

# Add - Personal account

Path to function: *Accounts > Add > Personal account*

Account creation runs over a four-tab wizard.

## Login

First you set the [username](#) and whether they can log in via email address, then whether you want to email the user an activation code (recommended) or specify a [password](#) for them (e.g. if you are creating a test account for yourself).

The screenshot shows a wizard window titled "Create a new personal account under 'United Federation of Planets.'". The wizard has four steps: 1. Login (active), 2. Details, 3. Optional details, and 4. Permission sets. In the "Login" step, there is a "Choose a username\*" field with the value "ufp wcrusher" and a help icon. Below it is a "Login by email address" checkbox which is unchecked. There is an "Expires on\*" field with the value "2022-09-12" and a calendar icon. Under "Create account and", there are three radio button options: "Email an activation code to the user" (selected), "Save in 'Accounts not activated' list", and "Specify a password now". At the bottom left, there is a note "\* required fields". At the bottom right, there are "Cancel" and "Next" buttons.

## Details

Enter the user's details - all the fields on this tab must be completed. Depending on your [schema](#) you may see more mandatory fields here than first name (s), last name and email address. Checkboxes will appear here if they are marked as mandatory, but do not have to be ticked.

Create a new personal account under 'United Federation of Planets.'

1 Login 2 Details 3 Optional details 4 Permission sets

First name(s)\* Wesley

Last name\* Crusher

Email address\* w.crusher@ncc1701.starfleet.mil

\* required fields ? Cancel < Previous > Next

## Optional details

These include non-mandatory fields. By default these are items such as group, title, phone number and department but your view may be different if you have custom schema fields.

Create a new personal account under 'United Federation of Planets.'

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Group Select a group... ▾

Title Type to start searching...

Department

Position Humans

Phone number

Fax number

Staff/student number

Postal address

Favourite Show Star Trek: The Next Generation

\* required fields ? Cancel < Previous > Next

Featured here is the group selector. If you have many groups, the search will reduce the list as you type. You can also create a new group if what you enter is not already in the list.

## Permissions

Which permission sets should be assigned to the account. Default permission sets are already selected. Clicking on the permission set description will [open that permission set](#).

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Chemistry

Default permission set  
default

Physics

\* required fields

? Cancel ← Previous Create account

## Create

Once you have completed all pages you can click the button to create the account. Assuming you left the activation option unchanged, the user will now be sent an email with instructions [using your template](#).

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