

Admin Guide: The New User Login Experience

To best help you prepare and support your colleagues for the switch to our new login solution, Visma Connect, we've created this guide.

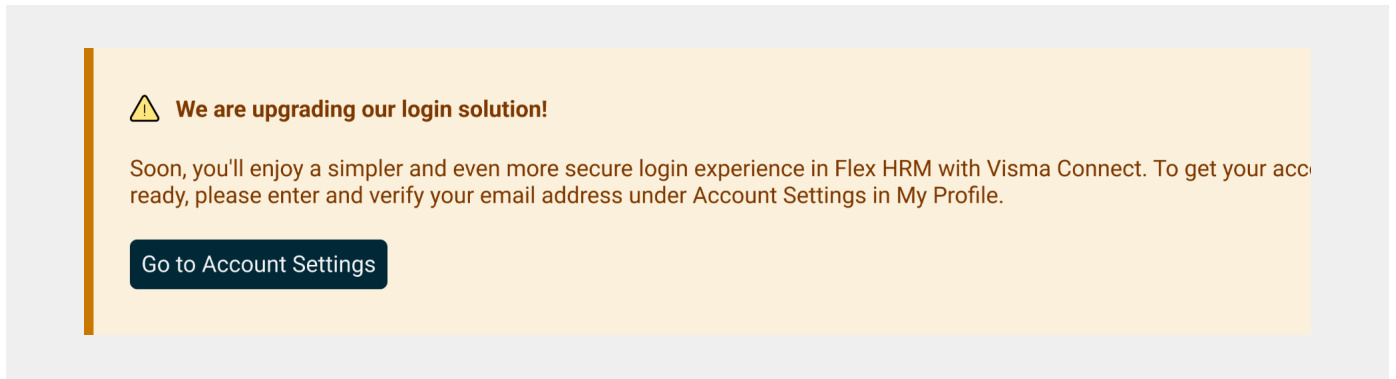
Here, we'll walk you through the entire process step-by-step, exactly as your users will experience it. The guide is split into two parts: first, a visual walkthrough of the user journey, followed by a [Frequently Asked Questions \(FAQ\) section](#).

Our goal is to ensure you feel confident with the process and can easily assist if any questions arise.

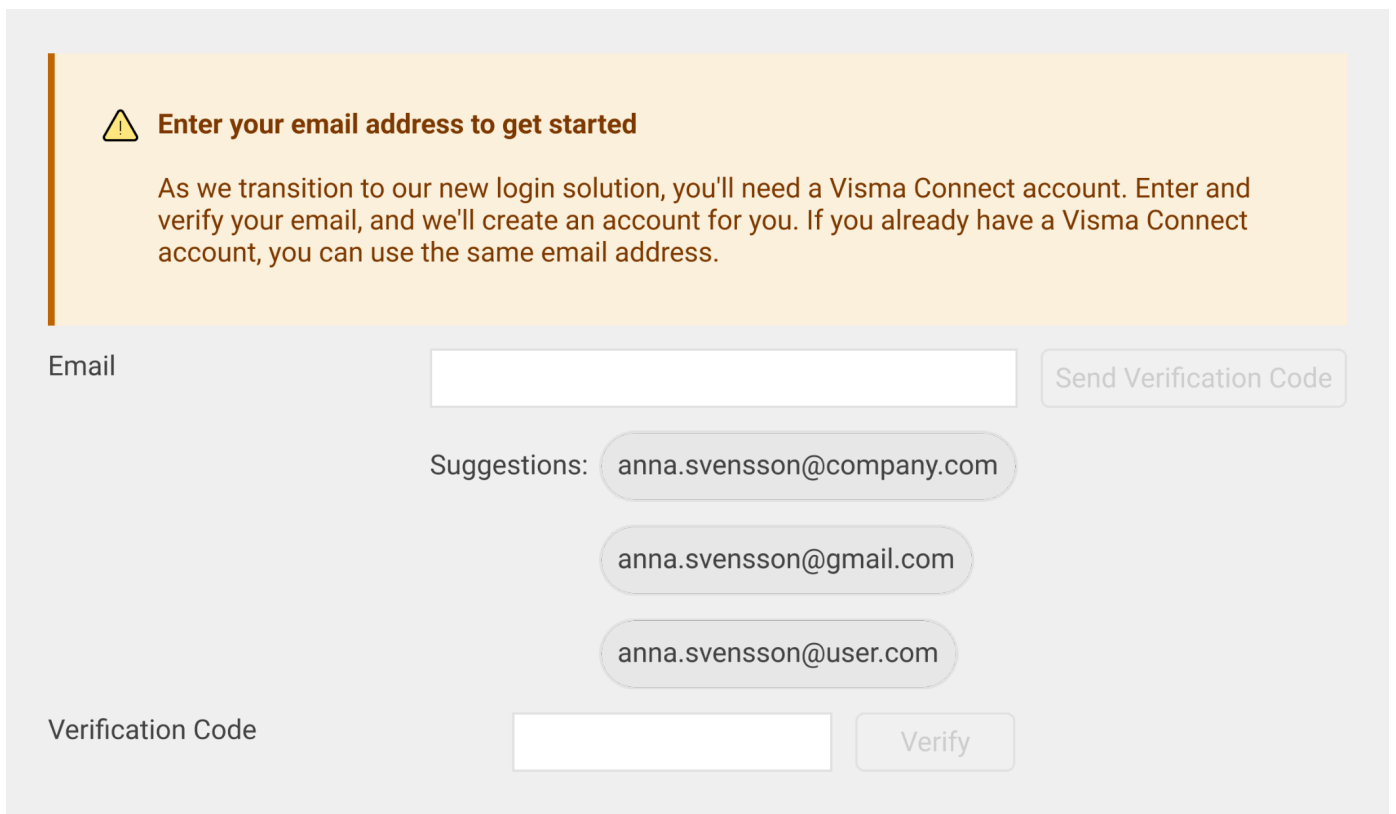
Let's begin with the user journey!

User journey (Desktop)

1. During the provisioning period, users will see a banner displayed at the top of all pages in Flex HRM until they link their user to a Visma Connect account. The banner prompts the user to prepare their account by going to Account Settings.



2. Under My Profile > Account Settings, the following banner is displayed which prompts the user to enter and verify their email address:

A screenshot of a banner in Flex HRM for entering an email address. The banner has a yellow background with a dark orange border on the left. It features a warning icon (a yellow triangle with an exclamation mark) followed by the text "Enter your email address to get started". Below this, a paragraph states: "As we transition to our new login solution, you'll need a Visma Connect account. Enter and verify your email, and we'll create an account for you. If you already have a Visma Connect account, you can use the same email address." Below the banner is a form with two main sections. The first section is labeled "Email" and contains a text input field. To the right of the input field is a button labeled "Send Verification Code". Below the input field are three suggestions, each in a rounded rectangle: "anna.svensson@company.com", "anna.svensson@gmail.com", and "anna.svensson@user.com". The second section is labeled "Verification Code" and contains a text input field. To the right of the input field is a button labeled "Verify".


3. The user can select one of the suggested email addresses or enter a different email

address. The email addresses that are suggested are those that are saved on the user or the employment with mailings activated.

The screenshot shows a web interface for email verification. At the top, a yellow banner with a warning icon contains the text: "Enter your email address to get started". Below this, a paragraph explains: "As we transition to our new login solution, you'll need a Visma Connect account. Enter and verify your email, and we'll create an account for you. If you already have a Visma Connect account, you can use the same email address." The main form has two sections. The first section, labeled "Email", features a text input field containing "anna.svensson@company.se" and a dark blue button labeled "Send Verification Code". Below the input field, under the heading "Suggestions:", there are three rounded buttons: "anna.svensson@company.com" (highlighted in blue), "anna.svensson@gmail.com", and "anna.svensson@user.com". The second section, labeled "Verification Code", has a text input field and a light gray button labeled "Verify".

4. When the user has selected or entered an email address, they can click the button to send an email with a verification code to the specified address.

Please note: If you have a verified domain under General > Security, and the email address belongs to this domain, the account will be created immediately without a verification message being sent. In such cases, steps 5 and 6 will be skipped.

 **Check your inbox**

An email has been sent to anna.svensson@company.com to verify your email address

Email

Send Verification Code

Suggestions:

anna.svensson@company.com

anna.svensson@gmail.com

anna.svensson@user.com

Verification Code

Verify

5. The user will receive the following email:



Hi Anna

We're soon updating our login solution to Visma Connect. Verifying your email address is an important step in preparing your account for this change.

Here's what to do:

- Enter the code below in Flex HRM to verify your email address.
- Once verified, a Visma Connect account will be created for you using this email address and linked to your Flex HRM user
- If you already have a Visma Connect account with this email, your existing account will instead be linked to Flex HRM.


Your verification code:

123456

The code is valid for 30 minutes.

If you don't want to verify your email address or if this message has reached you by mistake, you can simply ignore it. No action will be taken if the code isn't used.

6. The user should now go back to Account Settings in Flex HRM, enter the code in the code field and click on the "Verify" button.

 **Check your inbox**

An email has been sent to anna.svensson@company.com to verify your email address

Email

Send Verification Code

Suggestions:

anna.svensson@company.com


anna.svensson@gmail.com

anna.svensson@user.com

Verification Code

Verify

7. Now the user is connected to Visma Connect and thus fully provisioned. The user can at this stage choose to create a password for the account through Visma Connect Account Settings.

 **You're all set!**


Your user is now linked to a Visma Connect account. You won't be able to use it to log in to Flex HRM just yet, but your administrator will let you know when it's time!

If you haven't used Visma Connect before and want to be fully prepared for the transition, you can go ahead and set your password now via Visma Connect Account Settings. Just click the link below, enter your email address, and select "Forgot your password?".

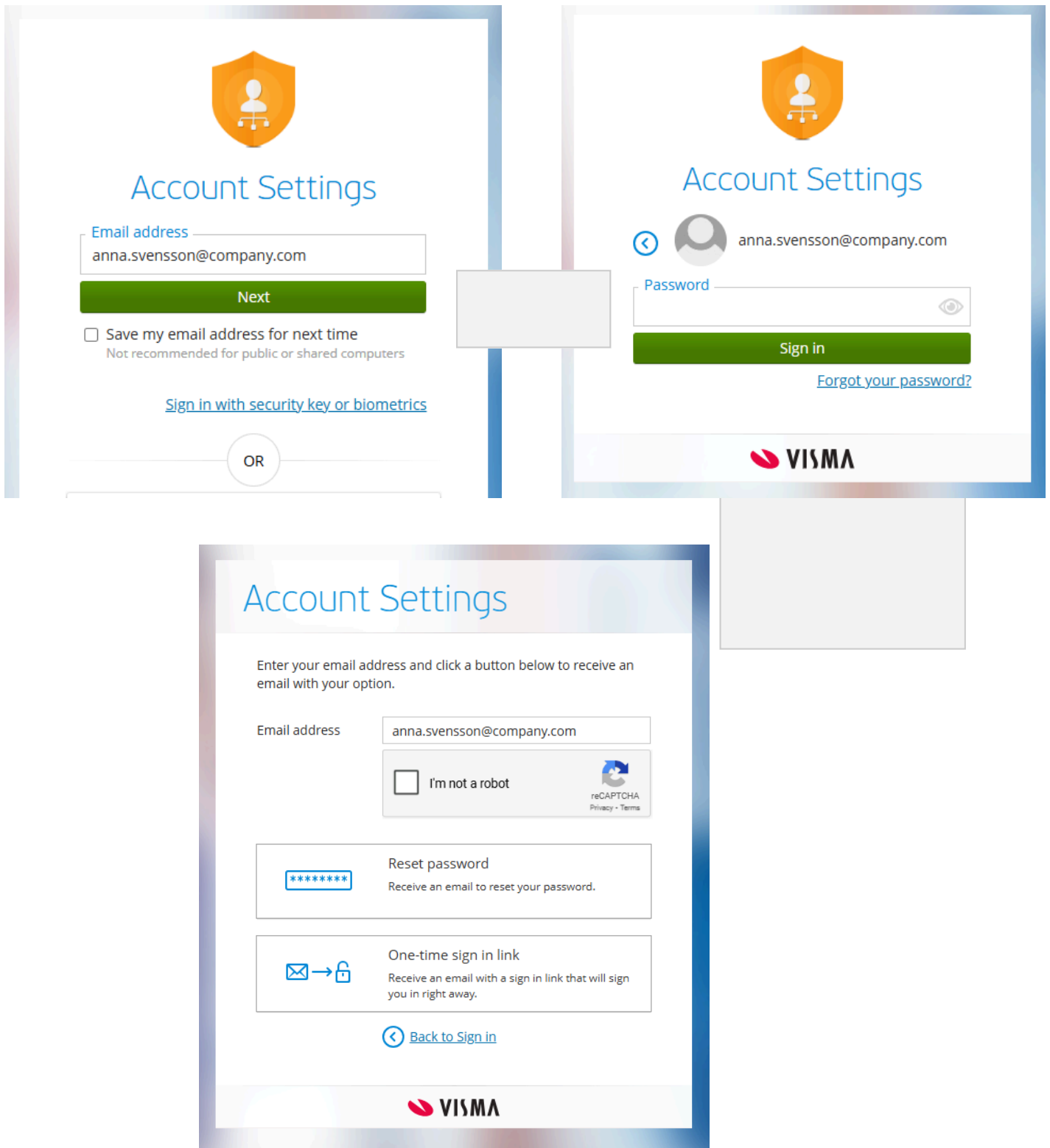
Email

anna.svensson@company.com

Manage your account

<https://accountsettings.connect.visma.com/> 

Create a password before the transition



FAQ

An employee was absent during provisioning and cannot log in now that we have switched to Visma Connect, what do we do now?

An administrator with authorization to the Users view can enter an email address and send a verification message to the user. The user will now receive a link to click on to verify their email address.

Please note: If you have a verified domain under **General > Security**, and the email address belongs to this domain, the account will be created immediately without a verification message being sent.

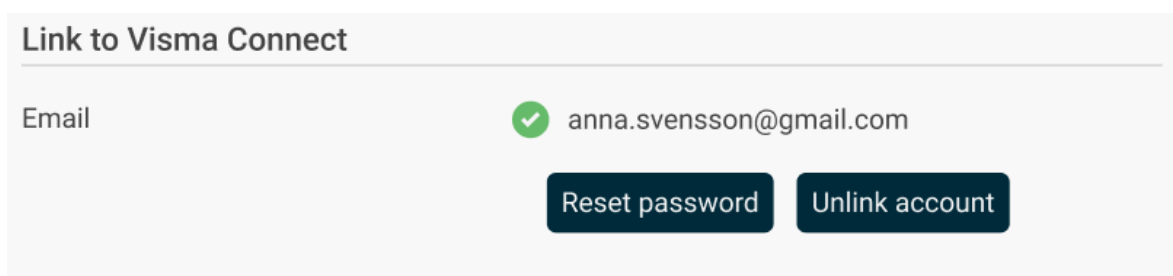
When the user has verified their email address, the user is linked to Visma Connect.

After that, the user can create a password through "Forgot your password?" on the login page.

An employee has used a private email address instead of the company's to link their HRM user to Visma Connect, how do we change it?

1. Remove the connection

An administrator with authorization to the "Users" view must first delete the current Visma Connect connection.

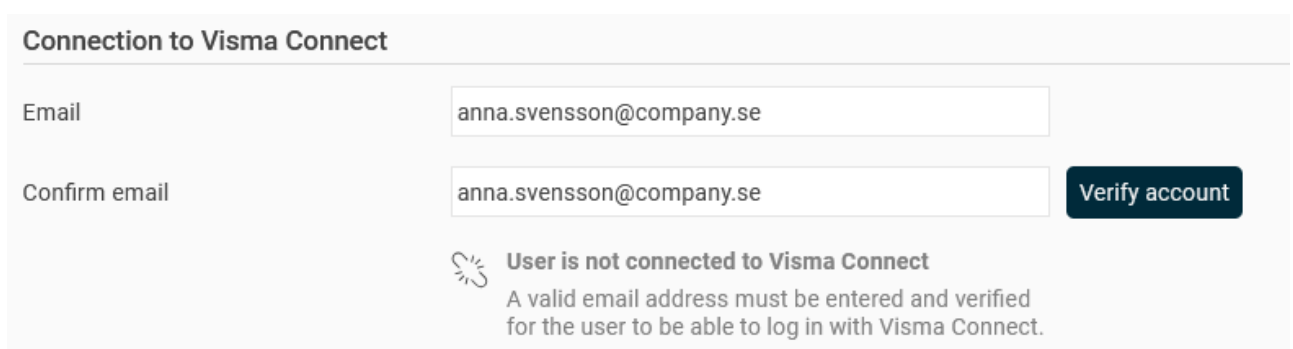


The screenshot shows a section titled "Link to Visma Connect". Below the title, there is a label "Email" followed by a green checkmark icon and the email address "anna.svensson@gmail.com". At the bottom of this section, there are two dark blue buttons: "Reset password" and "Unlink account".

2. Connect a different email address

- If you are still in the provisioning period (preparation phase), the user will again see a banner at the top of Flex HRM when the link is removed. The user can then go to My Profile > Account Settings and redo the link with the correct email address.
- If you are already using Visma Connect for login, the administrator can update the email address manually:
 - Enter the new email address for the user in the "Users" view.
 - Send a new verification email to the new address.

Please note: If you have a verified domain, and the email address belongs to this domain, the account will be created immediately without a verification message being sent. Step 3 can then be skipped.



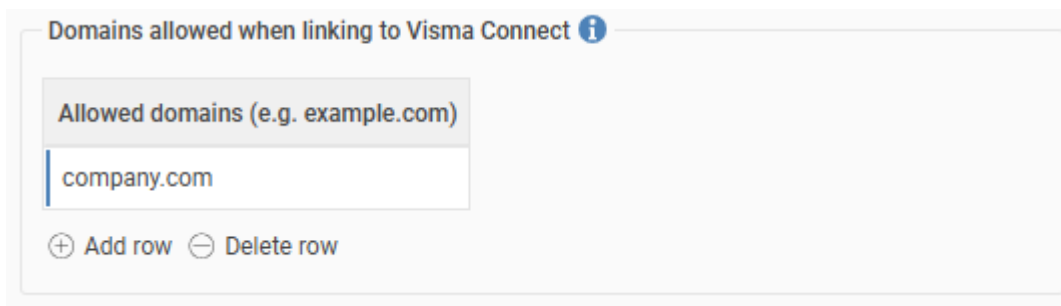
The screenshot shows a section titled "Connection to Visma Connect". Below the title, there are two input fields. The first is labeled "Email" and contains the text "anna.svensson@company.se". The second is labeled "Confirm email" and also contains "anna.svensson@company.se". To the right of the "Confirm email" field is a dark blue button labeled "Verify account". Below the input fields, there is a warning icon (a lightning bolt in a circle) followed by the text "User is not connected to Visma Connect" and "A valid email address must be entered and verified for the user to be able to log in with Visma Connect."

3. Complete the connection

The user clicks on the link in the verification email to confirm the email address.

We want all employees to use only their email addresses ending with '@company.com' when connecting their HRM user to Visma Connect. How can we enforce this restriction?

You can find a new section for specifying allowed domains for connecting to Visma Connect by navigating to the General > Security page. This is where you can list the domains you wish to permit.

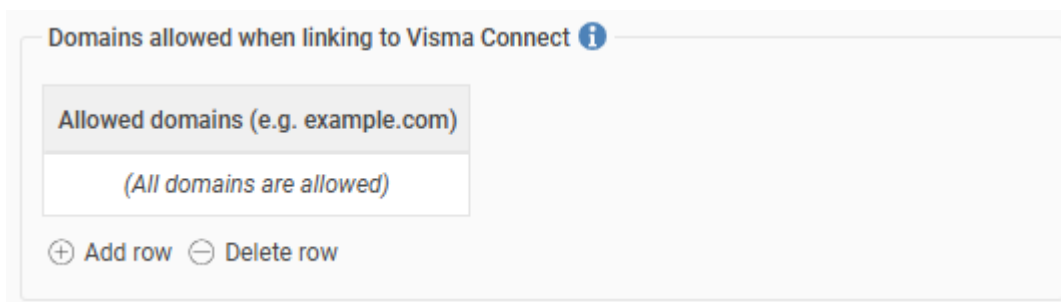


Domains allowed when linking to Visma Connect ?

Allowed domains (e.g. example.com)
company.com

+ Add row - Delete row

It's crucial to configure the allowed domains before the preparation phase begins, as this setting will not affect users who are already connected. If no domains are specified, all domains will be allowed during email verification and, consequently, the connection to Visma Connect.



Domains allowed when linking to Visma Connect ?

Allowed domains (e.g. example.com)
(All domains are allowed)

+ Add row - Delete row

We want to be able to import and export email addresses. Is this possible?

Yes, it is!

The field "Email Visma Connect" is now available to choose in import and export templates of type "Employees/users". If an invalid email address is entered, the field will not be updated.

Note that it is only possible to import emails for users not linked to Visma Connect.