User Manager

User Accounts

A User Account is made of the pre-defined questions required by the Active CM and any System or Site User Profile questions defined by the System Administrator. **The only field that must hold unique information in each User Account is the Login User Name.**

Create a User Account

Create new users and assign them to groups.

1. Open the **User Manager**.

2. Click **Add User**.

3. Check the **Active** checkbox if you want the user to be active. The default is often set to Inactive; this is a good practice if you have people using Application Forms applying to have a user account for the site.

4. Leave the **Locked Out** checkbox blank. Only check this if you want to keep someone from accessing your website.

5. Complete the User Details noting the required fields.

6. Click **Save**. The Personal Information and Groups tabs are displayed. If you are adding multiple new users and completing personal information and group assignments later, click **Save & Add**. This will save the new user account and return you to a blank New User form.

7. Complete the questions on the **Personal Information** tab. The items that appear on this tab come from the Site Manager User Profile, Global System Variables User Profile or Application Forms used on a site.

8. On the **Groups** tab, assign the user to groups they need to be members of by checking the box beside the group name(s).

9. Click **Save**.

Note You can now create a Public User by selecting the Public checkbox on a user record. A Public User account requires only the use of an email address, password and preferred full name and cannot be assigned to groups with permissions, providing added security for your website. See *Appendix N* for further details.

Locate a User Account

There are a number of ways you can locate user records in the User Manager.

Note Users marked with a —P‖ are public users.

Open the **User Manager**. Choose one of the following methods to locate the user record: **First letter of last name**

      1. Click on the first letter of the last name.

      2. Locate the name in the search results.

      3. Click on the **Name.**

Use the search

      1. Enter a portion (must be more than one character or the ACM will return all users with that character) of the user's first name or last name or their email address, in the **User Search** field.

      2. Click **Search**.

      3. Locate the name in the search results.

      4. Click on the **Name**.

By group name

      1. From the **Group/Folder drop-down**, select a group that you know the user belongs to.

      2. When the members of the group are displayed, locate the user name in the list.

      3. Click on the **Name**.

Public Users Only

      1. Check the —Public Only‖ checkbox to search for only users that are flagged as public users.

When viewing search results in the User Manager, you can sort the information by clicking on a Column Header.

Modify a User Account

All fields in a User Account can be modified and saved. Changing a User Password is unique; an additional dialog box will open, requiring both it and the Edit User page to be saved. **Change a User Password**

      1. Open the **User Manager**.

      2. Locate the User Account to edit.

      3. Click **Change Password.**

      4. On the **Change Password** dialog, enter the new password**.**

      5. Enter the password again in the **Retype New Password** field.

6. Click **Save.**

7. When returned to the **Edit User** page, click **Save** again.

Copy a User Account

When you need to create a new user account and many of the settings will be the same as another user already in the system you can open an existing user record and copy it as a template for a new record.

1. Open the **User Manager**.

2. Open the **User Account** to copy or create a new user and save.

3. Click **Save & Copy.** The original user account will be saved and closed and a new user record is opened. The new account will not be a permanent record until it is saved.

4. A new inactive user record is created. The user details will display a copied First Name, the previous record's last name, and a copied preferred full name. You will need to update these fields, and complete all the required fields before the new record can be saved.

5. The Group assignments will remain the same as the original record.

6. Click **Save.**

7. Any Personal Information questions created for the user records will now be available to be completed, any required questions must be answered prior to saving the record.

8. Make any edits that may be required for the new user account.

9. Click **Save** again to close the record, or **Save & Copy** to create another user record based on the same user information.

Delete a User Account

Deletes a user from the ACM but retains the record in the database. If you want to temporarily suspend a user's access, you should **deactivate** the user.

1. Open the **User Manager**.

2. Locate the User account.

3. Once the User record is displayed, click **Delete**.

4. A **confirmation screen** will display. Click **OK** to delete user.

Tip If you attempt to delete a User Account and the User is a member of a group that is assigned to an active Workflow (assigned to pages). You will receive a message warning of this fact and the account will not be deleted. You must first remove the User from any Groups currently assigned to a Workflow. You will then be able to delete the account. If the User you are removing from the Group is the last member of the Group, you will need to add a User to the Group before you will be permitted to delete the original user.

Note As of version 8.9, a deleted username can now be reused within the CMS.