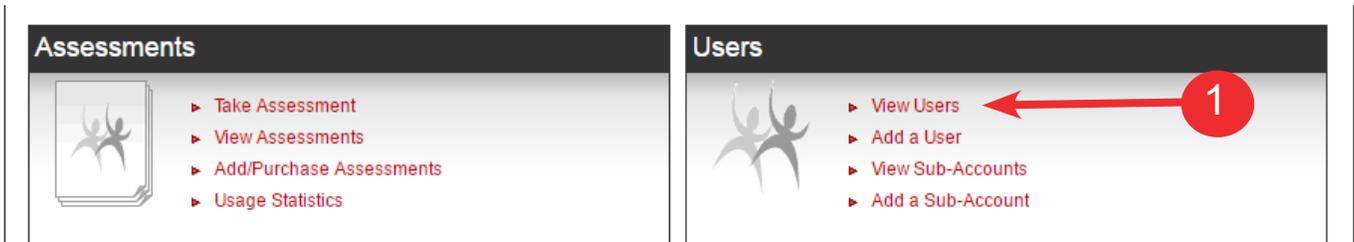


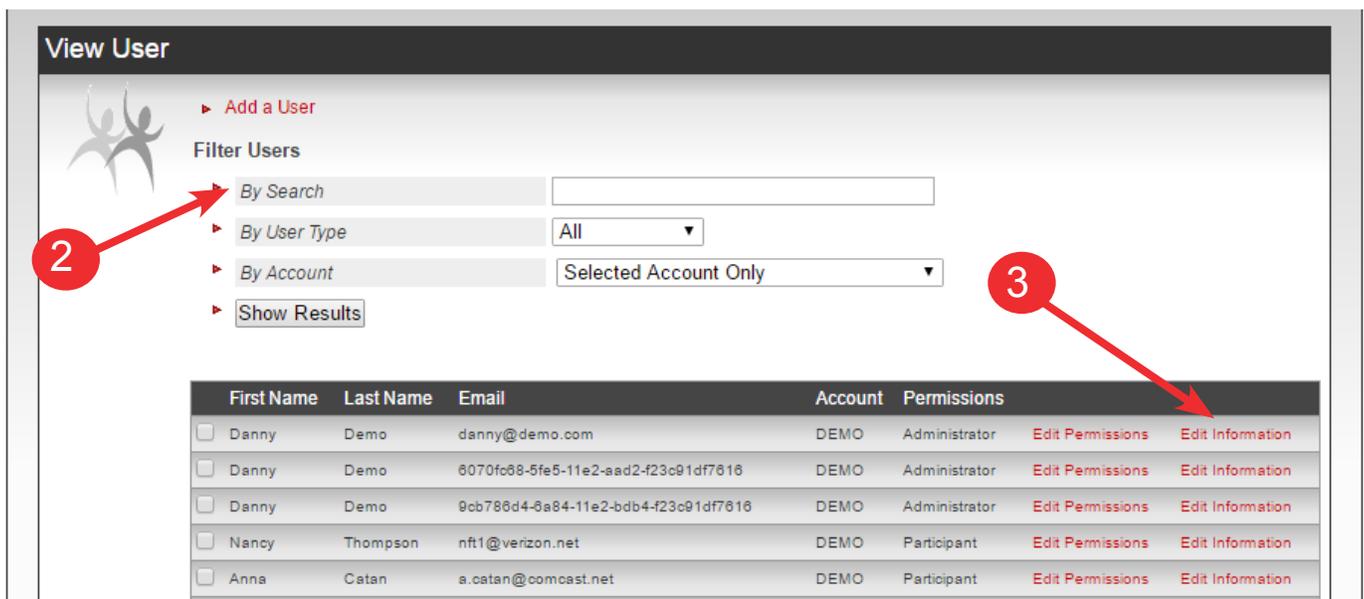


Manage Users

1. On your homepage, click View Users.



2. From the View Users page, you can conduct a search by Name, e-mail address or even partial information. If you have created sub-accounts, make sure you select to search in all sub-accounts. Columns are sortable by clicking on the header.



3. You can edit a variety of personal information (including changing passwords) by clicking Edit Information. Because passwords are secured, you will not see any password information. If someone forgets their password, all you can do is change it.

To change a password, enter the new password, confirm it and click Save changes. If a person is in multiple accounts, you can select a default account for when they login. They will always have access to all accounts, but will log in every time to the default account. You can add a person to a sub account on this page as well. (See Module 7 for creating sub-accounts).

For example, the person to the left is a user in the Worldwide Consulting account, but now you want her to be a Manager of the General Amalgamated Products account. At the bottom of the page, click the next to the present account, then select the account you want to add her to. It will turn brighter red, then select the permissions for that account, in this case “Manager”. Click Add to Account and refresh your screen (press F5). You will now see the new account listed under the User’s Accounts.

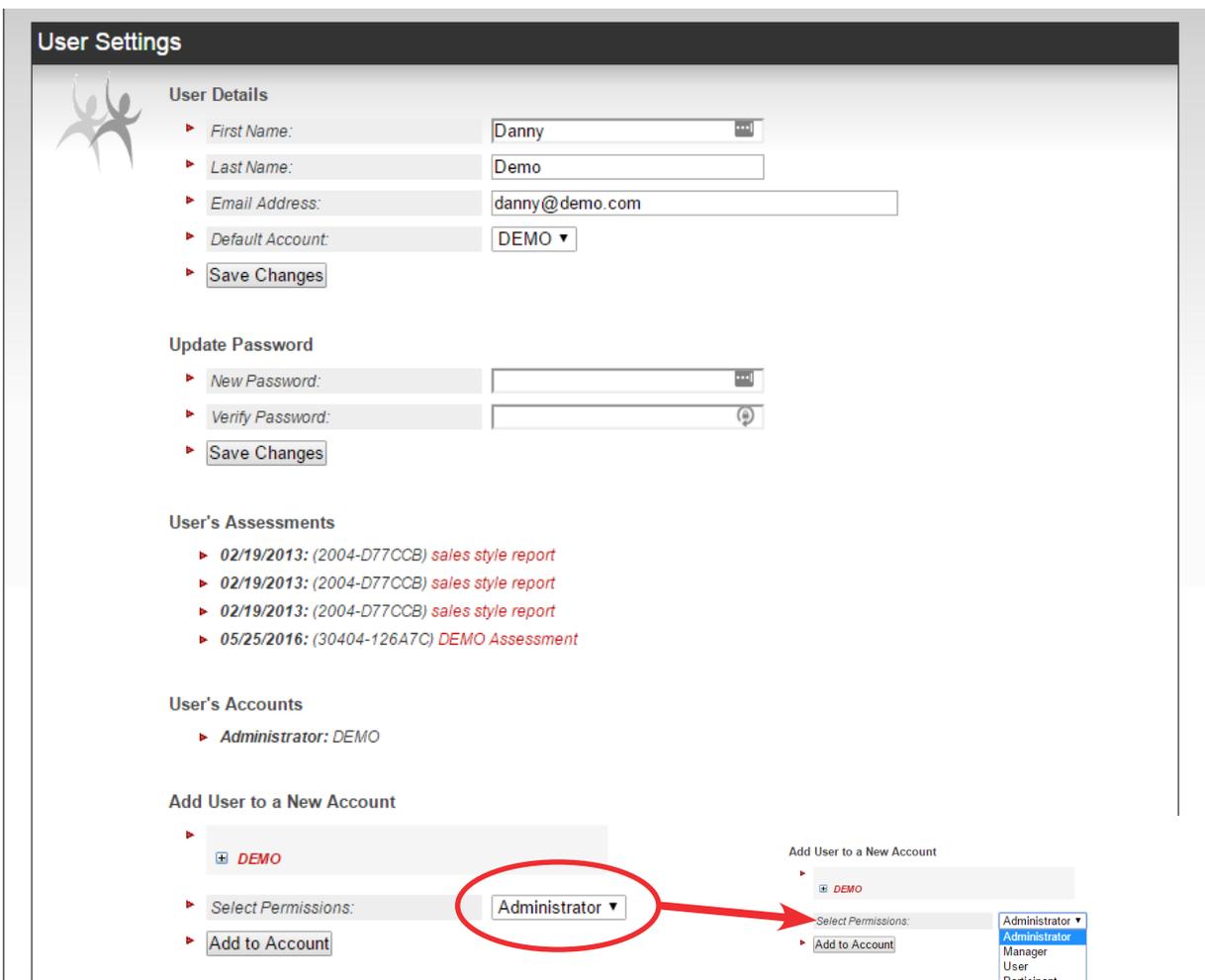
User Account Permissions:

Administrator-Can set up sub-accounts, create new users, purchase assessments, etc
Administrators can do it all.

Manager- “Can view, but can not do.” Can see everything but can not create accounts or users and cannot purchase assessments.

User-Assessment taker- Can only log in to view their own report after the assessment is complete.

Participant-Assessment taker- Can not log back in at all after the assessment is complete.



The screenshot displays the 'User Settings' page for a user named Danny. The interface is divided into several sections:

- User Details:** Fields for First Name (Danny), Last Name (Demo), Email Address (danny@demo.com), and Default Account (DEMO). A 'Save Changes' button is present.
- Update Password:** Fields for New Password and Verify Password, with a 'Save Changes' button.
- User's Assessments:** A list of four assessment reports with dates and IDs.
- User's Accounts:** A list showing the user is currently an Administrator for the DEMO account.
- Add User to a New Account:** This section shows a process to add the user to another account. A red circle highlights the 'Administrator' permission dropdown menu, which is also shown in a larger view to the right. The dropdown options are Administrator, Manager, User, and Participant.