CommCareHQ Web Users

CommCareHQ Web Users are managed on the Users tab

- Add/invite a new web user
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Add/invite a new web user

1. You can add another user by clicking the “+ Web User” link. Only admin users, or those with the ability to edit web users, have the ability to invite other web users to the project and configure the permissions of other Web users
2. Enter the email address of the user you want to invite
3. Assign the permissions for this web user using the Role drop-down. By default, the new web user has Admin access to the project space, meaning they have access to everything in the project space. Choose a different role to restrict access to certain features. You can also create your own roles and edit default roles if the project is on a Standard software plan or higher. See below for more information on how to do this.
4. Click on `Send Invite`.

The person you invite will receive an email from commcarehq-noreply@dimagi.com and will have up to 30 days to accept the invitation before it expires. As the person inviting the new user, you will also receive a copy of this email. If the invitee does not immediately accept their invitation, CommCare will send reminder emails after 15 days, and 29 days (one day before the invitation expires). The user who sent the invite will also receive copies of these reminder emails.

If any of these invitation emails bounce, this will show in the invite list with a status of “Blocked”. If a user’s address bounces 3 times, this email address will be blocked in our system and will no longer receive emails from CommCareHQ. You will see a red “Blocked” label next to that email address. You can contact support@dimagi.com if you believe this is in error or if the receiving email address has been fixed.

If the invitation expires, or if you need to resend the invitation email, you can do this form the Web User page under Pending Invitations.

Accept an Invitation

Tips:

- Please use Chrome or Firefox as your default browser when you open CommCareHQ. For more information please see Internet Browsers for CommCareHQ.
- Log out of any accounts on CommCareHQ that are already logged in.
- You may only login with the email address to which you received the invitation.
- Once you are logged in you can update your email address by clicking on your name -> My Account Settings -> My Information -> Update your email address

Steps:

1. In your inbox, you should receive an email that says “Invitation from [Name] to join CommCareHQ.”
2. To accept the invitation, please click on the provided link in the message. You may also copy and paste the given url into your browser.
3. Upon clicking on the link, you will be directed to the CommCareHQ website for your project.
4. You will be prompted to set up an account on CommCareHQ.
5. Enter your first name, last name, email address (which you will use to log in), password and agree to the terms of service. Click on the ‘Create Account’ button before proceeding.
6. A success message will appear in a green bar to confirm that your user account has been created. Now you can login with your email address.

To open the CommCareHQ project in the future, you need not go back to the invitation email. The link provided in the invitation email is only valid once. You can go back to your project by logging into www.commcarehq.org. If you have more than one project, you can choose which project using the dropdown in the upper right corner.
If your invitation has expired, please request to be invited again.

Removing a Web User

To remove a web user, click on “Remove Membership”

You cannot remove your own web user account from a project space. You will have to ask another admin to remove your membership from the project space. If you are the only admin on the project space, you can reach out to support@dimagi.com / report an issue and we will remove your account from the project space.

Note: Deleting a web user will not affect the application or application architecture. It may, however, affect the following:

- Scheduled reports: If there are any scheduled reports created by this person that is being sent to others, these may stop.
- If the web user had submitted forms, you cannot filter the submit history report to find the removed web user's form submissions.
- Cases they own (if they created any cases through Web Apps or App Preview) will be owned by an ID string, not an actual user.

For information on Roles and Permissions, please see the related article, linked here.

If you're using two-factor authentication for your web users, see here.