

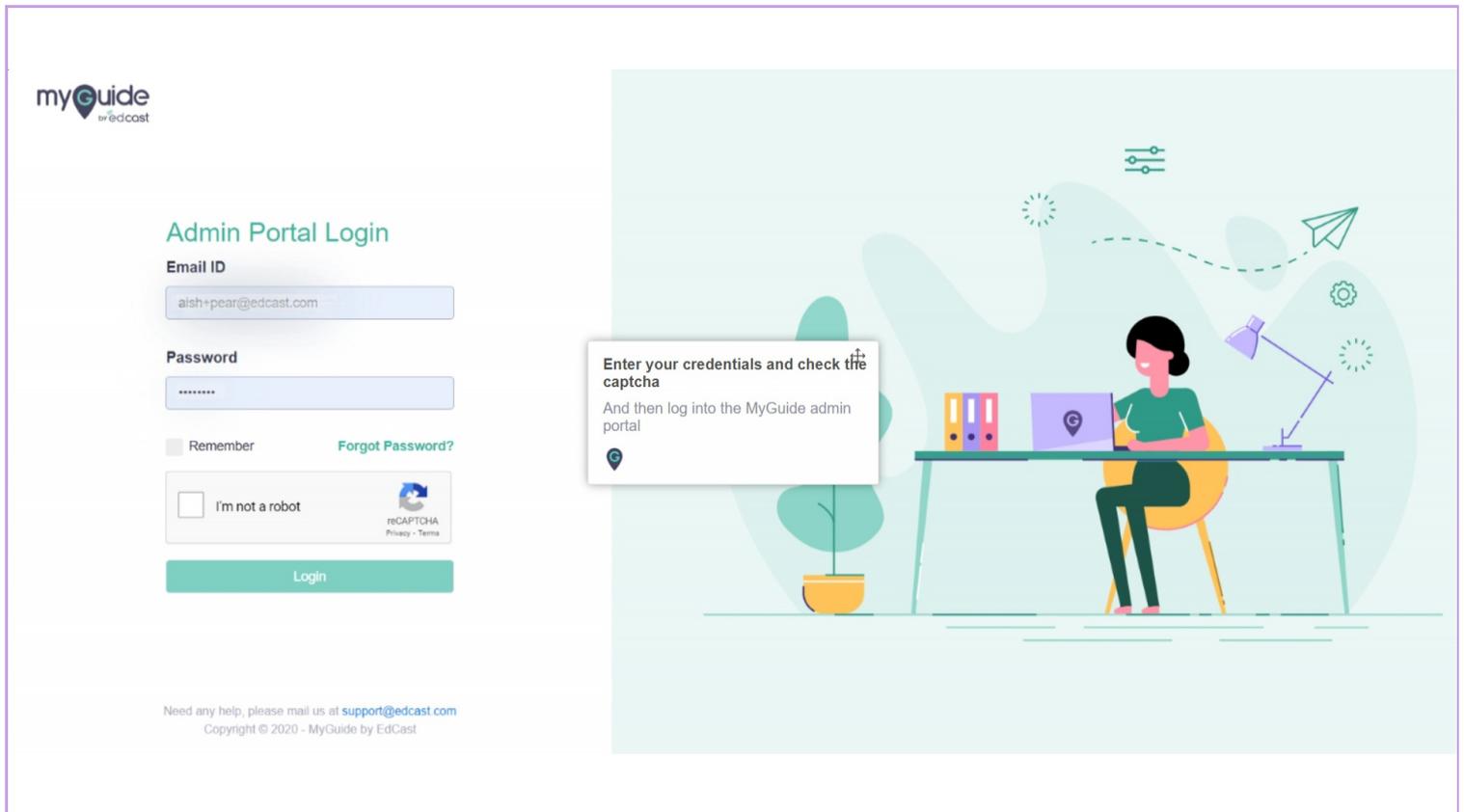


## How to Add Users to MyGuide Admin

## Step: 01

# Enter your credentials and check the captcha

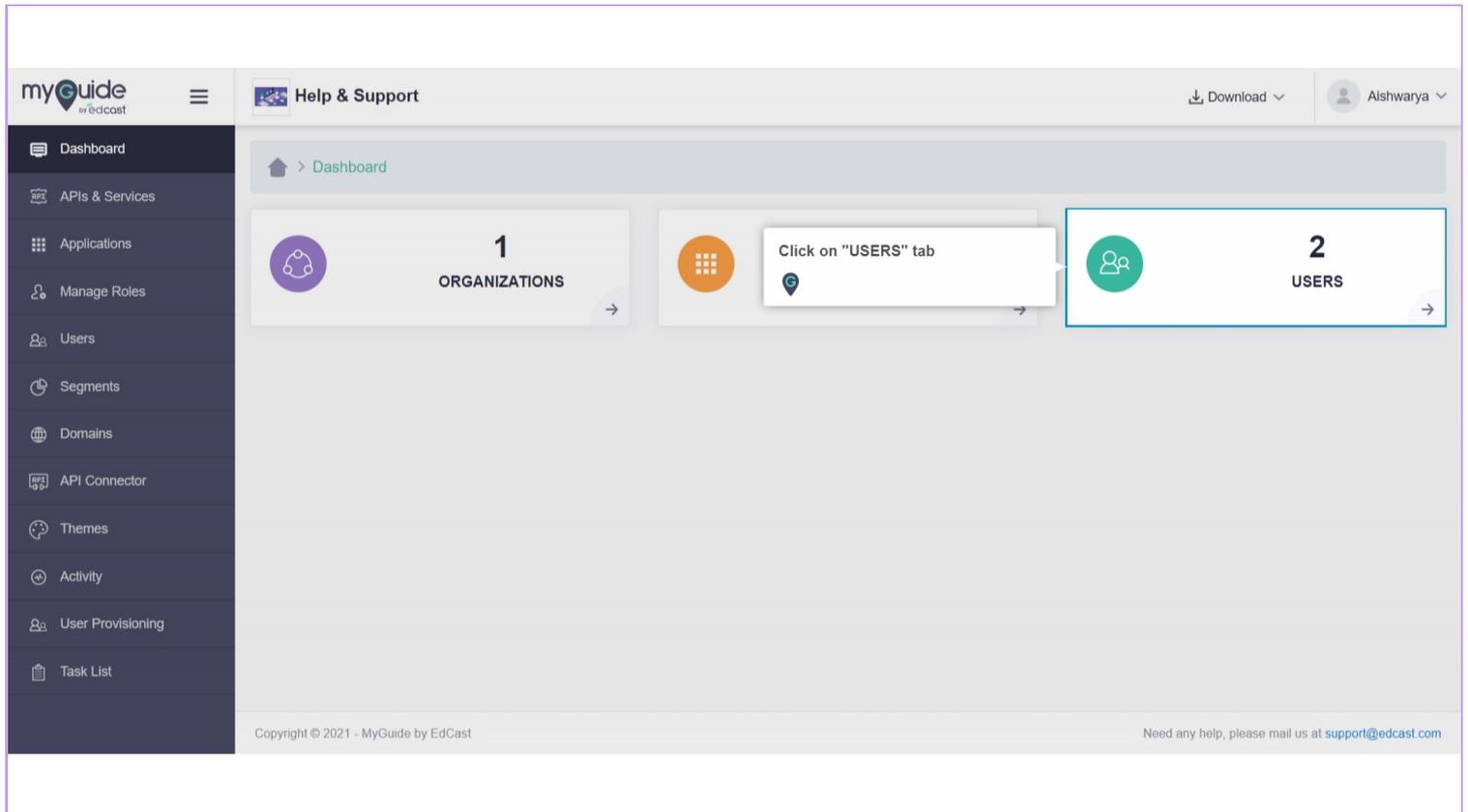
And then log into the MyGuide admin portal



The image shows a screenshot of the MyGuide Admin Portal Login page. On the left, the login form includes the MyGuide by EdCast logo, the title "Admin Portal Login", and fields for "Email ID" (containing "aish+pear@edcast.com") and "Password" (masked with dots). There are checkboxes for "Remember" and "I'm not a robot", a "Forgot Password?" link, and a reCAPTCHA widget. A green "Login" button is at the bottom. Below the form, it says "Need any help, please mail us at [support@edcast.com](mailto:support@edcast.com)" and "Copyright © 2020 - MyGuide by EdCast". On the right, an illustration shows a person sitting at a desk with a laptop, surrounded by icons of a paper plane, gears, and a lightbulb. A white callout box with a location pin icon contains the text: "Enter your credentials and check the captcha" and "And then log into the MyGuide admin portal".

## Step: 02

Click on "USERS" tab



The screenshot displays the myGuide by edcast dashboard interface. On the left, a dark sidebar menu lists various navigation options: Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area features a top navigation bar with the myGuide logo, a 'Help & Support' button, a 'Download' dropdown, and a user profile for 'Aishwarya'. Below the navigation bar, a breadcrumb trail shows 'Dashboard'. The dashboard contains three primary cards: '1 ORGANIZATIONS' (purple icon), an unlabeled card with an orange icon, and '2 USERS' (green icon). A white callout box with a location pin icon points to the 'USERS' card, containing the text 'Click on "USERS" tab'. The 'USERS' card is highlighted with a blue border. At the bottom of the dashboard, there is a copyright notice 'Copyright © 2021 - MyGuide by EdCast' and a support contact email 'support@edcast.com'.

# Step: 03

## Click on "Add User"

The screenshot shows the 'myGuide by EdCast' user management interface. The left sidebar contains a menu with options: Dashboard, APIs & Services, Applications, Manage Roles, Users (selected), Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area is titled 'Help & Support' and shows a breadcrumb for 'Users'. A search bar is present above the table. The table has the following data:

Avatar	First Name	Last Name	Email ID	Status	Guide Role	Organization Role	User Action
	Aishwarya	Karanjkar	aishwaryak+stageuser@edcast.com	Active	App Admin	Default	
	Aishwarya	Karanjkar	aishwaryak+stage2@edcast.com	Active	Administrator	Default	

At the bottom of the page, there is a copyright notice: 'Copyright © 2021 - MyGuide by EdCast' and a support link: 'Need any help, please mail us at [support@edcast.com](mailto:support@edcast.com)'.

## Step: 04

### Enter "First Name"

The screenshot displays the 'Add User' form in the MyGuide by EdCast application. The interface includes a dark sidebar with navigation options such as Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area is titled 'Help & Support' and shows the breadcrumb 'Users > Add'. The form fields are as follows:

- First Name \***: A text input field containing 'First Name'. A tooltip with the text 'Enter "First Name"' is positioned over this field.
- Email ID \***: A text input field containing 'name@domain.com'.
- Role \***: A dropdown menu with 'Select' as the current option.
- Organization Role \***: A dropdown menu with 'Select' as the current option.
- Segments**: A section with a 'Key 1' label and a text input field containing 'Enter a new tag'.

At the bottom of the form, there are two buttons: 'Cancel' and 'Add User'. The footer of the page contains the copyright notice 'Copyright © 2021 - MyGuide by EdCast' and the support email 'Need any help, please mail us at support@edcast.com'.

# Step: 05

## Enter "Last Name"

The screenshot displays the 'myGuide by edcast' user management interface. On the left is a dark sidebar with navigation options: Dashboard, APIs & Services, Applications, Manage Roles, Users (highlighted), Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area is titled 'Help & Support' and shows a breadcrumb 'Users > Add'. The form contains the following fields:

- First Name \***: Input field with placeholder 'First Name'.
- Last Name \***: Input field with placeholder 'Last Name'. A tooltip with the text 'Enter "Last Name"' and a location pin icon is positioned over this field.
- Email ID \***: Input field with placeholder 'name@domain.com'.
- Role \***: Dropdown menu with 'Select' as the current option.
- Organization Role \***: Dropdown menu with 'Select' as the current option.
- Segments**: Section with a 'Key 1' label and an input field for 'Enter a new tag'.

At the bottom of the form are two buttons: 'Cancel' and 'Add User'. The footer contains the text 'Copyright © 2021 - MyGuide by EdCast' and 'Need any help, please mail us at support@edcast.com'.

## Step: 06

Enter the email ID of the user

The screenshot displays the 'myGuide by edcast' user management interface. The left sidebar contains navigation options: Dashboard, APIs & Services, Applications, Manage Roles, Users (highlighted), Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area is titled 'Help & Support' and shows a breadcrumb 'Users > Add'. The form includes fields for 'First Name', 'Last Name', and 'Email ID'. The 'Email ID' field contains 'name@domain.com' and has a tooltip that reads 'Enter the email ID of the user'. Below these fields is an 'Organization Role' dropdown menu set to 'Select'. There is also a 'Segments' section with a 'Key 1' field labeled 'Enter a new tag'. At the bottom of the form are 'Cancel' and 'Add User' buttons. The footer contains the copyright notice 'Copyright © 2021 - MyGuide by EdCast' and a support email address 'support@edcast.com'.

# Step: 07

## Assign a role to your user from here

Below are the roles:

- 1) Administrator
- 2) App Admin
- 3) Creator
- 4) Player

The screenshot shows the 'Add User' form in the MyGuide application. The form includes fields for First Name, Last Name, Email ID, and Organization Role. A dropdown menu for 'Role' is open, showing options: Select, Administrator, Creator, Player, and App Admin. A callout box titled 'Assign a role to your user from here' is overlaid on the right side of the form, listing the roles: Administrator, App Admin, Creator, and Player. The interface also features a sidebar with navigation options like Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The footer contains copyright information and a support email address.

## Step: 08

### Select "Organization Role" from here

Organization role is required for application segmentation. By default the default role is assigned to the Home app and if we select the default role from here for a user, that means the user will be able to access the Home app.

The screenshot displays the 'myGuide by edcast' user management interface. The left sidebar contains navigation options: Dashboard, APIs & Services, Applications, Manage Roles, Users (highlighted), Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area is titled 'Help & Support' and shows a breadcrumb 'Users > Add'. The form includes fields for First Name, Last Name, Email ID (pre-filled with 'name@domain.com'), and Segments. The 'Organization Role' dropdown is highlighted with a blue border, and a tooltip is displayed over it. The tooltip text reads: 'Select "Organization Role" from here. Organization role is required for application segmentation. By default the *default* role is assigned to the Home app and if we select the default role from here for a user, that means the user will be able to access the Home app.' Below the form are 'Cancel' and 'Add User' buttons. The footer contains 'Copyright © 2021 - MyGuide by EdCast' and 'Need any help, please mail us at support@edcast.com'.

## Step: 09

If you have enabled segmentation for your org and you want to target the guides based on the segmentation attributes, then you would have to assign the respective attributes to the user

The screenshot displays the 'Add User' form in the MyGuide by EdCast application. The interface includes a sidebar with navigation options such as Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area shows the 'Add User' form with fields for First Name, Last Name, Email ID (pre-filled with 'name@domain.com'), Role (a dropdown menu with 'Select' and a red error message 'Role is required'), and Organization Role (a dropdown menu with 'Select'). Below these fields is a 'Segments' section with a 'Key 1' label and an input field containing 'Enter a new tag'. A callout box points to this input field, containing the text: 'If you have enabled segmentation for your org and you want to target the guides based on the segmentation attributes, then you would have to assign the respective attributes to the user'. At the bottom of the form are 'Cancel' and 'Add User' buttons. The footer of the page contains the copyright notice 'Copyright © 2021 - MyGuide by EdCast' and the support email 'support@edcast.com'.

## Step: 10

Click on "Add User"

The screenshot displays the 'myGuide by edcast' user management interface. The left sidebar contains navigation options: Dashboard, APIs & Services, Applications, Manage Roles, Users (highlighted), Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area is titled 'Help & Support' and shows the 'Add User' form. The form includes fields for First Name (Aishwarya), Last Name (Karanjkar), Email ID (aishwaryak+tst@edcast.com), and Role (Player). Below these are Organization Role (Role 2) and Segments (Key 1) sections. At the bottom of the form are 'Cancel' and 'Add User' buttons. A callout box with a location pin icon points to the 'Add User' button, containing the text 'Click on "Add User"'. The footer contains copyright information and a support email address.

# Step: 11

To edit the user details click here

The screenshot shows the 'myGuide by edcast' user management interface. The left sidebar contains navigation options: Dashboard, APIs & Services, Applications, Manage Roles, Users (selected), Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area is titled 'Help & Support' and shows a 'Users' section. A search bar and buttons for 'Add User' and 'Import User' are at the top right. Below is a table of users:

Avatar	First Name	Last Name	Email ID	Status	Guide Role	Organization	Action
	Aishwarya	Karanjkar	aishwaryak+stageuser@edcast.com	Active	App Admin	Default	
	Aishwarya	Karanjkar	aishwaryak+stage2@edcast.com	Active	Administrator	Default	

A tooltip is visible over the 'Edit' icon of the second user, containing the text: 'To edit the user details click here'.

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# Step: 12

To delete the user, click here

The screenshot shows the 'myGuide by edcast' user management interface. The left sidebar contains navigation options: Dashboard, APIs & Services, Applications, Manage Roles, Users (highlighted), Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area is titled 'Help & Support' and shows a 'Users' table. The table has columns for Avatar, First Name, Last Name, Email ID, Status, and Guide Role. Two users are listed, both with the name 'Aishwarya Karanjkar'. The first user has the email 'aishwaryak+stageuser@edcast.com' and the role 'App Admin'. The second user has the email 'aishwaryak+stage2@edcast.com' and the role 'Administrator'. Both users have a status of 'Active'. A tooltip with the text 'To delete the user, click here' is positioned over the delete icon (a trash can) in the action menu of the second user. The footer contains the copyright notice 'Copyright © 2021 - MyGuide by EdCast' and the support email 'support@edcast.com'.

Avatar	First Name	Last Name	Email ID	Status	Guide Role	Action
	Aishwarya	Karanjkar	aishwaryak+stageuser@edcast.com	Active	App Admin	[Edit] [Delete] [Refresh]
	Aishwarya	Karanjkar	aishwaryak+stage2@edcast.com	Active	Administrator	[Edit] [Delete] [Refresh]

# Step: 13

You can change the password of a user from here

The screenshot shows the 'myGuide by EdCast' user management interface. The left sidebar contains navigation options: Dashboard, APIs & Services, Applications, Manage Roles, Users (highlighted), Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area is titled 'Help & Support' and shows a breadcrumb 'Home > Users'. A search bar is present above a table of users. The table has columns for Avatar, First Name, Last Name, Email ID, Status, and Guide Role. Two users are listed, both with the name 'Aishwarya' and last name 'Karanjkar'. The first user has the email 'aishwaryak+stageuser@edcast.com' and role 'App Admin'. The second user has the email 'aishwaryak+stage2@edcast.com' and role 'Administrator'. Both are 'Active'. A 'Change Password' button is highlighted on the second user's row. A tooltip points to this button with the text: 'You can change the password of a user from here'. The footer contains 'Copyright © 2021 - MyGuide by EdCast' and 'Need any help, please mail us at support@edcast.com'.

Avatar	First Name	Last Name	Email ID	Status	Guide Role	
	Aishwarya	Karanjkar	aishwaryak+stageuser@edcast.com	Active	App Admin	Default
	Aishwarya	Karanjkar	aishwaryak+stage2@edcast.com	Active	Administrator	Default

# Step: 14

From here, you can sign out the user of all the active sessions.

The screenshot shows the 'myGuide by edcast' user management interface. The left sidebar contains navigation options: Dashboard, APIs & Services, Applications, Manage Roles, Users (selected), Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area is titled 'Help & Support' and 'Users'. A search bar is present above a table of users. The table has columns for Avatar, First Name, Last Name, Email ID, Status, Guide Role, and Org. Two users are listed, both with 'Active' status. The second user's row has a 'Sign Out of All Sessions' button highlighted by a tooltip that reads: 'From here, you can sign out the user of all the active sessions.'

Avatar	First Name	Last Name	Email ID	Status	Guide Role	Org	
	Aishwarya	Karanjkar	aishwaryak+stageuser@edcast.com	Active	App Admin	Default	
	Aishwarya	Karanjkar	aishwaryak+stage2@edcast.com	Active	Administrator	Default	Sign Out of All Sessions

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# Step: 15

You can search for a user from here

myGuide by edcast

Help & Support

Download

Aishwarya

Dashboard

APIs & Services

Applications

Manage Roles

Users

Segments

Domains

API Connector

Themes

Activity

User Provisioning

Task List

You can search for a user from here

Search

Add User

Import User

Avatar	First Name	Last Name	Email ID	Status	Guide Role	Organization Role	User Action
	Aishwarya	Karanjkar	aishwaryak+stageuser@edcast.com	Active	App Admin	Default	
	Aishwarya	Karanjkar	aishwaryak+stage2@edcast.com	Active	Administrator	Default	

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# Step: 16

From here you can filter your search results

The screenshot displays the 'myGuide by edcast' user management interface. A 'Filter by' dialog box is open, allowing users to filter search results based on Status, Guide Role, and Organization Role. The dialog box has three dropdown menus, each currently set to 'All'. Below the dropdowns are 'Cancel' and 'Apply' buttons. A callout box points to the dialog with the text 'From here you can filter your search results'. The background shows a table of users with columns for Avatar, First Name, Last Name, and Email ID. The user list contains two entries for 'Aishwarya Karanjkar' with email addresses ending in '@edcast.com'. The interface also includes a sidebar with navigation options like Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The footer contains copyright information and a support email address.

Avatar	First Name	Last Name	Email ID
	Aishwarya	Karanjkar	aishwaryak+s@edcast.com
	Aishwarya	Karanjkar	aishwaryak+s@cast.com

# Thank you

[myguide.org](https://myguide.org)