
How can I create and delete *Research Professional accounts as an institutional administrator?

- **Product:** Research Professional
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Question

How can I create and delete *Research Professional accounts as an institutional administrator?

Answer

Automated account creation (bulk upload)

If you need accounts to be created for a large number of academic staff, we can expedite the process for you - all we need is for you to provide some information about each prospective user. To ensure an expedient user upload process, the preferred way to present this information is a Microsoft Excel spreadsheet with user information separated into columns for:

First Name

Last Name

Institutional Email Address

Note: if your institution has a Networked-level subscription, you can also include a column with respective workgroups for each user.

Bulk uploads of users can be requested by submitting a request via our support portal. Once users are successfully created, we will send a welcome email to each user – to be approved by you, of course - with instructions to claim their account, in addition to [quick-start guides](#) and links to our [Knowledge Centre](#).

Manual account creation

If you only need to create a few accounts, then you can do this quite simply by logging into *Research Professional and clicking on **Our Institution** at the top of the homepage. Keep in mind that your account will need to have administrator privileges to proceed.

Once you are in the **Our Institution section**, click on the **Actions** dropdown menu (next to the orange **Edit** button) and select **New user**.

This will take you to a user registration form – all you need to do is fill out the mandatory information (indicated by*). Once filled out and successfully created, the user will receive an automated email with instructions to claim their new account (this will include an option to reset their password).

Create new user

* Indicates a required field.

Username*	<input type="text"/>
Password*	<input type="password"/>
Re-enter password*	<input type="password"/>

Title	<input type="text"/>
First name*	<input type="text"/>
Last name*	<input type="text"/>
Job title	<input type="text"/>
Faculty/Department	<input type="text"/>

Main email*	<input type="text"/>
Personal email	<input type="text"/>
Use personal email	<input type="checkbox"/>
Suspend alerts	<input type="checkbox"/>

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Manual account deletion

If you would like to disable or delete a user account, go to **Our Institution**, select the **People** tab (next to Start Page) and search for your user – if you cannot seem to find the user, click on the drop-down menu above the red **Search** button, and select **Whole institution** instead of **This group only**.

Once you find the user, click on their name – this should prompt the user's profile to appear next to the user directory. You will then see the options to **Edit profile**, **Edit alerts** or **Archive**. To begin the deletion process, click **Archive**.

The screenshot shows a web interface with two tabs: 'Start page' and 'People'. Below the tabs is a search bar labeled 'Search for group members' and a dropdown menu set to 'This group only'. A search button labeled 'Search' is to the right of the search bar. Below the search bar are navigation buttons: 'Previous', '1', and 'Next'. The main content area is divided into two columns: 'Group Members' and 'Profile'. The 'Group Members' column lists several users: 'Admin Account', 'Demo Account' (highlighted in yellow), 'James Bond', 'Tyson Fury', and 'John Henry'. The 'Profile' column shows details for the selected user: 'Full Name: Demo Account', 'Email: demo@theuniversity.eu', and 'Role: Member' (with a dropdown arrow). At the bottom of the profile are three buttons: 'Edit profile', 'Edit alerts', and 'Archive'.

Once archived, the user can then be viewed by going back to the drop-down menu above the **Search** button and selecting **Archived users**. You will find the archived user here and upon clicking, you will see the options to **Restore** or **Delete** their account.

The screenshot shows the same web interface as above, but the dropdown menu is now set to 'Archived users'. The search bar is empty, and the search button is still present. The navigation buttons are 'Previous', '1', and 'Next'. The 'Group Members' column now only lists 'Demo Account' (highlighted in yellow). The 'Profile' column shows the same user details as before, but the buttons at the bottom are now 'Restore' and 'Delete'.

If you know that the user is no longer active at your institution but have reason to believe that they may return at some point, you can leave their account archived as this will only disable their account until their return, at which point you can click Restore to switch their account back on.

If you want to proceed with a full deletion, simply click the **Delete** button. Once a user is deleted permanently, their account cannot be recovered.

Automated account deletion

If you would like to delete many users without having to go through each profile individually, you can also request us to do this for you. All we need is a spreadsheet in the same format as the user creation form (see top of the page), with the First Name, Last Name and Institutional Email Address for each user you would like deleted.

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