How to Manage Users: Adding Program Staff

1. Log in to tx.oncorpsreports.com

2. From your dashboard, choose Manage Records, then the option “Program Directors”

3. Click "Add New Program Director"

From this Program Director Screen you can also edit existing users. As you can see, all of these users are marked "Active". OnCorps recommends that any time you need to remove a user, you switch their status to "Inactive" instead of deleting them. This way, you can retain all their data and see their history but they are no longer able to access the database. You can do this by clicking the "Edit" button above, changing the status and then clicking "Save".
4. Enter user information. You can limit the user to budget/financial access only OR lock the user out of the budget/financial access. **DO NOT CHOOSE BOTH** or your user will not be able to view any information.

5. Enter login information and a password and verify the password

6. Click "Save"

7. The user can change their password after logging in by clicking "view/edit profile" at the top left of their screen

As best practices, we recommend that you designate one or two people to add program staff. We also recommend that you designate a consistent naming convention for your staff’s usernames. For example: jdoe, janedoe, janed, JaneD, JDoe.

For additional tutorials, visit the "Help" tab on your OnCorps dashboard or visit the OnCorps Reports section of our Grantee Resource page.