Adding and removing roles on user login accounts

Your volunteer's user login account is the area you use to add roles to or remove roles from your contacts. You will work with a contact's user login account when you have a new volunteer or staff member, or when a volunteer or staff member quits. You can add specific roles to limit their access and you can also remove their access.
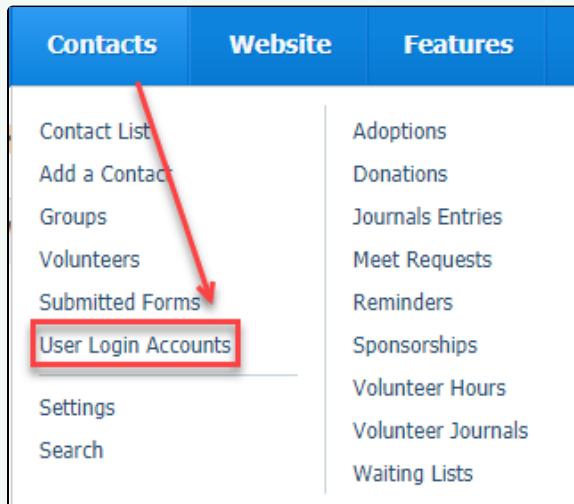
> ⚠ We highly recommend you do not give out your personal user login. Instead, create a user login for each volunteer/staff member so you can add and remove permissions as needed.

✅ **Where do I find it?**

You can find the User Login Accounts page by going to **Contacts > User Login Accounts**.

On this page:

- Adding or removing roles
    - If the contact does not already exist
    - If the contact exists
    - Adding roles for your volunteers and staff
- Removing roles
- Resetting a user's login account password
- Deleting a user login account

Related pages:

- Reactivating a deleted user login account

Adding or removing roles

For your volunteers and staff to perform their duties, you, as the site administrator, must attach roles to their user login account. In general, you simply access the person's user login account and add a role that you'll select from a drop-down menu. However, your new volunteer or staff member may not be listed as a contact, and only contacts can be assigned a user login account.

Here is a video explaining the process of adding and removing roles:

See the instructions below **If the contact does not already exist** for how to register someone who is not already a contact. If they are already listed as a contact, follow the instructions in the section, **If a contact exists.**
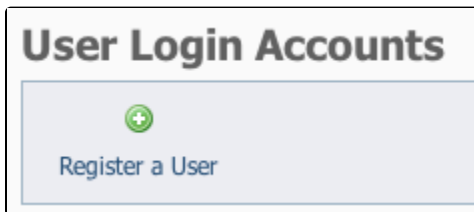
Remember:

- A user must be listed as a contact. If they are not, you will have to register them as a contact.
- Once they have a user login account, you can add roles to give them the security permissions they need to perform their duties within the organization.

If the contact does not already exist

If the contact does not already exist, you must register them:

1. **Go to Contacts > User Login Accounts** and click **Register a User**.

2. Fill in the required information. **NOTE**: You can pick any username for them and they can change their username after they log in.


3. **Select Volunteer** for the registration type.
4. Click **Register User.** They will receive an email with the username you designated for them and a temporary password.

Registering the user will also create a contact for them. Next, you'll add **Roles** to grant them specific permissions to your service.

If the contact exists

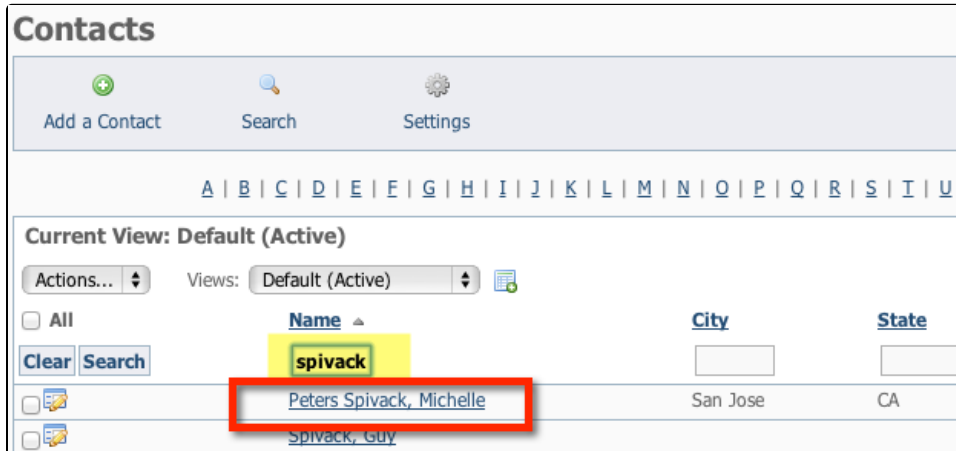Search your contacts to see if the person is listed as a contact:

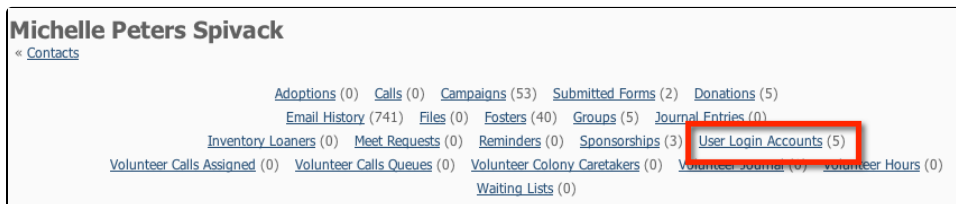1. Go to the **Contacts > Contacts List** on the menu.
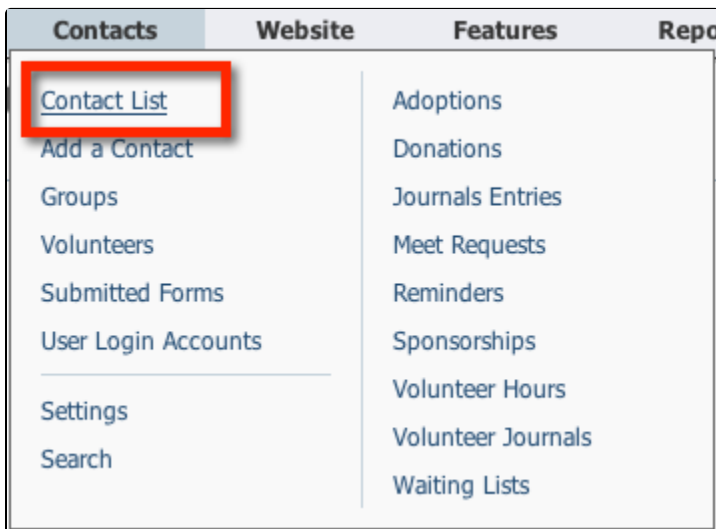
2. Find the contact in your list of contacts by clicking one of the **Search** icons**.**
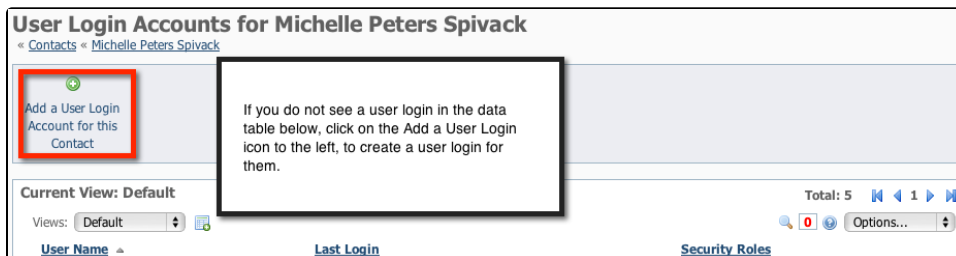

3. Click the contact's name to view the **Contact's** page.

4. At the top of that contact's page, click **User Login Accounts** to go to the next screen. (**NOTE**: most people will either have a 0 or 1 next to this)


5. Click **User Login Accounts** to take you to the user login data table for this contact. (see below). You will be able to see if they have a user login. If not, you can create one for them.

If they do not already have a user login, you can create one for them so that you can then assign roles and grant them access to your service. To do this:

1. Click the **Add a User Login Account for this Contact.**
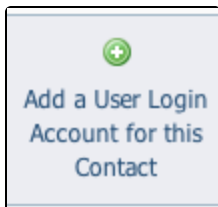
2. On the user registration page, verify that the contact information is correct.
3. Fill in the required information. **NOTE**: You can pick any username for them and they can change their username after they log in.
4. **Select Volunteer** for the registration type.
5. **Click Register User.**
6. **They will receive an email** with the username you designated for them and a temporary password.

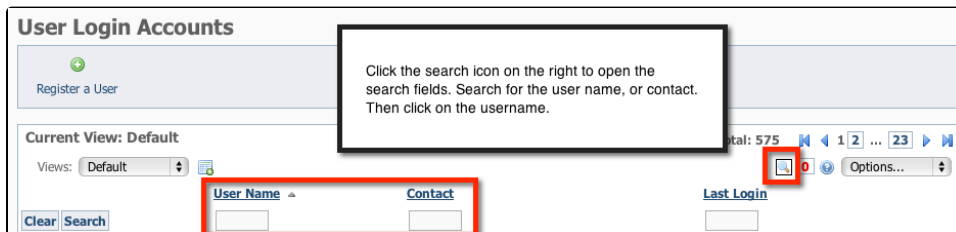Next, you'll **add Roles** to grant them specific permissions to your service.

Adding roles for your volunteers and staff

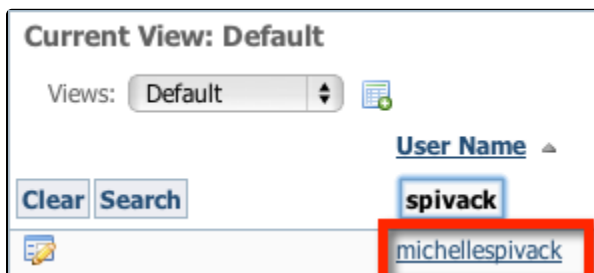To add the appropriate roles for your volunteers and staff:

1. Go to **Contacts > User Login Accounts** in the menu.
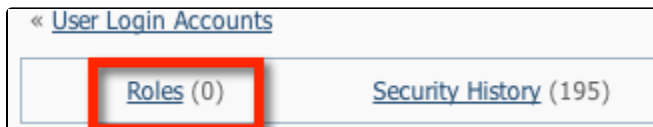

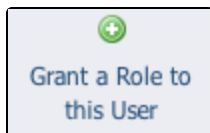2. Find and click the username for the user you would like to grant access to.

3. Click the **User Name.**

4. Cick **Roles.** If the user has no roles it will show *Roles (0)*

5. Click **Grant a Role** to this user to add permissions.

See the **About roles, security, and permissions** section of this guide for an explanation of all the possible roles.

Removing roles

1. Go to **Contacts > User Login Accounts** in the menu.
2. Find the user in the list and click their username to see the user's details.
3. At the top of the user view page, click the **Roles** link.
4. Remove all roles for the user by checking the appropriate boxes for the roles, then selecting **Remove** from the **Actions** drop-down list at the top left corner of the roles data table.

Ⓘ   Be careful you do not remove your own permissions!

Resetting a user's login account password

Follow these instructions to reset a user's login account password.   A new password will be emailed to the email address on the **Login Account.**

1. Go to **Contacts > User Login Accounts** on the menu.
2. Find the user in the list and click on their username, this will take you to that user's details.
3. Click **Reset Password**.

Deleting a user login account

Follow these instructions to delete a user's login account.

1. Go to **Contacts > User Login Accounts.**
2. Scroll to the **User Login** you would like to delete. Note that this is different from the **Contact** name.

Current View: Default

Views: Default ▼ 🗐 🗐

User Name ▲   **Contact**

3. Click the **User Name** for the contact you want to delete. A screen opens with the contact's user login information.
4. Click the **Delete** button at the lower left.

Reset Password | Force Logi | Delete | dit

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