# CargoX Creating User Accounts for Co-Workers

## version Version 3

**CargoX**

November 23, 2021

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# Adding new users

### *Note*

Only a user with the **"Manage company details" aka "company manager"** `permission` is able to add new users and manage them.

You can easily create accounts for your co-workers under your Company account in the CargoX Platform. Each company can have unlimited user accounts. To track users and hold them responsible for their actions we recommend that each user has their own account.

CargoX users management system offers very granular access rights via the configuration of user privileges and permissions. This enables companies to use the CargoX Platform without a need to change their internal processes and document workflows.

Users can use a simple login (username and password) to view and prepare documents. To transfer documents they will need to add a blockchain key to their account. They will also need to have permission to transfer documents, which can be added or removed in the user management view.

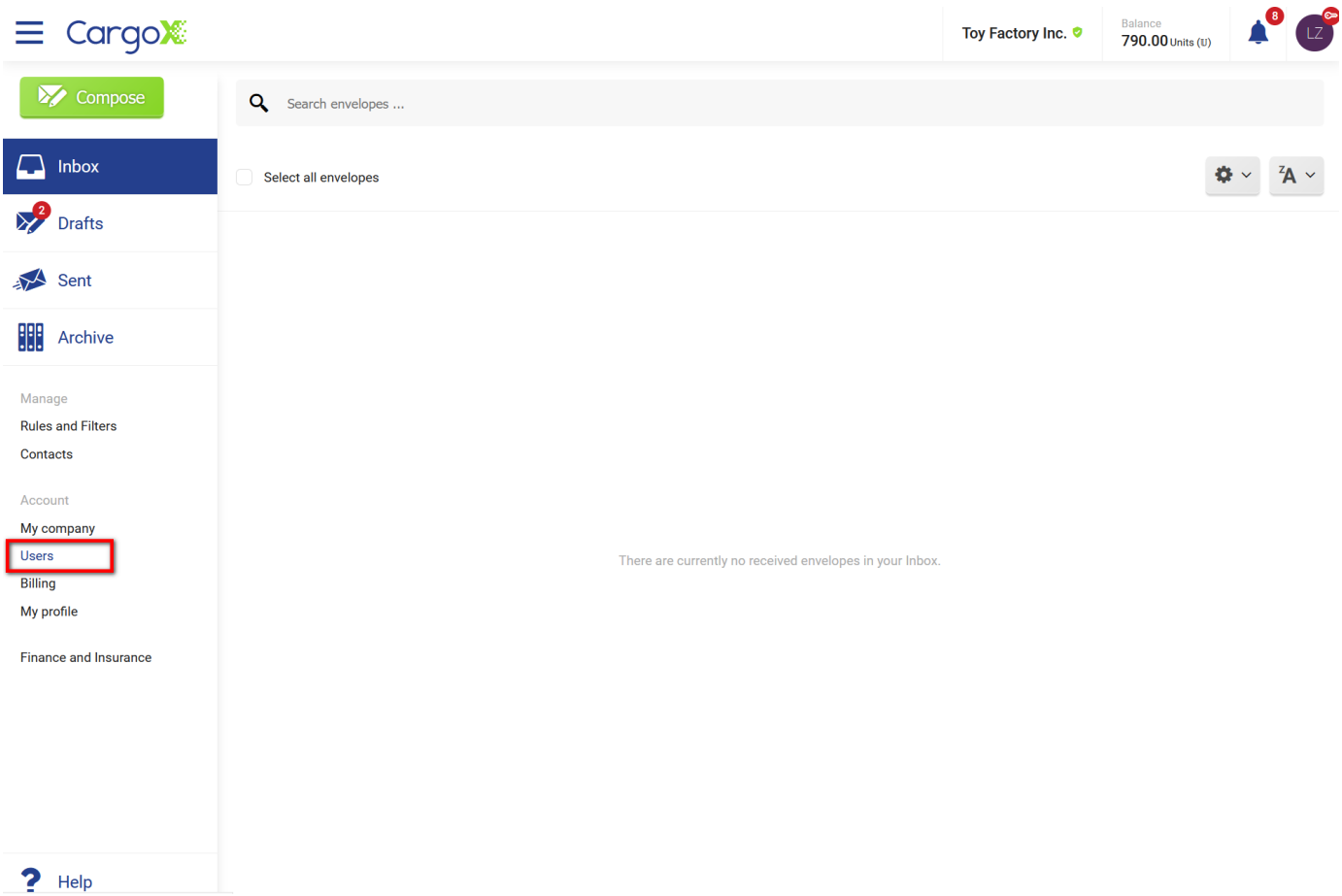
### *Attention!*

*Quick instructions: To create a new user account for your co-worker, go to Users and click the green +Add user button. Enter co-worker's details and click Next. Select permissions this account will have. Complete with clicking the green Add user button. You are done.*

*You can also watch a tutorial video or follow the extensive step-by-step guide below. You can also download this guide as PDF.*

**Step 1: Access user management**

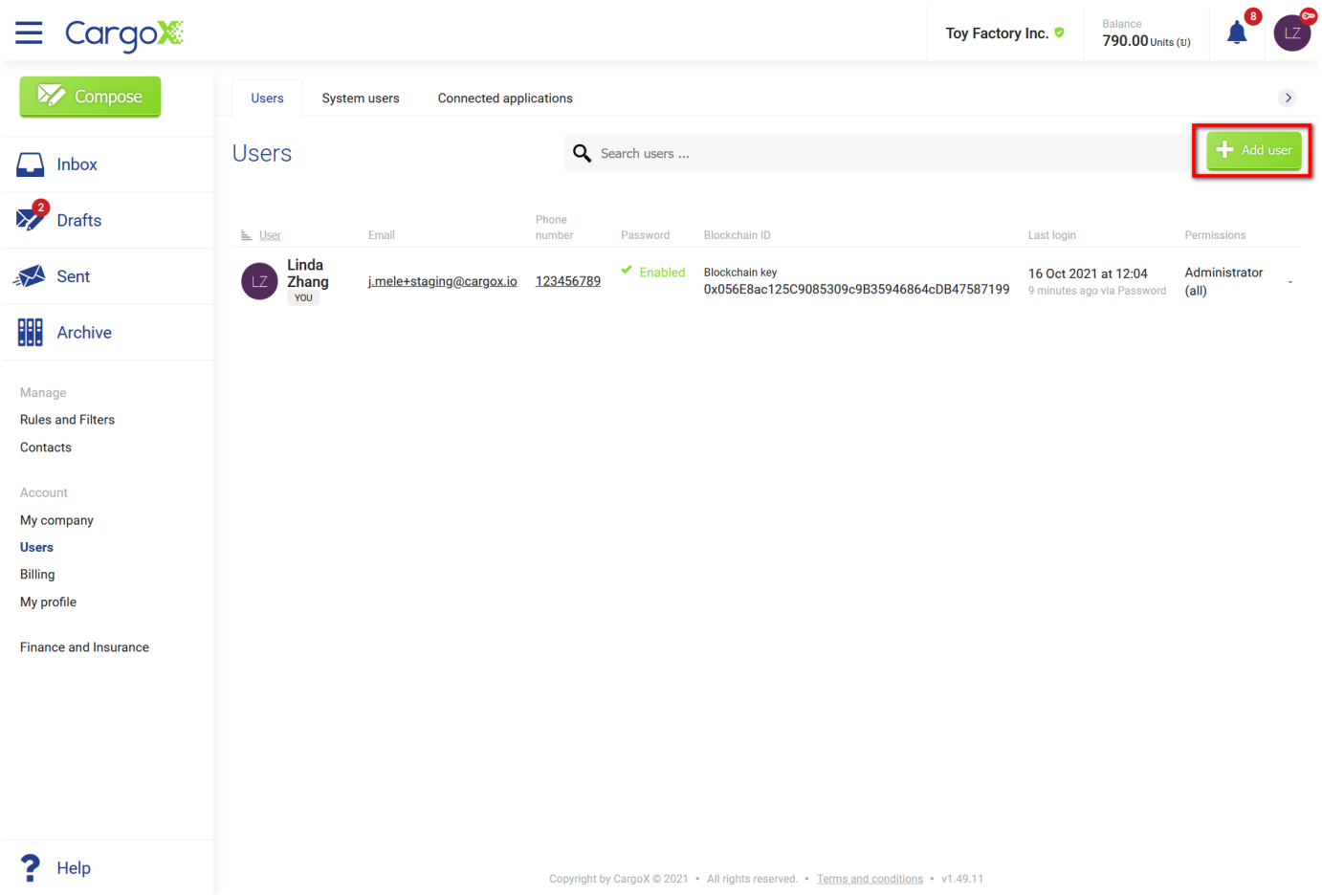
To access user management, go to **Manage | Users**.




**Step 2: User overview**

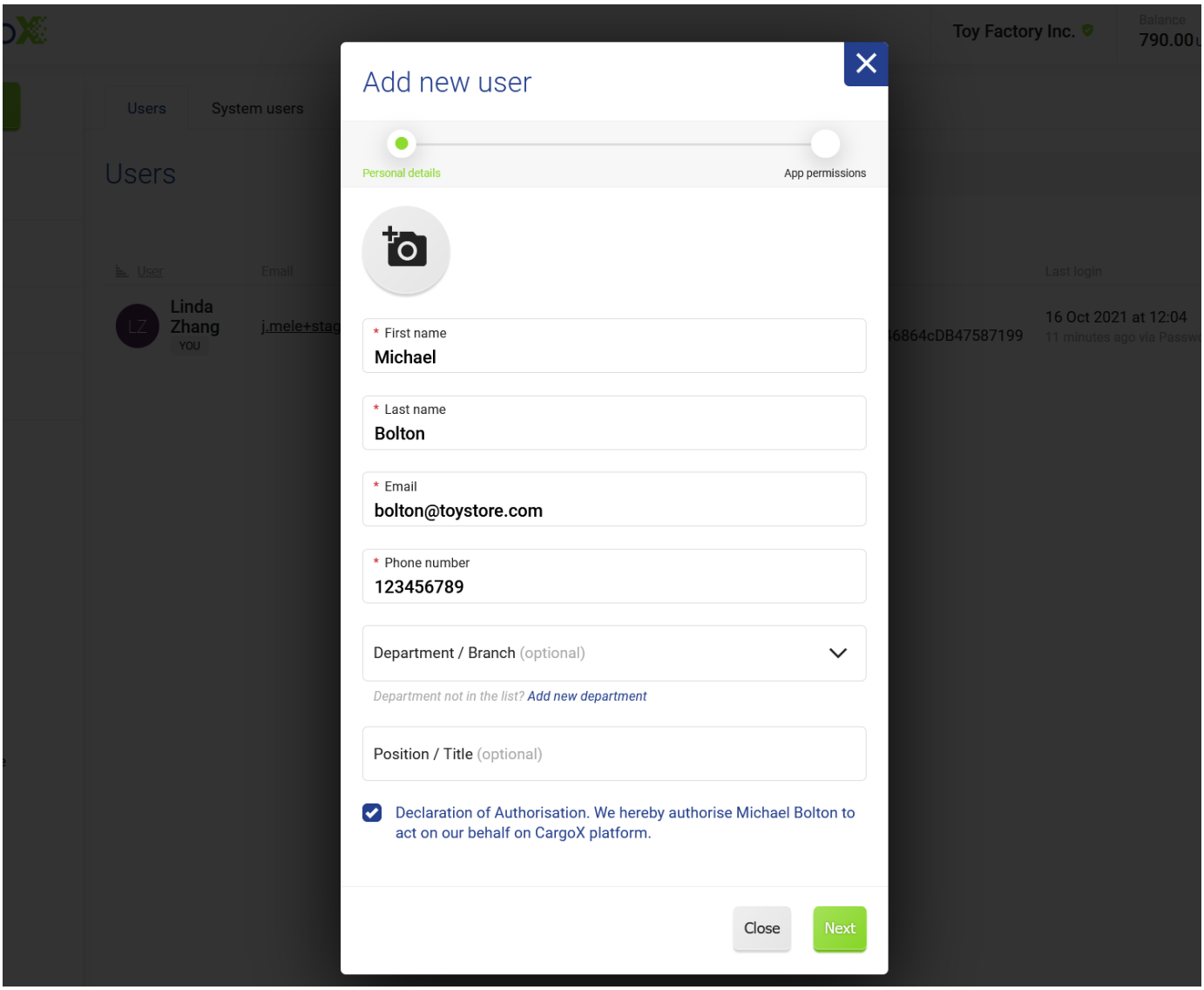
The user management page provides an overview of all existing users, including their email, blockchain key address, last login information, and their permissions.

To add a new user, click the green **Add user** button.



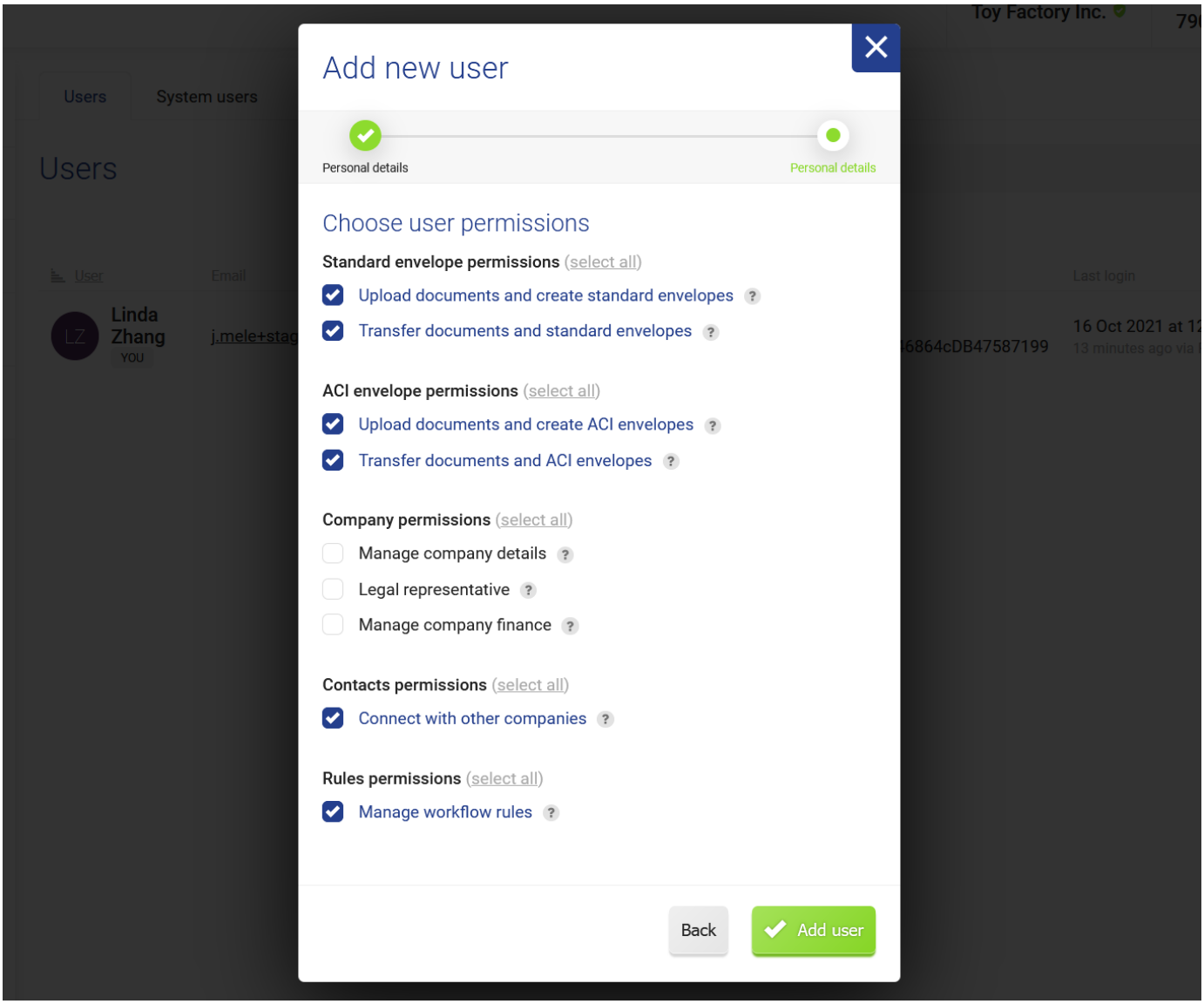

**Step 3: Add a new user - basic information (1/2)**

Fill out the user information and click Next. Some fields are optional and you can leave them empty. If you have users from many departments and/or branches using the same company account, you might want to set up departments - this will allow you to receive per department report on spent units. More about **`setting up user departments`** can be read here.



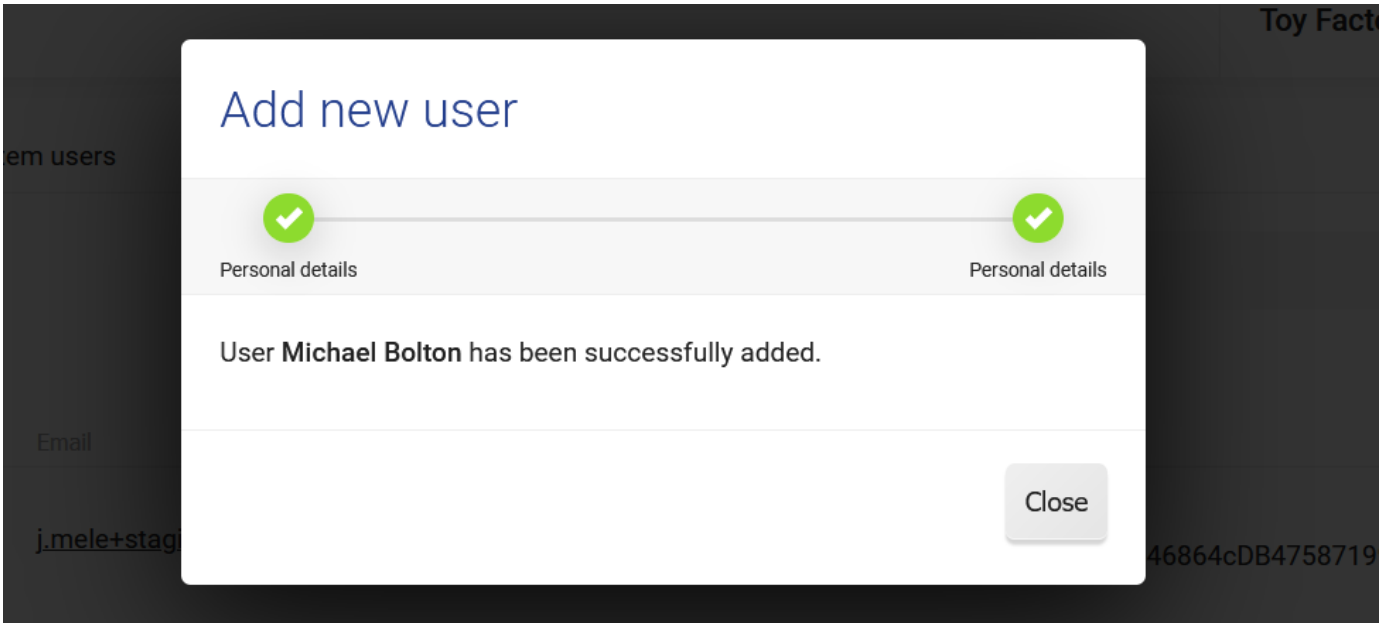

**Step 4: Add new user - Permissions (2/2)**

Select the permissions (access rights) the user will have. You can use the **Select all** button to select all permissions. Click here for a **`detailed explanation of permissions`**. We suggest that you start with giving users full permissions, and then narrow them down if needed later on (read **`how to manage users`**).




Once done, click the **Add user** button.

**Step 5: Instructions for the user**



Process is complete. You can now close the window. The added user will automatically receive an email with instructions on how to finalize their account creation - set the password.

Immediately afterward they can start using the system.

If your co-workers have questions regarding finalizing their accounts, feel free to point them to these **`instructions`**.

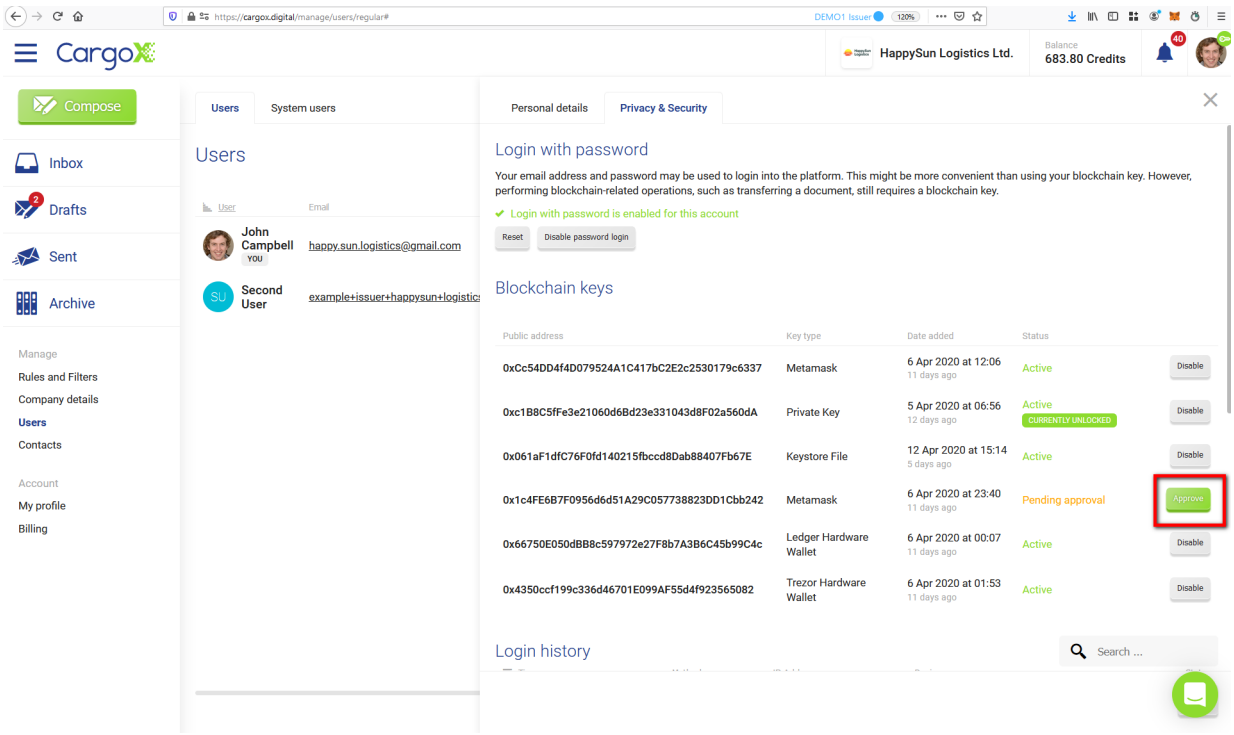
### Step 6: Activate their blockchain key

Once your co-workers set their password and log into the CargoX Platform for the first time, they will be prompted to add a blockchain key to their accounts.

Before their blockchain key is allowed to sign blockchain actions on behalf of your company, it needs to be approved.

Once new users set up their blockchain key, the administrator of the company (and any user from your company with an active blockchain key and permissions to perform this action) will receive an email notification.

To approve user's newly added blockchain key, log into the CargoX Platform, open **Users** section (sidebar), click on that particular user, and once viewing their account, go to the second tab titled **Privacy & Security** and activate their blockchain key by pressing the green **Approve** button (and then sign this action with your blockchain key).

Once their blockchain key is activated (or deactivated), users will receive an automated email notification.

> ***Note***
>
> Only users with active blockchain key and permission to manage users can perform this action.