

Create a User Account

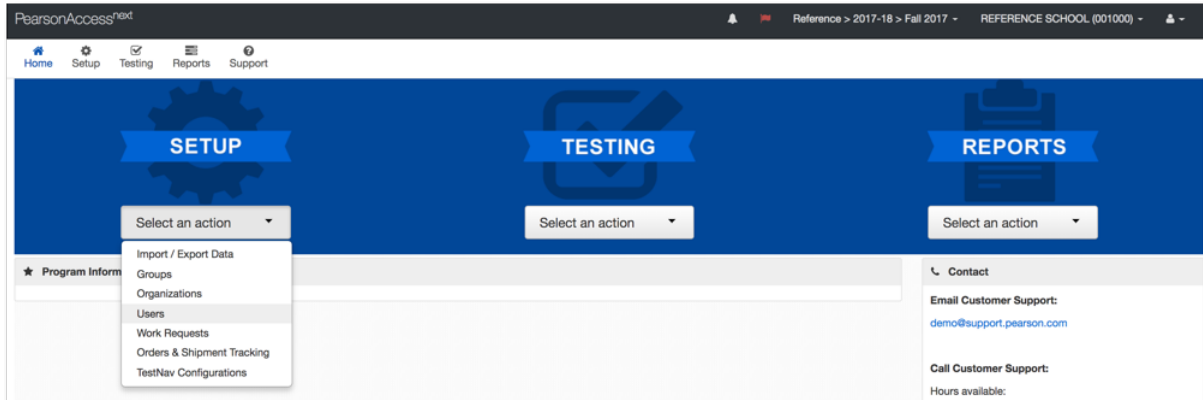
You can create a [user](#) to add an account holder by entering personal and system-related information. For example, you can enter a user ID and email address, and assign this user to an organization. When you assign the user to an organization, you define the data he or she can access.

You can also specify a date range for account access. Doing so ensures that the user can log in *only* during the specified date range.

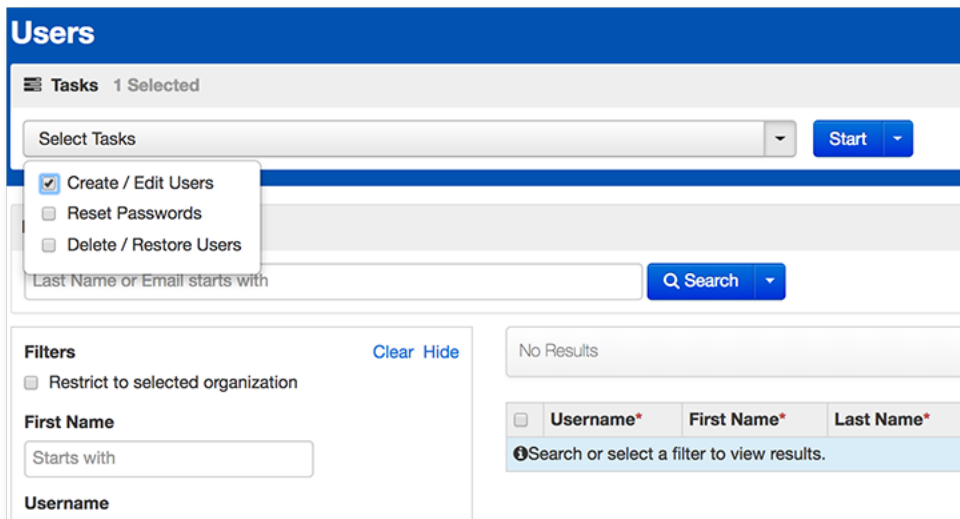
To learn about user account data fields, see [User Account Data Fields](#).

Step-by-Step

1. From **Setup**, select **Users**.



2. Click **Select Tasks**, select **Create / Edit Users**, and click **Start**.



3. Type/Select the user information.

Create / Edit Users

USERS (0)

Create Users

DETAILS

New User Create Reset

Selected Organizations*

DEMO DISTRICT 1 (010000)

Selected Roles*

11 - Proctor

Account

Enabled

First Name*

Samuel

Active Begin Date

Last Name*

Jones

Active End Date

Email*

samuel.jones@email.com

Delete Date

Username*

samuel.jones@email.com

* Required

Create Reset

4. Click **Create**.

Create / Edit Users

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* Required

Create Reset

Effects

After you create a user, you can view user account information.

▼ [To view user details...](#)

1. From **Setup**, select **Users**.

2. Type a user name into the search field, and click **Search**.

The screenshot shows the 'Users' management interface. At the top, there are two tabs: 'Tasks' (0 Selected) and 'Users' (0 Selected). Below the tabs, there are search fields for 'Select Tasks' and 'Manage'. The 'Find Users' section has a search input field containing 'jones' and a 'Q Search' button. Below the search field, there are filters for 'Restrict to selected organization' and 'First Name' (Starts with). The results table shows 1 result for 'jones' with columns: Username*, First Name*, Last Name*, Email*, Disable Date, Disable Reason, Delete Date, Active End Date, and Active Begin Date. The first row of the table contains the user 'james.jones@email.com' with first name 'James' and last name 'Jones'.

3. Click the information icon in the **Username** column.

This screenshot is similar to the previous one, but the information icon (a blue circle with a white 'i') in the 'Username' column of the results table is highlighted with a red square. The search input field still contains 'jones'.

*If this column does not display, click **Manage Columns**, select **Username**, and click **Apply**.*

What's Next?

- ✓ When you enter an email address for a new user...

It serves as the username. This is true even if you previously entered a different username.

You can change the username after you enter the email address, but *you must do so before you click **Create***.

After you create an account, the system sends an email to the new user. If the email is returned, undelivered, the system displays an **email delivery failure**.
