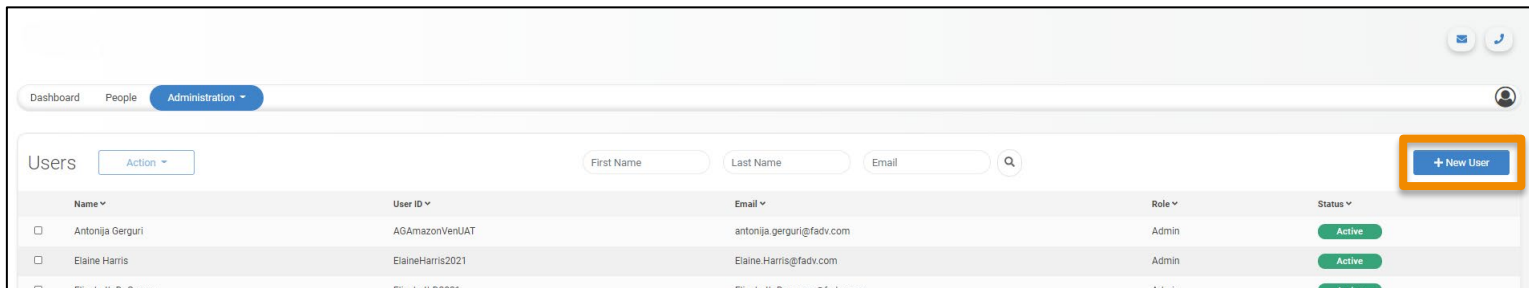


Introduction

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**.



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 'New User' form shows the 'Personal Information' section. Fields include Name (Sally), Last Name (Sample), User ID (SSample2021), Email (sally.sample@noemail.com), Status (Active), and Role (Role *). A dropdown menu for 'Status' is open, showing 'Active' and 'Inactive' options. The 'Add New User' button is highlighted with a blue background.

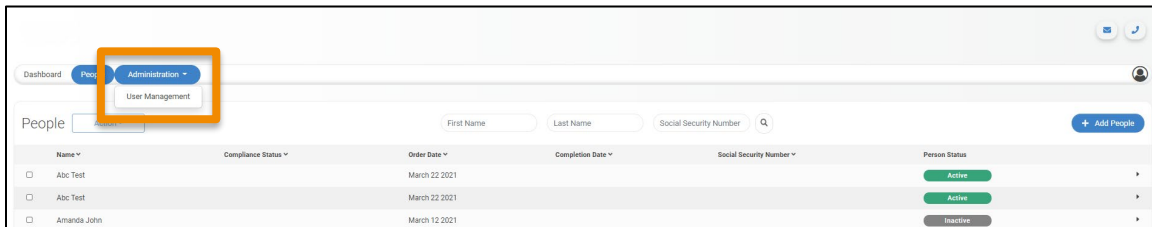
The 'New User' form shows the 'Personal Information' section. Fields include Name (Sally), Last Name (Sample), User ID (SSample2021), Email (sally.sample@noemail.com), Status (Active), and Role (Role *). A dropdown menu for 'Role' is open, showing 'ADMIN', 'SUMMARY', 'UPDATE', and 'VIEW' options. The 'Add New User' button is highlighted with a blue background.

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

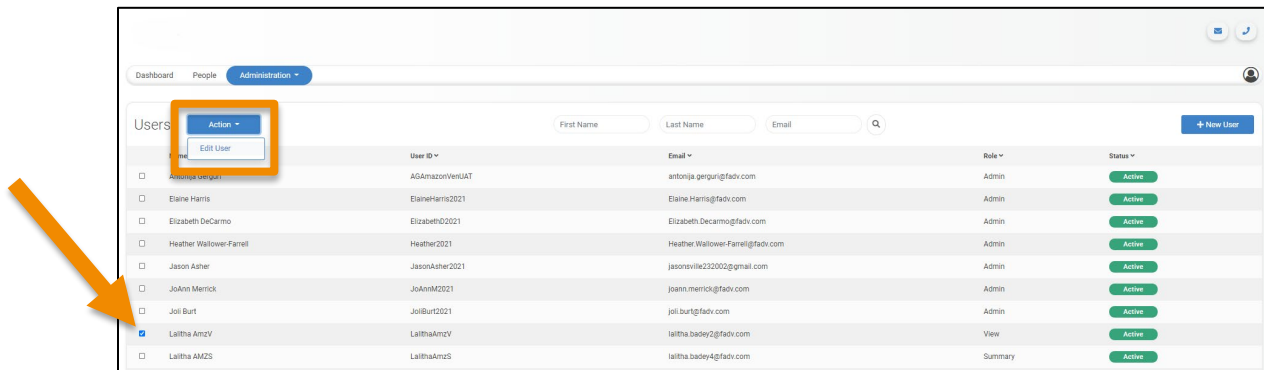
The 'New User' form shows the 'Personal Information' section. Fields include Name (Sally), Last Name (Sample), User ID (SSample2021), Email (sally.sample@noemail.com), Status (Active), and Role (SUMMARY). The 'Password' field is filled with dots and has a strength indicator showing 'Very Strong'. The 'Add New User' button is highlighted with an orange box.

Editing an Existing User

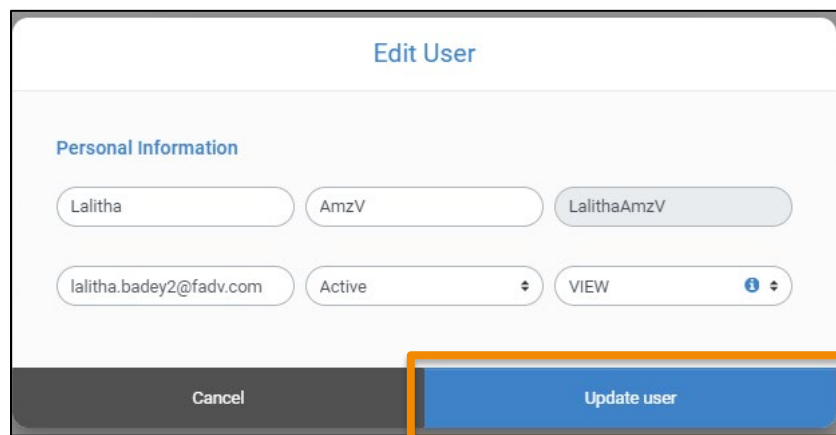
1. Under **Administration**, click **User Management**.



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**.



Edit User

Personal Information

Lalitha AmzV LalithaAmzV

lalitha.badey2@fadv.com Active VIEW

Cancel Update user