# EDM User Guide – Managing Users

Primary (Principal) User

As the primary user, you are responsible for setting up and managing other users within your organisation, these are called 'basic users'. Primary users can add new users and unlock existing users.

On the home screen click on 'Manage Users'.
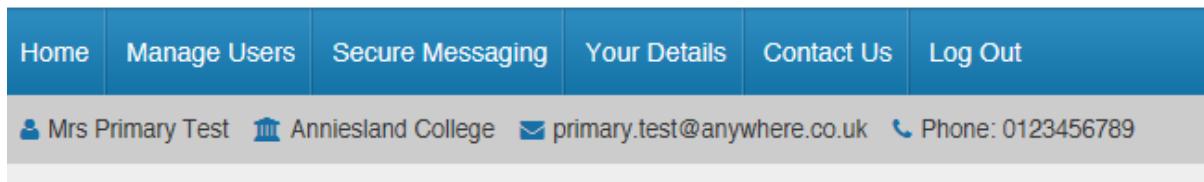
You will see a menu screen that lists all users associated with your employer number and the status of each user. The icons under each menu item show as either green or red. Green icons indicate the user is not locked, unregistered or deactivated and red indicates otherwise. The image below shows the menu screen listing a user who is fully active on EDM:
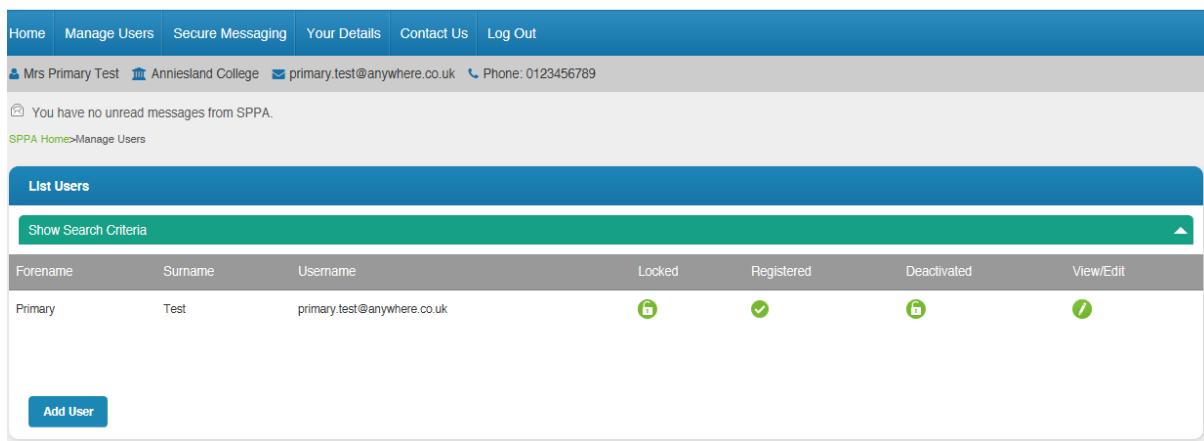
Adding New Users

To add another user, click on 'Add User'.

Enter your new users details and click 'Save'. The following message will appear.

The EDM portal will automatically email the new user with a registration token, which will enable the new user to register and set their own password as outlined in the Registration user guide.

Unlock Users

As a primary user, you can also unlock other users in your organisation. If a user has their password locked you will see a red padlock icon under the 'Locked' column in the menu screen.
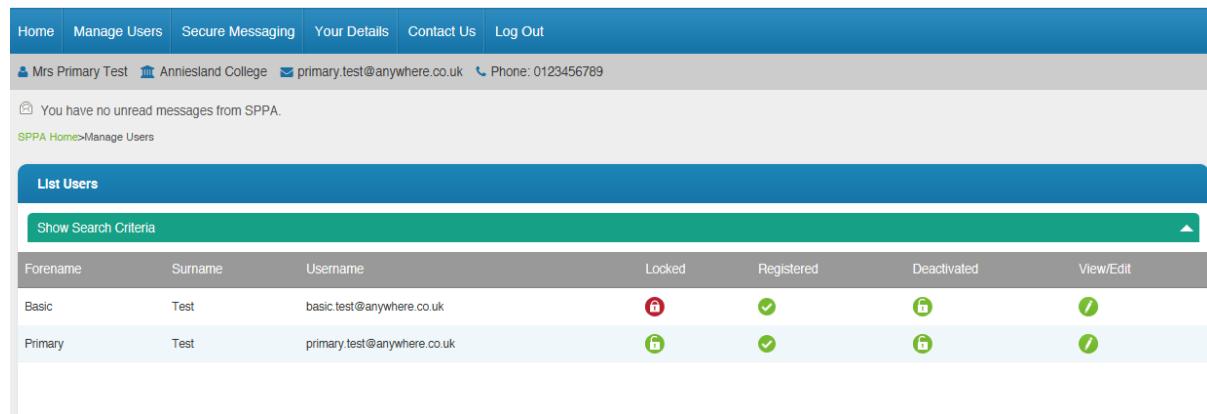
Click on 'View/Edit' to proceed to unlocking the account.
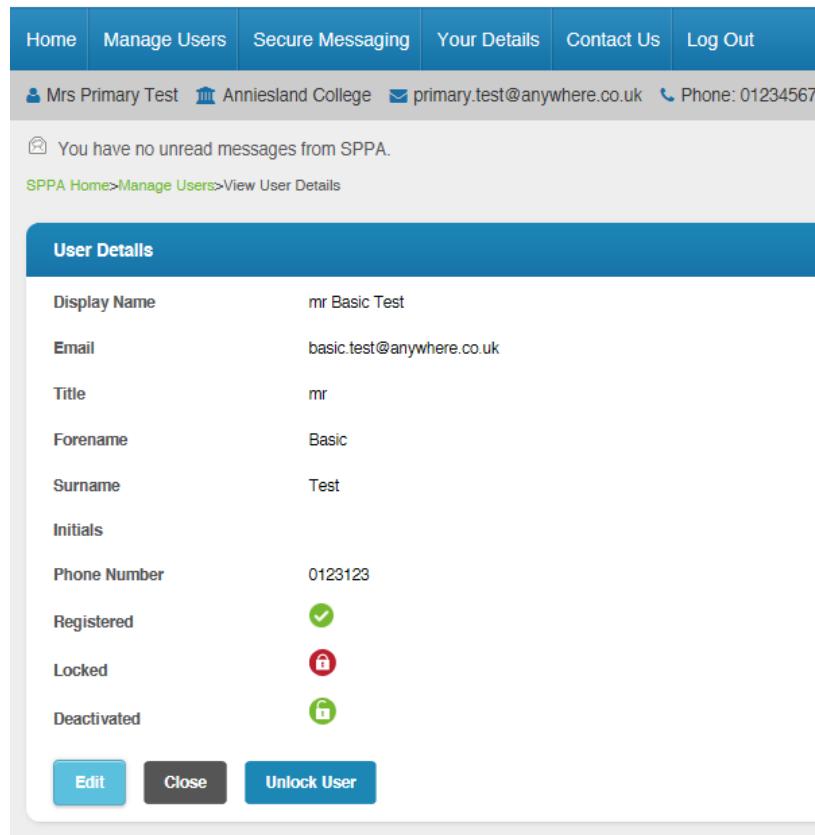
You can unlock the user by clicking 'Unlock User' then 'Close' This will take you back to the user list where the user account is displayed as unlocked. The user can now login using their existing password.


Please only unlock users if they know their password. If a user has forgotten their password they should use the forgotten password link on the main login screen.

Removing Users

If a basic user leaves your organisation or is no longer responsible for submitting data to SPPA you can remove them from EDM. Please use secure messaging to contact the EDM team stating the name of the user(s) you wish to remove from your organisations profile.

Your Details

You can manage your own user details by accessing 'Your Details' from the menu.
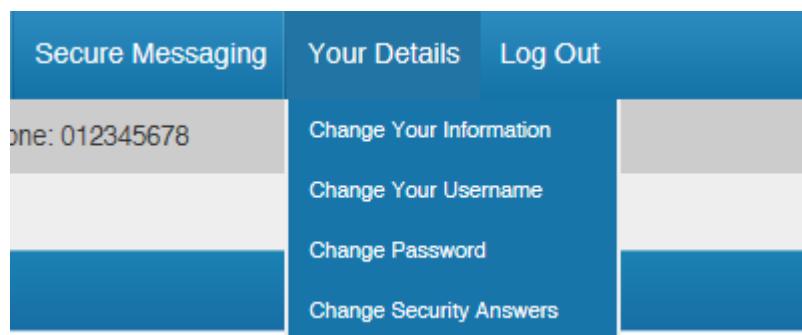
Choose what you want to update from the dropdown menu and then save changes to update.

If you are having difficulty managing users please contact the EDM team using the 'Contact Us' function or telephone on 01896 893000 and ask for 'EDM'.