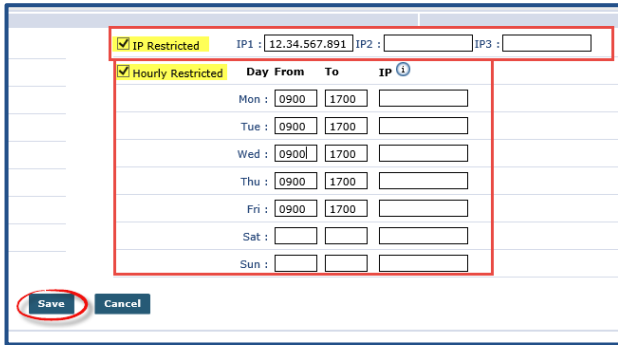


Creating New Users Job Aid

Users with the Admin role are granted the permission to add **New Users** and **deactivate User Accounts** in the system. This job aid provides instructions on how to create new users in the system and deactivate user accounts.

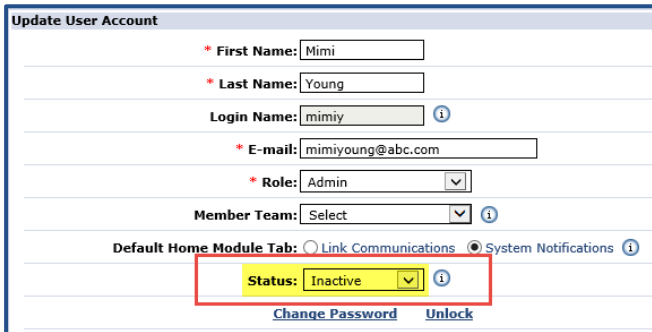
Creating a New User

Step	Action														
1	Navigate to Admin > User Management > New User to access the <i>Add New User</i> page.														
2	<p>The <i>Add New User</i> page opens. Complete the required fields (denoted with a red asterisk), as illustrated in the image below and described in the table underneath.</p> <div data-bbox="337 709 1409 1037" data-label="Image"> </div> <p style="text-align: center;">Add New User Page</p> <table border="1" data-bbox="310 1136 1430 1638"> <thead> <tr> <th data-bbox="310 1136 524 1188">Field</th> <th data-bbox="524 1136 1430 1188">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="310 1188 524 1234">*First Name</td> <td data-bbox="524 1188 1430 1234">Enter the user's first name.</td> </tr> <tr> <td data-bbox="310 1234 524 1268">*Last Name</td> <td data-bbox="524 1234 1430 1268">Enter the user's last name.</td> </tr> <tr> <td data-bbox="310 1268 524 1398">*Login Name</td> <td data-bbox="524 1268 1430 1398">Enter the login name for the user to enter the system. Login name must be unique within an Agency AND across the HHAX platform. Username can include letters, numbers, underscores, dashes, @ sign, or dots. Note that there is a 50-character limit to any login name. Email address can be used.</td> </tr> <tr> <td data-bbox="310 1398 524 1499">*Email</td> <td data-bbox="524 1398 1430 1499">Enter the user's unique email address. This email is used for any assigned system notifications to include the initial email with temporary password to log in to the system.</td> </tr> <tr> <td data-bbox="310 1499 524 1541">*Role</td> <td data-bbox="524 1499 1430 1541">Select the Role(s) for the user.</td> </tr> <tr> <td data-bbox="310 1541 524 1638">Default Home Module Tab</td> <td data-bbox="524 1541 1430 1638">(Optional) Select Link Communications or System Notifications as the user's Home default page. If neither is selected, Link Communications is assigned by default.</td> </tr> </tbody> </table>	Field	Description	*First Name	Enter the user's first name.	*Last Name	Enter the user's last name.	*Login Name	Enter the login name for the user to enter the system. Login name must be unique within an Agency AND across the HHAX platform. Username can include letters, numbers, underscores, dashes, @ sign, or dots. Note that there is a 50-character limit to any login name. Email address can be used.	*Email	Enter the user's unique email address. This email is used for any assigned system notifications to include the initial email with temporary password to log in to the system.	*Role	Select the Role(s) for the user.	Default Home Module Tab	(Optional) Select Link Communications or System Notifications as the user's Home default page. If neither is selected, Link Communications is assigned by default.
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Step	Action						
3	<p>On this page, User Access location, days, and times can be restricted using the IP Address fields.</p> <p>Select one or both options as illustrated in the image to the right and described in the table below.</p> <p>Note: These restrictions are optional.</p>  <p style="text-align: center;">Access Restriction</p> <table border="1"> <thead> <tr> <th>Select</th> <th>To...</th> </tr> </thead> <tbody> <tr> <td>IP Restricted</td> <td>restrict access to the system to up to 3 unique IP addresses.</td> </tr> <tr> <td>Hourly Restricted</td> <td>specify the days and hours when Users may access the system. A valid IP address for each day of the week can also be added.</td> </tr> </tbody> </table>	Select	To...	IP Restricted	restrict access to the system to up to 3 unique IP addresses.	Hourly Restricted	specify the days and hours when Users may access the system. A valid IP address for each day of the week can also be added.
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4	<p>Click the Save button to create the New User's profile. The screen refreshes and the Member Team field appears.</p> <p>Note: A user may optionally assign a Member Team at this point. Refer to the Team Function Process Guide for further details on assigning Teams.</p>						
5	<p>Upon Save, the user receives an email with a temporary password to log in to the system. Provide the user his/her login name. The email does not include this information.</p>						

Deactivate User Account

Only roles with the **Inactivate Users** permission can deactivate a user; otherwise the **Status** field is unavailable to edit.

Step	Action
1	Navigate to Admin > User Management > Search User .
2	Click on the Edit link to access the <i>Update User Account</i> page.
3	<p>From the Status field select <i>Inactive</i>.</p>  <p style="text-align: center;">User Status</p>
4	Click Save . Once saved, the user cannot access the system with given credentials.