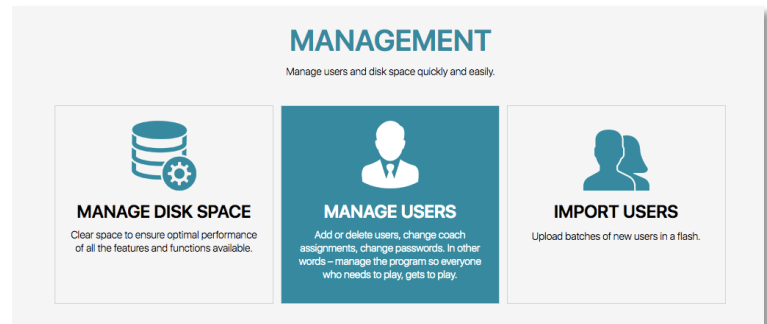


» How do I add or import users? (Admin)

This is the part of Management that you will use most often. Here you can:

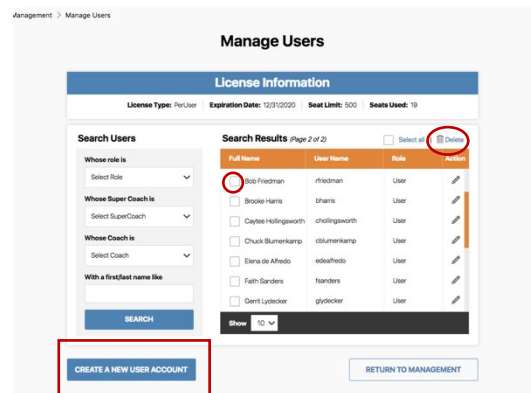
- Search for and edit the profile for any user
- Change Coach assignments
- **Add new users**
- Delete users



Add new users

You can create new user accounts through “Manage Users”

- Click the left lower button that says “create a new user account”
- You can also delete users by selecting the user (clicking the box on the left side of their name) and then pressing the trash icon. ****Please note: once you delete any user, all their records will be gone and cannot be retrieved.**



- Fill out all the information to create the new user account.
- Once you are done, click SUBMIT.

The screenshot shows the 'Create User' form. It has two main sections. The left section contains fields for 'First name', 'Last name', 'Username', 'Email', 'Password', 'Confirm Password', 'Role' (dropdown), 'Unassigned' (dropdown), 'Date of Birth', 'Gender (Optional)' (radio buttons for Male/Female), 'Designation' (Optional), 'Location' (Optional), and 'Department' (Optional). The right section contains fields for 'Designation' (Optional), 'Location' (Optional), and 'Department' (Optional), followed by a 'SUBMIT' button.

Import Users

1. Follow the instructions on the screen image to import users in batches.

2. When uploaded a group of new users you can do a batch upload using an xlsx file.

3. Enter all new users in an Excel spreadsheet using the format in the template. Fill in any of the fields that you want to be populated in the program. Fields include:

- User Name (required)
- First Name (required)
- Last Name (required)
- Email (required)
- Role (required - user, Coach, Super Coach (enter as supercoach), or Admin)
- Date of Birth (optional)
- Gender (optional)
- Designation (optional)
- Location (optional)
- Department (optional)
- Coach User Name(required)

4. Use the browse button to locate the Excel file, select and click open. The file name will appear in the box on the screen.

5. Once you have selected your file click Import Users to upload the list to the system.

6. You will receive a message indicating that your upload is complete. ****Note: if you receive an error contact Success Sciences.**

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R |
|----|------------|-----------|----------|---------------------|----------|-------------|--------|-------------|--------------|------------|---------------|---|---|---|---|---|---|---|
| 1 | Username | FirstName | LastName | Email | RoleName | DateOfBirth | Gender | Designation | Location | Department | CoachUserName | | | | | | | |
| 2 | ccTestuser | ccTest | ccTest | ccTestuser@test.com | user | 3/16/1987 | M | Account | Marl Florida | U Account | coachusername | | | | | | | |
| 3 | | | | | | | | | | | | | | | | | | |
| 4 | | | | | | | | | | | | | | | | | | |
| 5 | | | | | | | | | | | | | | | | | | |
| 6 | | | | | | | | | | | | | | | | | | |
| 7 | | | | | | | | | | | | | | | | | | |
| 8 | | | | | | | | | | | | | | | | | | |
| 9 | | | | | | | | | | | | | | | | | | |
| 10 | | | | | | | | | | | | | | | | | | |
| 11 | | | | | | | | | | | | | | | | | | |
| 12 | | | | | | | | | | | | | | | | | | |
| 13 | | | | | | | | | | | | | | | | | | |
| 14 | | | | | | | | | | | | | | | | | | |
| 15 | | | | | | | | | | | | | | | | | | |
| 16 | | | | | | | | | | | | | | | | | | |