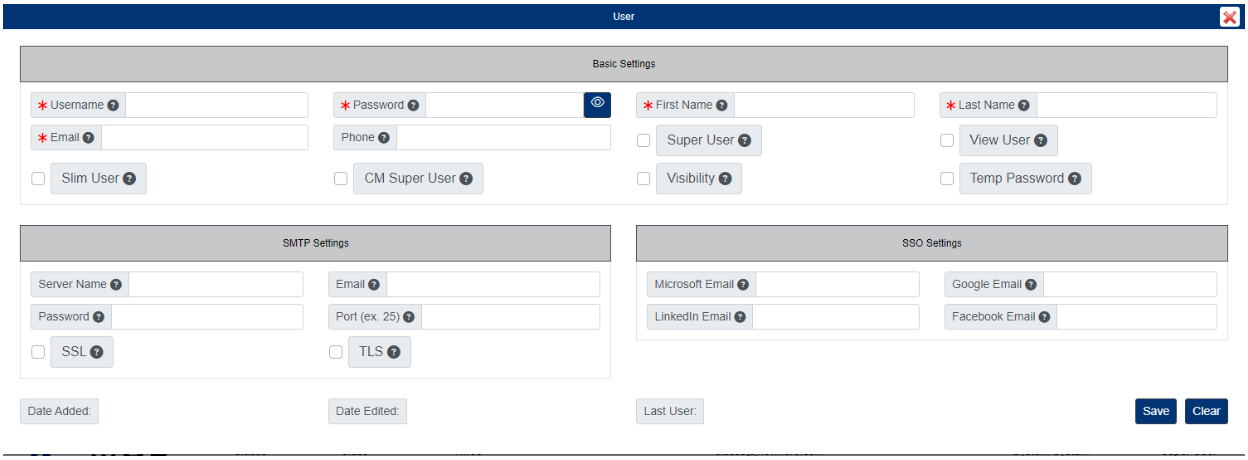
Manage Users

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.