

Add Users

Administrators may add an unlimited number of users, including third-party providers.

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Add a user

Steps *To add a user:*

1. Visit **Users** in the left menu.
2. Click the **+add** link in the blue bar.
3. Enter the information required.
 - **Account information**
 - **First name:** First name for this user.
 - **Last name:** Last name for this user.
 - **Email:** Select the email domain for this user from the email domain dropdown. See email tips
 - **If your district uses LDAP**, you will see fields:
 - **LDAP username:** Enter the LDAP username for this user if
 - They are in LDAP and
 - Their LDAP username is not the same as their email username (e.g. LDAP username is "smithb", while their email address is "bsmith@schools.org")
 - **User not in LDAP:** Check when the user does not have an LDAP account (e.g. a related service provider)
 - **Permissions**
 - **Admin account:** Check if this user should have full admin privileges.

- **User roles:** Use the dropdown to select any user roles this user should be added to if they are not an admin.
 - **New account email:**
 - **Include note:** Optional note to include in email to new user.
4. Once the information above is entered, click the **Add User** button. An email containing a link to confirm this email address and login information will be sent to this user. This link will expire after 90 days (so that it can remain active throughout summer if issued at the end of the prior school year).
 5. You will be redirected to the user's **Details** tab. You may enter general information on this tab about the user to assist with management. This information is autosaved.

Email tips

Considerations:

- SameGoal sends email notifications to the email address specified for each user.
- When a staff member terminates employment with the district, that person should no longer retain access to these emails.

Best practices:

- Use a staff member's district email address whenever possible.
- When a user does not have a district email address (for example, if they are a related service provider), enter the user's agency work email.
- Avoid entering email domains managed by major web email providers (e.g. gmail.com, hotmail.com, yahoo.com) except in rare circumstances when no other email address is available for a given user (e.g. your charter school is extremely small and only uses gmail.com accounts).

Troubleshooting

- **Email is already in use.** This message appears when a given email address is already being used. Email addresses must be unique in each SameGoal environment. To find the account an email address is already being used for, visit **Users** in the left menu, enter the email, then click **Search**. If there are no results, try checking the **Deleted** checkbox. If needed, undelete the user.
- **New user is unable to log in.** Each new user must follow the email link to confirm login information. They will be unable to log in before doing so.
- **New user is unable to locate their new account email.**
 - Log in to SameGoal as an administrator.
 - Visit Users > Search for this user > visit Basics tab.
 - Verify the email address entered for this user is correct.
 - If the user does not use LDAP, click the **Send password reset** link. Once the user follows the link in the email to set a password, they will be able to log in.
 - If the user logs in over LDAP, automatically re-sending a new user confirmation email is not yet supported. Contact help@samegoal.com for assistance.
- **New LDAP user is unable to log in.** If a new LDAP user follows the link in the new account email sent to them but is unable to log in:
 - Verify their LDAP username:
 - Log in to SameGoal as an administrator.
 - Visit Users > Search for this user > visit Basics tab.
 - Verify that the correct LDAP username is entered (if it is different than the user's email username).
 - Verify they have received and clicked the link in their new account email.
 - Reset or verify the user's LDAP password at the district.