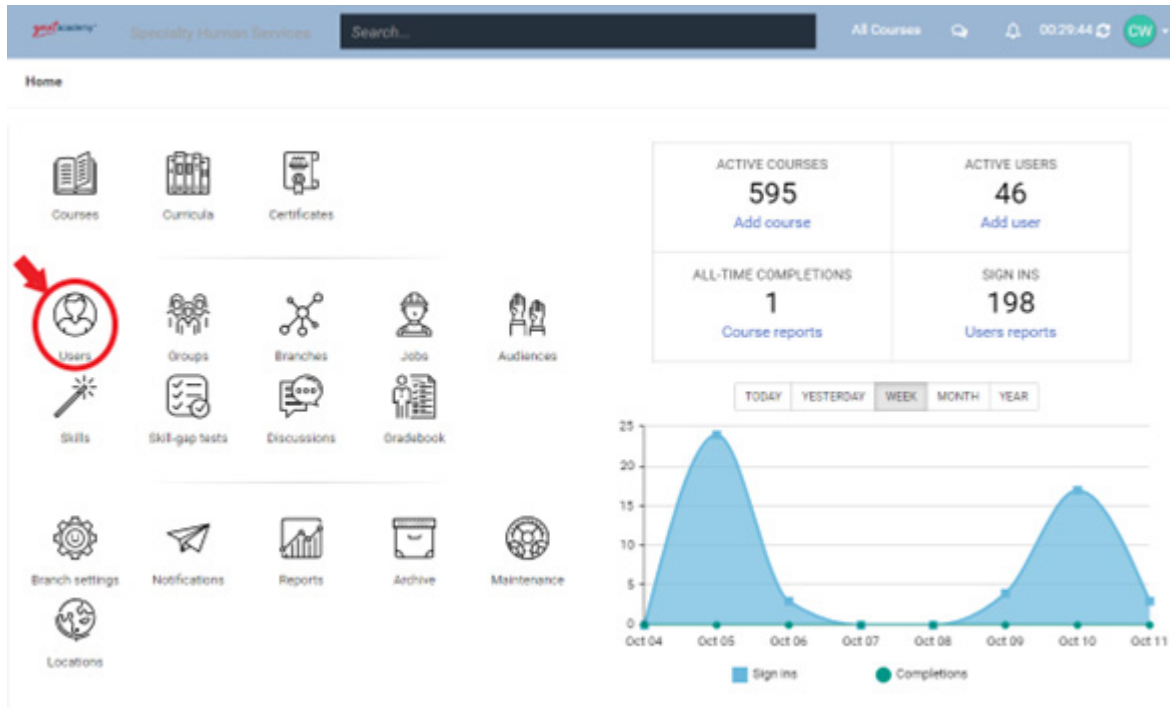# GreatAcademy® Quick Guide – Adding Users to Your Portal
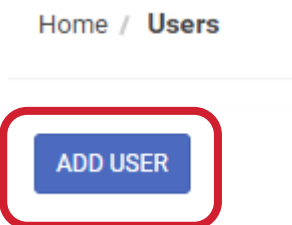
There are three main ways to add users to your system.

Add Users Individually

1. Add them individually by going to your Users icon.

2. Click Add **USER**

3. Fill in user information:
   - **First Name** – User's first name.
   - **Last Name** – User's last name.
   - **Username** – User's username – It is advised to use the user's email address.
   - **Password** – Enter any password.
   - **Repeat Password** – Enter the same password as above.
   - **Email Address** – User's email added.
   - **Receive System Emails** – This box should be checked so the user receives notifications.

- **User Type** – Select the user type: Instructor, Learner, Portal Administrator.
- **Branch** – This should typically be Specialty Human Services/"name of your organization".
- **Language** – Select language from drop-down.
- **Time Zone** – Select preferred language from drop-down.
- **Active** – Box should be checked if the user needs to be active.
- **VolunteerMatters ID** – Nothing required, enter information if needed.
- **EmployeeID** – Nothing required, enter information if needed.
- **Volunteer or Employee** – Nothing required, enter information if needed.
- **Worker Type** – Not required, enter information if needed.
- **Branch** – Not required, enter information if needed.
- **Department** – Not required, enter information if needed.

4. Click **ADD** – at the bottom of the page.   ADD

Have Users Self Sign-Up

1. Select Branch Settings.
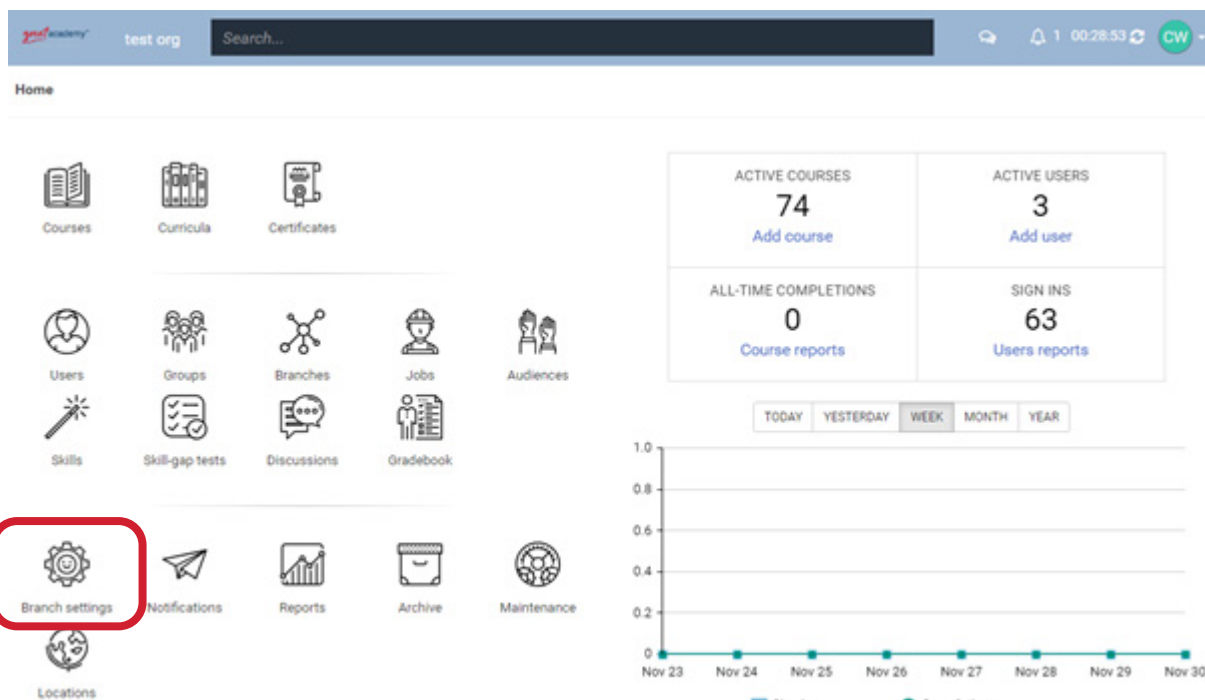
2. Select the **USERS** tab.

3. Under the **ALLOW SELF SIGNUP** dropdown, select how you would like to enable self signup and click **SAVE** at the bottom of the screen.

4. Share your URL out with those you would like to sign up for the system and instruct them to select **SIGN UP HERE!**

Add Users In Bulk

1. Click the Maintenance button.
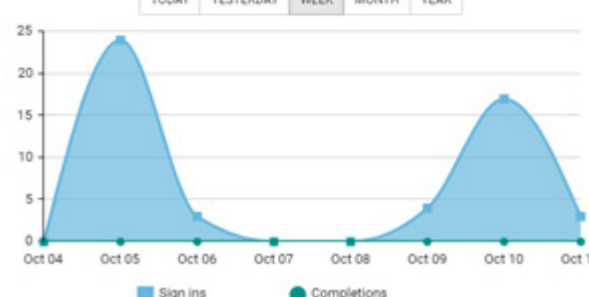
2. Click **IMPORT FROM CSV.**

3. Make sure the Data type **USERS** is selected from the dropdown menu.

4. In the **AVAILABLE FIELDS** section, note that the bolded fields are the required fields.

5. Click **DOWNLOAD EXAMPLE**.

6. Fill in the CSV field required fields and any optional fields you would like to add, including the following:

   • **Login:** Also displayed sometimes as username

   • **Name:** First Name

   • **Surname:** Last Name

   • **Password**

   • **Email**

   • **Receive Emails:** 1 means users will receive system emails, such as their login credentials and when they are enrolled in a course. 0 means they will not receive any emails from the system.

   • **Active:** 1 means the user should be active in your system. 0 means the user will be inactive.

   • **User Type:** Choose from Learner, Instructor or Portal Administrator.

   • **Branch Name:** Sort the user in the appropriate sub-portal based on location, department, etc.

7. Adjust your **DUPLICATES** setting. **IGNORE** will mean that any fields you are using to update a user's status will not be ignored by the system. **REPLACE** will update an existing user's information.

8. Decide whether or not you want users to get system notifications from the import. Do you want the system to send their login credentials when you upload the list?

9. Choose the file you just created and select the **IMPORT** button.