

Managing access to your CiviCRM

Using the Healthwatch Civi CRM

About this resource

As with any system, it is important that you regularly check and monitor who has access to your CRM and the permissions levels they have to ensure your data stays secure.

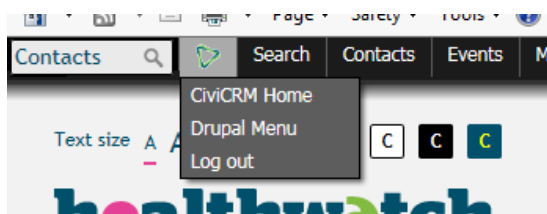
When new people join or leave your organisation you will need to add or remove them and the permissions they have as appropriate.

This resource is for users with administrator permissions to explain how to best manage users access to their CiviCRM.

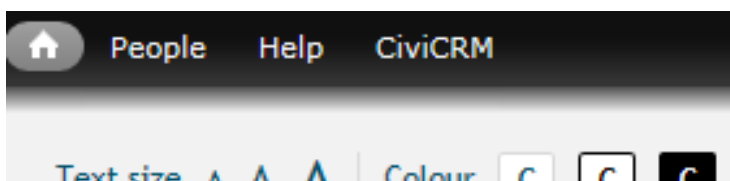
Managing users on your Civi CRM

To be able to effectively manage the users on your CiviCRM, you need to have an administrator permissions role.

- Click on the green triangle at the top of your screen and select 'Drupal Menu'.



- Once in the Drupal Menu, you should then select 'People'. This will then bring up a new page, showing all your existing users



Adding new users

- On the page with all your existing users, click 'Add User'. This then brings up another page where you need to fill in all the details for the new user.
- Fill in the fields on the page to set up the account including a username and email address. **Please note:** The new user's username and email address must be unique and cannot be used twice. Users should not share accounts and should have their own username.
- Enter a password for the user, but tell them once their account has been set up to reset their password by clicking on the 'Request new password' link on the CRM homepage.
- Decide what level of permissions they should have by selecting either administrator, user or volunteer.
- If you also tick the box 'Notify user of new account' then an email will automatically be sent to your new user with a link that will allow them to access the CRM to change their password.
- Remember to click 'Save' at the bottom of the page.

This web page allows administrators to register new users. Users' e-mail addresses and usernames must be unique.

Username *

Spaces are allowed; punctuation is not allowed except for periods, hyphens, apostrophes, and underscores.

E-mail address *

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be news or notifications by e-mail.

Password *

Password strength: _____

Confirm password *

Provide a password for the new account in both fields.

Status

Blocked

Active

Notify user of new account

Roles

CiviCRM administrator

CiviCRM user

Volunteer

Additional advanced administration

Change roles assigned to user.

Changing a user's role

You might need to change a user's role from time to time.

- Go to the Drupal Menu and click 'People' as in the previous steps.
- Click Edit next to their name.
- This will then bring up the same screen as above, and you can go to their role and change it accordingly.
- Again, remember to 'Save' at the bottom of the page.

<input type="checkbox"/>	USERNAME	STATUS	ROLES	MEMBER FOR	LAST ACCESS	OPERATIONS
<input type="checkbox"/>	test_civicrm_admin	active	· CiviCRM administrator	5 months 2 weeks	4 months 4 days ago	edit
<input type="checkbox"/>	demo2	active	· CiviCRM user	8 months 1 week	6 days 17 hours ago	edit

Status

Blocked

Active

Roles

CiviCRM administrator

CiviCRM user

Volunteer

Additional advanced administration

Change roles assigned to user.

Removing a user

If one of your team leaves the organisation, or if for any reason you need to take away access to an individual member of staff, you need to take action to ensure your data remains secure.

- Go to the Drupal Menu and click 'People' as in the previous steps.
- Click Edit next to their name.
- This will then bring up the same screen as above, you'll then need to change their status from 'Active' to 'Blocked'
- Again, remember to 'Save' at the bottom of the page.