Adding User to Reserve Cloud

2018 - Spring Edition

User Guide - Table of Contents

Overview

This guide will cover adding a **New Club User** for access to Reserve Cloud.

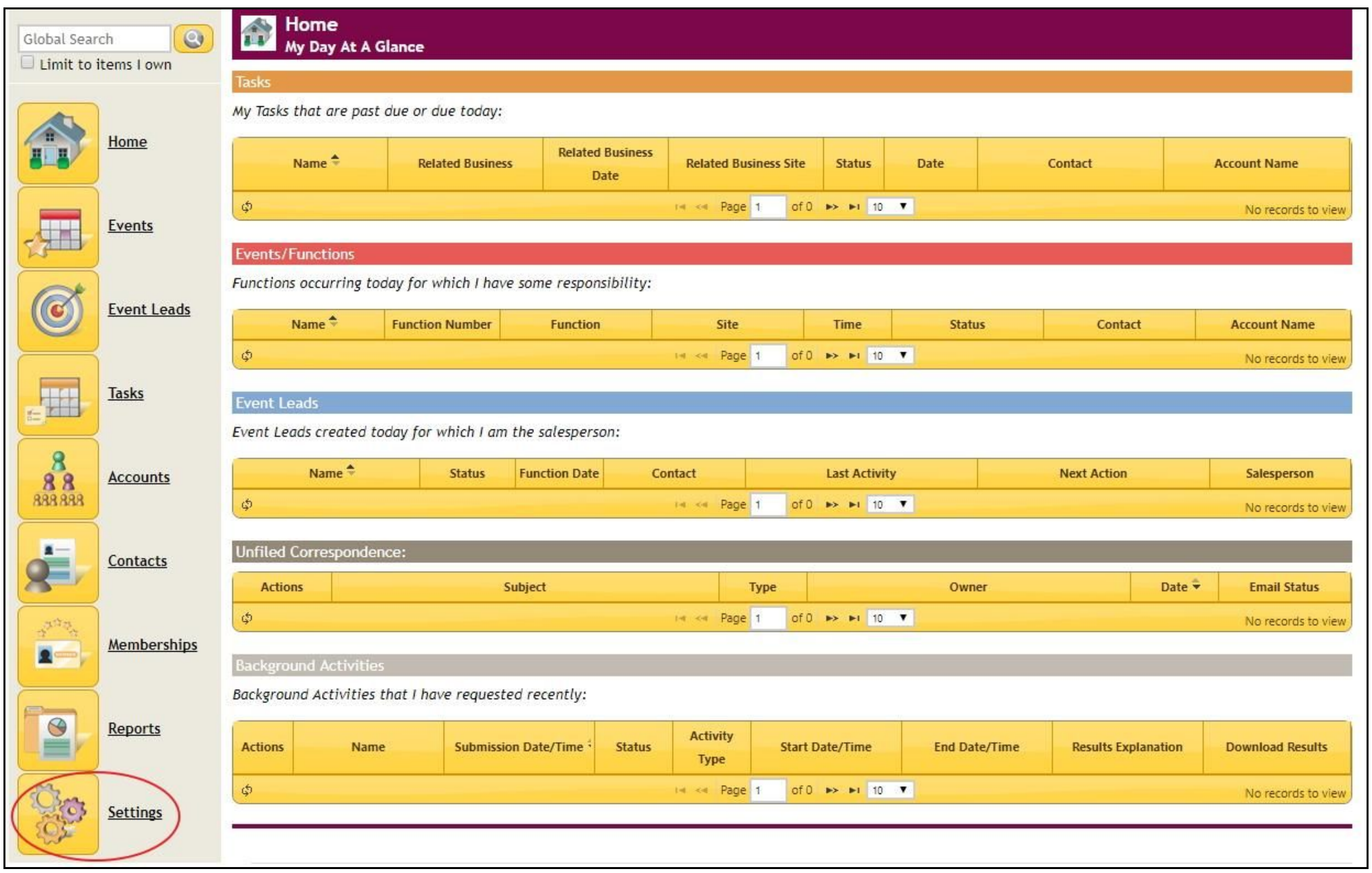
Use Case(s)

After going live with Reserve Cloud new users will need to be created to access the system at various security levels and roles.

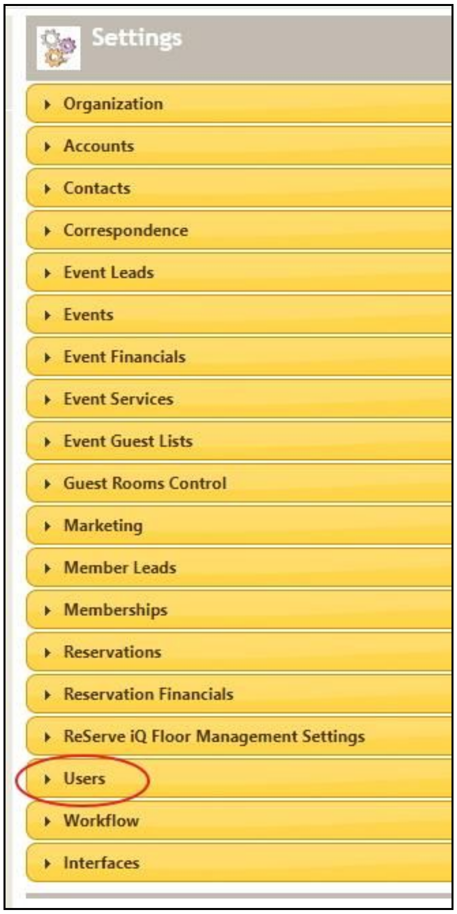
Accessing the Tool

To access Reserve Cloud please click here.

To add a new user, first view the **Settings** menu on the bottom right of the home page.

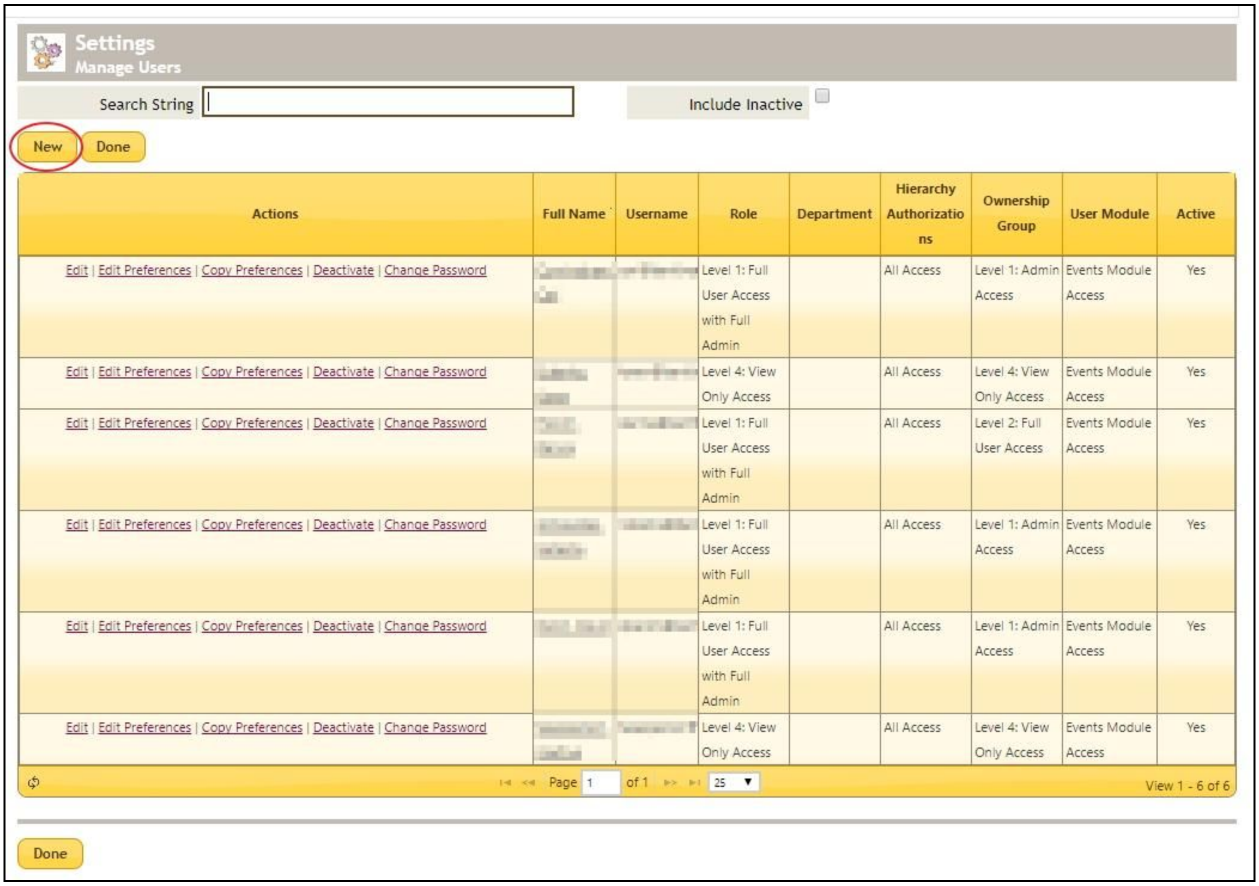


Once in the Settings menu, select **Users**.



The Users drop down menu will expand to show My Settings, User Settings, Distribution Lists, and Imports. Under **User Settings**, you will select **Manage Users**.

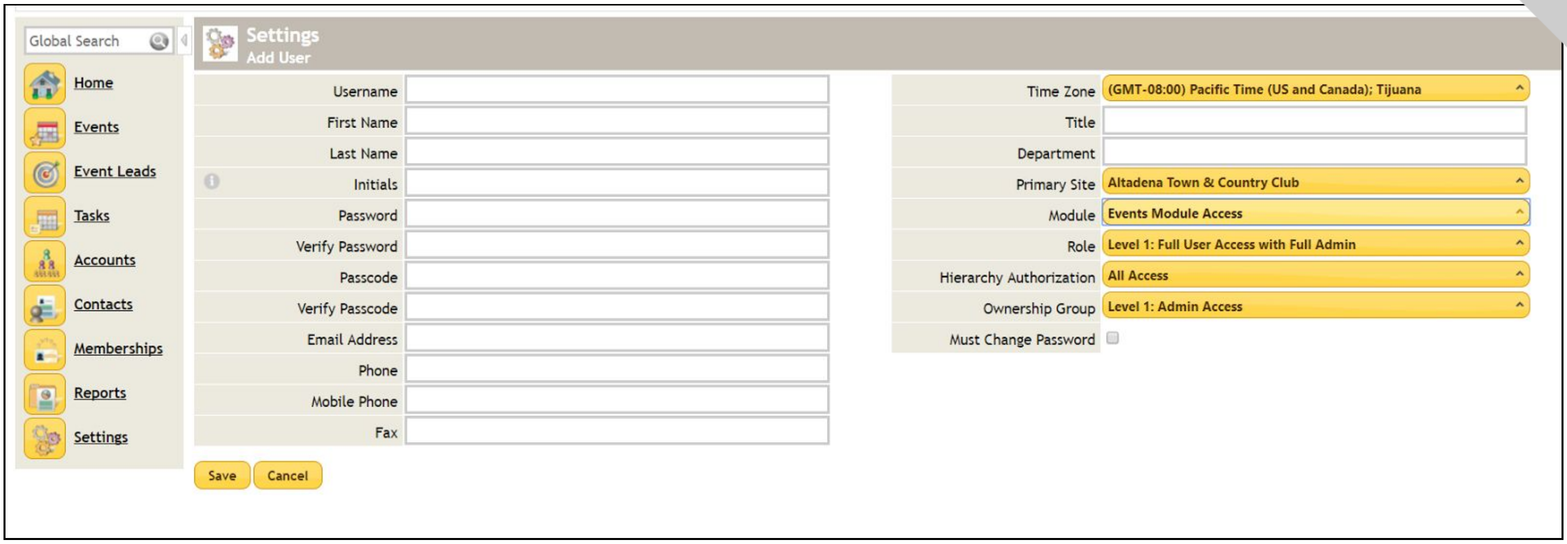
Select **New**.



New User Detail

Complete the New User information sections with all appropriate information. See below for each role assigned setting.

Please Note: *Required Fields include Username, Password, First Name, Last Name, and Module, Role, Hierarchy Authorization, Ownership Group, and Change Password.*



Settings for Various Roles

User Admin

Able to create new Users, make changes to Settings, and add/edit Events

Module - Events Module Access

Role - Full User Access with Full Admin

Hierarchy - All Access

Ownership Group - Admin Access

Settings Admin

Able to make changes to Settings, and add/edit Events

Module - Events Module Access

Role - Full User Access with Limited Admin

Hierarchy - All access

Ownership Group - Full User Access

Full User

Able to add/edit Events, but not make changes to Settings

Module - Events Module Access

Role - Full User with No Admin

Hierarchy - All access

Ownership Group - Full User Access

View Only

Able to access calendar of events, but not able to add/edit events

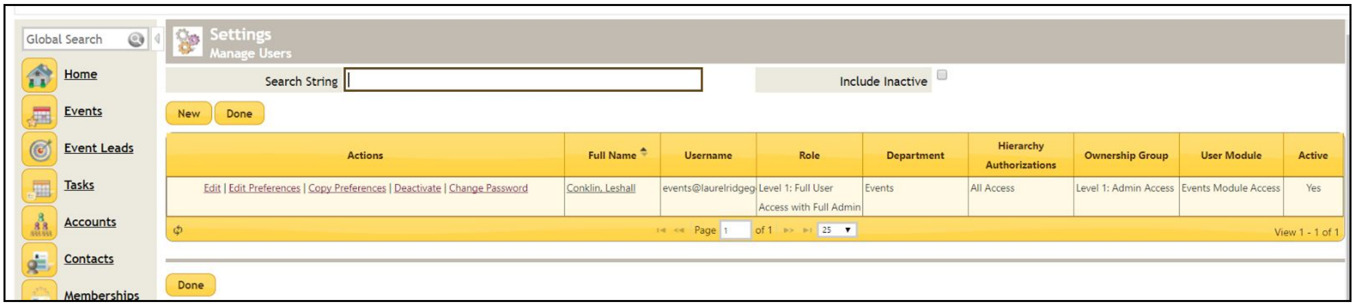
Module - Events Module Access

Role - View Only

Hierarchy - All access

Ownership Group - View Only

Once the new user details have been added, click **Save**. The Reserve system will then return to the **User listing**.



Common Questions and Concerns

Q: What role is required to add a new User?

A: User Admin role is required to add any new users to the system.

Q: How can I delete a User that is no longer with the Club?

A: Access the Settings menu, then Users, and Manage Users. From here, click **Deactivate** next to their name. **Please Note**: There is not a delete option, only deactivate.

Best Practices

- Only give New Users the access that is needed, it is not recommended to make everyone an Admin User.
- Make sure when creating a New User, check the box that allows for New Users to reset their password on the next login for security purposes.
- When adding a new user, be sure to include an Email Address. The User will need this to access any forgotten login information.