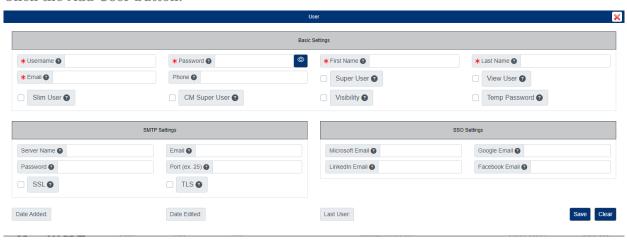
## **Manage Users**

From the menu on the left-side of the screen, click Admin, then click Users under the third column: Security Management.

### **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.

#### **Edit User**

- 1. Click the Username, then edit the user as needed.
- 2. 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, select the groups 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 Master Admin)

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