

# Users

## Brief overview

The Users page allows you to add, view and edit your WalkMe users. Access it from [admin.walkme.com](https://admin.walkme.com) under the **Users & Roles** section.

You can also add users via the Editor (see below).


## Use cases

- Improve user management consistency across accounts
- Help WalkMe admins manage team permissions by standardizing role distribution and hierarchy in each account
- Add a new permission type to support basic use cases (separate publish to Production/Test)
- Increase account security by reducing the number of “Admin” users per account

## Create a new user

**Users**  
Manage account users and roles configurations, review access requests to your account.

Users 30 Access Requests 2

**Users**  

Email	Name	Role	System	Login Method	Last Login	Status
		Backoffice	NetSuite Oracle Cloud Concur +8	Password	Jul 13th 2022 14:36	Active
		Admin	Clickwise Default	Password	N/A	Provisioned
		Content Manager	Clickwise	Password	Oct 5th 2021 20:49	Active
		Translator	Clickwise Default Androtaggrn +1	Password	N/A	Provisioned
		Publisher	Clickwise Default Androtaggrn +2	Password	N/A	Provisioned
		Translator	Clickwise Default Androtaggrn +1	Password	N/A	Provisioned
		Content Viewer	Clickwise Default	Password	N/A	Provisioned
		Content Viewer	Concur Clickwise Default +1	Password	N/A	Provisioned
		Content Viewer	Concur Clickwise	Password	N/A	Provisioned
		Admin	Concur Clickwise Default +1	Password	N/A	Provisioned

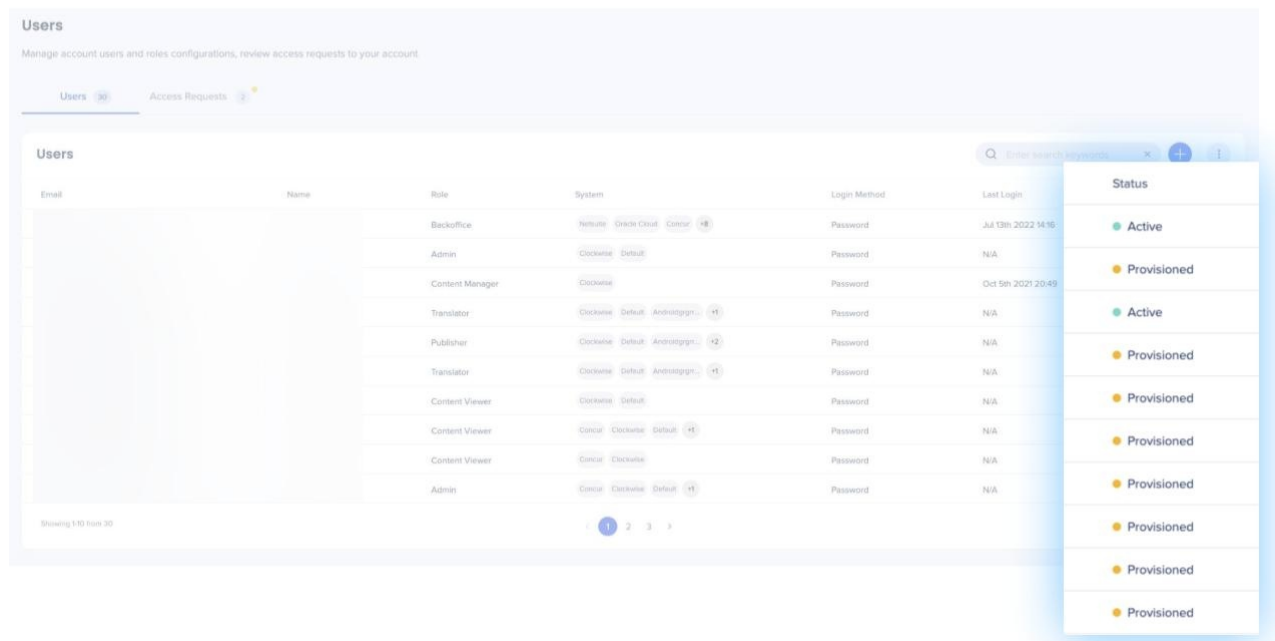
Showing 1/10 from 30

1 2 3 >

Rows per Page: 10

1. Click **+**
2. Enter the email address of the new user(s)
  - To add users, press enter on your keyboard
3. Click **Add**
4. Choose which role and system(s) to assign to the user
  - Only one role can be assigned to a user. This role will apply to the user for all Systems they are assigned to.
5. Click **Advanced Settings** to choose which SSO type and SSO ID to assign
  - SSO Type and SSO ID will only display if you have SSO toggled on in the Security tab
6. Click **Send Invitation** to send an activation email to the user(s)
7. The user will immediately receive an e-mail prompting them to activate their WalkMe account
  - This email may mistakenly send to the Spam folder. Please check there before contacting Support for assistance
8. The user must click **Activate My Account** in the email and it will navigate them to the WalkMe login page
9. The new user can set up their WalkMe account by entering a password and clicking **Sign Up**
  - Passwords must be at least 10 characters and contain 1 special character

## View a user's status



1. Go to the Users Page
2. View the "Status" column in the Users' table

## Resend a activation email

1. Click on the relevant user from the Users list
  - The user must be in orange "Provisioned" status to re-activate
2. Click **Resend Email** to resend the activation email to the user

## Reset a user's password

1. Click on the relevant user from the Users list
  - The user must be in green "Active" status
2. Click on **Reset Password Via Email** to send an email prompting a user to reset their password

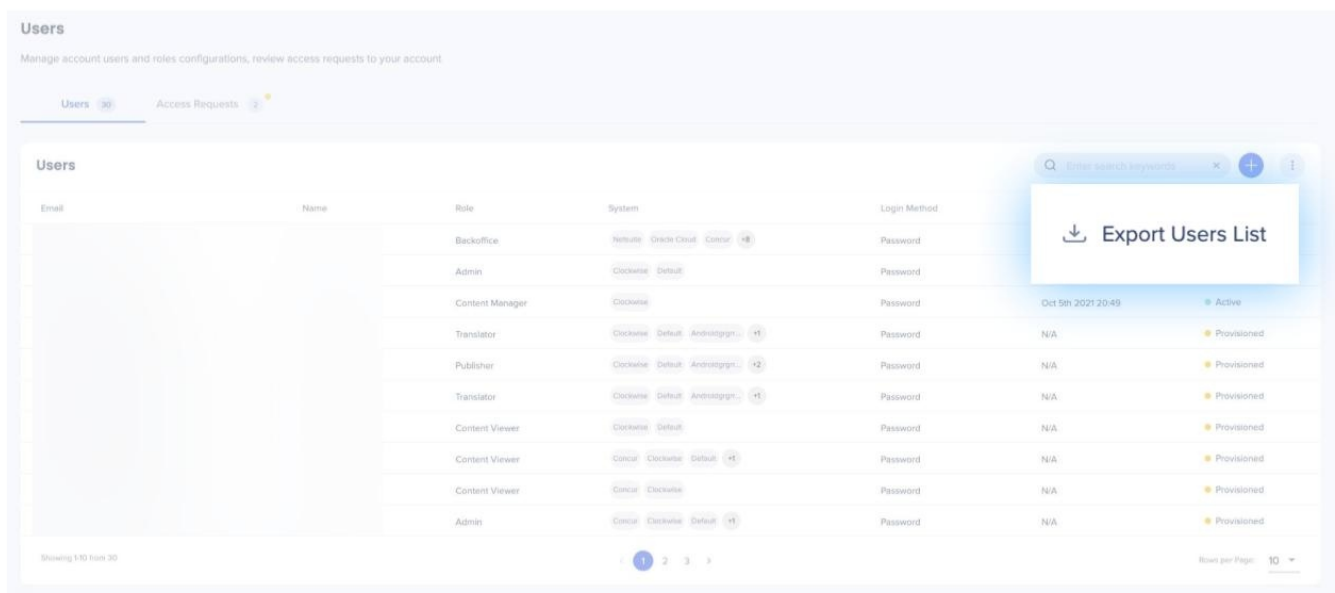
## Edit a user

1. Click on the User row you want to edit
2. Change the desired details
3. Click **Save**

## Manage access requests

- The **Access Requests** tab is visible only to users with Admin role
- Here, Admins can review requests from users who want to join the account
- The Admin can assign a role, system(s), and SSO to those users in the same way as described in the steps above

## Export users list



1. On the Users tab, click the button with the three dots
2. Click Export Users List

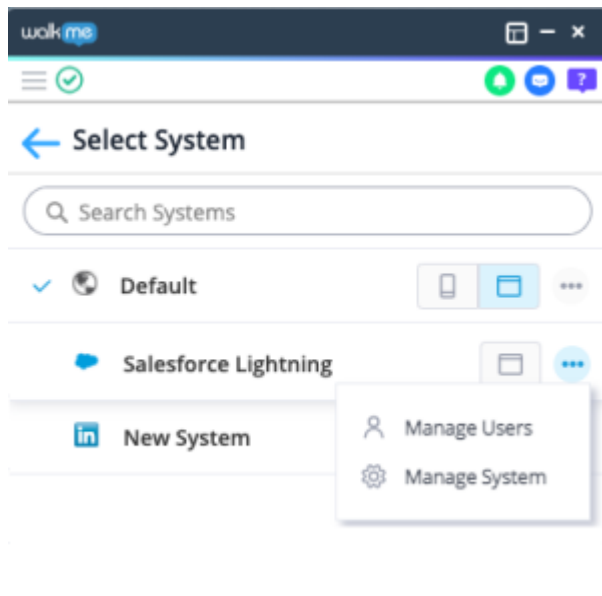
## Managing users via the Editor

Users with Admin permissions will have access to Manage Users & Manage Systems from the Select Systems screen, including the ability to invite new users.

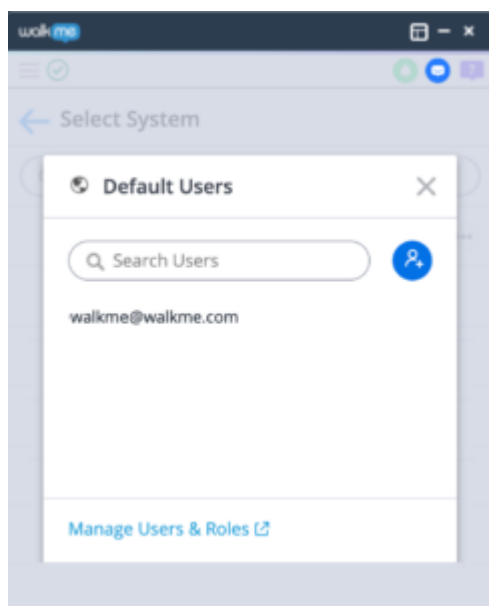
This can be done by clicking on the ... Menu button, where you see the following dropdown options:

- **Manage Users** - Allows you to view current System users, invite new users, and access link to Users & Roles in the Admin Center

- **Manage Systems** - Opens the Systems screen in the Admin Center



After clicking Manage Users you will be able to view the current users for a System and invite new users to join by using the Invite Users icon:



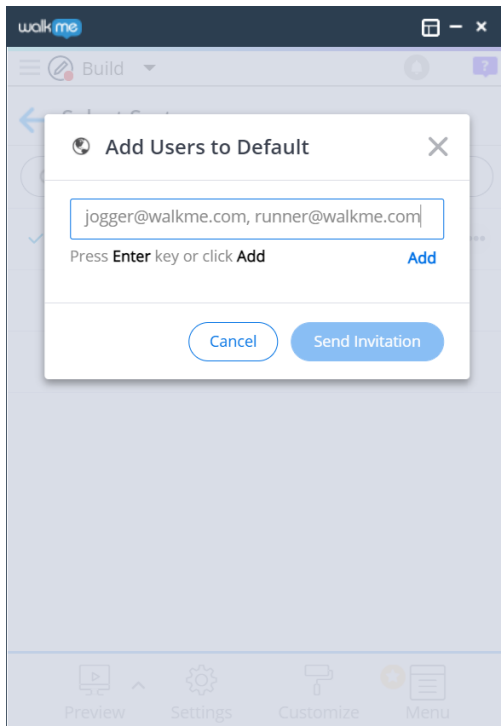
## Invite Users

By clicking the Invite Users icon, users with Write permissions can invite users to the System.

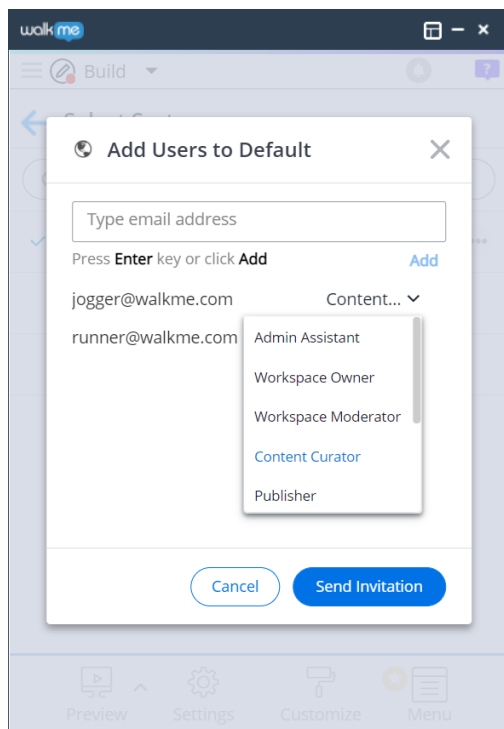
- Option to bulk invite users by pasting directly from Excel, Google Sheet, etc.
- Pasting or typing a list of users can be done in one of the following options:

- Separated by semicolons (;)
- Separated by line breaks
- Separated by spaces
- Separated by commas (,)

Press enter on keyboard or click **Add** once finished entering new user email addresses.



- Once added to the list, a User's role can be modified using the Roles dropdown
  - **Note:** A user that already exists in the Account cannot be edited from the Editor since the role is set in the Account level and affects others Systems
  - Please use the Admin Center to edit an existing role
- Sending the invitation will send an email with an activation link to the invited user or users



Learn more about [Systems and Account Management](#).