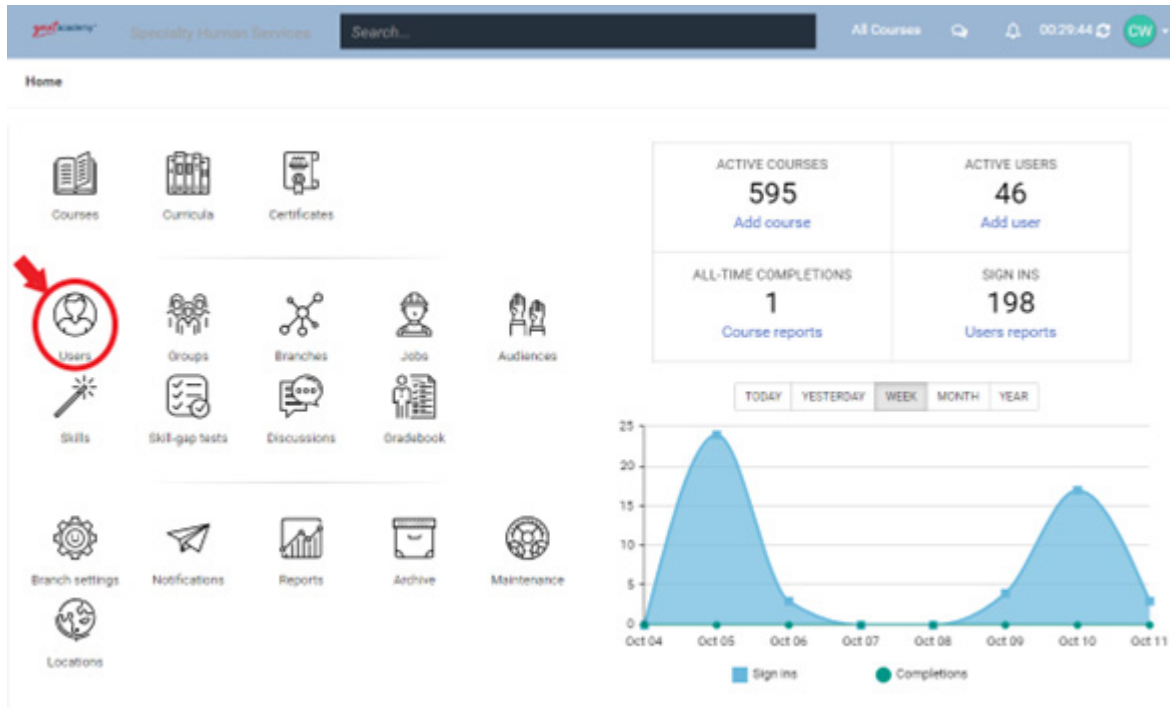


GreatAcademy® Quick Guide – Adding Users to Your Portal

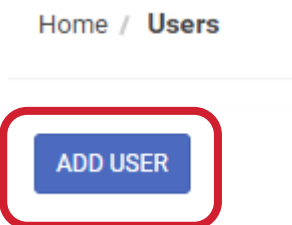
There are three main ways to add users to your system.

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.

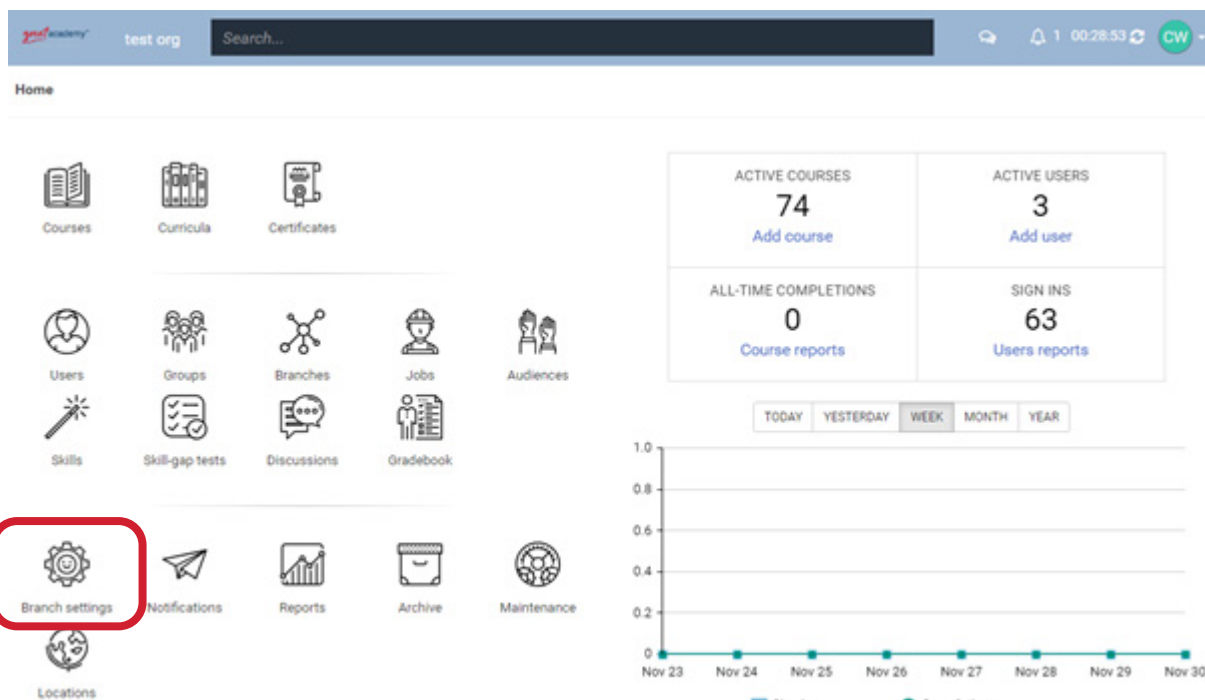
- **User Type** – Select the user type: Instructor, Learner, Portal Administrator.
- **Branch** – This should typically be Specialty Human Services/”name of your organization”.
- **Language** – Select language from drop-down.
- **Time Zone** – Select preferred language from drop-down.
- **Active** – 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.

The screenshot shows the 'Users' settings page. The left sidebar contains a list of settings categories: Identity, Date & Language, Appearance, Security, Users (selected), Single Sign On, and Integrations. The main content area is divided into two tabs: GENERAL and ADVANCED. Under the GENERAL tab, there are three sections: 'Allow self signup' (set to 'Enabled, but requires administrator activation'), 'Restrict registration to specific email domains' (with a text input field containing an asterisk), and 'Terms of Service' (set to 'Leave blank to disable').

- Under the **ALLOW SELF SIGNUP** dropdown, select how you would like to enable self signup and click **SAVE** at the bottom of the screen.
- Share your URL out with those you would like to sign up for the system and instruct them to select **SIGN UP HERE!**

Home

Username

Password

SIGN IN

[Forgot login details](#)


Haven't you joined yet? [Sign up here!](#)


Add Users In Bulk


- Click the Maintenance button.


greatacademy[®] Specialty Human Services Search... All Courses 00:20:36 CW


Home



Courses



Curricula



Certificates



Users



Groups



Branches



Jobs



Audiences



Skills



Skill-gap tests



Discussions



Gradebook



Branch settings


Notifications


Reports


Archive


Locations


Maintenance

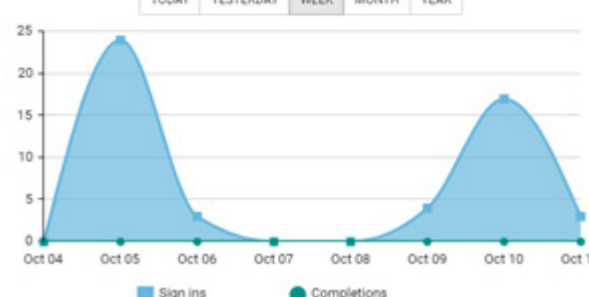
ACTIVE COURSES
595
[Add course](#)

ACTIVE USERS
46
[Add user](#)

ALL-TIME COMPLETIONS
1
[Course reports](#)

SIGN INS
198
[Users reports](#)


TODAY YESTERDAY WEEK MONTH YEAR




Date	Sign ins	Completions
Oct 04	0	0
Oct 05	24	0
Oct 06	3	0
Oct 07	0	0
Oct 08	0	0
Oct 09	4	0
Oct 10	17	0
Oct 11	3	0

- Click **IMPORT FROM CSV**.

Home / Maintenance


Import from CSV


Export to 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**.

IMPORT FROM CSV

Data type: Users

Available fields: active, balance, branch_name, branch_public_id, email, is_ldap, language, **login_name**, need_pwd_change, password, public_id, receive_email, **surname**, timezone, user_type, viewed_license, branch, department, volunteermattersid, EmployeeID, VolunteerorEmployee, workertype

Download example

Duplicates: ☒ Ignore ☐ Replace

Date format: Y-m-d

☒ Suppress notifications

CSV file: Choose File No file chosen ...or click here to import using plain text

Note: Maximum import size is 1000 lines

IMPORT

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.

IMPORT FROM CSV

Data type: Users

Available fields: active, balance, branch_name, branch_public_id, email, is_ldap, language, **login_name**, need_pwd_change, password, public_id, receive_email, **surname**, timezone, user_type, viewed_license, branch, department, volunteermattersid, Em

Download example

Duplicates: ☒ Ignore ☐ Replace

Date format: Y-m-d

☒ Suppress notifications

CSV file: Choose File No file chosen ...or

Note: Maximum import size is 1000 lines

IMPORT