

Set Up Users and Passwords

After planning user names and passwords, you can set up your organization's users in the program. On the Administration tab, click **Users & Passwords**.

1. At the top, click **Add User**.
2. Enter the user information. For more on these fields, see the Additional Field Information below.
3. When you're finished, click **Save**.

For each user you add, be sure to set [access and privileges](#), assign [individual fund access](#), and select [user preferences](#).

Additional Field Information

User Name

The unique name a user enters when opening the program. This doesn't have to be the user's full name or real name. For example, Suzanne might want her user name to be "Susie" or "Sue". This is not case-sensitive.

Inactive

Inactivate a user account that you might reactivate at a later date. Inactive users can't log in.

Password

If you require users to have passwords to enter the program, enter it here. A password can be up to ten characters and can contain alphabetic, numeric characters, or a combination of both. Passwords are case-sensitive.

Security Adm.

Select **Yes** to mark the user as a security administrator. At least one person must be the security administrator and have All Access to all program areas. This person is responsible for creating and maintaining all user accounts and resetting other users' forgotten passwords. For this reason, you should also have a backup administrator.

Phone Number

Enter a telephone number where this user can be reached outside of the office. Select **Unlisted** if this number shouldn't be shared with others.

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