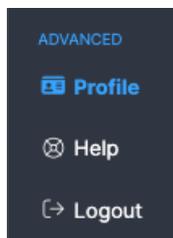


Adding and editing users

01/31/2024 1:58 pm EST

The InsightStore is a great tool you can share with other members of your organization.



All existing users appear on the *Users* page. To get to it, click on *Profile*, which is in the lower left navigation bar.

On the *Profile* page, select *Your Organization*, then *Users*. From this page, you can invite new users, edit existing users' permissions, remove existing users, and re-invite users who didn't join the first time they were invited.

MEMBERS OF THIS ACCOUNT

ADD A USER

First Name *: **Last Name ***:

Email *:

Administrator users can manage organization settings, write new questions, and invite others to join the organization.

Researcher users can explore results, but they cannot make changes. Researchers may be granted write access to certain items shared individually.

User has contract signing privileges

| | | |
|----------------------|---------------|----------------------------------|
| <input type="text"/> | Administrator | <input type="button" value="x"/> |
| <input type="text"/> | Researcher | <input type="button" value="x"/> |
| <input type="text"/> | Administrator | <input type="button" value="x"/> |
| <input type="text"/> | Administrator | <input type="button" value="x"/> |
| <input type="text"/> | Administrator | <input type="button" value="x"/> |

User Types

There are two user types: *Administrator* and *Researcher*. Each user is associated with one user type. The user type is selected when a new user is invited and can be changed later by an administrator.

Administrators can perform all tasks in the system, including managing account settings, writing new questions (if your account permits that), and inviting others to join the account.

Researchers are not allowed to create or deploy questions, manage account settings, or invite others to join the account. They can, however, create dashboards, segments, and reports and share them with others.

Inviting a New User

To invite a new user, provide their first name, last name, and email address in the *Add a User* card. Select their user type, then click *Save*.

Two emails will be sent to the user you invited. The invited user must follow the instructions in the emails they receive from our system to be added to your account. Both messages will be sent from noreply@civicscience.com.

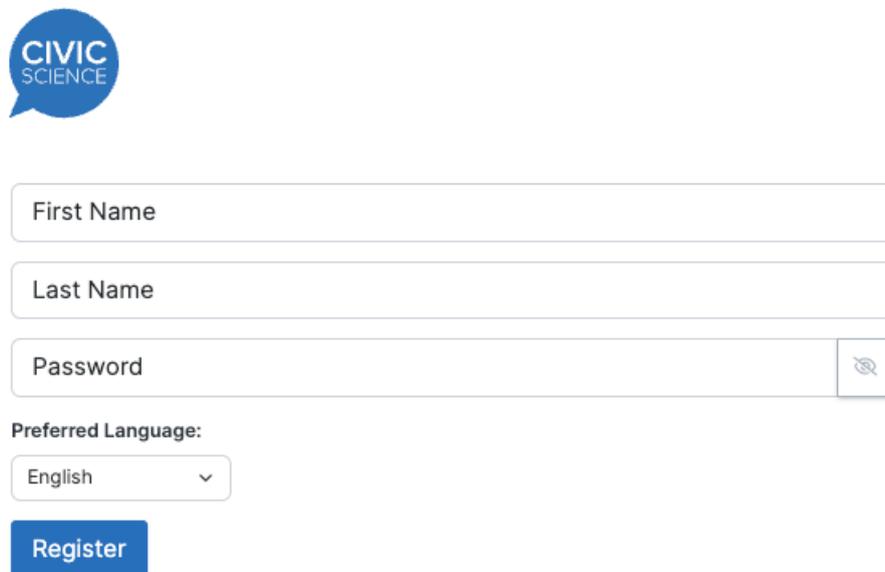
First Email

The first email¹ sent to the new user will look something like this:



Registration Screen

After clicking on the *click here* link in the first email, the user will be taken to this screen:

A registration form with the CivicScience logo at the top left. The form contains four input fields: "First Name", "Last Name", "Password" (with a toggle icon on the right), and "Preferred Language:" with a dropdown menu currently set to "English". Below the fields is a blue "Register" button.

They will fill in their first name, last name, and password, then click the *Register* button.

After hitting the *Register* button, they will see the message *Account registered, please check your email for a confirmation email*.

✓ Account registered, please check your email for a confirmation email.

Second Email

The second email will look like this:

CivicScience <noreply@civicscience.com>
to [redacted]

Thank you for signing up for the InsightStore. Your registration is nearly complete

Please [click here](#) to activate your account.

Login Screen

After using the *click here* link in the second email, the user will be taken to this login screen:



Email or Username

Password

Login

Don't have an account? [Create one now.](#)
Forgot password? [Reset](#)

[Help & FAQ](#)
[Contact Us](#)

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The user will fill in their username (email address) and password and click the *Login* button to enter the InsightStore.

¹A few users need to access multiple organizations' InsightStore accounts. If an email is sent to an address for which there is already a user account, the new organization is added to that user account, and the user accesses it by [switching accounts](#) within their current user. In that situation, the invitation received looks like this:

CivicScience Invite Inbox x

CivicScience <noreply@civicscience.com>
to [redacted]

You have been invited to join CivicScience Demo Account.

There is no link, as no registration is required.
