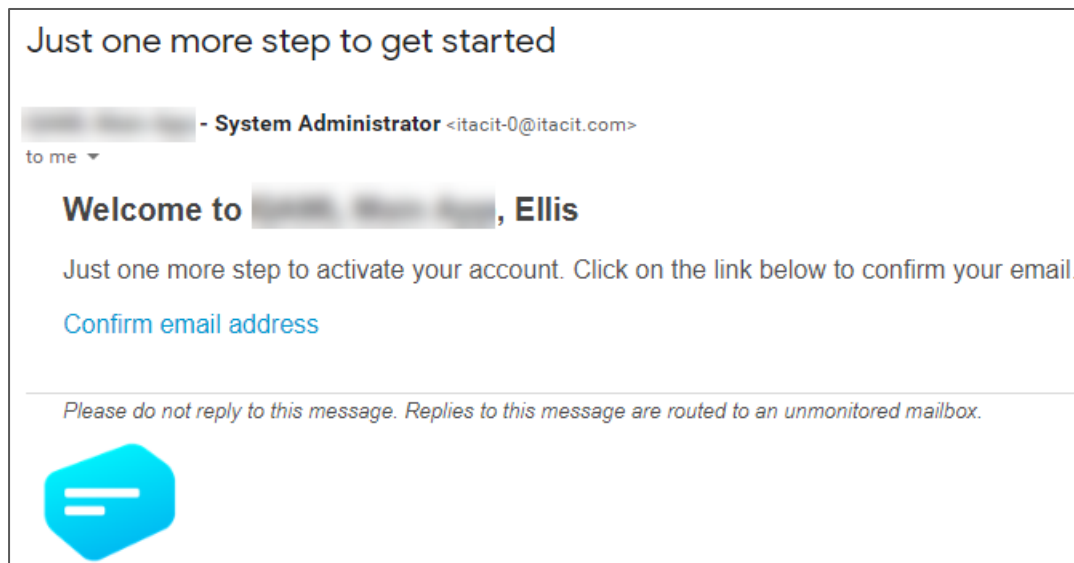
A validation email has been sent to your email address. Please click on the link in the email to validate your account.

Email did not arrive? [Click here to resend the validation email.](#)

OK

- Enter a valid email address. This will be the Self Registrant's user name.
- First Name
- Last Name
- Enter a password
- Re-enter the password
- Select Location. This dropdown is populated by the Business Units configured for Self Registration.
- Select Role. This dropdown is populated by the Roles configured for Self Registration.
- Confirm you are a human by checking off 'I am not a robot'
- Select the **Get My Account** button to submit responses
- Following this, a pop up will display confirmation that an Account validation email has been sent
- The account validation email will arrive within the next several minutes. The Self Registrant may need to check their Spam or Junk folder. Alternatively, they may select **Click here to resend the validation email** if needed.

- The validation email will look similar to the below. To complete the Self Registration process, the user will select **Confirm email address** to validate the account.



- A new browser tab will open. Select the **OK** button to confirm.
- From here, the user can log in with their email address (i.e. Username) and Password.