Administrator guide

For system administrators and HR advisors who govern Attest for their organization. Read the User guide first: it explains the staffing workflow these tools support.

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Roles and what administrators do

ROLE	CAN SEE	CAN DO
Hiring manager	Files they own or that are shared with them	Run their staffing processes; share their files
HR advisor	Every file	Work in any file; assign or transfer file owners
System administrator	Every file and the Admin area	Approve SOMCs, guides and custom wording; manage users, criteria, the Q+A catalogue, letters and records retention

Attest roles

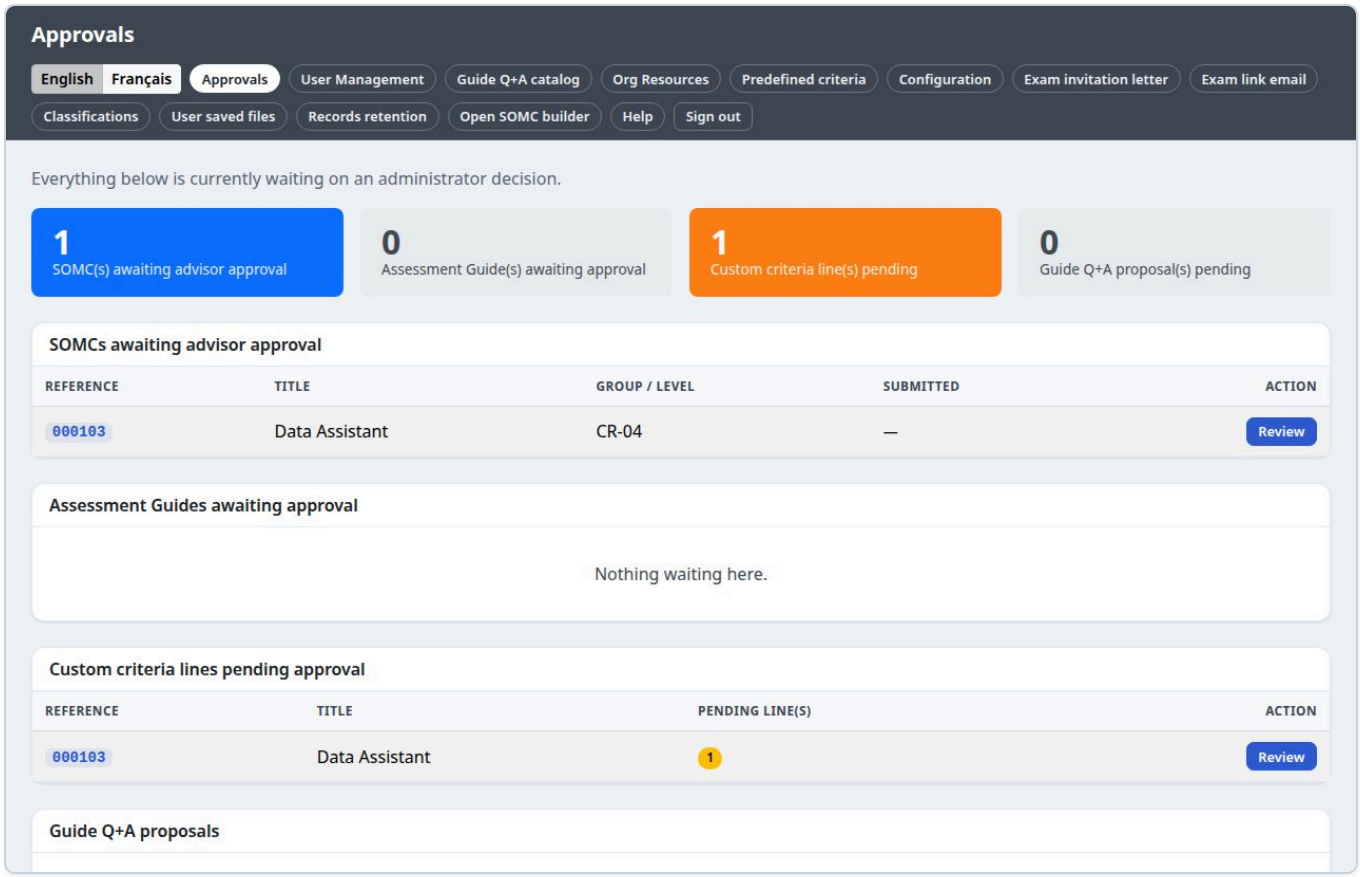
The **Admin** button in the header opens the Admin area. Its menu gives access to every page described below. The Help link is always in the header.

Signing in as an administrator

- When single sign-on is set up, staff sign in with their organization account. By default, password sign-in then remains available only to system administrators, as an emergency (“break-glass”) access. Keep at least one administrator account with a strong password.
- With single sign-on, a person can use Attest only if an administrator has created their account (same email), unless IT has configured automatic roles from identity-provider groups.
- Administrators are signed out after inactivity like everyone else.

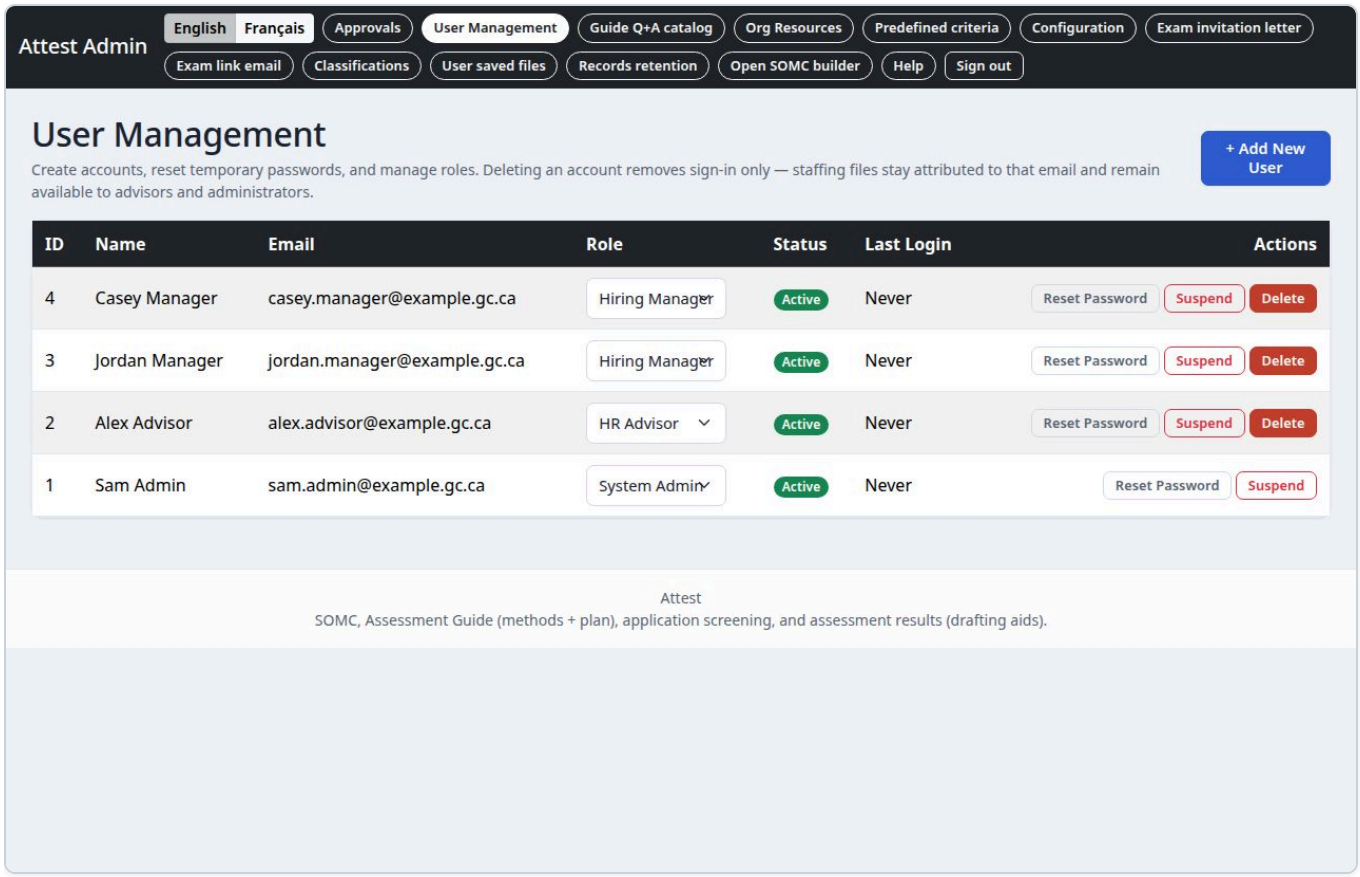
Approvals

Approvals lists everything waiting on an administrator: SOMCs and Assessment Guides awaiting approval, custom criteria lines and proposed Q+A entries.



1. Choose **Review** to open a file. The review page shows the criteria, the custom lines and the file's activity log (who changed what, and when).
2. Approve or reject each custom criterion line. Rejected lines need a comment; approved wording can be added to the predefined criteria.
3. Approve the SOMC or request changes with a comment. Do the same for the Assessment Guide. Screening and assessments open for users only when both are approved.
4. An approved SOMC is locked for users. Return it to draft if it must change.

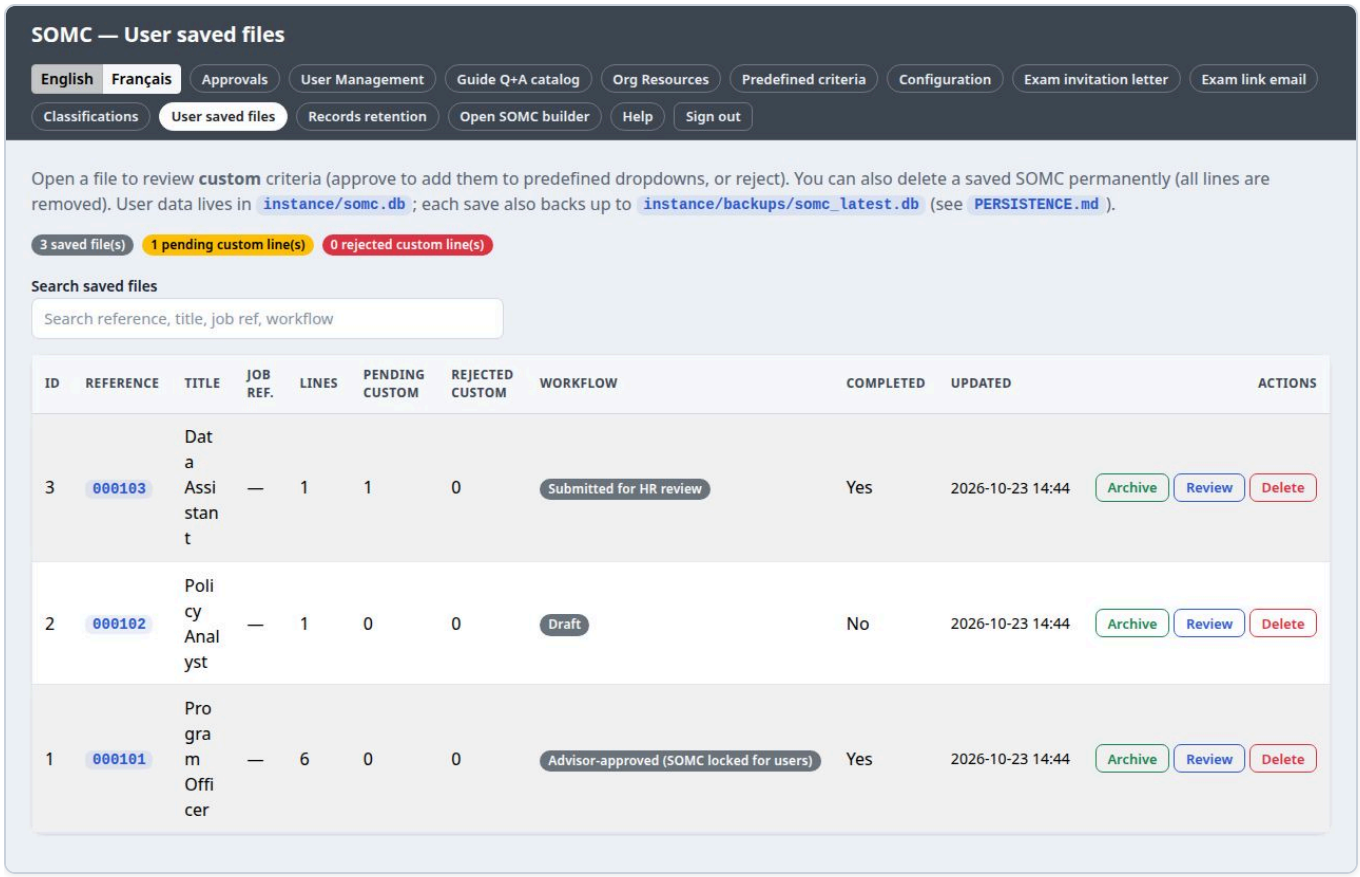
User management



- **Add New User**: name, Government of Canada email, role and a temporary password. Share the password securely; the person must choose their own at first sign-in. With single sign-on, the password is only a fallback.
- **Change role** from the role list on the user's row.
- **Reset password** sets a new temporary password.
- **Suspend** blocks sign-in immediately without removing anything; **Unsuspend** undoes it. Prefer suspension when someone leaves.
- **Delete account** removes the account but keeps their staffing files. Assign those files to a new owner (see below).

Files, owners and sharing

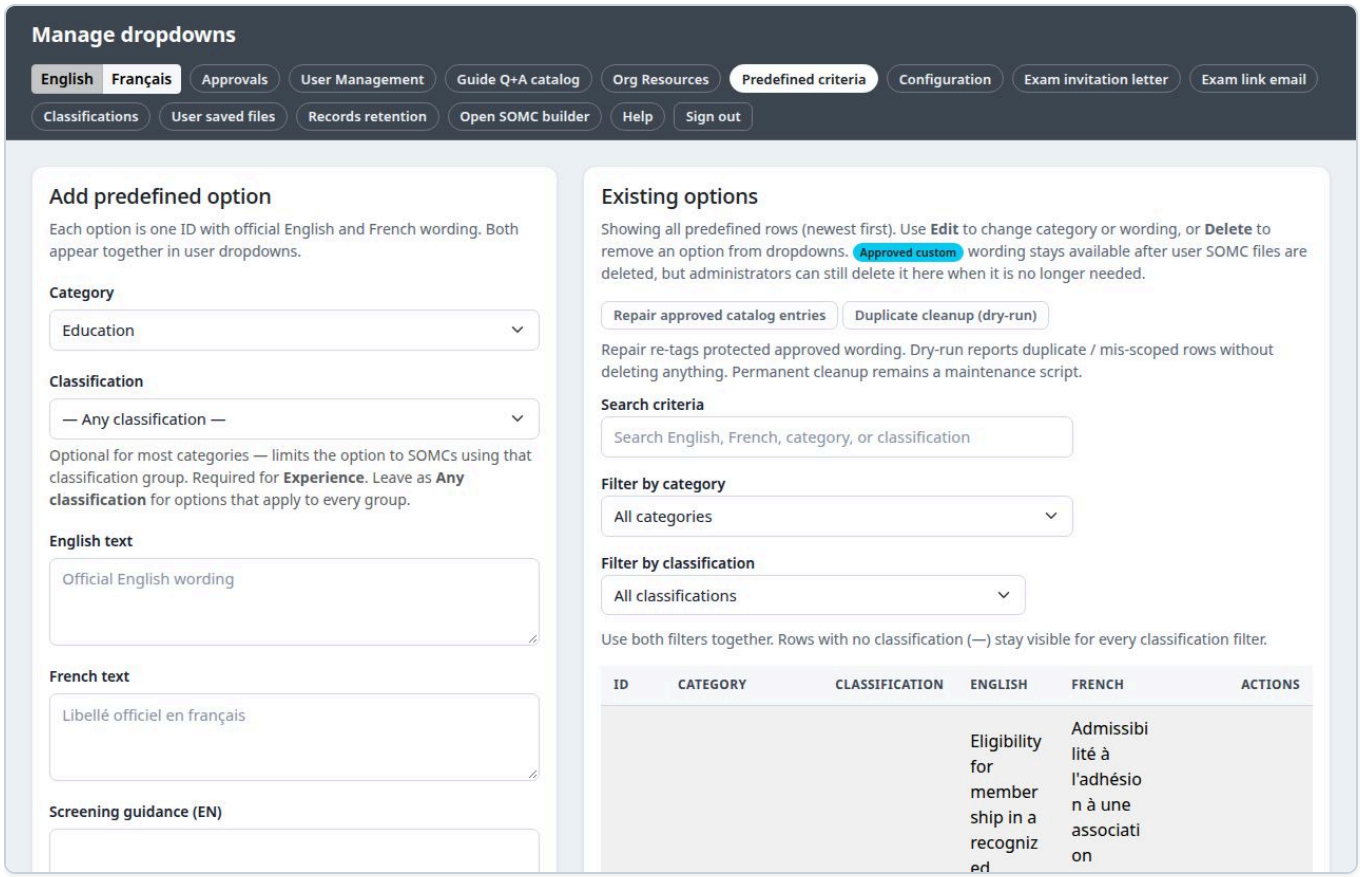
User saved files (Saved SOMCs) finds any file in the system by number, title, job reference or workflow status.



- Each file has one owner and any number of collaborators. To assign or transfer the owner, open the file's dashboard, choose **Share with colleagues** and use **Assign owner** (HR advisors and administrators only). The new owner must have an active Attest account. You can keep the previous owner as a collaborator. Every change is recorded in the file's activity log.
- A file without an owner (for example one created before ownership was tracked) is visible only to HR advisors and administrators until an owner is assigned.
- Owners cannot delete a file that has applicants; it must be closed instead. Administrators can delete files, but should normally rely on closure and records retention.

Predefined criteria

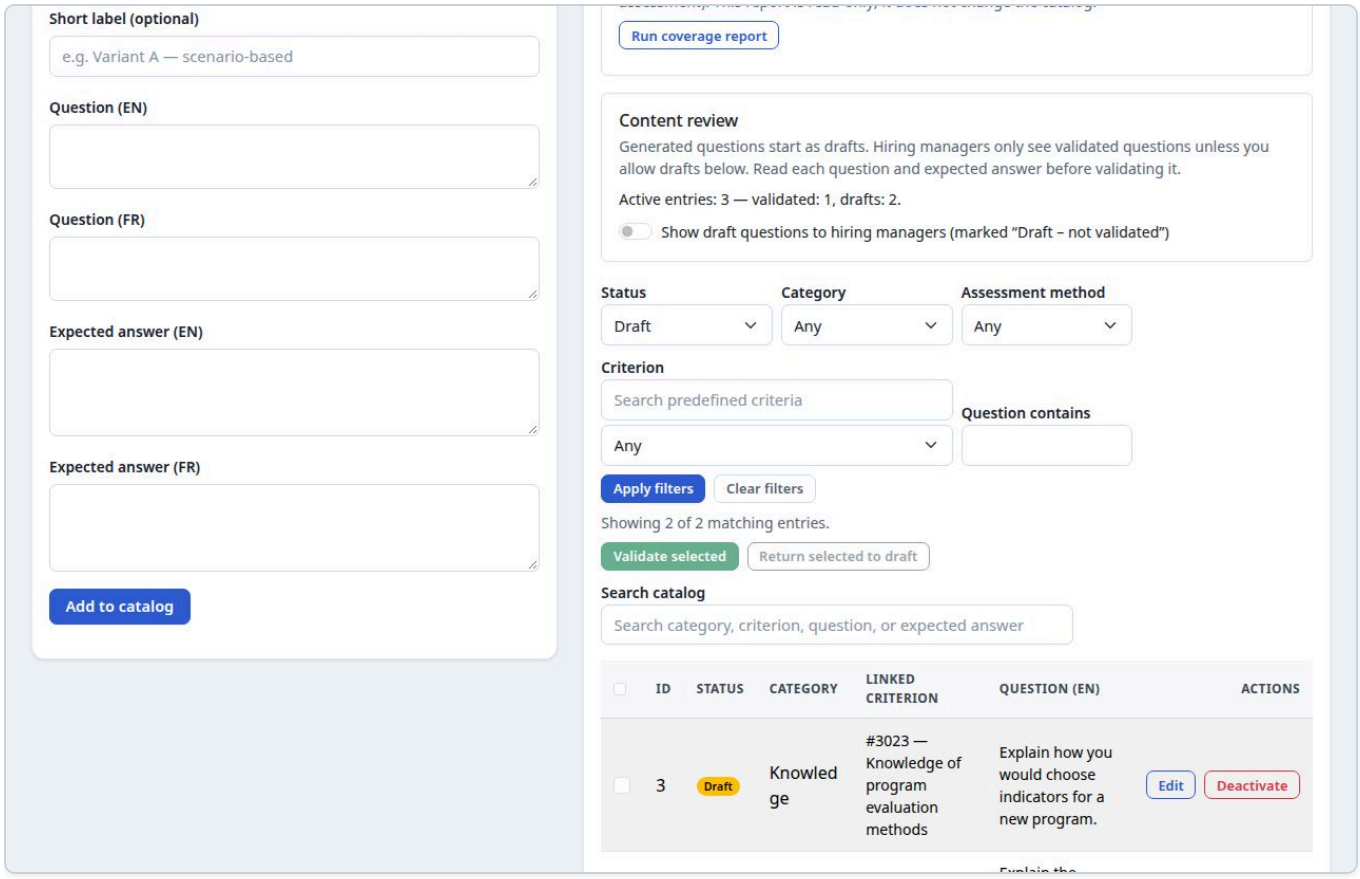
Manage dropdowns maintains the predefined criteria offered in the SOMC Builder. Each option has official English and French wording, a category and, optionally, the occupational groups it applies to.



- Add, edit or remove options. Removing an option does not change files that already use it.
- Experience options must be tied to an occupational group.

Q+A catalogue and content review

The **Q+A catalogue** holds the questions and expected answers suggested to users in the Assessment Guide, linked to predefined criteria and assessment methods.



Drafts and validated questions

Questions that were generated or imported start as **drafts**. Users see only **validated** questions, unless you turn on **Show draft questions to hiring managers**, in which case drafts appear marked "[Draft – not validated]". Questions an administrator writes or approves are validated automatically.

1. Filter by status **Draft**, and by category, assessment method, criterion or text.
2. Read each question and expected answer. Edit or deactivate any that are not suitable.
3. Select the ones you approve and choose **Validate selected**. With a criterion selected in the filter, **Validate all drafts for this criterion** validates every draft for that criterion (and method, if filtered). Use it only after reviewing them.
4. **Return selected to draft** withdraws questions from users.

Other tools

- **Add Q+A entry** on the left creates a validated question directly.
- **Export JSON / Import JSON** back up or move the catalogue. Imported questions keep their status; questions not marked validated in the file arrive as drafts.
- **Run coverage report** shows which criteria and methods have too few questions.

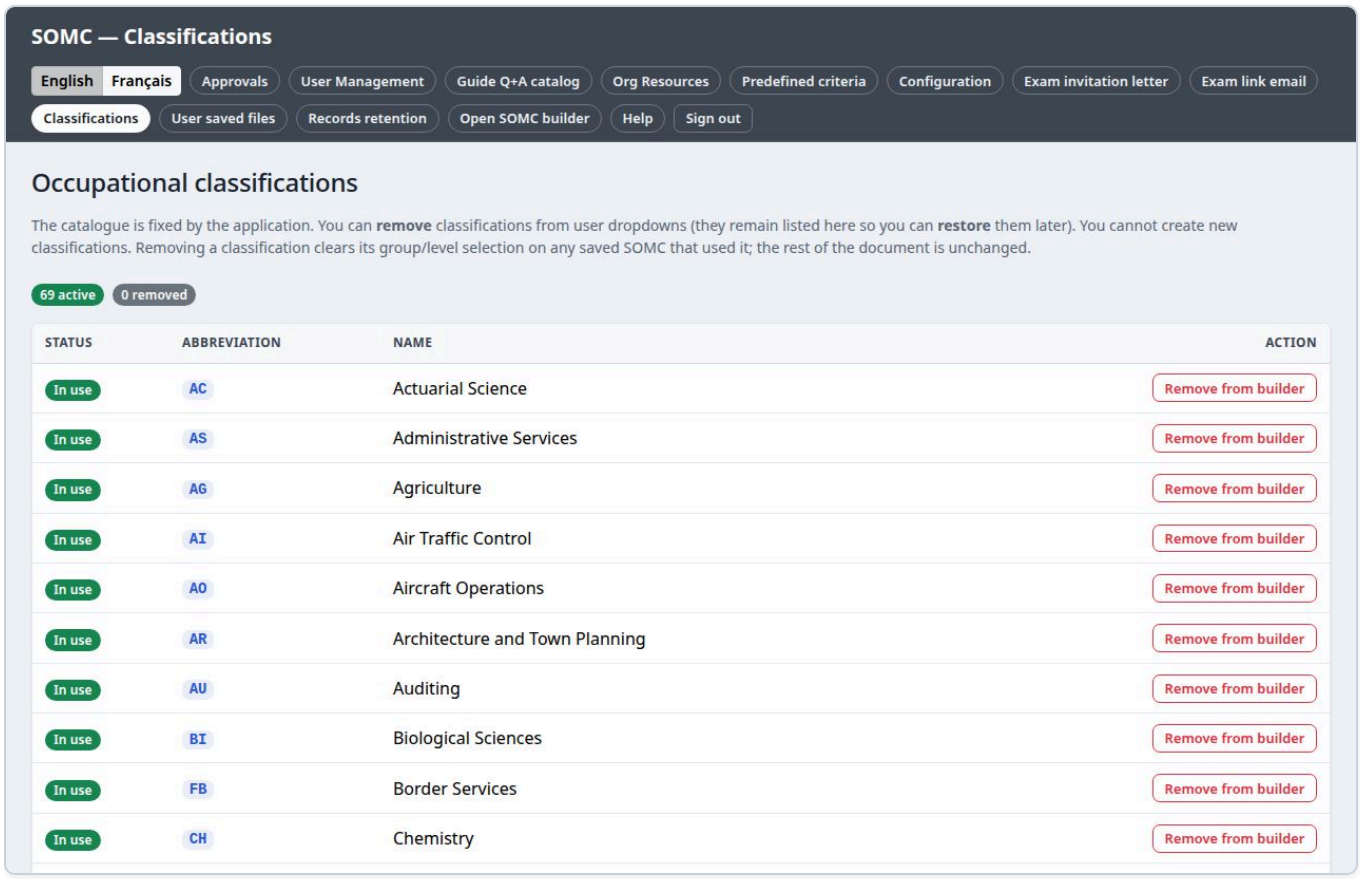
- **Pending user proposals**, at the bottom, lists questions users submitted from the Assessment Guide. Approving one adds it to the catalogue as validated.

Org-wide resources

Org-wide resources summarizes what users have contributed to the organization: approved Q+A proposals, approved custom criterion wording and active catalogue entries, with an audit log.

Classifications

The list of occupational groups is built into Attest, in English and French. You can remove groups your organization does not use from the users' lists and restore them later.



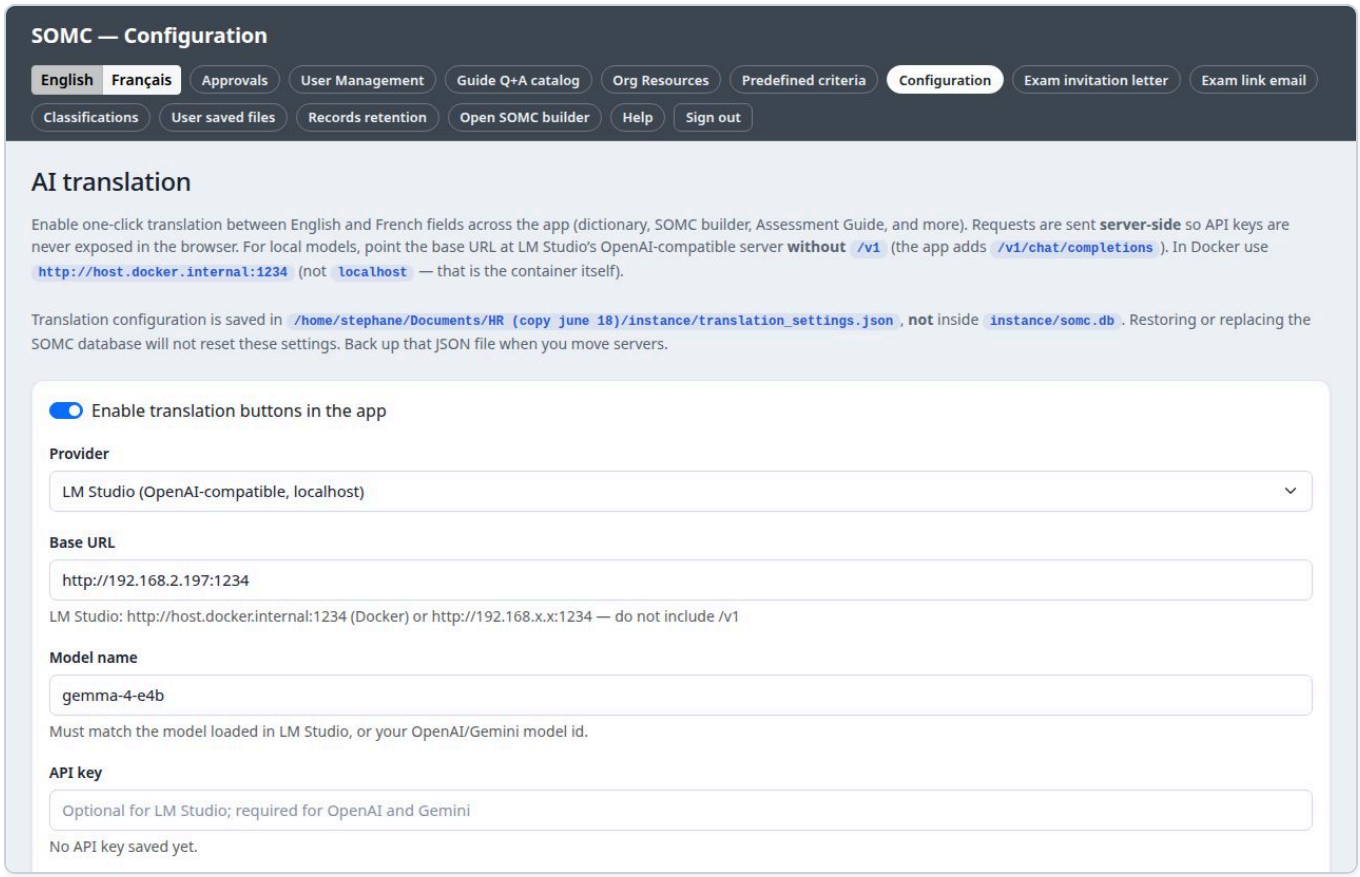
Invitation letters and emails

Written exam invitation and **Written exam link email** let you edit the bilingual text Attest uses for invitations and for the email that carries a candidate's online exam link.

- Edit the subject and body in each language. Placeholders such as `{{PROCESS_NUMBER}}`, `{{CANDIDATE_NAME}}` or `{{ORG_NAME}}` are replaced with each file's details; the list of placeholders is on the page.
- Check the result in **Preview**, which uses sample data. **Reset to default** restores the original text.

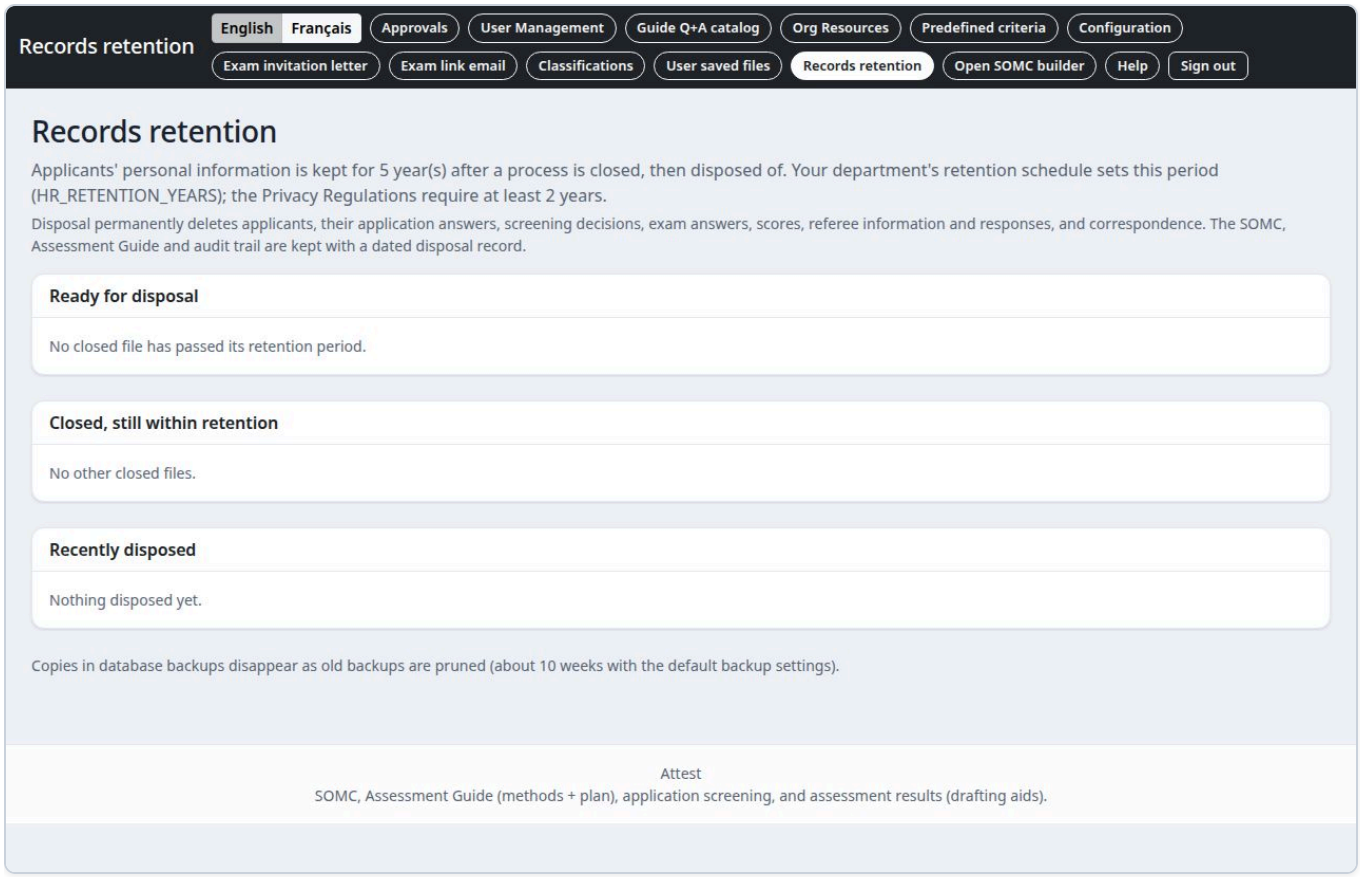
Configuration and translation

Configuration controls the optional translation buttons that suggest a French or English version of text users type. Translation is off unless configured. Commercial AI services are refused unless IT explicitly allows them after a privacy assessment, so candidate information is never sent to them by default. A model hosted inside your network can be used instead.



Records retention

Applicants' personal information must not be kept longer than your department's retention schedule allows. **Records retention** lists closed files and when each becomes due for disposal.



- **Dispose of personal information** permanently removes the applicants of that file: names, contact details, application answers, screening decisions, scores, exam answers, referee details, correspondence entries. The process itself (criteria, guide and statistics) is kept.
- Disposal cannot be undone and is recorded in the file's activity log.
- The retention period (default 5 years after closure, never less than 2) is a deployment setting chosen from your retention schedule. IT can also run disposal on a schedule.

Departmental templates

The **HR templates** page offers your department's own forms for download. Attest ships none. To add one, IT places Word, Excel or PDF files in the `hr_templates` folder of the server's data volume; they appear immediately. A workbook named `asr_template.xlsx` in that folder is used as the starting point for Assessment Summary Report exports.

Deployment settings (for IT)

These are set by IT in the server configuration, not in the Admin area. Full details are in the installation guide.

SETTING	PURPOSE
`HR_OIDC_*`	Single sign-on with the department's identity provider (for example Microsoft Entra ID), multi-factor requirement and roles from groups
`HR_PASSWORD_LOGIN`	Who may still sign in with a password when single sign-on is on
`HR_ALLOWED_EMAIL_DOMAINS`	Email domains allowed to sign in
`HR_IDLE_TIMEOUT_MINUTES`	Inactivity sign-out (default 30 minutes)
`HR_RETENTION_YEARS`	Years after closure before personal information is disposed of
`HR_PRIVACY_PIB_EN` / `_FR`	Personal information bank cited in the candidate and referee privacy notices
`HR_ORGANIZATION_NAME`	Organization name used by default in letters
`HR_GC_BRANDING`	Government of Canada signature and wordmark on public pages (federal institutions' own instances only)
`HR_SECURE_DOCUMENT_TOKENS`	Unguessable links for candidates and referees (keep on in production)
`HR_ALLOW_EXTERNAL_AI`	Allows commercial AI translation services (off; requires a privacy assessment)

Settings administrators most often ask about

Administrator checklist

Every day or two

- Clear **Approvals**: SOMCs, guides, custom lines and Q+A proposals.

- Answer requests to share or reassign files.

Regularly

- Review draft questions in the Q+A catalogue and validate the good ones.
- Suspend accounts of people who have left; reassign their files.
- Check **Records retention** and dispose of personal information that is due.
- Keep predefined criteria and letters current.

With IT

- Confirm backups run and are tested, and that updates are applied.
- Confirm single sign-on, the inactivity limit, the retention period and the privacy notice reflect departmental policy.

Guide updated 2026-10-23.