

Manage Users

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DevResults offers several tools for managing users:

- **Add** a new user
- **Change a user's permission group** (or other information)
- **Add** or **edit** multiple users using an **Excel upload**
- **Edit** multiple users from the **user index**
- **Assign passwords** to new users
- **Impersonate users**

Notes:

- Any user whose group includes **View & Edit** permissions for **People** can create new users.
- Organizations must be stored in DevResults before they can be assigned to a user.
- Once a user is added, you can **assign the user to one or more projects**. Partner users gain access to projects when they're assigned to the project.

Add a new user

To create a new user, go to **Administration > Users**.



This will open the users index page. To add a new user, click the **+ Add User** button in the lower right.

Example Organization
DevResults

Quick search...

Administration

Home > Administration > People > Users

187 of 187 users shown

Search users

0 users

	aboubacar.diallo@devresultsdemo.com	Aboubacar	Diallo		Owners
	adame.diouf@devresultsdemo.com	Adame	Diouf		Contributors
	adriana.campbell@devresultsdemo.com	Adriana	Campbell		Partner Managers
	agatha.mcintosh@devresultsdemo.com	Agatha	Mcintosh	Sebastian Foundation	Partner Managers
	aicha.zeinab@devresultsdemo.com	Aicha	Zeinab	Gates Foundation	Partner Managers
	aissata.diop@devresultsdemo.com	Aissata	Diop	Kunkle Associates	Partner Managers
	aissatou.devers@devresultsdemo.com	Aissatou	Devers		Viewers
	alejandro.vega@devresultsdemo.com	Alejandro	Vega		Partner Managers
	alex.edwards@devresultsdemo.com	Alex	Edwards		No Access
	alexander.patrick@devresultsdemo.com	Alexander	Patrick		Partner Managers
	alexandra.mitchell@devresultsdemo.com	Alexandra	Mitchell		Partner Managers
	alexis.wright@devresultsdemo.com	Alexis	Wright		Contributors
	alhassane.senghor@devresultsdemo.com	Alhassane	Senghor		Partner Managers
	ali.sabahath@devresultsdemo.com	Ali	Sabahath		Partner Managers

In the **Add User** pop-up, type the user's first and last name, their email address, and assign them a permission group from the dropdown. Then click the **+ Add User** button.

Note: The individual will use their email address to log into DevResults.

Add User

Name

Email

Group

This will open the new user's profile page. Adding information to the **Contact Details** section is optional, but adding a partner user's organization affiliation is strongly advised.

Example Organization
DevResults

Quick search...

Data Program Info Tools **Administration** Bookmarks

Home > Administration > People > Users > Jane Smith

Jane Smith

Photo

Upload photo
... or drag and drop your file here

Contact Details

Name

Email

Job title

Organization

Department

Work Phone

Security

Group ☒ Contributors
Can log into the system to manage activities.

To grant access to a new user, give them a link to your DevResults login page (____.devresults.com) and ask them to click on "Send Password Reset Email". You can also provide them with [instructions for how to set their password](#).

Alternatively, you can use the **send password reset link by email** button on their profile page. The user will receive an email with a link that lets them set their password. However, the link will expire in 3 hours, so this is only advisable when the user is waiting for access and will use the link in that timeframe.

Security

Group ☒ **Contributors**
Can log into the system to manage activities.

☐ **Managers**
Can mark checklist items as approved. Can sign off on results data submitted by partners.

☐ **No Access**
Cannot log into the system.

☐ **Owners**
Can configure the system's global settings and lists. Can manage user accounts and logins, reset passwords, and assign permissions.

☐ **Partner Managers**
Can manage users for their organization and also edit information for their organization's activities

☐ **Partners**
Users from other organizations with limited access to activities they implement.

☐ **Viewers**
Can log into the system, browse activities, and view reports. Cannot change anything.

Password This person does not have a password.

Note: If you have a DevResults Enterprise site, you have three options for [adding users to linked sites](#).

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Change a user's permission group (or other information)

Go to **Administration > Users** and then select the user whose permission level you'd like to change (or whose profile you'd like to edit).

In the Permissions section, select the new permission level for the user. Your change will be automatically saved.

Security

Group

- ☐ Contributors
Can log into the system to manage activities.
- ☒ **Managers**
Can mark checklist items as approved. Can sign off on results data submitted by partners.
- ☐ No Access
Cannot log into the system.
- ☐ Owners
Can configure the system's global settings and lists. Can manage user accounts and logins, reset passwords, and assign permissions.
- ☐ Partner Managers
Can manage users for their organization and also edit information for their organization's activities
- ☐ Partners
Users from other organizations with limited access to activities they implement.
- ☐ Viewers
Can log into the system, browse activities, and view reports. Cannot change anything.

Password This person has a password.

Send password reset link by email

Edit other contact details if needed.

Not what you're looking for? These links might be helpful:

- [Permissions Overview](#)
- [Change a Group's Permissions](#)

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Upload new users

To add many new users at once, you can upload a spreadsheet containing their details instead of creating each user individually. First, go to **Administration > Users** to open the user index.

On this page, click on the gear icon and then click **Download Blank Template** to get an Excel template.

DevResults
Example Organization

Quick search...

Data
Program Info
Tools
Administration
Bookmarks

Home
Administration
People
Users

188 of 188 users shown

Group

Organization

- ☐ Aid Alternatives, Incorporated
- ☐ Caudill Associates
- ☐ Committee for Collaborative ...
- ☐ Example Partner Organization
- ☐ Gates Foundation
- ☐ Kunkle Associates
- ☐ Sebastian Foundation

Search users

0 users
Change group
Change organization
Delete

	Photo	Email	First Name	Last Name	
<input type="checkbox"/>		aaron.fox@devresultsdemo.com	Aaron	Fox	
<input type="checkbox"/>		aboubacar.diallo@devresultsdemo.com	Aboubacar	Diallo	
<input type="checkbox"/>		adame.diouf@devresultsdemo.com	Adame	Diouf	
<input type="checkbox"/>		adriana.campbell@devresultsdemo.com	Adriana	Campbell	
<input type="checkbox"/>		agatha.mcintosh@devresultsdemo.com	Agatha	Mcintosh	Sebastian Found
<input type="checkbox"/>		aicha.zeinab@devresultsdemo.com	Aicha	Zeinab	Gates Foundatio
<input type="checkbox"/>		aissata.diop@devresultsdemo.com	Aissata	Diop	Kunkle Associat
<input type="checkbox"/>		aissatou.devers@devresultsdemo.com	Aissatou	Devers	
<input type="checkbox"/>		alejandro.vega@devresultsdemo.com	Alejandro	Vega	

Export Filtered Items
Export All
Download Blank Template
Import

Columns

- ☒ Photo
- ☒ Email
- ☒ First Name
- ☒ Last Name
- ☐ Title
- ☐ Department
- ☐ Phone
- ☒ Organization
- ☒ Group
- ☐ Is Advanced Notice
- ☐ Is Beta Tester

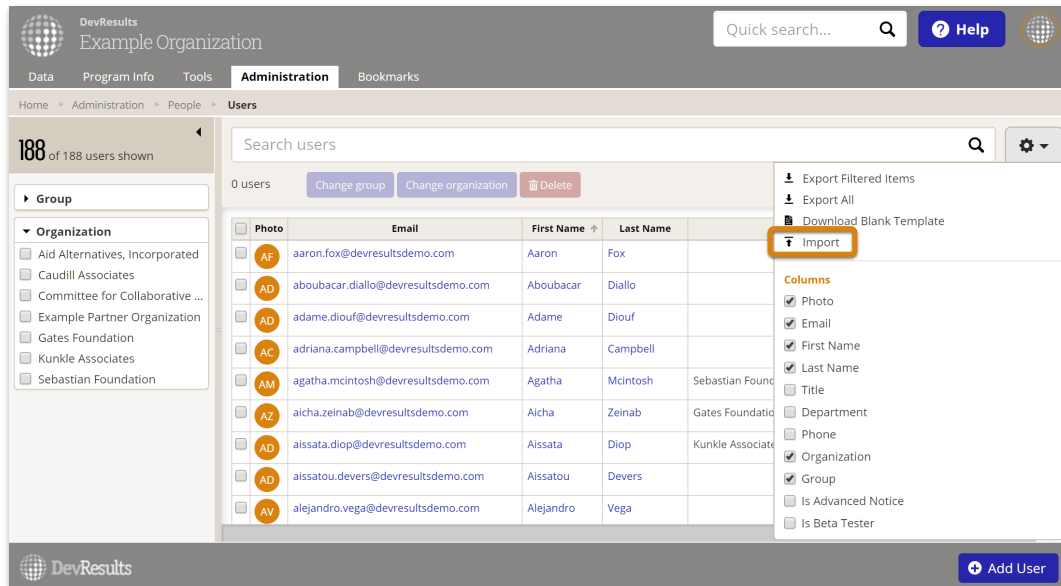
Add User

Edit the Excel file by adding the list of users you'd like to upload.

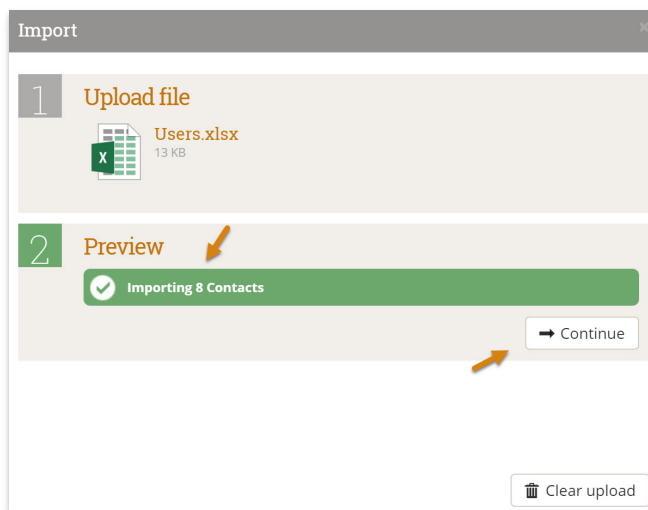
	A	B	C	D	E	F	G	H	I
1	Email	First Name	Last Name	Title	Department	Phone	Organization	Group	Is Advanced Notice
2	cadence.medina@devresultsdemo.com	Cadence	Medina	Program Economist		+224 555-910-8643	Caudill Associates	Owners	TRUE
3	djenab.fofana@devresultsdemo.com	Djenab	Fofana	Health Sector Specialist		+224 555-195-4802	Aid Alternatives, Incorporated	Partner Managers	FALSE
4	francine.kotodzou@devresultsdemo.com	Francine	Kotodzou	Program Management Specialist		+224 555-952-7260	Refugee Relief, Inc.	Contributors	TRUE
5	javier.moreno@devresultsdemo.com	Javier	Moreno	English Tutor Adviser		+224 555-495-5276	Srivats Action, Inc.	Partner Managers	FALSE

- Email, First Name, Last Name, and Group are **required**. The other fields are optional.
- **Organization** needs to reference an organization that already exists in your site.
- **Group** needs to reference a group that already exists in your site.
- Enter **TRUE** for **Is Advanced Notice** to sign someone up for notifications in advance of updates to the system.
- Enter **TRUE** for **Is Beta Tester** to sign someone up for previews and testing of new features.

Save your spreadsheet, click the gear icon again, and select **Import**.



This will open a pop-up window to walk you through the upload process. Choose your file and make sure the summary shows you the expected number of new users. If there are any errors in the file, you'll get a message explaining what they are. If everything looks good, click **Continue**.



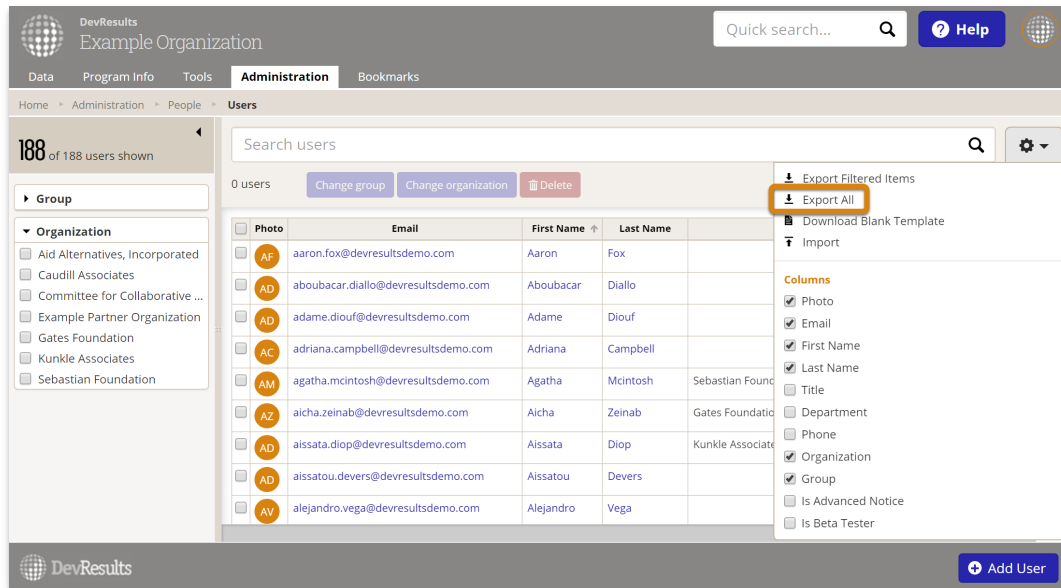
You'll get a message saying that the users were imported. Once you click **Done**, your users index page will refresh and you'll see your new users there!

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Edit multiple users using an Excel upload

You can also use Excel to update multiple users. To do so, use the same instructions as above, but instead of

downloading a blank template, choose **Export All**



Then edit the spreadsheet that you downloaded -- for example, to edit a name or add a phone number. However, there are restrictions when using this tool. Excel imports cannot be used to change a user's:

- Email address
- Permissions group (see the section below for how to edit multiple users' permissions groups)

Note: To edit existing users, DO NOT delete or change the contactID. This is the only way the system knows which user should be updated.

When you import the Excel file, existing users will be updated with any changes to the spreadsheet.

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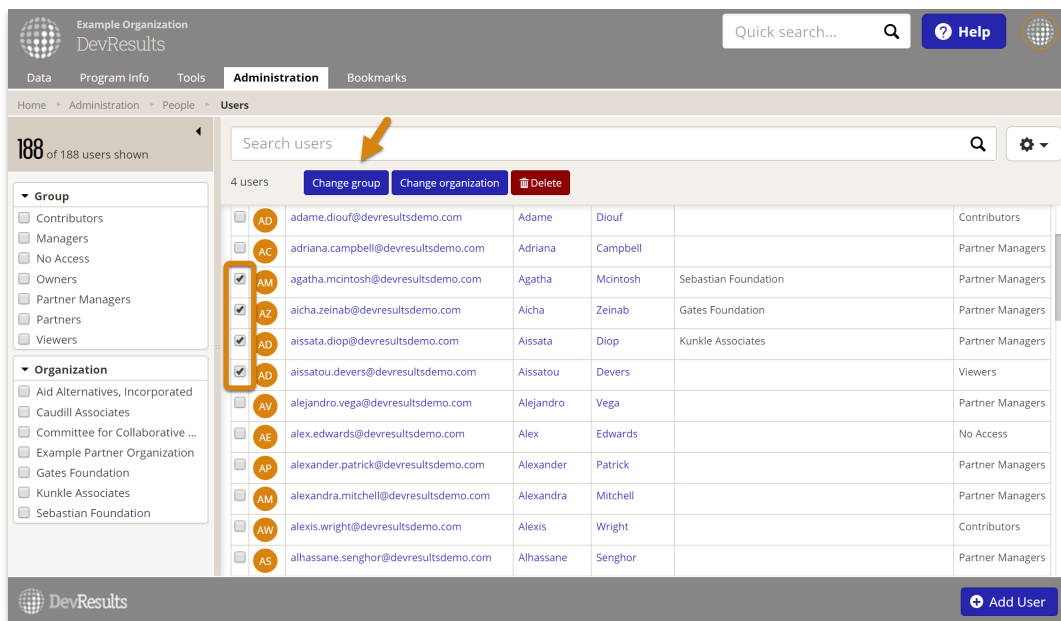
Edit multiple users from the user index

To make managing users easier and faster, we offer the ability to edit multiple users at once right from the user index. Currently, the edits you can make this way are:

- Changing group
- Changing organization
- Deleting users (don't worry -- we'll check to confirm that you really want to!)

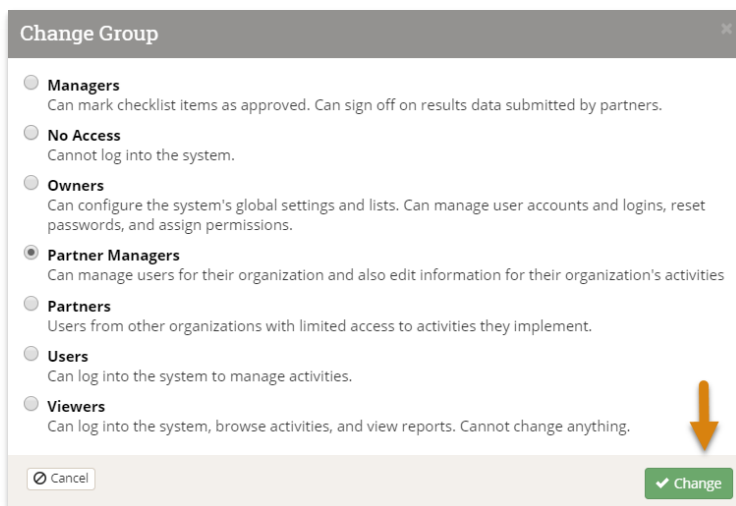
To make these kinds of edits, first go to **Administration > Users** to open the users index page.

When the index page opens, click the checkbox next to the users you want to edit. You can either scroll through the list to find what you need, or use the filters and search to get the perfect list and click the checkbox in the column header to select all indicators displayed. Once you have the indicators you want to edit checked, click the button for the bulk action you'd like to complete.



If any additional selections are needed, this will open a pop-up or confirmation window before proceeding; otherwise, it will complete the action. For example, to change users' permission groups, you'll see pop-up below.

Select the group you would like to change the users to and then click **Change**. Your changes will now be saved.



If you see a pop-up, make the necessary selections (if any are required) and click the button to cancel or proceed with the bulk edit.

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Assign passwords to new users

When you create new users (or when you initially launch your new DevResults site), you have two options for providing passwords:

- Follow the instructions [above](#) to email each new user a password reset link.
- Email new users with instructions to visit your DevResults site (something.devresults.com), enter their email, and click on **Send password reset email**. Users should then follow the instructions in the email.

Welcome! Please log in.

Email
new.user@email.org

Password
Password

☒ Stay logged in on this computer

Log in

Trouble logging in? [Send password reset email](#)

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Impersonate users

Occasionally, it is helpful — when training, troubleshooting, or testing out new permissions — for site owners to see what other users are seeing without having to share screens or lean over their shoulder. By navigating to a user's profile page (**Administration > People / Users** and select them from the list), you can click on **Impersonate this user** in the upper right hand corner to log out as yourself and log in as them temporarily.

Sample Organization
DevResults

Quick search... [Help](#)

Data Program Info Tools **Administration** Bookmarks

Home > Administration > People > Users > Jane Smith

Jane Smith

Impersonate this user

Photo

Upload photo
... or drag and drop your file here

Contact Details

Name Jane Smith

Email jane@devresultsdemo.com

Job title

While you are logged in as another user, you will be able to:

- Accept the DevResults privacy policy on their behalf (**not recommended**).
- See and edit exactly what they are able to see and edit — no more, no less.
- Make edits in accordance with their user group permissions; these edits will be attributed to them, not to you, in the Change History.

Note: Use discretion when impersonating another user. This is an admin-only feature designed to enhance training, troubleshooting, and testing, and should NOT be used for routine tasks, circumventing closed submission windows, approving data on behalf of absent colleagues, or any other action that a site owner can already perform with their existing permissions.

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