crimson

Project Admin Access Setting

In addition to **User Groups**, **Crimson** users can be assigned different **Access Settings** to enable additional access. One of these settings is **Project Admin**. **Project Admin** allows you to manage other users for your Database. You can create other **Project Admins**, remove and update User access, and add Users.

How to Make an Existing User a Project Admin

To make an existing user a **Project Admin**, you can reach out to <u>Crimson Support</u> and we can add that access setting. If you are already a **Project Admin**, you can add this setting to another User.

- 1. Click on the Users menu on the left-hand side of Crimson.
- 2. Go to the user list that appears and open an existing user.
- 3. On the right hand side under Access Info, check the Project Admin box.
- 4. Click Save in the bottom right when done.

Account Profile	User Group	Access Info	
User Name btaylor21	Assigned Project(s) Roosevelt for President	Access Settings Approved	User Preferences Email Notification
First Name Brooke	User Group All Access - With Reconciliation	Project Admin	Mobile Notification
Last Name Taylor		Reset Reset to Email	
Email			
btaylor58036@aol.com			

Adding a New User

1. To add a new User to your database, click on the **User** menu item on the left side of **Crimson**.



- 2. This will take you to the **User Search** page. On that page, click the Add User icon.
- 3. In the window that appears, complete the User Name, First Name, Last Name, and Email fields.
- 4. Select the **User Group** to assign the new User.
- 5. Be sure the **Send Welcome Email**, **Approved**, and **Email Notification** checkboxes are checked.
 - For language on available **User Groups**, please see the PDF at the bottom of the guide.
 - The User Name must be unique, and Crimson will not let save the new User if the User Name has already been taken by another Crimson User.

Add User			:
Account Profile	User Group	Access Info	
User Name	User Group	Send Welcome Email	
	All Access	Access Settings User Preferences	
First Name		Approved Email Notification	n
Last Name		Project Admin Mobile Notification	on
		2-Factor Authentication	
Email		Reset Reset to Email	

- 6. Check the **Project Admin** box if to give this user Project Admin access rights. NOTE: You must be a project admin to give project admin access rights to another user.
- 7. Click Save in the bottom right when done.

Editing a User

A **Project Admin** can edit the name, email, **User Group**, and **Access Setting** information of an existing User. They cannot update the **User Name**.

- Navigate to the User List and use the search bar to find the existing user. You can use the User Name, First Name, Last Name, or Email to search.
- 2. Use the **contoning** icon to open an existing User account.
- 3. From there, use the fields to edit information.
- 4. To remove access, uncheck the **Approved** checkbox.
- **5.** Click Save in the bottom right.