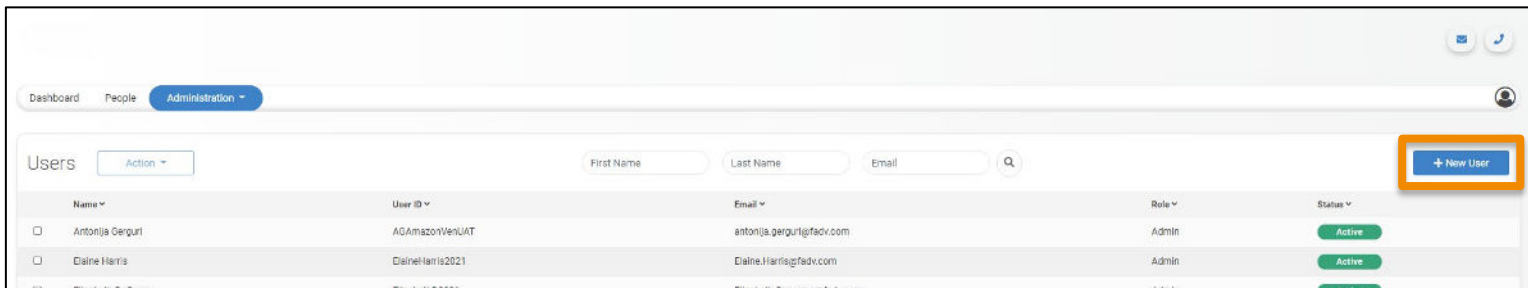


Introduction

This job aid will outline how to manage XtdForce users on your account. Only individuals with the administrative role will have the ability to add/edit users.

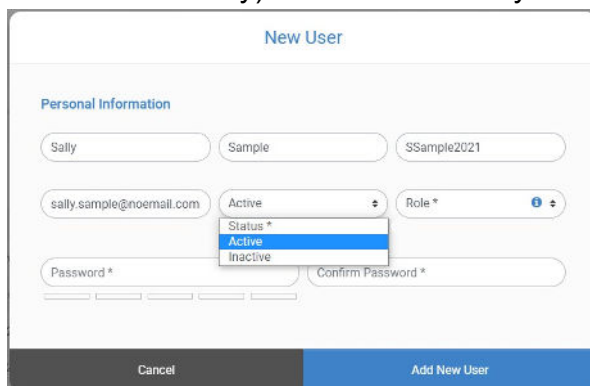
Adding a New User

1. On the **Administration** page, click **+ New User**.

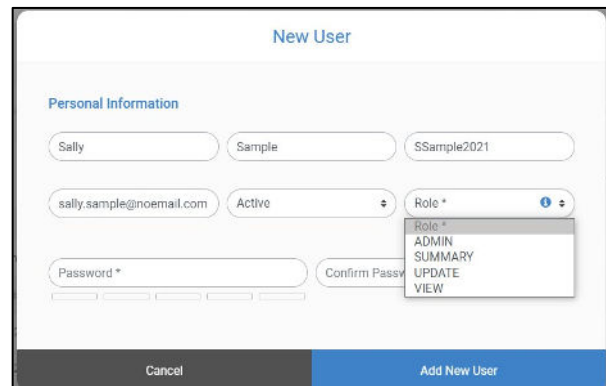


The screenshot shows the 'Administration' page with a 'Users' table. The table has columns for Name, User ID, Email, Role, and Status. Three users are listed: Antonija Gerguri, Elaine Harris, and Elizabeth DeCarmo. The '+ New User' button is highlighted with an orange box in the top right corner.

2. Enter the new user's **name**, create a **User ID** for the individual and enter their **Email**. Select their **Status** from the drop down and select their **Role** (Admin, View, Update, Summary) with the necessary level of access.

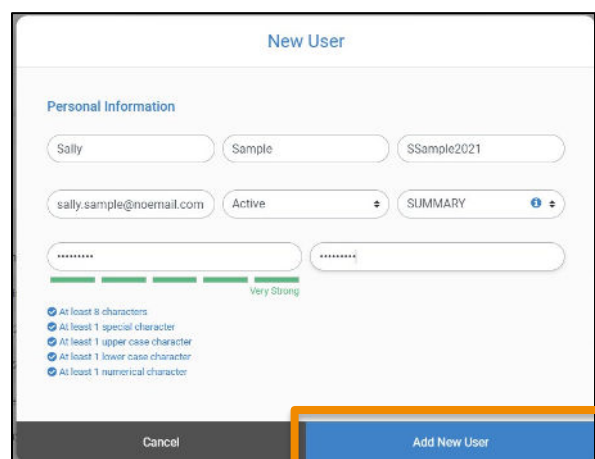


The screenshot shows the 'New User' form with the 'Personal Information' section. The 'Status' dropdown menu is open, showing options: Active, Inactive, and a third option that is partially obscured. The 'Role' dropdown menu is also open, showing options: ADMIN, SUMMARY, UPDATE, and VIEW.



The screenshot shows the 'New User' form with the 'Personal Information' section. The 'Role' dropdown menu is open, showing options: ADMIN, SUMMARY, UPDATE, and VIEW.

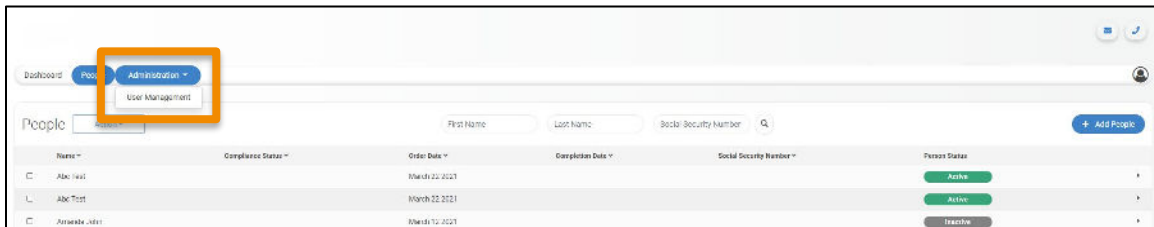
3. Create a **Password** for them and click **Add New User**.



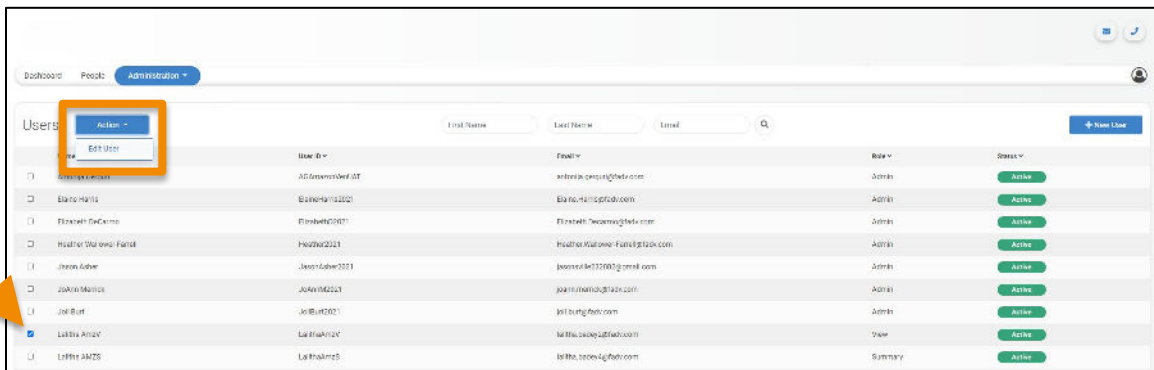
The screenshot shows the 'New User' form with the 'Personal Information' section. The 'Add New User' button is highlighted with an orange box. The password field is filled with asterisks, and a strength indicator shows 'Very Strong'.

Editing an Existing User

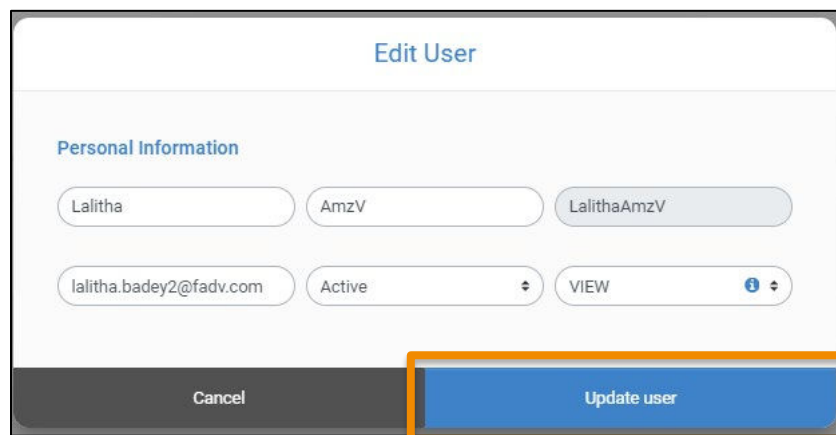
1. Under **Administration**, click **User Management**.



2. The list of **Users** will display. Select the **checkbox** for the user you wish to edit and select **Edit User** from the **Action** drop down.



3. On the **Edit User** pop up you can edit the user's personal information, change their status, or change their level of access. Make necessary edits and click **Update user**.



The screenshot shows the 'Edit User' pop-up form. The form contains fields for Personal Information, including Name, Email, and Status. The 'Update user' button is highlighted with an orange box.