Create a User

Administrators with the appropriate rights can add users to specific regions. The user account allows an individual to log in and access information in EMResource. Creating a new user account involves defining profile details, assigning a role or roles, assigning one or more views, and more.

Roles and rights are assigned during the user creation process. The roles you assign to users govern the views and features that are available to them. Specifically, a role grants a predefined set of rights.

You can specify the region views to which the user has access, including the user's default view. If your region has mutual aid agreements set up with other regions, you can allow this user to have access to viewing one or more them. This feature may be particularly appropriate for those along regional borders.

While creating the user's profile, you will specify the resources to which the user has access, and the type of access that user has. For example, you can specify that the user can only view the resource or allow the user to update the resource's status or run reports. Refer to About Users for more information.

In addition, you can access this new user's notification preferences after you save this new account. Refer to Edit a User for details.

There are filters available at the top of the *Resource Rights* section of the *Create User* page. In addition to filtering by resource type or searching by view, you can filter the list of resources by the rights you can assign in this section: association with the resource, update, reports, view, and administer users.

Note: To change a user's login email, you must simply create a new account with the new login email and deactivate or delete the account with the old login email.

Important: If you want the person to have access to the solution, you must provide a login email. Then, the person will receive a welcome email, through which they must activate their account. For more information, go to Account Activation.

To create a user

1. In the main menu, click **Setup** and then click **Users**. The *Users List* opens.
2. Click **Create User**. The *Create User* page opens.
3. In the *User Profile* section, enter this information.

Field	Description
Username	Unique identification previously/temporarily used as part of their login process.
Login Email	Email address to which the person has access to receive and respond to emails.
Full Name	First and last name of the user as it should appear in the solution. For example, Alexa Smith.
First Name, Middle Name, Last Name	First, middle, and last name of the person.
Organization	Organization to which the person belongs.
Administrative Comments	Comments from the administrator adding or editing the user profile.

4. In the *Contact Information* section, click **+ Contact Method** and, in the list, click **Email**, **Text**, **Pager**, and/or **Voice**. The corresponding field appears.
5. Enter the person’s email address or text, pager, or voice number.
   Note: The person must have voice contact details on their profile to receive event notifications by phone.
6. In the *Notification Preferences* section, for each contact method select or clear the checkboxes for **Receive Notifications**, **Include Resource Summary**, and **Excluding during time range**.
7. In the *Roles and Rights* section, take these actions.

If you want to…	Then…
Assign roles,	a. Click **Select Assigned Roles**. The *Assigned Roles* window opens. b. Select the checkboxes for the roles you want to grant this person. c. Click **Close**.

Remove roles,	In this section: To remove one role, on that chip, click the X icon. To remove all roles, click **Clear**.
Assign roles this person administers,	**a.** Click **Select Roles to Administer**. The *Roles to Administer* window opens. **b.** Select the checkboxes for the roles you want this person to administer. **c.** Click **Close**.
Remove roles this person administers,	In this section: To remove one role, on that chip, click the X icon. To remove all roles, click **Clear**.
Add specific rights,	**a.** Click **Select Rights**. The *Rights* window opens. **b.** Select the checkboxes for the rights you want this person to have. **c.** Click **Close**.
Remove specific rights,	In this section: To remove one right, on that chip, click the X icon. To remove all rights, click **Clear**.

8. In the *Views* section, take these actions.

If you want to…	Then…
Assign views,	**a.** Click **Select Views**. The *Views* window opens. **b.** Select the checkboxes for the views you want this person to have. **c.** Click **Close**.
Remove views,	In this section: To remove one view, on that chip, click the X icon. To remove all views, click **Clear**.
Assign other region views,	**a.** Click **Select Other Region Views**. The *Other Region Views* window opens. **b.** Select the checkboxes for the views you want this person to have. **c.** Click **Close**.
Remove other region views,	In this section: To remove one view, on that chip, click the X icon. To remove all views, click **Clear**.

9. To identify this person's home page, in the *Home* section, click **View**, **Custom View**, **Map**, or **Dashboard**.
10. If you select View in step 9, in the **Default View** list, select the view.
11. In the *Resource Rights* section, locate and select the resources to which you want this person to have access to resources.
    - **View** (required for any other rights to be applicable), which offers access to information about the resource through views, events, and other tools. Refine allows you to limit resource view rights by status type.
    - **Associated**, which links the user to the resource, as a participant for inclusion in notifications, events, and reports.
    - **Update**, which grants the access and opportunity to update resource statuses.
    - **Reports**, which grants the access and opportunity to run general reports about the resource. Access to various reports is further controlled through.
    - **Administer Users**, which grants the user control to create, edit, and otherwise manage users that are associated with a resource. As appropriate, expand the *Advanced Options* section to take these actions.
      Note: This right is usually reserved for resource administrators, and is used in conjunction with **User Can Assign Role** options specified in the User Type & Roles section.
12. Click **Save**.