

User Management

The website provides information for all user accounts including username, status, roles, when their account was created and when they last logged into the site. Administrators are able to add new users as well as modify or delete existing users at any time.

How do I view user accounts?

1. Click your site login link {url: /login}
2. Enter your username and password
3. Go to the "User Administration" link on your Dashboard {url: /dashboard}
4. Click on "Administer Users"
5. Scroll down to see all users

Note: There is also an area at the top of the page which allows you to filter the user listing to "Show only users where" the selected criteria applies. To use this filter simply select the criteria you want to see and click the filter button.

Adding a New User

1. Click your site login link {url: /login}
2. Enter your username and password
3. Go to the " User Administration " link on your Dashboard {url: /dashboard}
4. Click on "Administer Users"
5. Click on the Add User button {url: /admin/people/create }
6. Enter a username (typically we use the beginning portion of the user's email address or the information that precedes the @ symbol. Example: For a user with the the email address support@ahaconsulting.com, their username would be support.
7. Enter the email address of the new user
8. Enter a starter password
9. Confirm the password
 - a. Note: Users will be forced to change their password upon first login. If a user ever forgets their password they are always able to request a new on right from the Login screen of the website.
10. Status: Check active
11. Assignable Roles:
 - a. Check off the box for each Role the user should have permission to.
 - b. Users should always have the staff role in addition to any other role.

For example, a basic user would have the following checked:

_Staff

A user with a User Management Role would have the following roles checked:

_Staff

User Management

_User Management

12. Check off the box next to “Notify user of new account” (This is optional)
 - a. This will send an email to the user with instructions to log in to their account.

Editing an Existing User

1. Click your site login link {url: /login}
2. Enter your username and password
3. Go to the " User Administration" link on your Dashboard {url: /dashboard}
4. Scroll down to find the user you want to edit
5. Click on the “Edit” link to the right of the user
6. Make any changes to the user account as needed
 - a. Refer to the steps above for Creating a New User
7. When finished, click Save at the bottom of the page.

How do I search for a particular user?

1. Click your site login link {url: /login}
2. Enter your username and password
3. Go to the “User Administration” link on your Dashboard {url: /dashboard}
4. Click on “Search Users”
5. Enter the user’s name you are searching for and click the “Search” button
6. If the user is in the system their username will appear
7. If you do not see results for the user you were looking for try entering their email address instead when searching.