# Managing and Inviting Users in the PDWS

Users with a Coordinator or Super User role can invite new users (for equal access or lower) to access the PDWS using the User Management Tool (UMT) in the Setup tab.

When users are invited:

- The system sends an email to the new user and tracks the status of the invitation
- The invited user receives an email invitation with a link to the PDWS and instructions to:
    - Register for an AAMC account or log in with an existing AAMC account and
    - Verify their email account (only if a new AAMC account was created).
- After the user logs into the PDWS and accepts the Terms and Conditions, the user will be able to access the system.

Follow the steps below to send the invitation.

1. From the Dashboard, click on the Setup tab.
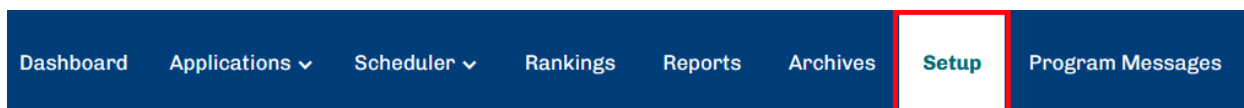
2. Click on Manage Users to be redirected to redirected to the User Management Tool (UMT).

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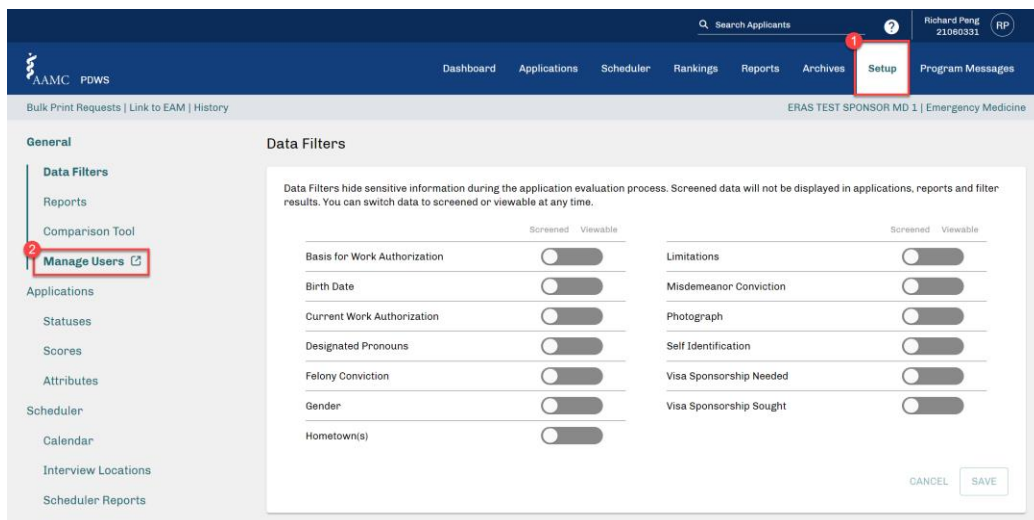
The view and available options in the **Setup** tab are dependent on your assigned role. You must have either a Program Coordinator Role, Program Super User Role, or Institutional Super User Role to manage or invite users.

3. Select the appropriate tab to view your institution(s) or program(s) that you have access to.

To manage access at the <u>institutional level and grant an institution specific role</u>, click on **Manage Access** for the institution you would like to configure under the **Institution** tab.
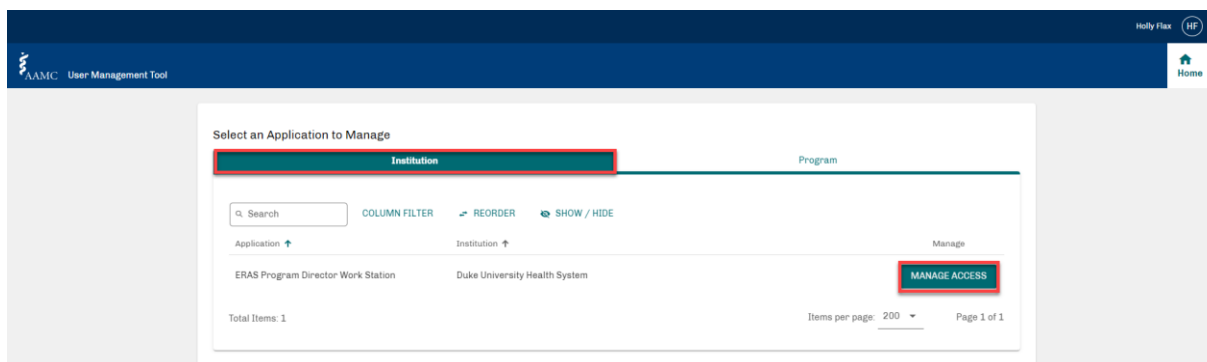

To manage access at the <u>program level and grant program specific roles</u>, click on **Manage Access** for the program you would like to configure under the **Program** tab.
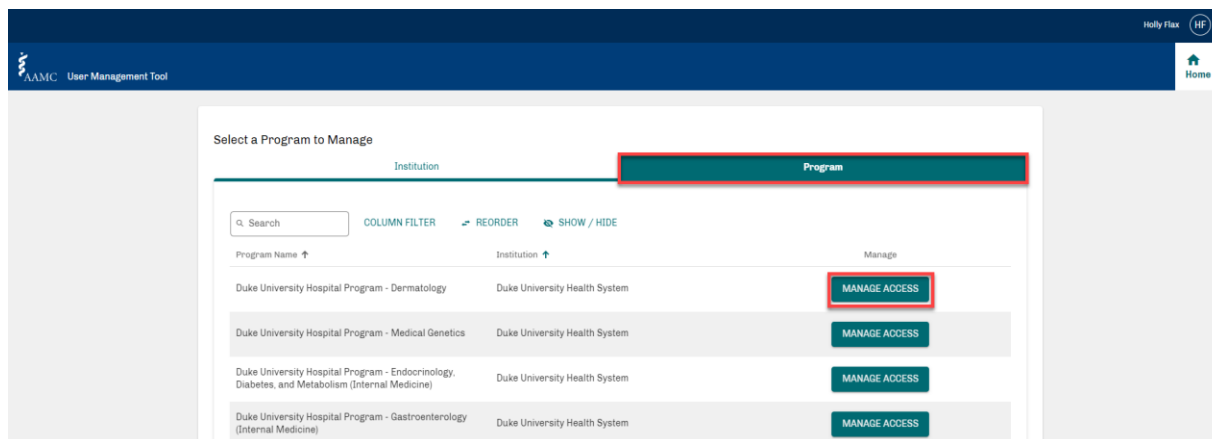

Your view may vary depending on the institution(s) or program(s) you have access to.

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4. Configure current users' access in the Users tab using the available Actions drop-down menu items.
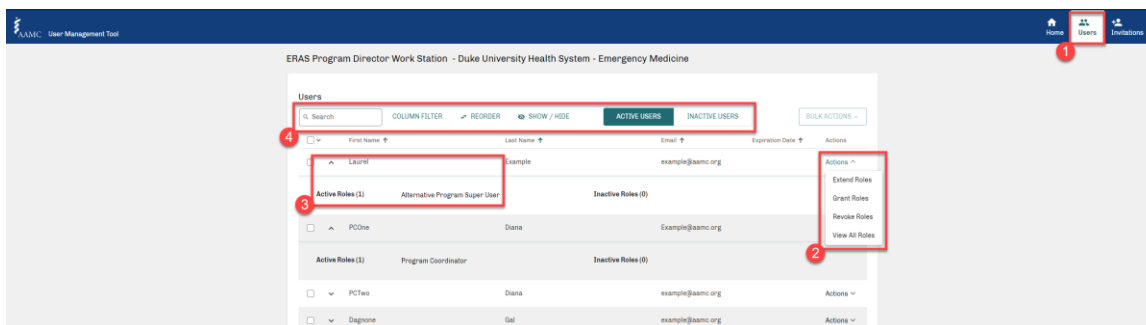
Use the tools at the top of the page to quickly identify users you need to configure and expand user details to view Active roles.

5. Click on the Invitations Tab to manage existing invitations or to send new invitations to new users. Click on the Actions drop-down menu to manage an existing invitation or click on Invite User to invite a new user to access the PDWS.
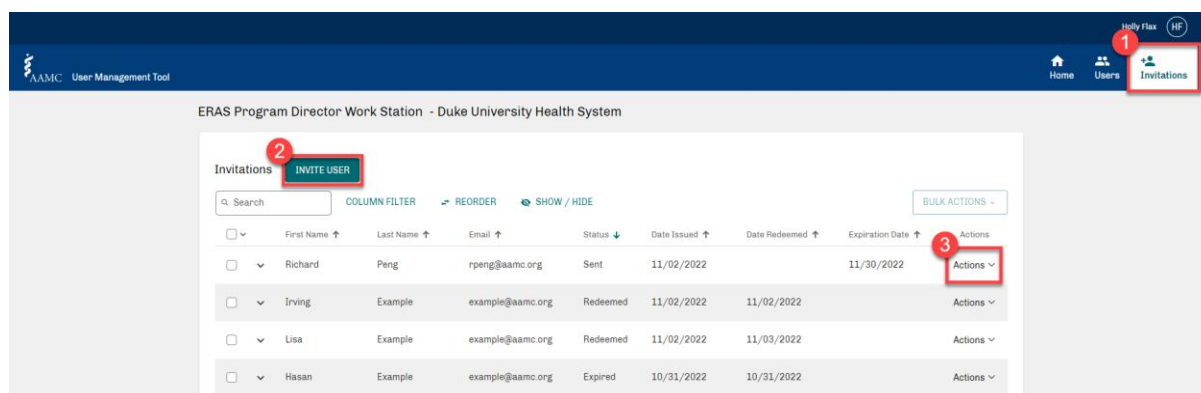
6. Insert the first name, last name, and email address. Select a role appropriate for the invited user.

Click on the Show More toggle below each role to view the comprehensive list of role capabilities. Choose a role based on the needs of the user in the PDWS.

7. Click on Send Invitation at the bottom of the page to invite the respective user. Once the user has received the invitation and completed steps to sign into the PDWS, their status within the Invitations section of UMT will change to "Redeemed".