

Add a New User

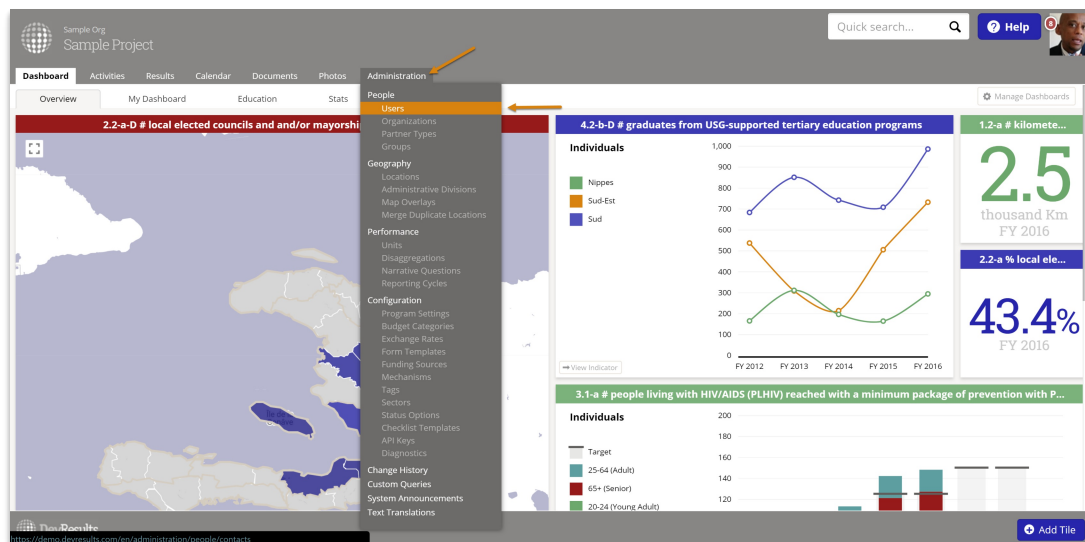
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Who can add a new user?

Users who belong to a group with **View & Edit** permissions on **People** can create new users.

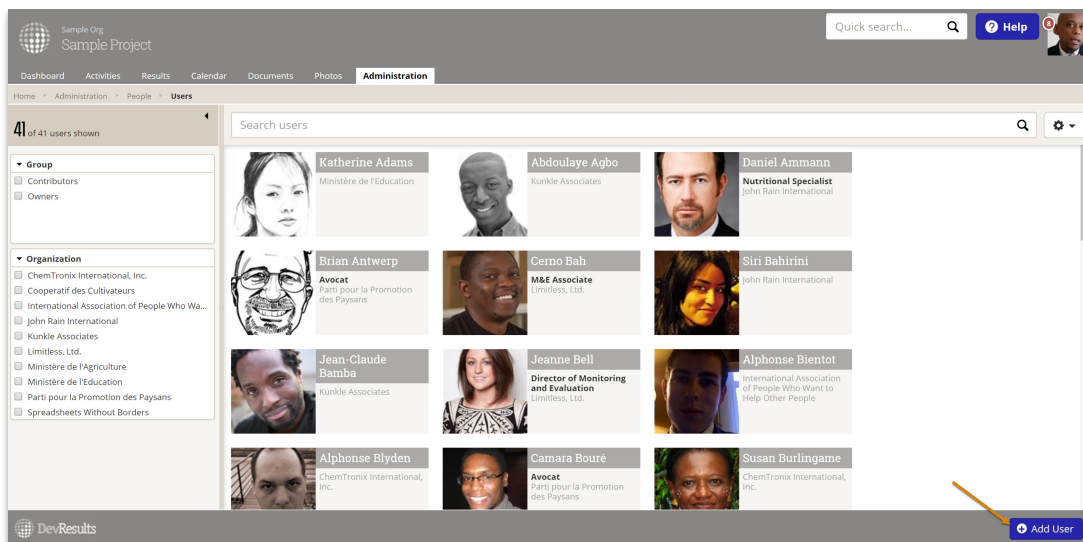
How do I create a new user?

To create a new user, go to **Administration > Users**.



Note: If you do not see the Administration menu, then you do not have permission to add users. Please speak to your site administrator.

This will open the Users Index. Click the **+ Add User** button in the lower right to begin creating a new user.



Note: If you do not see the **+ Add User** button, then you do not have permission to add users. Please speak to your site administrator.

This will open an **Add User** pop-up. Enter the user's first and last name, email address, and assign them a permission Group from the dropdown. The Group determines what objects a user can see and interact with. Then click the **+ Add User** button:

The 'Add User' pop-up form is shown. It has a title bar with a close button. The form contains three main sections: 'Name' with two input fields (Jane and Smith), 'Email' with one input field (jane@email.com), and 'Group' with a dropdown menu (Contributors). At the bottom, there are two buttons: 'Cancel' and '+ Add User'. A yellow arrow points to the '+ Add User' button.

Note: The individual will use their email address to log into DevResults.

This will open the User Details screen. You may enter any other information you'd like to add, such as assigning this user to an Organization, Job Title, etc. If the user is a partner, you **must** assign him/her to an organization!

Sample Project

Quick search... Help

Dashboard Activities Results Calendar Documents Photos Administration

Home Administration People Users Jane Smith Impersonate this user

Jane Smith

Photo

Upload photo
... or drag and drop your file here

Contact Details

Name Jane Smith

Email jane@email.com

Job title

Organization Select an organization...

Department

Work Phone

Security

Group

- ☒ **Contributors** Can log into the system to manage activities.
- ☐ **Managers** Can mark checklist items as approved. Can sign off on results data submitted by partners.
- ☐ **No Access** Cannot log into the system.
- ☐ **Owners** Can configure the system's global settings and lists. Can manage user accounts and logins, reset passwords, and assign permissions.
- ☐ **Partner Managers** Can manage users for their organization and also edit information for their organization's activities
- ☐ **Partners** Users from other organizations with limited access to activities they implement.
- ☐ **Viewers** Can log into the system, browse activities, and view reports. Cannot change anything.

Password This person does not have a password.

Assign new password

DevResults Delete Done

Note: Partners should have their correct organization listed. Partners gain access to their activity(s) when the partner and the activity(s) are assigned to the same organization. Start typing the name of the organization and select the organization when it appears in the search list. Before ever adding a new organization, confirm in the Organizations list (Administration > Organizations) that an organization is not yet added. Be sure to look for the full name of the organization, not just the acronym.

Send the new user a password to log in by clicking the **Assign new password** button. It will open a **Change Password** pop-up.

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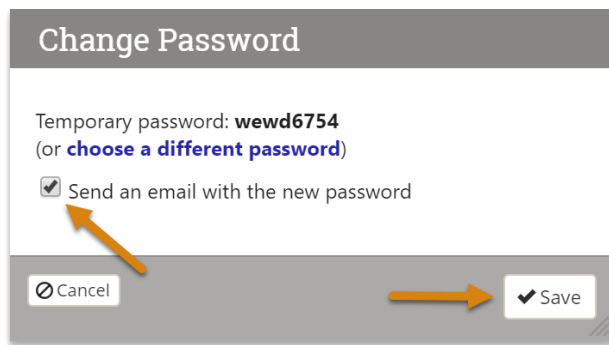
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Assign new password

The system will auto-generate a random temporary password. If you don't want to use it, click **choose a different password** and type in any password you like.

If you'd like the system to email the user with their password, be sure the **Send an email with the new password** box is checked.

Then click **Save**.



Change Password

Temporary password: **wewd6754**
(or **choose a different password**)

☒ Send an email with the new password

Note: If you have a DevResults Enterprise site, you can add a user to all child sites through the Users page of your Enterprise site.

Next, you can [assign the user to one or more activities](#) . In addition to a partner and an activity sharing the same organization assignment, assigning a partner to an activity is another way to give a partner access to an activity.

Didn't answer your question? Please email us at help@devresults.com .

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