

Adding User Accounts

Market: Federal/State/Local, House, Senate

Description: These instructions teach users how to add new user accounts in IQ. There are 2 options to conduct this activity.

Note: This activity requires administrative privilege. Contact your office IQ Consultant for information regarding this activity.

Option 1. Adding a new user that has unique settings

This option refers to adding a new user account that may have unique settings.

1. Navigate to Admin > Setup and Configuration > Users and Groups.

Hor	me Contacts 🗸	Messages 🗸	Outreach 🗸	Services 🗸	Library 🗸	Events 🗸	LegiStats 🗸	Admin 🔨
S(etup and Configuration	IMA IMA Inc	omings	Data Manual Merg	e	Utilitie My Us	es ver Lists	-
S D	ystem Settings Dashboard Settings	IMA Rul	les and Email Settings	Merge Recov Auto Merge a	ery and Data Cleanup	Backg Jobs Addre	round Jobs ss Checker Batches	;

2. In the Users and Groups page, click **Actions > New > User**.

Admin » Users and G	Groups								
Users and Gr	oups								Action 🤇
Users	Group	5 Departments	Profiles	Security Locks	Record Security Profiles	Add-in Usage	Ner	w User w Group	
• Filters		IQ Users (41 R	esults) 🕑				Net Net Cus	w Departm w Record s stom Field	nent Security Profile S

3. The **General** tab is the default window. Complete the fields appropriate for the user and click **Save**.

	User Identity and Status			Contact Information	
Login ID:	Required		Contact:		
User Name:	Required		Phone/Email:	Organization Information and Approvals	
Initials:	Required		Department:		
User Password:	Required	0	Supervisor:		Ψ
Re-enter Password:	Required		Groups:	Ealact around	
User Status:	Active	v		Select groups	0
Start Date:			Approval Groups — Form Messages:		
Stop Date:			Custom Messages:		· ·
Default IQ UI:	IQ4 Access Only	¥	Form Letters:		v
License Type:	Full	v	Outgoing Empil From		
	Alerts		Address List:		
Forward Alerts:	IQ Only	¥	Administrator-Selected	× Lori Zeoli	0
Forwarding Address:					
Exceptions			Self-Selected 'Acts As' Users:		

4. Click the Security Settings tab.

General	Security Settings	Logins	Failed Logins	Log (5)

5. Click Actions > Set Module Access Profiles.

User #198 U	JserAccou	unt1			
General	Securi	ty Settings	Logins	Failed Logins	Log (5)
Filters		[≇] User	Security Se	ttings (0 Results) ©	

- 6. Select the options appropriate for the user using the information below. A Best Practice is to set modules to "Standard Access" except for the Admin Module. This module is typically set to "no profile assigned".
- 7. Click Save.



Option 2: Adding new user account by copying similar user settings from an existing account

This option refers to adding a new user account (e.g., a new intern) with settings that will be copied from another existing user account (e.g., another intern account already in IQ).

- 1. Navigate to Admin > Setup and Configuration > Users and Groups.
- 2. Use **Filters** to search for an existing account. In this example only, the **Department** filter is used to search for intern accounts.



3. Select the row of the intern whose settings you will copy for the new user. Click **Copy**.



4. Complete the fields below associated with the new intern account.

ity settings, preferences, tile and menu layout, and rs from Amanda Stratton.
d
d
d
d
Switch to Batch User Creation

5. Click Save.