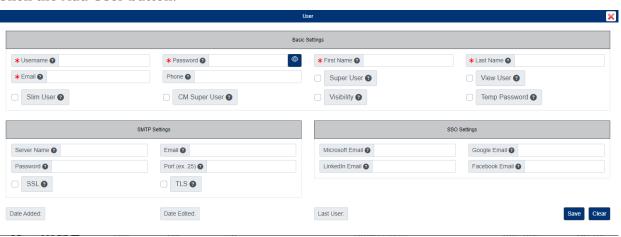
Manage Users

From the menu, click Admin, then click Users, or use the Users shortcut button below the menu.

Add User

1. Click the Add User button.



- 2. Enter the Username.
- 3. Enter the user Password.
- 4. Enter the First Name and Last Name for the user.
- 5. Enter the user Email.
- 6. If needed:
 - Enter the Phone Number.
 - Check Super User if the user should have automatic view rights to every document added to the fileroom.
 - Check View User if the user should only be able to view documents in the view portal (gallery view).
 - Check Slim User if the user should only have access to the gallery view, content search, File Review, and My Workflows.
 - Check CM Super User if the user should have access to all the pages under Contact Management.
 - Check the Visibility box if the user can view classified folder and document fields.
 - Check Temp Password if you want a temporary password emailed to the user.
- 7. Click the Save button when finished.

Import Users

- 1. Click the Import Users button at the top of the Manage Users page.
- 2. In the pop-up that appears, choose the file you would like to import.
 - There is an Example Template you can use if needed.
- 3. Click the Import Users button when you are ready.

Edit User

- 1. On the Manage Users page, click the Username,
- 2. In the pop-up window that appears, edit the user as needed.

3. Click the Save button when finished.

Manage User Groups

- 1. Under the Actions column, click the Manage Groups button next to the user.
- 2. In the pop-up window that appears, click the + sign next to the group(s) you want to add the user to.
- 3. Close the window when finished.

Hold User Documents

If you need to put an automatic hold on all documents last updated by a user, please follow the steps below:

- 1. Under the Actions column, click the Hold button next to the user.
- 2. Click Yes to confirm.

Delete User

- 1. Under the Actions column, click the Delete button next to the user.
- 2. Click Yes to confirm.

Reset Security Question (must be logged in as System Admin)

- 1. Under the Action column, click the Reset Security Question button next to the user.
- 2. Click Yes to confirm.
 - The user will be prompted to set a new Security Question when they next log in.