



**HOW TO ADD A NEW USER**

**SITCORE 9 | HENRY FORD HEALTH SYSTEM**

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## Logging into Sitecore

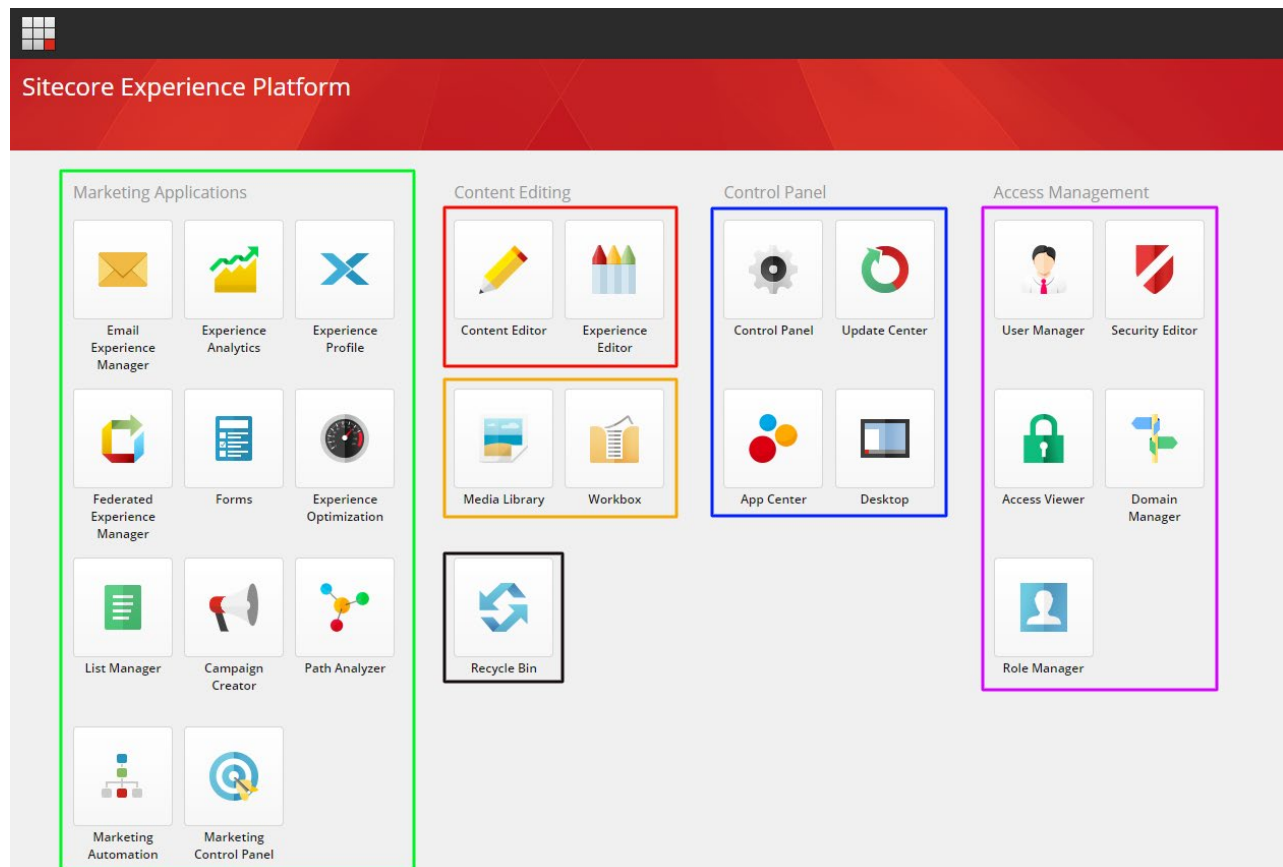
The image shows the Sitecore login interface. At the top, there is the Sitecore logo, which consists of a white circular icon with a stylized 'S' inside, followed by the text 'sitecore' in a bold, sans-serif font and the tagline 'Own the experience' in a smaller font below it. Below the logo, there are two input fields: one for 'User name:' and one for 'Password:'. Both fields have a light gray placeholder text that says 'Enter user name' and 'Enter password' respectively. Below these fields is a large blue button with the text 'Log in' in white. At the bottom of the form, there are three links: a checkbox labeled 'Remember me', a link labeled 'Forgot your password?', and a link labeled 'License options'.

1. Enter your **User Name**, **Password**, and then click **Login** to log into Sitecore
2. **Forgot Your Password** – enter in your User Name to have Sitecore email you a newly generated password (this may go to your junk email folder – sender: [donotreply@website.net](mailto:donotreply@website.net))

## The Launchpad – The Experience Platform

**Note:** Based on the access rights of your account and role, your launchpad may look different.

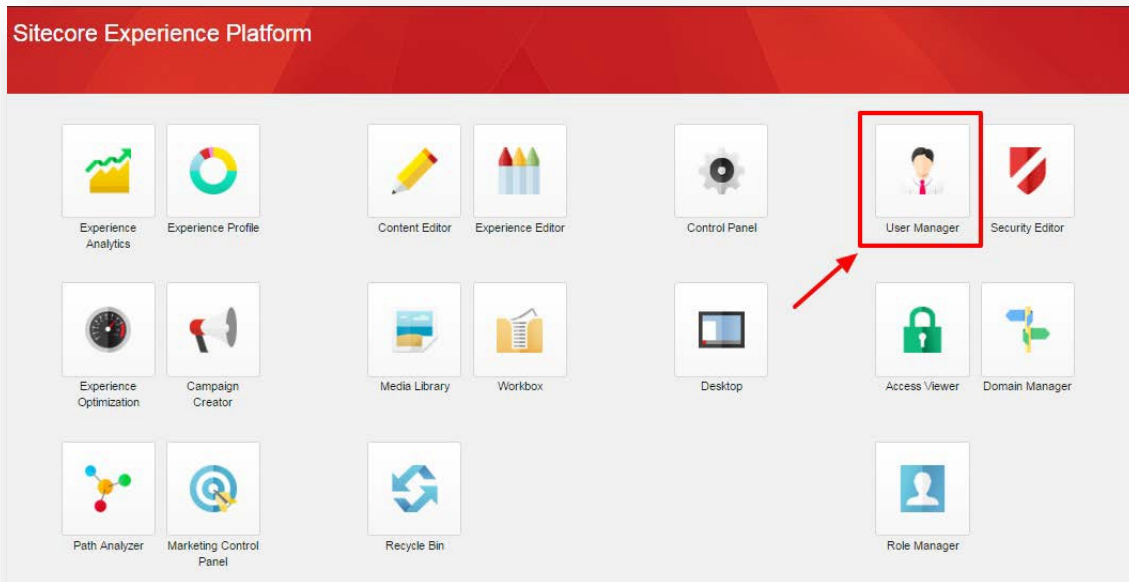
4. The Sitecore Launchpad is well organized in the following categories:
  - Green – marketing and analytics tools
  - Red – content editing tools
  - Orange – tools to organize your digital assets and page workflows
  - Black – recycle bin to retrieve your deleted items
  - Blue – account configuration, system setup and app installations
  - Purple – user account settings



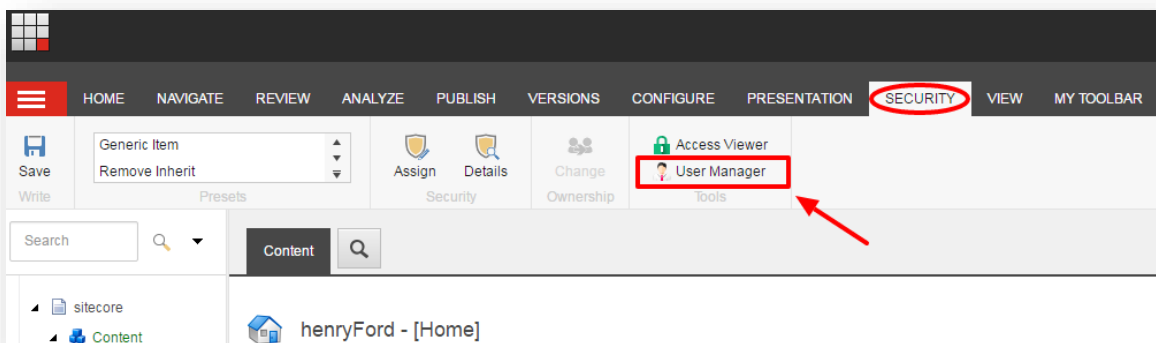
4. The contents of this document will focus on:
  - **User Manager(Purple)**

## Setting Up a New User

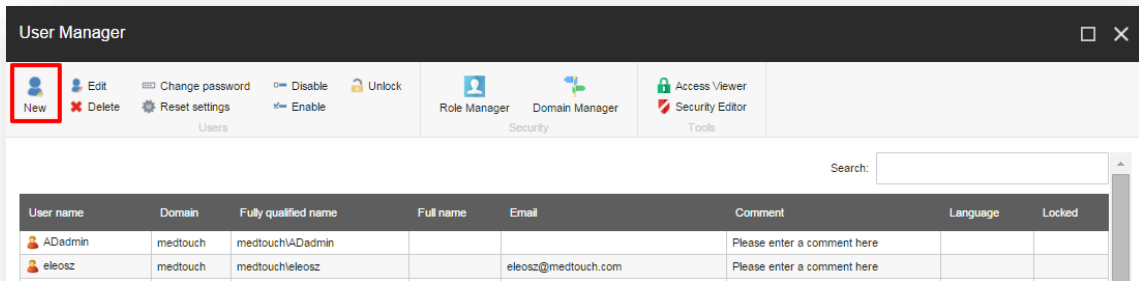
1. Click **User Manager** from Sitecore's launch pad.



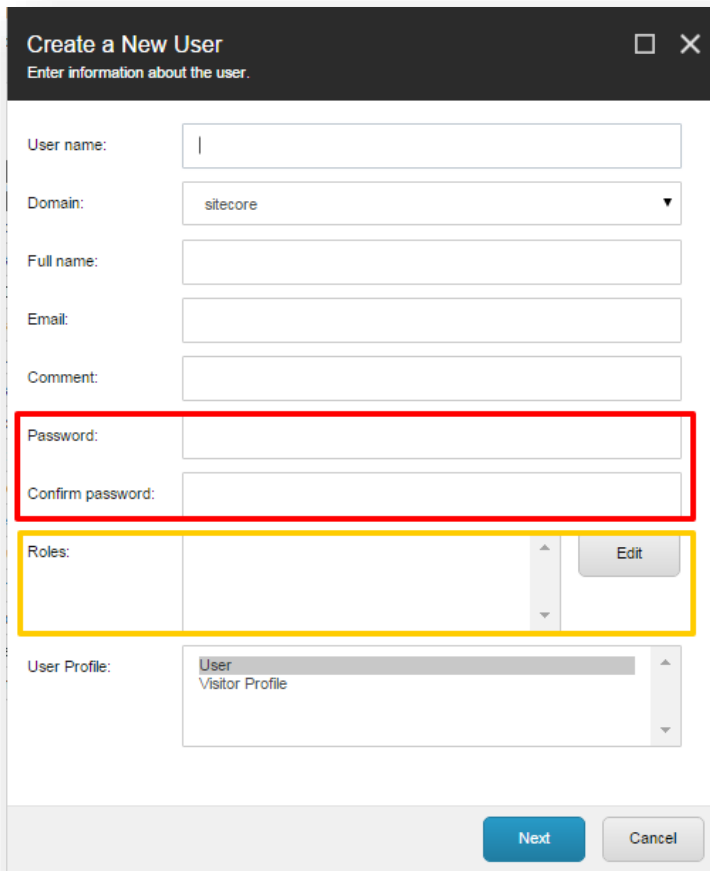
- Alternate path: From the **Security** tab in the **Content Editor**, select **User Manager**. All steps are the same from either starting point.



- From the **UserManager** dialog box, click **New**.



- In the **Create a New User** dialog box, complete the necessary fields:



**Create a New User**  
Enter information about the user.

User name:

Domain:

Full name:

Email:

Comment:

Password:

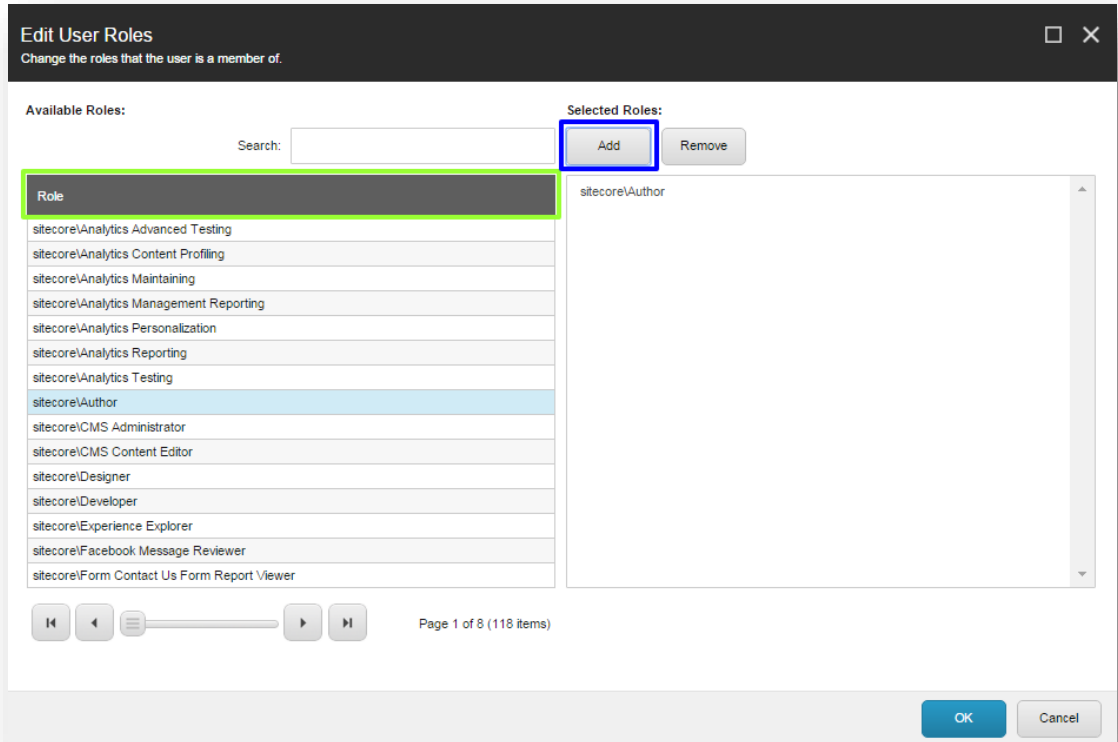
Confirm password:

Roles:

User Profile:   
Visitor Profile

- User Name:** Click inside field to enter an unique user name
- Domain:** If multiple options are available from the dropdown, ask System Administrator if you have questions
- Full name:** Click inside field to enter user's full name
- Email:** Click inside field to enter user's email address

- **Comment:** Optional
- **Password (Red):** Password requirements such as length and requiring nonalphanumeric characters can be set up.
- **Roles (Orange):** This field can be left blank and roles can be chosen later or click **Edit** to choose roles now.
  - In the **Edit User Roles** dialog box, select one or more roles from the **Role** column (Green), click **Add** (Blue), then **OK**.



**Edit User Roles**  
Change the roles that the user is a member of.

**Available Roles:**

Search:

**Selected Roles:**

**Add** **Remove**

**Role**

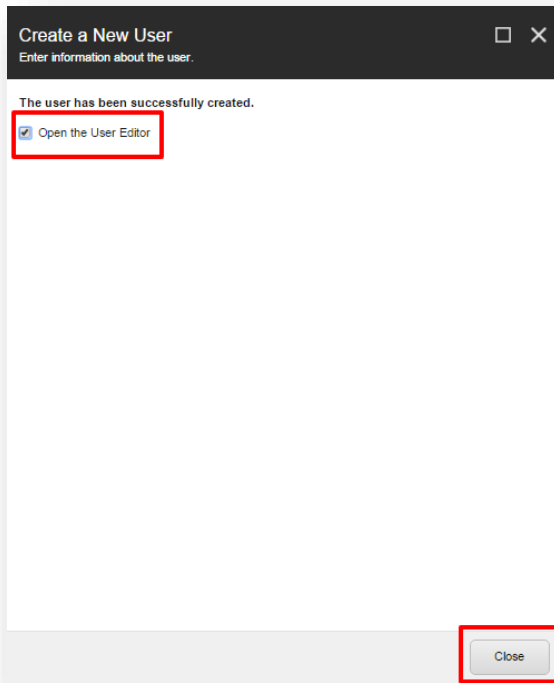
- sitecore\Analytics Advanced Testing
- sitecore\Analytics Content Profiling
- sitecore\Analytics Maintaining
- sitecore\Analytics Management Reporting
- sitecore\Analytics Personalization
- sitecore\Analytics Reporting
- sitecore\Analytics Testing
- sitecore\Author
- sitecore\CMS Administrator
- sitecore\CMS Content Editor
- sitecore\Designer
- sitecore\Developer
- sitecore\Experience Explorer
- sitecore\Facebook Message Reviewer
- sitecore\Form Contact Us Form Report Viewer

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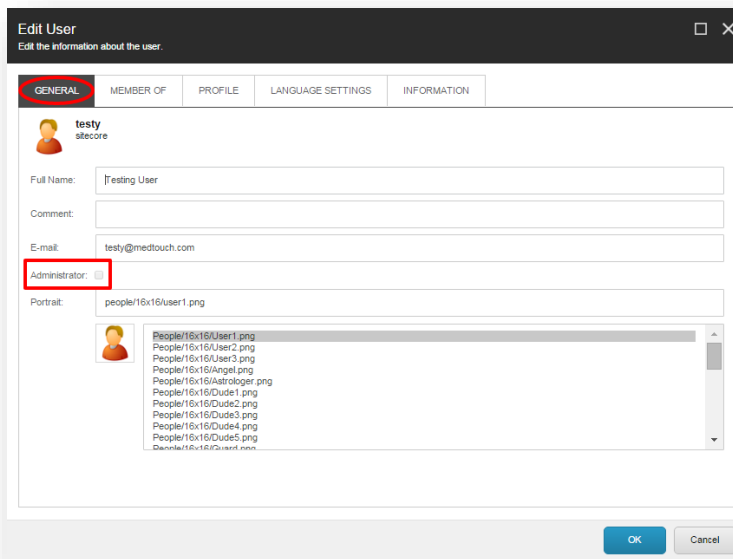
**OK** **Cancel**

- **User Profile:** User or Visitor Profile
- **Select Next**

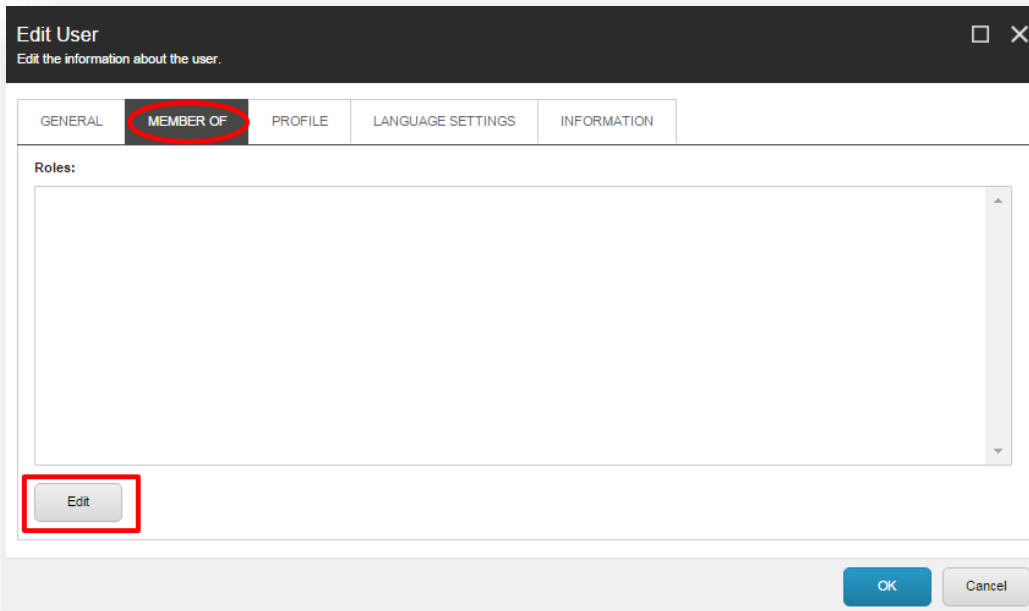
4. In **Create a New User** dialog box, check **Open the User Editor**, then select **Close**.



5. **Edit User** dialog box opens in the **General** tab. Check the **Administrator** box if the new user is a system administrator. **Portrait** is optional.



- In the **Member Of** tab, click **Edit** to choose Roles for the User.



**Edit User**  
Edit the information about the user.

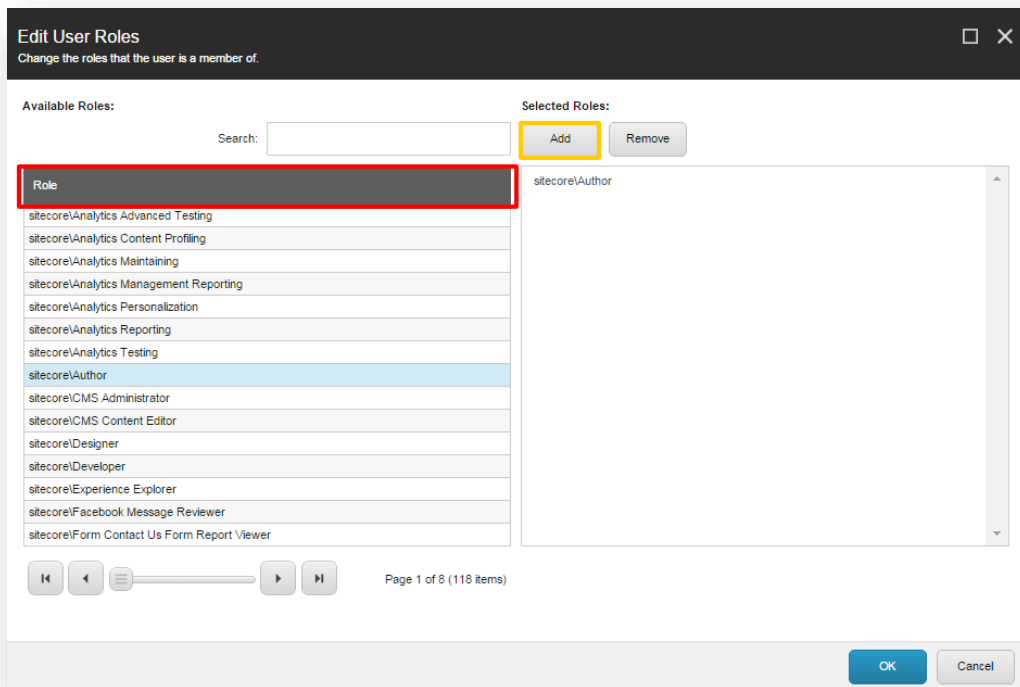
GENERAL **MEMBER OF** PROFILE LANGUAGE SETTINGS INFORMATION

Roles:

**Edit**

OK Cancel

- In the **Edit User Roles** dialog box, select one or more roles from the **Role** column (Red), click **Add** (Orange), then **OK**.



**Edit User Roles**  
Change the roles that the user is a member of.

Available Roles: Search:

**Role**

- sitecore\Analytics Advanced Testing
- sitecore\Analytics Content Profiling
- sitecore\Analytics Maintaining
- sitecore\Analytics Management Reporting
- sitecore\Analytics Personalization
- sitecore\Analytics Reporting
- sitecore\Analytics Testing
- sitecore\Author
- sitecore\CMS Administrator
- sitecore\CMS Content Editor
- sitecore\Designer
- sitecore\Developer
- sitecore\Experience Explorer
- sitecore\Facebook Message Reviewer
- sitecore\Form Contact Us Form Report Viewer

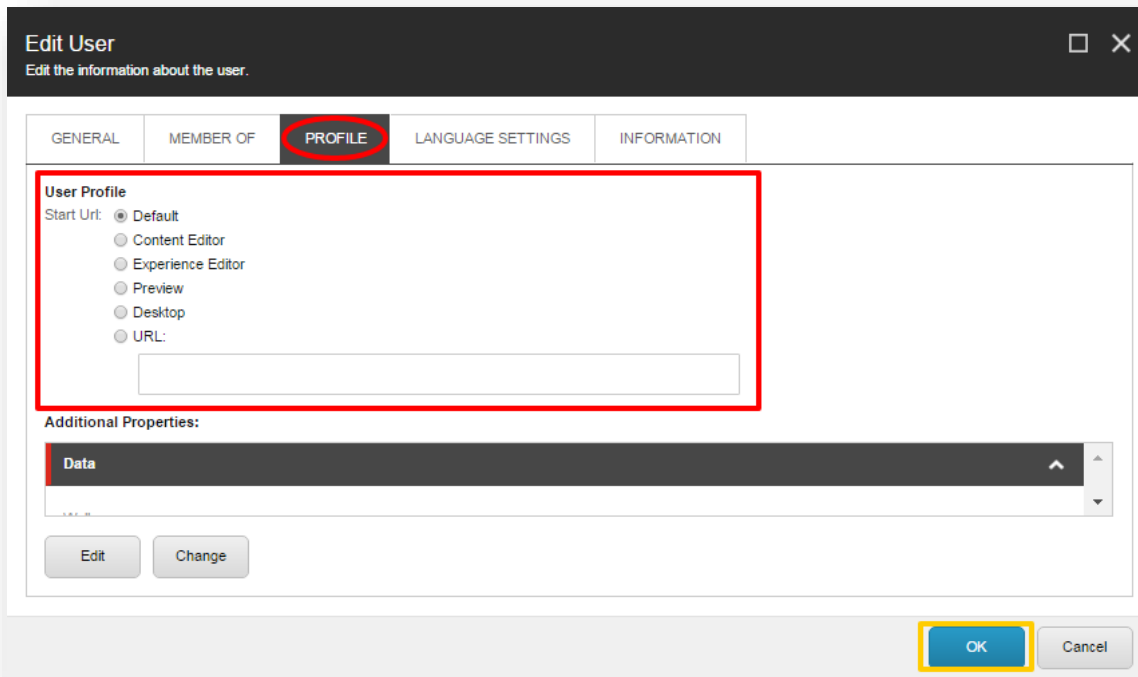
Selected Roles: **Add** Remove

sitecore\Author

Page 1 of 8 (118 items)

OK Cancel

- From the **Profile** tab, a **Start Url** can be selected. This can be very helpful for Users who have very specific roles and only edit one section of a large site.



**Edit User**  
Edit the information about the user.

GENERAL MEMBER OF **PROFILE** LANGUAGE SETTINGS INFORMATION

**User Profile**  
Start Url: ☒ Default  
☐ Content Editor  
☐ Experience Editor  
☐ Preview  
☐ Desktop  
☐ URL:

**Additional Properties:**  
**Data**

Edit Change

OK Cancel

- Communicate the username and password to the new user in a secure manner.