samegoal

Manage Users

Administrative users can update user account information and permissions.

Update account information:

- Update name
- Update email address
- Update LDAP information
- Send password reset

Update permissions:

- Update whether admin account
- Update user roles
- Bulk update user roles

Update name

Steps *To update a user's name (e.g. user changes last name):*

1. Visit **Users** in the left menu.
2. Search for the user you wish to update.
3. Visit the **Basics** tab.
4. Update **First name** and/or **Last name** fields.
5. Click the **Update user** button.

Update email address

Steps *To update a user's email address when it is incorrect or changes:*

1. Visit **Users** in the left menu.
2. Search for the user you wish to update.
3. Visit the **Details** tab.
4. Click the **Change email** link.
5. The user's current email will be shown. Enter the new email for this user. See email tips
6. Click the **Save** button.

The user will be sent an email containing a link to confirm they can access this new email address. **The user's email address will remain unchanged** in the admin web interface and for login purposes until they follow the confirmation link in this email.

Update LDAP information

If your district uses LDAP, you can update each user's LDAP username or set them to instead use an application username and password (only do so if they are not in LDAP).

Steps *To update a user's LDAP information:*

1. Visit **Users** in the left menu.
2. Search for the user you wish to update.
3. Visit the **Details** tab.
4. Update the fields below as needed:
    - **LDAP username:** 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)
5. Click the **Update user** button.

Send password reset

Administrators can send users an email containing a link for them to reset their password. This is helpful when:

- The user has forgotten their password.
- The user has a new account and has not yet set their password (e.g. has lost the new account email they were originally sent).

Steps *To send a password reset email:*

1. Visit **Users** in the left menu.
2. Search for the user you wish to update.
3. Visit the **Details** tab.
4. Click the **Send password reset** link.
    - Tip If the user uses LDAP authentication, a message will denote that the user must instead reset their LDAP password using your district-specific process.
    - Tip If the user does not have a valid email address entered, a password reset email cannot be sent. First update the user's email address
5. A message stating an email will be sent to the user is shown. Click the **Send** button.

Update whether admin account

Admin accounts have full system privileges.

Steps *To promote or demote an existing user to/from an admin account:*

1. Visit **Users** in the left menu.
2. Search for the user you wish to update.
3. Visit the **Basics** tab.
4. Locate the **Admin account** checkbox. Check or uncheck this box depending on whether the user should have an admin account going forward.
5. Click the **Update user** button.

Update user roles

User roles allow administrators to define a set of form default and maximum permissions specific to student building.

Steps *To update user role(s) for a specific user:*

1. Visit **Users** in the left menu.
2. Search for the user you wish to update.
3. Visit their **Basics** tab.
4. Under **Permissions** click the **User roles:** dropdown menu > select the role(s) to assign to the user.
5. Click the **no buildings** dropdown menu > select the building(s) to assign to the user.
6. Click the **X** next to any user role listed to remove it.
7. Click the **Update user** button.

Tip If a user is assigned a role without any buildings, the user will have a default permission of none and a max permission of owner for all forms.

Bulk update user roles

Steps *To update user role(s) for many users in bulk:*

1. Visit **Users** in the left menu.
2. Check the users you wish to bulk assign user roles to.
3. Click the **Actions** dropdown menu > select **Assign User Roles**.
4. Click the **User roles:** dropdown > select the role(s) to assign to or remove from the users.
5. Click the **no buildings** dropdown menu > select the building(s) to assign to or remove from the users.
6. Click **Add** to assign the selected roles and buildings to the selected users.
7. Click **Remove** to remove the selected roles and buildings from the selected users.
8. Click **Cancel** to return to the **Users** page.