

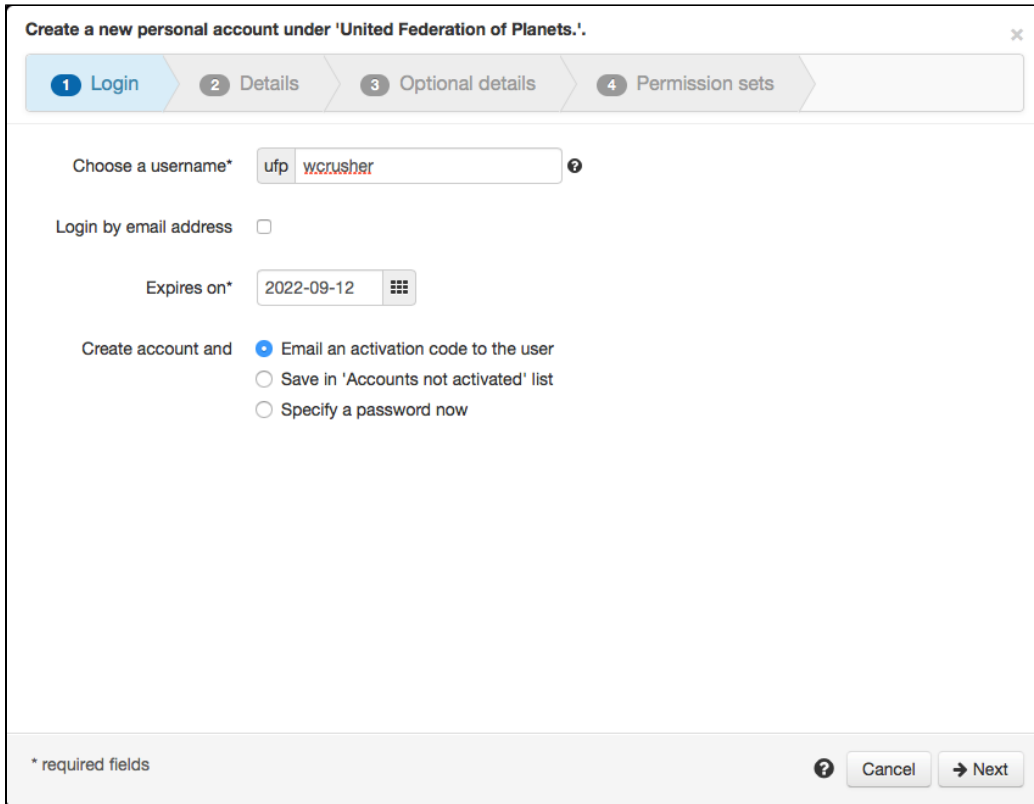
Add - Personal account

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

Account creation runs over a four-tab wizard. Default values for some of these fields can be set under [organisation preferences](#).

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 text input field for "Choose a username*" containing "ufp wcrusher". Below it is a checkbox for "Login by email address" which is unchecked. There is also a date field for "Expires on*" set to "2022-09-12". 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, there is a legend for "* required fields", a help icon, and "Cancel" and "Next" buttons.

Usernames must be unique. They include the prefix in the grey box - e.g. ufpwcrusher.

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)*

Last name*

Email address*

* required fields

Cancel Previous Next

If you get a warning that the email address is in use then you can use [search](#) to find it (if you don't immediately see it in the results, check the deleted tab)

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.'

1 Login 2 Details 3 Optional details 4 Permission sets

Group

Title

Department

Position

Phone number

Fax number

Staff/student number

Postal address

Favourite Show

* 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](#).

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

1 Login 2 Details 3 Optional details 4 Permission sets

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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