Members

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Managing member permissions

There are four roles which project members can have within a Rappt.IO project: **Trapper**, **Advanced trapper**, **Manager**, and **Administrator** (note that some roles were renamed in November 2021). Roles are used to grant assorted permissions to project members.

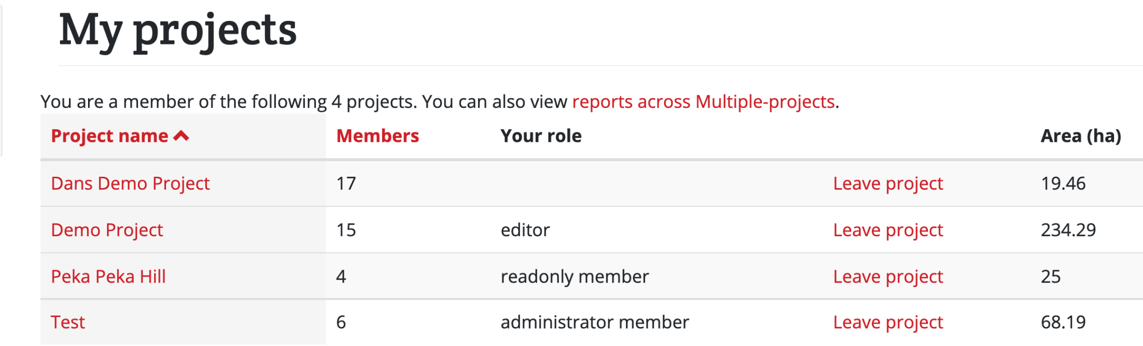
By default, all new members are assigned as **Trapper** and can be given broader permissions by an **Administrator** of the project.

Description of role permissions

- **Pre-authenticated member** This is a person who has created a Rappt.IO account but has not verified their account.
- **Trappers** (previously No role):
  - Can add new lines and installations to a project.
  - Can view, edit, and add records to installations which they've added, or have been assigned to.
- **Advanced trappers** (previously Read only):
  - Can do everything above, and also…
  - Can view any installation in the project (web only, the app displays only owned and assigned installations)
- **Managers** (previously Editor):
  - Can do everything above, and also…
  - Can edit or delete any installation in the project
  - Can add, edit, delete records from any installation in the project
  - Can run reports on the project
- **Administrators**:
  - Can do everything above, and also…
  - Can add and remove users from a project
  - Can change the role of any project member
  - Can assign members to installations
  - Can configure project specific settings (like new bait types)
  - Can edit the general information about the project (geographic area the project covers, description, contact details etc.)

How to tell what role you have in a project

- Go to the **My projects** menu. You can see your role in each of your projects.



My projects

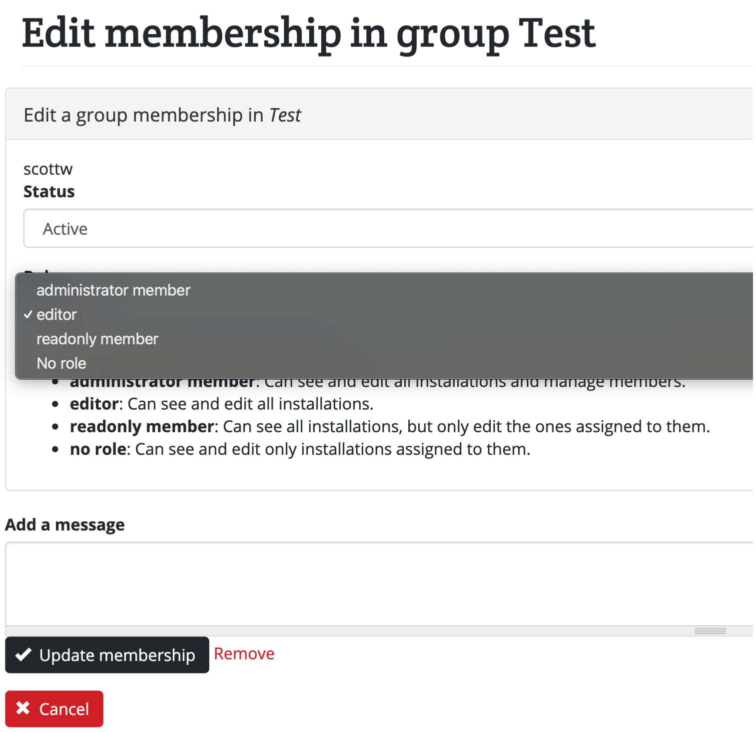
You are a member of the following 4 projects. You can also view reports across Multiple-projects.

Project name	Members	Your role		Area (ha)
Dans Demo Project	17		Leave project	19.46
Demo Project	15	editor	Leave project	234.29
Peka Peka Hill	4	readonly member	Leave project	25
Test	6	administrator member	Leave project	68.19

How to change a member's role

Changing a member's role can only be done by a project administrator.

1. Go to the My projects menu and click on the name of the project you want to manage
2. Click the "Members" tab
3. Find the person whose role you want to change and click "Edit" to the far right of their name
4. Under "Roles", select the dropdown and choose the new role you would like to assign
5. Click the "Update membership" button



Pre- Authenticated Member

What is a pre-authenticated member?

This is a person who has created a Rappt.IO account but has not verified their email account.

To verify your account you will have to access the email address you provided when creating your account and find the email from Rappt.IO, here you will find the link you will need to verify your account.

If you can’t find your Rappt.IO verification email. They are often in your spam folder.

If you still can't find the verification email or need Rappt.IO to resend it, please contact us on https://rappt.io/contact

The administration of a project will be unable to assign any installation to pre-authenticated member.

Adding and removing members

As the Administrator of a project, you are able to add, invite and remove people from the project. You can also control who is able to see and update traps.

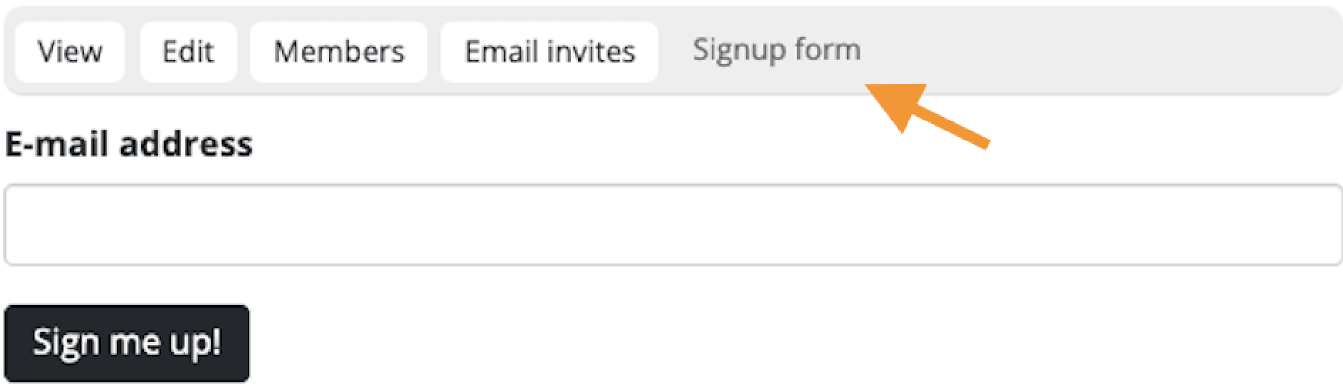
Adding new members using the Signup form

Administrators can add new and existing users to a project using the "Signup form". This allows admins to take full control of the project signup process. Useful for signup events where folks can use a provided device to join a project, for adding trappers while on the go, and for trappers who are not so tech savvy.

The form checks if the email address is already registered on Rappt.IO.

1. If they are registered, it adds the trapper to the project, sets the trapper as active, and sends a courtesy email to the trapper.
2. If they are **not** registered, it allows the administrator to register the new trapper first, then adds them to the project, sets them as active, and sends them the courtesy email.

Note - members added this way will have the basic Trapper role.



Inviting new members

Rappt.IO allows you to invite users to join a project. Adding members this way allows bulk invites, and role setting at the same time.

1. Go to My Projects and click on the name of the project you want to manage.
2. Click on the "Members" tab, then on the "Email invites" tab that appears.
3. Type the email address you want to invite into the "User email(s)" text box
   - If you want to invite more than one person, you can list multiple email addresses. You either need to put each address on its own line, or put a comma in between each address.
4. You can assign roles for these users using the "Assign roles" dropdown menu. If you're adding more than one member and they will have different roles, you can edit each person's role later.
5. Click the "Invite user(s)" button.

The invitee will receive an email with a link with an invitation to the project.

Adding somebody who has requested to join your project

A member can request to join any publicly listed project via the Find projects page. The Administrator will receive an email notifying them that somebody has requested to join their project.

1. To approve a request, go to "My projects" and click on the name of the project you want to manage.
2. Click the "Members" tab.
3. New requests will show up with as "Pending" in the Status column. If they included a message with their request it will be visible under "Message".
   - To approve their request click "Activate".
   - To refuse their request click "Revoke".

Removing members

1. Go to "My projects" and click on the name of the project you want to manage.
2. Click the "Members" tab.
3. Find the member you wish to remove
   - Clicking "Revoke" will remove them permanently from the project
   - Clicking "Deactivate" will set their status back to pending. They will no longer be able to see anything in the project, but they will remain in the list of members so they can be approved again later.?

Managing member assignments

Assign members to installations

By default, members with the **Trapper** or **Advanced trapper** role can only make changes to installations which they have added to the project. If you want someone with these roles to be able to make changes to other installations, you can assign additional installations to them:

1. Go to **My projects** and click on the name of the project you want to manage
2. Go to the **Traps**, **Bait stations** or **Monitoring** menu, then click **Manage traps**, **Manage bait stations** or **Manage stations**.
3. (optional) Use the filters to filter your installation list (e.g. filter by line by selecting the line from the Line filter), then click **Apply**
4. In the **Operations** box select **Assign members** in the dropdown
5. Select the tick boxes next to the traps you want to add members to
6. Click **Execute**
7. Click on the **Select members to assign** dropdown and choose which members you want to add to the previously selected traps
8. Click **Next** and review your changes
9. Click **Confirm**

These members will now be able to add, edit, and delete records for the selected stations (and edit the station details).

Unassign members from installations

To remove a member's access to an installation, repeat the above steps but choose **Unassign Members** at step 3.

Remember that members with **Manager** or **Administrator** roles will always have access to all stations - you cannot remove their access to particular stations.

View member assignments to installations

1. Go to **My projects** and click on the name of the project you want to manage
2. Go to the **Traps** menu, then **Manage traps**
3. At the far right of the each row in the traps table you will see a message which says **X member(s) assigned**
4. Click on the **X member(s) assigned** to see the names assigned to that trap

Assigning members to installations on a line

Only users with an "Administrator" role in a project can access these tools.

By default, members with the **Trapper** or **Advanced Trapper** role can only add records to installations which they have added to the project themselves. If you want someone with these roles to be able to add records to other installations, you can assign existing installations to them.

Before you start, make sure all the installations already belong to the line you want to work with.

The instructions below describe how to assign all the traps on a line to project members. The same instructions can be used to assign other installation types, just replace the word "trap" with the appropriate installation type.

How to assign the traps on a line to a member(s)

1. From the "My projects" page, select the project you want to manage
2. Click on the "Traps" section
3. Click on "Manage traps"
4. Select which line you want to add members to from the Line dropdown filter
5. Click the green "Apply filter" button
6. Select the checkboxes for all the traps you want to add members to. If you want to select all the traps on the line in one go, tick the checkbox at the top of the checkbox column, to the left of the "Number/Code" heading - this will select all the traps visible on the table. If you have more than one page of traps for this line, and you want to add members to them all, click the black button at the top of the table that says "Select all xx rows in this view".
7. In the "Operations" dropdown box, select "Assign members" in the dropdown
8. Click "Execute"
9. From the "Select members to assign" dropdown, choose which project members you want to add to the previously selected traps.
10. Click "Next" and review your changes
11. Click "Confirm"

These members will now be able to add, edit, and delete records for the selected traps, and edit the trap details.