

## Quick Reference Guide: Add User

The Add User function is changing with the September 23, 2016 release to make both username and password auto-generated to increase security and reduce errors. Please see below for revised instructions for how to add a new user. NOTE: You must record an email address for every new user since this is how users receive their new username and password. User email address is also required to reset a password.

### Step 1: Create New User

1. Click Admin module. The User section is selected by default.
2. Click Add User button on the right.
3. Complete all required fields on the Add User popup. Required fields are marked with \*
  - **Employer Name** is used in Reports.
  - **Username** is auto-generated after First Name and Last Name are entered.
4. Click the Save button.  
The User Permission page opens.  
The new user is DEACTIVATED when first created.

The format of the auto-generated username is: ABBB...CCCn  
 A = first initial of the first name  
 BBB... = the entire last name  
 CCC = 3-letter account name  
 n = a digit (only if required to prevent duplicate user name)

Add User

### Step 2: Activate New User

1. Click the Activate User button.  
User is now Active.

Activate User

### Step 3: Set Permissions

1. Insert a check for each required permission for this user.

### Step 4: Reset and Send Password

1. Click the lock icon to open the Reset Password and Send Email popup. (If the lock is disabled, it means the user is not active or is missing an email address).
2. Confirm that the email shown in the popup is the correct email address for this user. (If it is wrong, click Cancel and click Edit User to record the correct email address).
3. Click Reset and Send. User will receive an email with username and temporary password which is valid for 72 hours.



Enabled



Disabled

### IMPORTANT NOTE:

If the new user is also a new Account Provider, you must add the Provider to the Account Provider Library section of Admin and then link the new Account Provider to the new user. See "Quick Reference Guide: Link Account Provider to User" for instructions.