

# Creating a user account

You can create an account for a user and assign roles to the user to give access to one or more of your customer's projects and/or libraries.

## Requirements:

- In a stand-alone system, you must be assigned the following user roles:
  - To create a user at the customer level, you must be assigned an Administrator customer role at that level.
  - To create a user at the project or library level, you must be assigned the right to manage access for the project or library.
- In an integrated system, you must be assigned a Prepress Portal admin role that includes the Manage Access and View User rights, and you must also be assigned the following InSite Creative Workflow user roles:
  - To create a user at the customer level, you must be assigned a customer role that includes the Manage Access user right and the Administrator project and library roles.
  - To create a user at the project or library level, you must be assigned a project or library role that includes the Manage Access user right.

### 1. Create a user account:

| To create a user with this access                                                                              | Do this                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
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| Access to all of your customer's projects and libraries or to all projects and libraries that the user creates | <p>In a stand-alone system:</p> <ol style="list-style-type: none"><li>a . In the Manage Access view, in the left pane, select a customer.</li><li>b. From the <b>User</b> menu, select <b>Create User</b> or <b>Invite New User</b>.</li><li>c. Specify the user's logon and contact information.</li><li>d. Click <b>Create</b>.</li></ol> <p>In an integrated system:</p> <ol style="list-style-type: none"><li>a. Click <b>Administration</b> and <b>Users</b>.</li><li>b. Select a customer from the <b>Customer</b> dropdown.</li><li>c. Click <b>Create Customer User</b>.</li><li>d. Specify the user information and roles.</li><li>e. Click <b>Create</b>.</li></ol> |

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| Access to a specific project | <ol style="list-style-type: none"> <li>In the Manage Access view, in the left pane, select a project.</li> <li>From the <b>User</b> menu, select <b>Create User</b> or <b>Invite New User</b>.</li> <li>Specify the user's logon and contact information.</li> <li>Click <b>Create</b>.</li> </ol> |
| Access to a specific library | <ol style="list-style-type: none"> <li>In the Manage Access view, in the left pane, select a library.</li> <li>From the <b>User</b> menu, select <b>Create User</b> or <b>Invite New User</b>.</li> <li>Specify the user's logon and contact information.</li> <li>Click <b>Create</b>.</li> </ol> |

The e-mail address that you type in the **Email** box is the address to which the system sends messages, such as event notifications and reports. You can type multiple e-mail addresses for the user to a maximum of 80 characters combined, separated by semicolons—for example, john.doe@mycompany.com; john.doe@myhome.com. The system sends each message to all the listed addresses.

- In the list of users, find the user that you just created and assign the user project and library roles with the appropriate user rights. Roll over a role to view the rights included in that role.

In an integrated system, if you are creating a user with access to all projects and libraries, click **Manage Projects & Library Access** to assign project and library roles.

- Under each project and library role that you assign, select one of the following options:
  - Access All:** Gives the user access to all of your customer's projects or libraries. When you select this option, you can assign the user different roles at the project/library level. This allows you to give the user more or fewer rights for specific projects and libraries.
  - Limit Access:** Limits the user's access to the projects or libraries that she or he creates. When you select this option, ensure that the project/library role includes the Create Project or Create Library user right, so that the user can create projects and libraries.
- Click the **Apply** button.