



Quick Guide

iTacit Self-Registration

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Overview

This guide provides step-by-step instructions for enabling and configuring Self Registration within the iTacit Admin Tools. It also outlines the end-user experience when creating an account via Self Registration.

Important: Before Self-Registration can be activated in the Admin site, your iTacit Representative must complete the initial backend setup.

If you're unsure whether this has been completed, please contact iTacit Help Desk: helpdesk@itacit.com

How to set up Self Registration Notifications, Roles, and Business Units (Step-by-step)

Once the 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.

1. Notification Recipient groups

To create Self-Registration Notification Recipient Groups, access your Admin site and select **Menu > Configuration > Self Reg. Notification Recipient Groups**

- a) Select **New** (top-right corner).
- b) Enter a Group **Name** and click **Apply**.
- c) Use the **Permissions** dropdown to add recipients by:
 - Group
 - Business Unit
 - Job Classification
 - Role
 - 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 the current page title. Below the navigation bar, there's a form for creating a new group. The 'Name' field is populated with 'Sunshine State Corp - HR Self Registration Notification Recipient Group'. The 'Active' checkbox is checked. The 'Permissions' section is expanded, showing a list of permissions on the left and a list of recipients on the right. The permissions list includes 'Group (All)', 'Business Unit (All)', 'Job Classification (All)', 'Role', 'Human Resources Coordinator, Sunshine State Corporation (SS-C)', and 'Employee (All)'. The recipients list includes 'Human Resources Coordinator, Sunshine State Corporation (SS-C)' and 'Sunshine State Corporation'. There are 'Add >>' and 'Remove' buttons between the two lists. At the bottom, there are sections for 'Who can edit this permission?' and 'Who can use this permission?', both showing 'Bradley, Milo' and 'Titusville - Sunshine State Corporation'.

- d) Click **Add** to confirm.
- e) To preview included users, select **Who does this include?**
- f) Click **Apply** to save, then **Done** to close.
- g) Repeat as needed to create additional groups.

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

2. Roles

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

- Search for the desired role.
- Select the checkbox beside the role and click **Edit**.
- Enable **Allow new users to self register in this role**.

The screenshot shows the 'Roles' configuration page in a system. The breadcrumb trail at the top is 'Menu > Home > Roles > Role'. The page has a sidebar with 'Menu', 'Home', 'Roles', and 'Role' tabs. The main content area is for editing a role. The role name is 'Sales Consultant' and the business unit is 'Ft. Lauderdale (SS-FL)'. The 'Report To' is 'Sales Manager'. The 'Active' checkbox is checked. The 'Allow new users to self register in this role' checkbox is also checked. Below the role details, there is a section for 'This role can see the following:' and 'The following can see this role:'. The 'This role can see the following:' section is empty. The 'The following can see this role:' section shows a list of roles, including 'Sales Manager, Ft. Lauderdale (SS-FL)' and 'Manager'.

- Click **Apply** to save, then **Done** to close.
- Repeat for all applicable roles.

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.

3. Business Units

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

- a) Search and select the desired **Business Unit**.
- b) Open the **Self Registration** tab.
- c) Enable **Allow new users to self register in this business unit**.
- d) Enter a **Display Name** (visible to registrants).
- e) Under **Roles**, click **New** to add roles enabled for registration.

The screenshot shows the 'Self Registration' tab for a Business Unit configuration. The interface includes a top navigation bar with tabs: Details, Address & Phone, Branding, Alternate Identifiers, Roles, Self Registration (active), eCommerce, and Training Certificates. A language dropdown is set to 'English', and action buttons (New, Delete, Apply, Cancel, Done) are on the right. The main configuration area has two sections:

Self Registration Settings:

- Allow new users to self register in this business unit:** A checkbox that is checked.
- Display the business unit name as:** A text field containing 'iTacit'.

Roles:

The following roles will be available when a user is self registering in this business unit.

Role
☐ iTacit Coordinator, iTacit (DEMO)
☐ Chief Executive Officer, iTacit (DEMO)

Notifications:

The following notifications will be sent when a user self registers in this business unit.

Subject	Message	Notification sent to
☐ Welcome	Welcome to itacit	The user self registering

f) Under **Notifications**, click **New** to configure alerts:

- To the user who is self registering
- To specified recipients (select from previously created Notification Groups)

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.

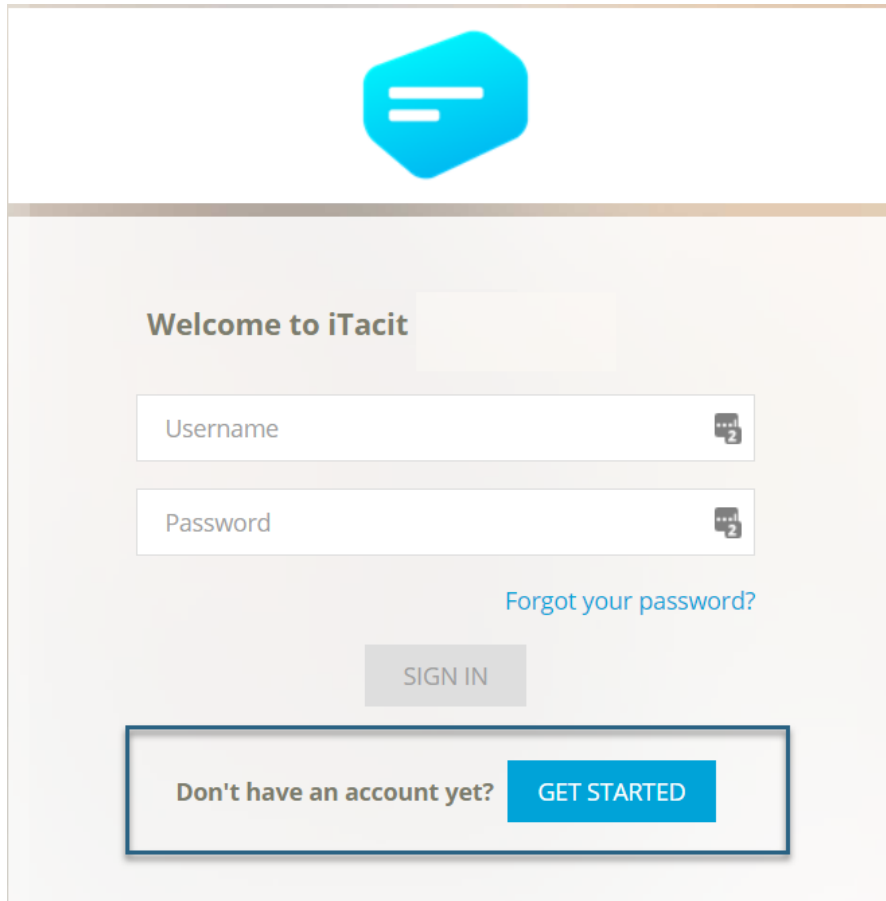
g) Click **Apply** to save, then **Done** to close.

h) Click **Apply** again to finalize changes, then **Done** to exit.

End-User Experience: Self Registration Process

Once configuration is complete, users can self-register by following these steps:

- Navigate to: *yourcompanydomain.itacit.com*
- Click **Get Started** below the login fields.

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" followed by a blurred area. Underneath are two input fields: "Username" and "Password", each with a small icon of a speech bubble and the number "2" to its right. Below the password field is a blue link that says "Forgot your password?". A gray button labeled "SIGN IN" is positioned below the link. At the bottom, there is a blue-bordered box containing the text "Don't have an account yet?" and a blue button labeled "GET STARTED".

On the **Let's Get Started** screen, enter:

- Valid Email Address (used as username)
- First Name
- Last Name
- Password and Confirm Password

- Select Location (Business Unit)
- Select Role



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 ▼

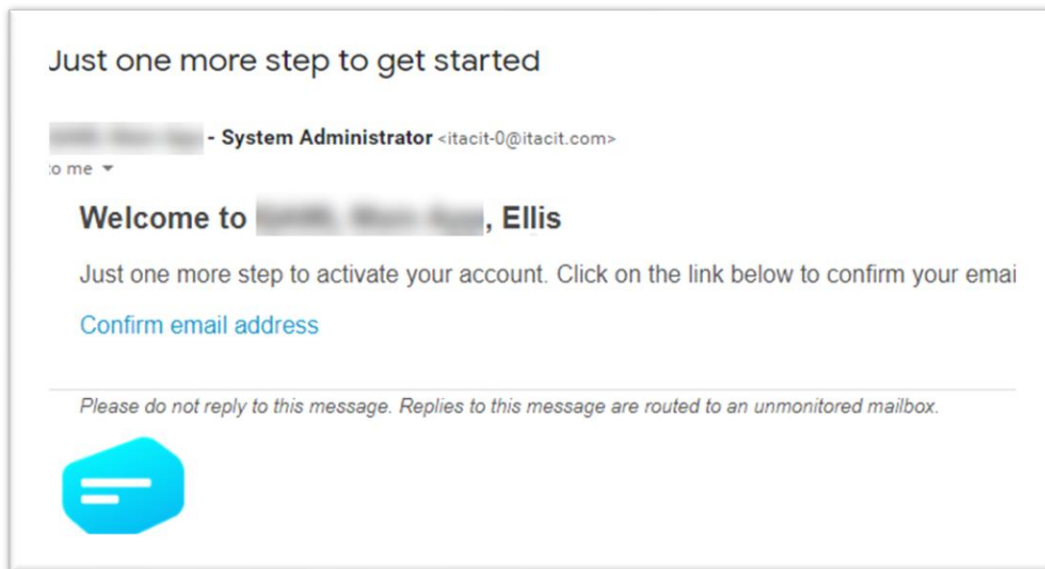
☐ I'm not a robot  reCAPTCHA
Privacy • Terms

GET MY ACCOUNT

- Confirm **I am not a robot**
- Click **Get My Account** to submit.

Email Confirmation

- A confirmation message will appear indicating that a validation email has been sent.
- Check your inbox (and Spam/Junk folders).
- If needed, click **Resend validation email**.
- Open the email and click **Confirm email address**.



- A new browser tab will open. Click **OK** to finalize.
- You may now log in using your email and password.