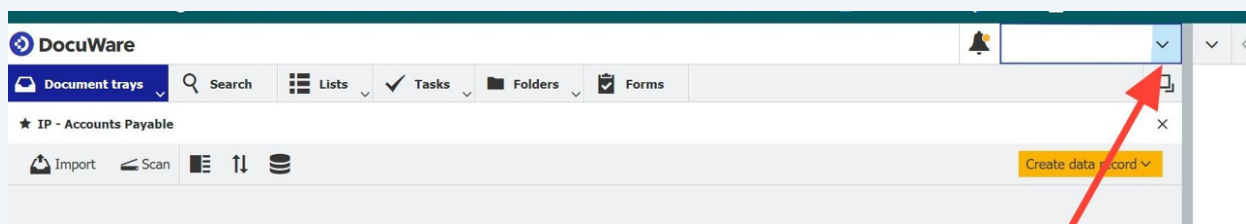


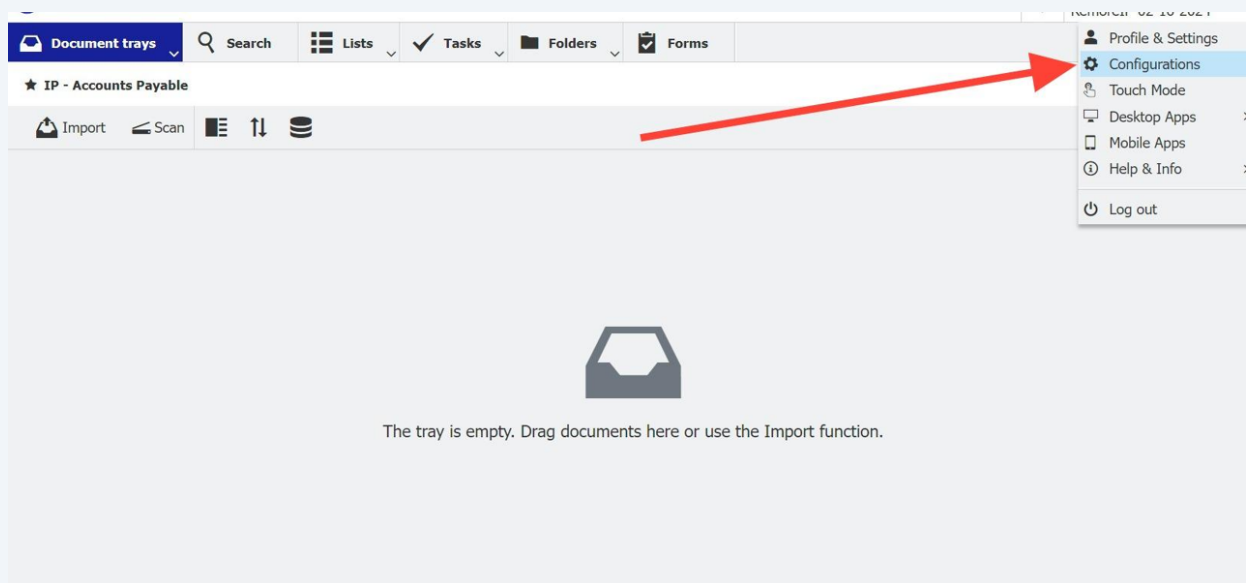
User Management 2- User List Options

This guide provides step-by-step instructions on various options available in user management, including sending password register/reset links, editing user entries, copying users, and deleting users. It also emphasizes the importance of understanding the differences between locking and deleting a user. If you need to manage users effectively, this guide is a valuable resource.

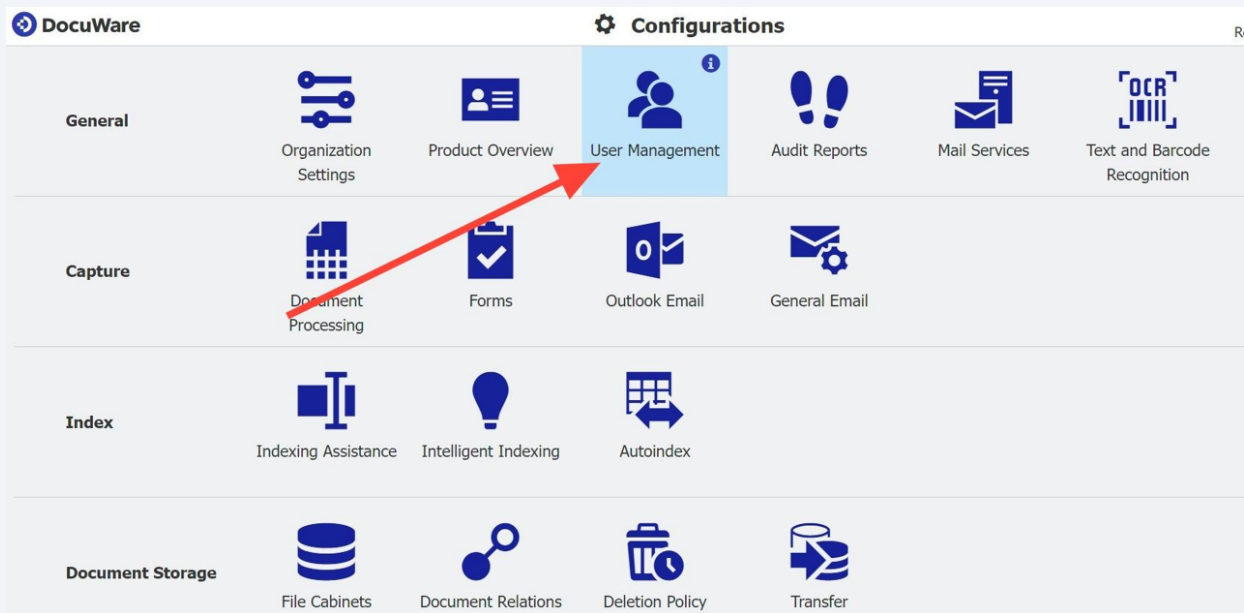
- 1 Click on the drop-down next to the user/site name:



- 2 Click "Configurations"

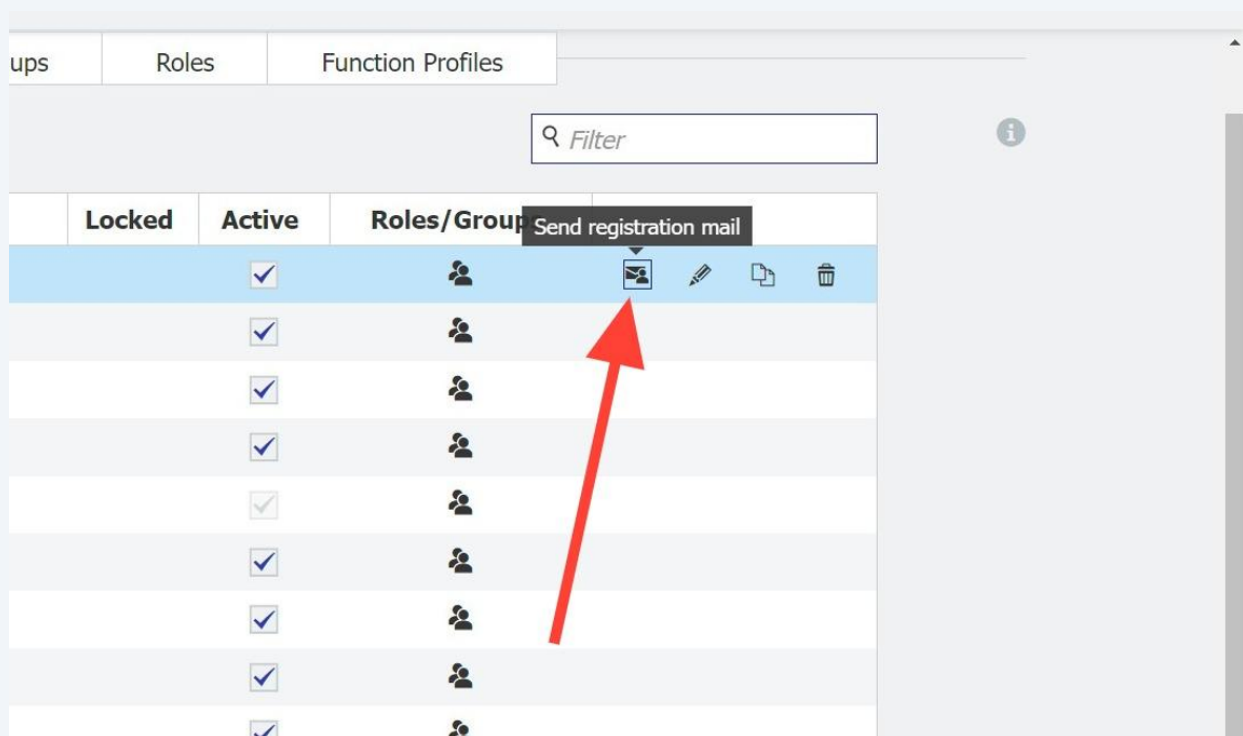


3 Choose "User Management"



4 Highlight the user's entry line for the following steps.

5 To send a password register/reset link, click here:



6

User Management

Users Groups Roles Function Profiles

New user Filter

Username	Email	Locked	Active	Roles/Groups
brian.ford	mremore@metrosales.com		<input checked="" type="checkbox"/>	
elizabeth.cash	mremore@metrosales.com		<input checked="" type="checkbox"/>	
fred.winner	mremore@metrosales.com		<input checked="" type="checkbox"/>	
mremore	mremore@metrosales.com		<input checked="" type="checkbox"/>	
mremore.admin	mremore@metrosales.com		<input checked="" type="checkbox"/>	
peggy.jenkins	mremore@metrosales.com		<input checked="" type="checkbox"/>	
peter.king	mremore@metrosales.com		<input checked="" type="checkbox"/>	
peter.sanders	mremore@metrosales.com		<input checked="" type="checkbox"/>	
simon.stone	mremore@metrosales.com		<input checked="" type="checkbox"/>	

An email will be sent out to "brian.ford" to reset the password


Send Cancel

7

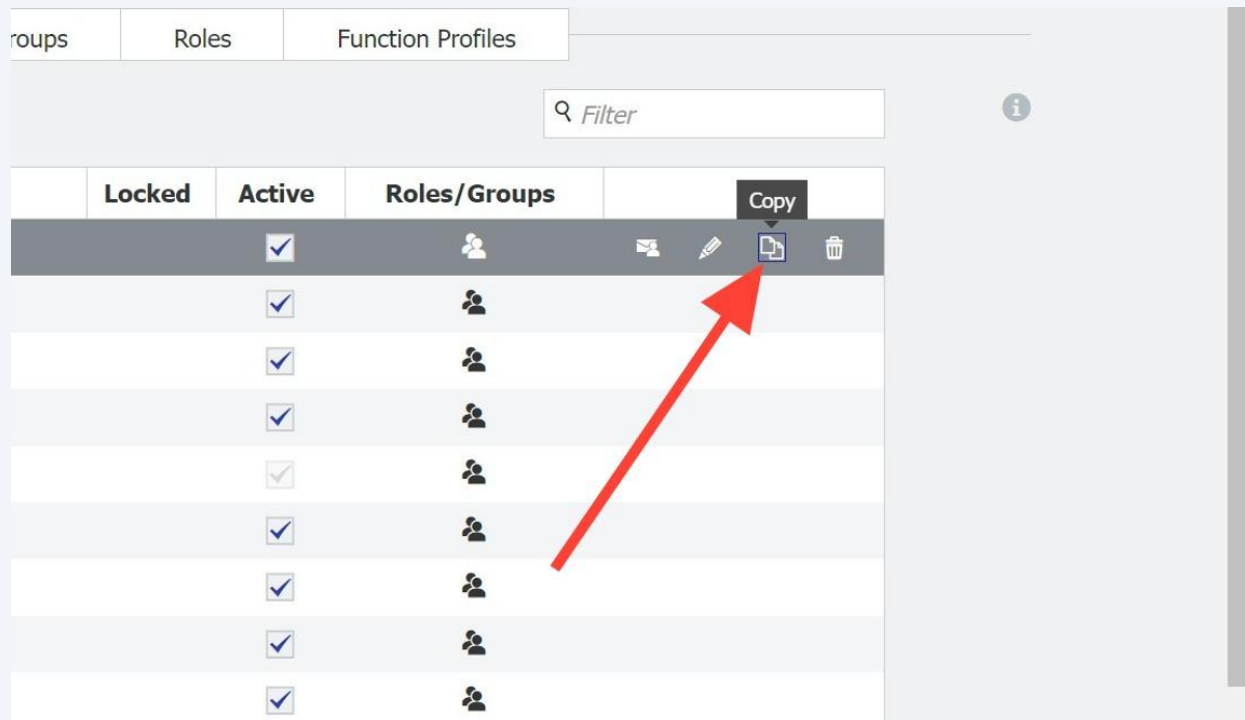
To edit the user's entry, either click on the user's name or click here:

Groups Roles Function Profiles

Filter

	Locked	Active	Roles/Groups	Edit
m		<input checked="" type="checkbox"/>		
m		<input checked="" type="checkbox"/>		
m		<input checked="" type="checkbox"/>		
m		<input checked="" type="checkbox"/>		
m		<input checked="" type="checkbox"/>		
m		<input checked="" type="checkbox"/>		
m		<input checked="" type="checkbox"/>		
m		<input checked="" type="checkbox"/>		

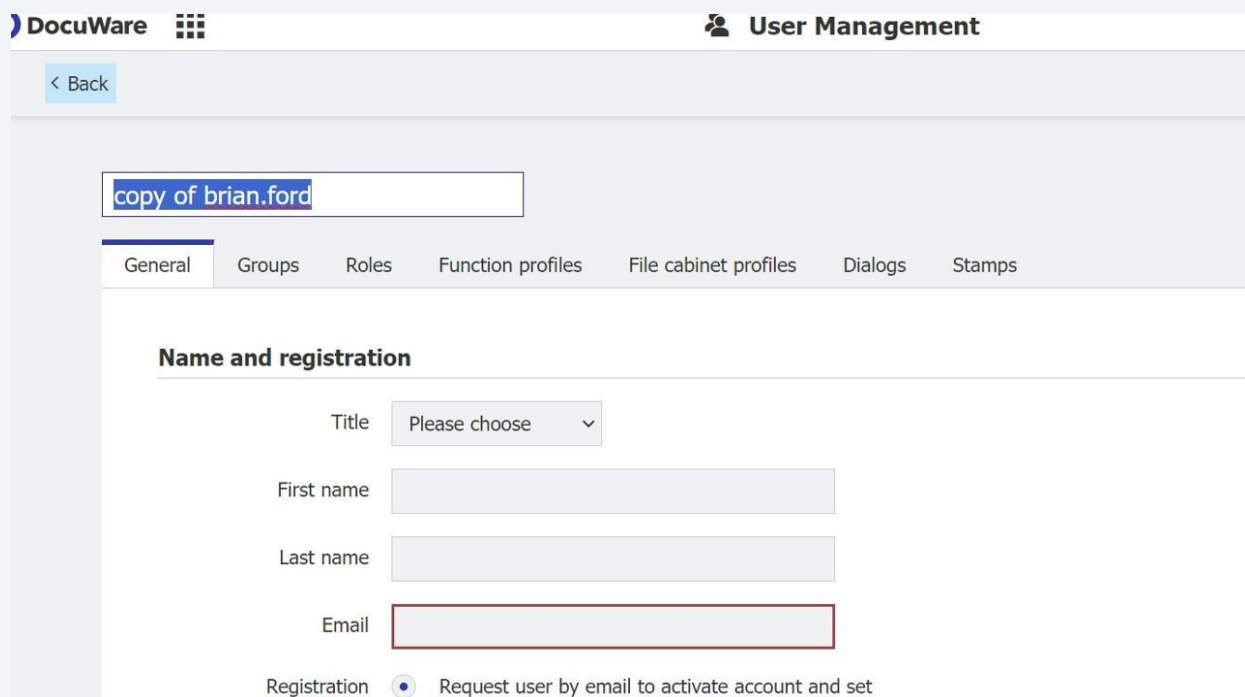
- 8 To copy a user to create a new user with similar properties, choose "Copy",



The screenshot shows the DocuWare User Management interface. At the top, there are tabs for 'Groups', 'Roles', and 'Function Profiles'. Below these is a search bar labeled 'Filter' and an information icon. The main area contains a table with columns: 'Locked', 'Active', 'Roles/Groups', and an action column. The 'Active' column has checkboxes, all of which are checked. The 'Roles/Groups' column shows user icons. The action column contains icons for email, edit, copy, and delete. A red arrow points to the 'Copy' icon in the first row. A 'Copy' button is also visible above the action icons.

Locked	Active	Roles/Groups	Action
	<input checked="" type="checkbox"/>	[User Icon]	[Copy] [Email] [Edit] [Delete]
	<input checked="" type="checkbox"/>	[User Icon]	
	<input checked="" type="checkbox"/>	[User Icon]	
	<input checked="" type="checkbox"/>	[User Icon]	
	<input checked="" type="checkbox"/>	[User Icon]	
	<input checked="" type="checkbox"/>	[User Icon]	
	<input checked="" type="checkbox"/>	[User Icon]	
	<input checked="" type="checkbox"/>	[User Icon]	
	<input checked="" type="checkbox"/>	[User Icon]	
	<input checked="" type="checkbox"/>	[User Icon]	

- 9 And make the desired changes.



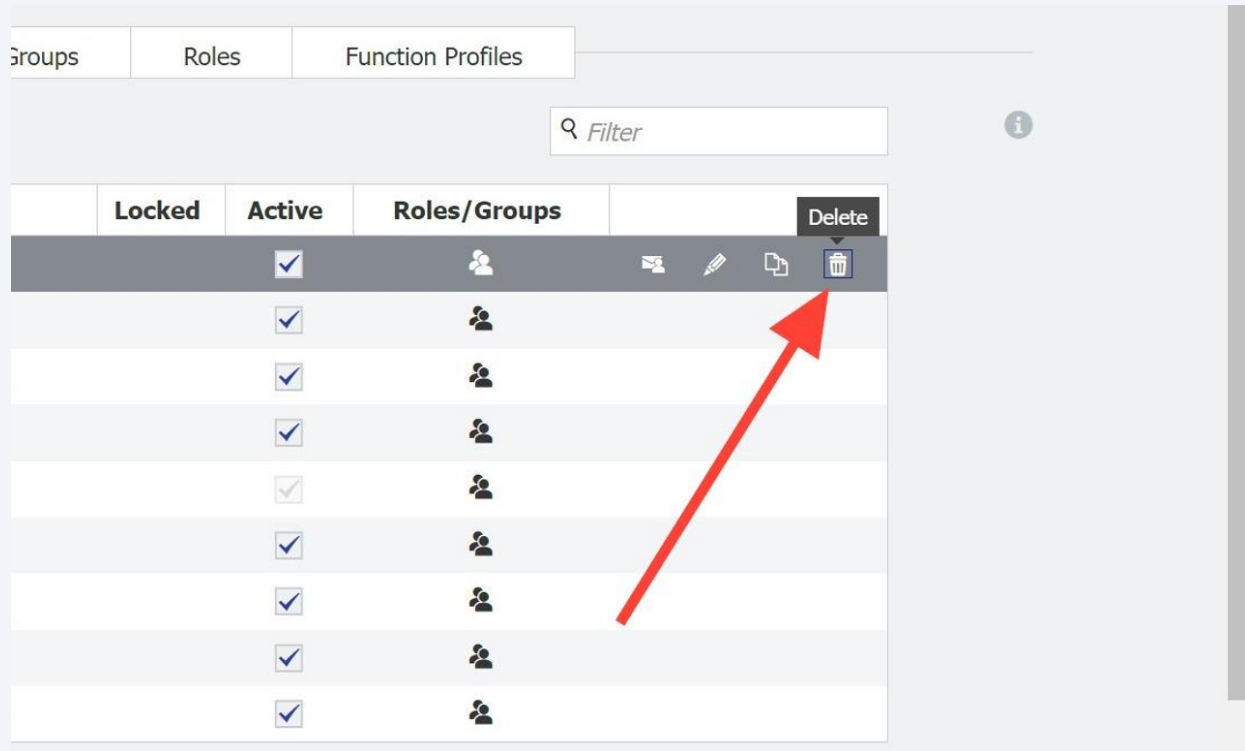
The screenshot shows the 'copy of brian.ford' user profile page in the DocuWare User Management interface. The page has a header with the DocuWare logo and 'User Management'. Below the header is a '< Back' button. The main content area has a tabbed interface with 'General' selected. The 'Name and registration' section contains the following fields:

- Title: Please choose (dropdown menu)
- First name: [Text input field]
- Last name: [Text input field]
- Email: [Text input field]

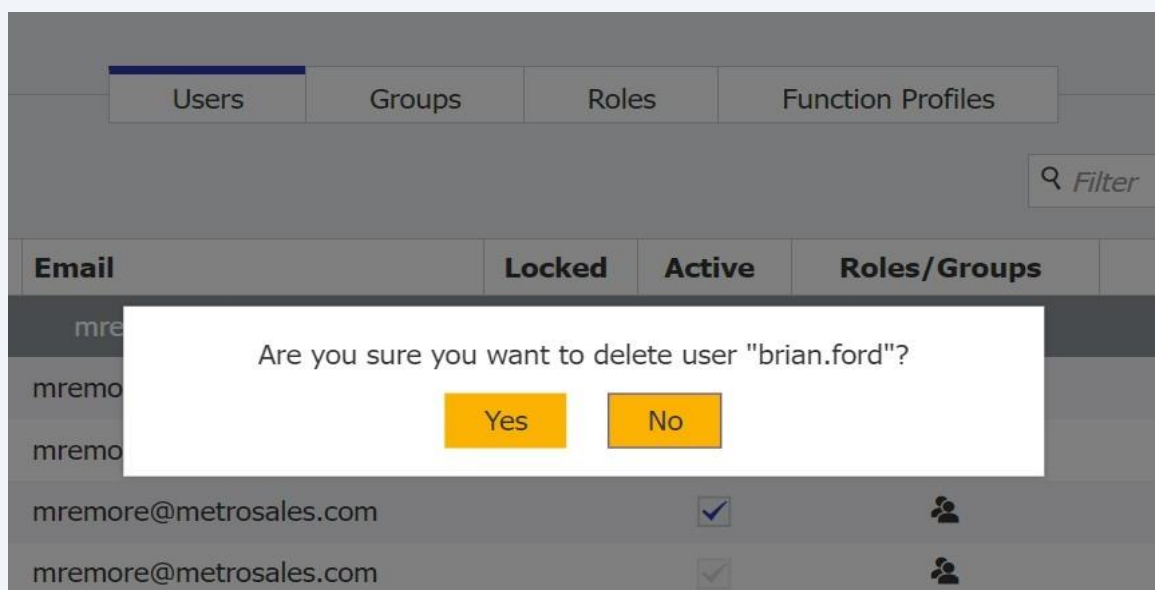
At the bottom, there is a 'Registration' section with a radio button selected for 'Request user by email to activate account and set'.

10 To delete a user, click this icon.

****IMPORTANT- Do not delete a user before reading the document covering the differences between locking and deleting a user****



11 Click here



12 Hover over this icon to view the Role/Groups assigned to this user.

	Locked	Active	Roles/Groups	
om	<input checked="" type="checkbox"/>			
om				
om				
om				
om				
om	<input checked="" type="checkbox"/>			   

Roles

IP - Invoice Validator IP - Invoice Distributor

IP - Final Invoice Processing IP - Finance Users

IP - Approval Rejected IP - Default Functions

Groups

Public