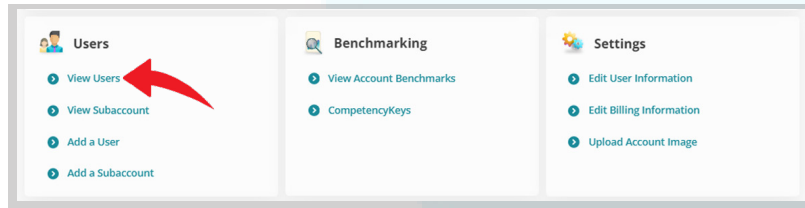


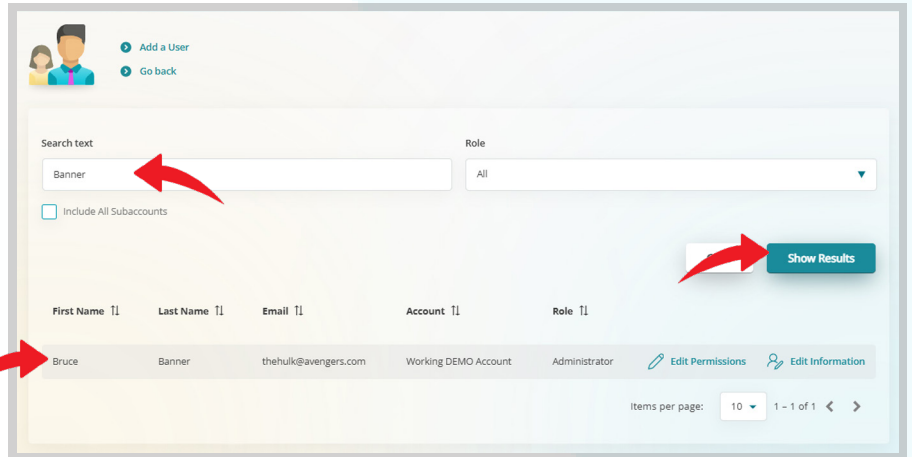
# MANAGE USERS

1. From your home page, look for the **Users** Box and click **View Users**.



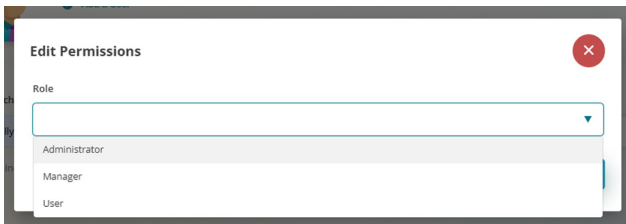
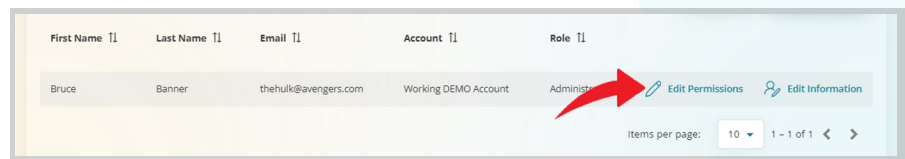
2. On the View Users page you will see a list of all the people in your account.

3. Use the search feature to search by email address, first, or last name then click **Show Results**.



4. Search results will appear at the bottom of the page.

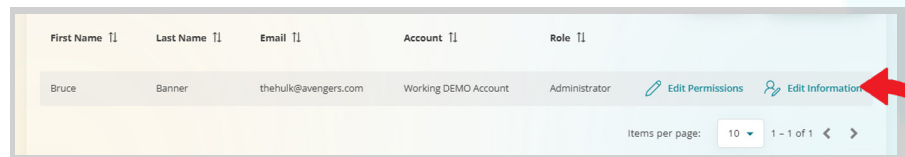
5. To change the user level, click **Edit Permissions**.



6. In the pop-up window select the user level:

**Administrator:** Full access to all account features  
**Manager:** Access to account but unable to make purchases  
**User:** Able to view their own assessments

7. Clicking **Edit Information** allows you to make changes to the selected user.



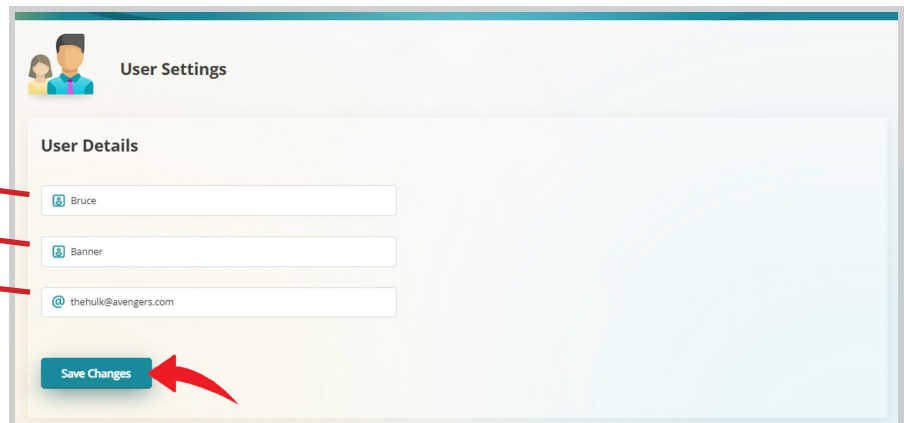
9. On the next page under user setting you can make the following changes:

First Name

Last Name

Email Address

If you make any changes click the **SAVE CHANGES** button.



10. Update Password allows you to update the user's password:

Enter New Password

Verify New Password

Click the **SAVE CHANGES** button to enable new password.

The screenshot shows the 'Update Password' form. It includes two input fields: 'New Password \*' and 'Verify Password \*'. Below these is a section for 'Automatic password' with a checkbox labeled 'Generate a password automatically and send to user email'. At the bottom is a blue 'Save Changes' button. To the right is a 'Password policy' box with a red arrow pointing to it. The policy includes: Length from 8 to 20; Not contain the user's First or Last Name; Not contain the user's Accounts names; and a requirement to contain 3 or 4 categories: Uppercase letters, Lowercase letters, Base 10 digits (0 through 9), and Special characters.

11. User's Assessments allows you to see a list of completed assessments.

User's Accounts allows you to see a list of accounts this user is associated with.

The screenshot shows two sections. The top section is 'User's Assessments' with a search bar and a table. The table has columns for Date, Keycode, and Name. One row is visible: Date: 05/29/2025, Keycode: 59390-1EDF00, Name: 4D-DISC, TEAMS, VALUES with BAI. Below the table is a pagination control showing 'Items per page: 10' and '1 - 1 of 1'. The bottom section is 'User's Accounts' with a search bar and a table. The table has columns for Account and Role. One row is visible: Account: Working DEMO Account, Role: Administrator. Below the table is a pagination control showing 'Items per page: 10' and '1 - 1 of 1'.

12. Add User to a New Account allows you to assign the selected user to a sub-account

The screenshot shows the 'Add User to a New Account' form. It features a search bar at the top. Below the search bar, a list of accounts is shown, with 'Working DEMO Account' selected. Below the list is a 'Select Permissions' dropdown menu. At the bottom is a blue 'Add to Account' button with a red arrow pointing to it. The top of the page shows the user's name 'Bruce Banner', email 'thehulk@avengers.com', and current account 'Working DEMO Acco...'. There is also a 'Sign Out' button.