

User Guide:

# Creating and Managing Users

# Creating A User

- Login to SMDS.
- Place your cursor over the **Administration** link.
- Place your cursor over the **Users** link.
- Click the **New SMDS User** link.



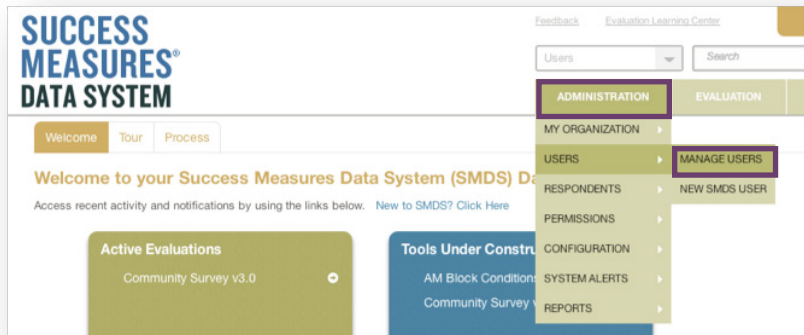
The New SMDS User screen appears. You must complete the required fields, indicated with a red asterisk.

- Click the **Save** button.

A screenshot of the 'New SMDS User' form in the Success Measures Data System. The form is titled 'User Information' and contains several fields: 'Organization' (pre-filled with 'Your Organization'), 'Email Address' (with a red asterisk and a sample email 'name@example.com'), 'Password' (with a red asterisk), 'Confirm Password' (with a red asterisk), 'First Name' (with a red asterisk), 'Last Name' (with a red asterisk), 'Primary Phone' (with a red asterisk and a sample number '409-555-4321'), and 'Receive Email' (checked). There is also an 'Is Active?' checkbox which is checked. Below the 'User Information' section are sections for 'Email Addresses', 'Phone Numbers', and 'Addresses', each with a message indicating no data is present and a link to add new data. At the bottom left, there are 'SAVE' and 'CANCEL' buttons. The 'SAVE' button is highlighted with a red box.

# Managing a User

- Place your cursor over the **Administration** link.
- Place your cursor over the **Users** link.
- Place Click the **Manage Users** link.



A search for a user can be conducted via the Filter section by Last Name, First Name, Email Address, Permission Group(s) or User Type. You can filter, or scan the list for a user that needs edits.

- After locating the user, click the **Pencil** icon to edit the user settings.

Note: To delete a user, click the **Trashcan** icon. To reset a user password, click the **Lock** icon.

A screenshot of the user list table in the SMDS interface. At the top, there is a filter section with a dropdown menu set to 'Last Name', a search input field containing 'enter text...', and buttons for 'Filter' and 'Clear Filter'. Below the filter is a table with columns: Last Name, First Name, Display User Groups, Primary Email, Primary Phone, User Type, and Is Active. Two users are listed: Sam Jones and Amy Lawson. The 'Is Active' column has a green checkmark for both. To the right of each row are three icons: a pencil (edit), a lock (password reset), and a trash can (delete). The pencil icon for Amy Lawson is highlighted with a purple box.

The User Information section is available to be modified. You can alter the First Name, Last Name, Email Address, and Primary Phone information. You can also add additional email, phone and location addresses.

- Click the **Save** button.

A screenshot of the user information form in the SMDS interface. The form has two sections: 'Phone Numbers' and 'Addresses'. Both sections contain the text 'There are no phone numbers. Click Here to add a new phone number.' and 'There are no addresses. Click Here to add a new address.' respectively. At the bottom of the form, there are two buttons: 'SAVE' and 'CANCEL'. The 'SAVE' button is highlighted with a purple box.