

Add a New User Manually

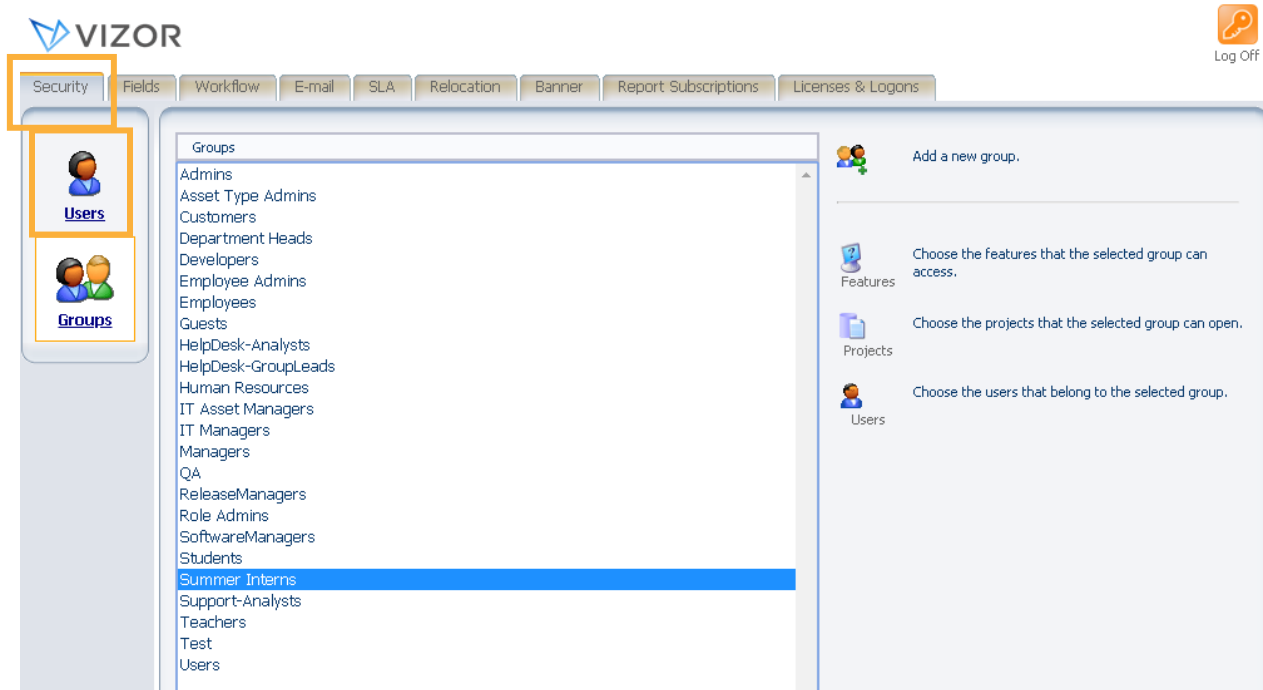
People are represented in VIZOR as either Users, Contacts or Employees.

Users can log into VIZOR to access functionality permitted by the administrators of the system, such as the Self-service portal. The logon account may be native to VIZOR or it may be via a 3rd party such as Active Directory or LDAP.

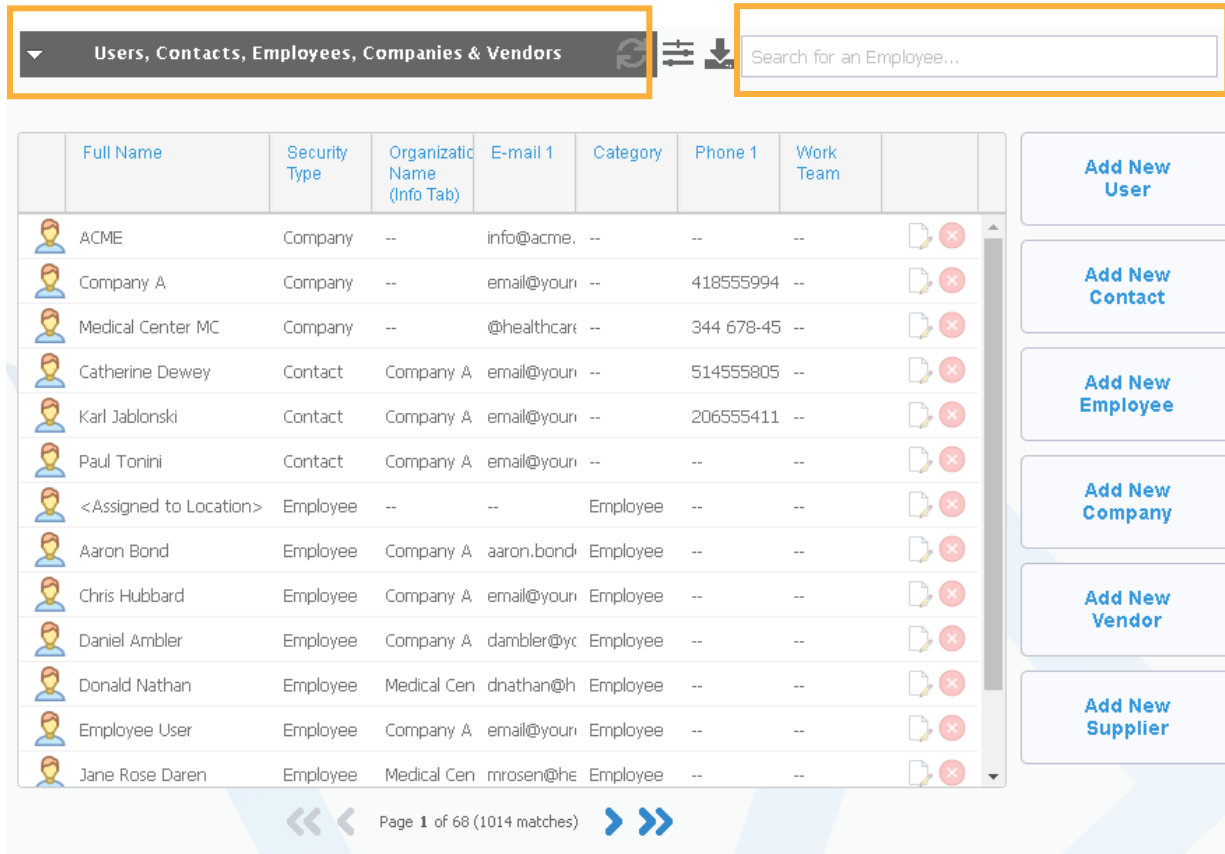
Employee is a type of user that is commonly used when managing assets internal to an organization. Employees are often imported from or synchronized with Active Directory or an HR system or onboarded into VIZOR.

Contacts of people do not log into VIZOR but can receive email notifications.

1. You require VIZOR administration privileges to manage VIZOR users. To login navigate to <https://YOURSERVER/connectadmin/>
2. Ensure that the **Security** tab is select and select **Users**



3. A list of your users will open. You can filter users using queries or search for a user to make sure they do not already exist.



The screenshot displays a user management interface. At the top, a navigation bar contains a dropdown menu with the text "Users, Contacts, Employees, Companies & Vendors" and a search input field labeled "Search for an Employee...". Below the navigation bar is a table listing various users and organizations. The table has columns for Full Name, Security Type, Organizational Name (Info Tab), E-mail 1, Category, Phone 1, and Work Team. To the right of the table is a vertical sidebar with buttons for "Add New User", "Add New Contact", "Add New Employee", "Add New Company", "Add New Vendor", and "Add New Supplier". At the bottom of the table, there are navigation arrows and the text "Page 1 of 68 (1014 matches)".

	Full Name	Security Type	Organizational Name (Info Tab)	E-mail 1	Category	Phone 1	Work Team	
	ACME	Company	--	info@acme.	--	--	--	
	Company A	Company	--	email@your	--	418555994	--	
	Medical Center MC	Company	--	@healthcar	--	344 678-45	--	
	Catherine Dewey	Contact	Company A	email@your	--	514555805	--	
	Karl Jablonski	Contact	Company A	email@your	--	206555411	--	
	Paul Tonini	Contact	Company A	email@your	--	--	--	
	<Assigned to Location>	Employee	--	--	Employee	--	--	
	Aaron Bond	Employee	Company A	aaron.bond	Employee	--	--	
	Chris Hubbard	Employee	Company A	email@your	Employee	--	--	
	Daniel Ambler	Employee	Company A	dambler@yc	Employee	--	--	
	Donald Nathan	Employee	Medical Cen	dnathan@h	Employee	--	--	
	Employee User	Employee	Company A	email@your	Employee	--	--	
	Jane Rose Daren	Employee	Medical Cen	mrosen@he	Employee	--	--	

Page 1 of 68 (1014 matches)

4. Create a new users, employees and contacts by clicking on one of the buttons on the right side of your user list. Note, these user accounts can also be created by synchronizing with Active Directory or an HR system.

Users, Contacts, Employees, Companies & Vendors ↻ ☰ ⬇️

	Full Name	Security Type	Organizatio Name (Info Tab)	E-mail 1	Category	Phone 1	Work Team	
	ACME	Company	--	info@acme.	--	--	--	
	Company A	Company	--	email@your	--	418555994	--	
	Medical Center MC	Company	--	@healthcar	--	344 678-45	--	
	Catherine Dewey	Contact	Company A	email@your	--	514555805	--	
	Karl Jablonski	Contact	Company A	email@your	--	206555411	--	
	Paul Tonini	Contact	Company A	email@your	--	--	--	
	<Assigned to Location>	Employee	--	--	Employee	--	--	
	Aaron Bond	Employee	Company A	aaron.bond	Employee	--	--	
	Chris Hubbard	Employee	Company A	email@your	Employee	--	--	
	Daniel Ambler	Employee	Company A	dambler@yc	Employee	--	--	
	Donald Nathan	Employee	Medical Cen	dnathan@h	Employee	--	--	
	Employee User	Employee	Company A	email@your	Employee	--	--	
	Jane Rose Daren	Employee	Medical Cen	mrosen@he	Employee	--	--	

⏪ ⏩ Page 1 of 68 (1014 matches) ⏪ ⏩

Add New User

Add New Contact

Add New Employee

Add New Company

Add New Vendor

Add New Supplier

5. In this case, let's pick add a new user. Its window will pop up where you can fill out the information.

Add New User ✕

Enter the information for the new User.

Info | Contact Details | Groups | Employment | Source

First Name: Last Name:

Full Name:

E-mail:

Logon Name: Number of Reserved Licenses:

Organization Name:

Authenticate With: Password:

Confirm Password: VOIP Username:

VOIP Password: Great Plains ID:

Is Disabled: Category:

* This color indicates a required field

Back Next OK Close

6. Press Ok.

For more information see, Chapter 4 - *People And Organizations* and Chapter 23 – *Managing Contacts, Users And Groups* of the VIZOR Guide <https://www.vizor.cloud/content/collateral/vizor-manual-guide/>