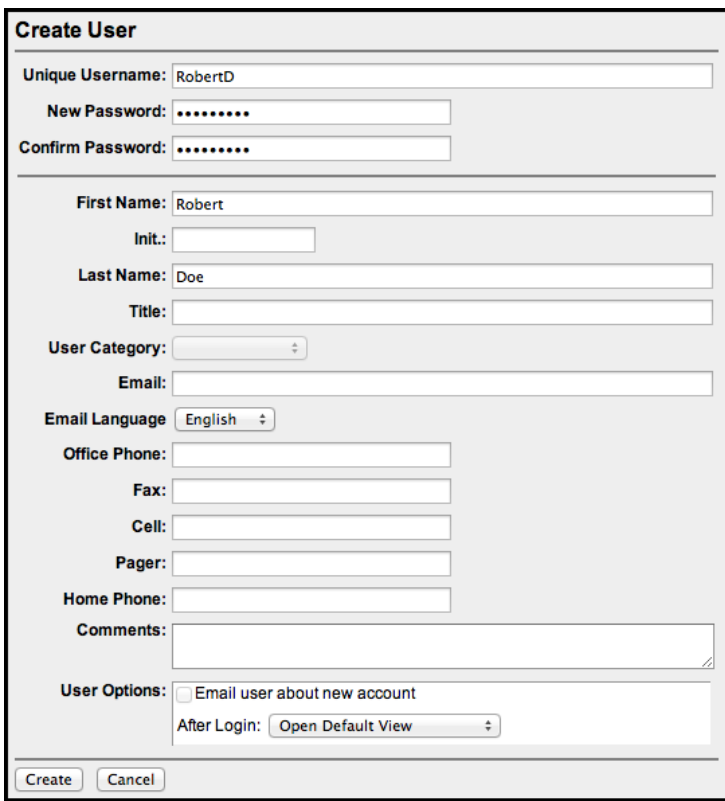


Creating users

Requirements: Your customer role must include the Manage Access user right and the Modify Customer user right.

On standalone InSite Creative Workflow system, perform the following steps:

1. On the navigation toolbar, click **Manage Access**.
2. In the left pane, select the customer for whom you want to create a user.
3. From the **User** menu, select **Create User**.
4. In the Create User dialog box, type the user's logon and contact information in the boxes.



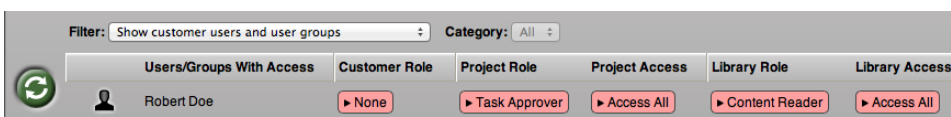
The 'Create User' dialog box contains the following fields and options:

- Unique Username:** RobertD
- New Password:** [masked]
- Confirm Password:** [masked]
- First Name:** Robert
- Init.:** [empty]
- Last Name:** Doe
- Title:** [empty]
- User Category:** [dropdown]
- Email:** [empty]
- Email Language:** English [dropdown]
- Office Phone:** [empty]
- Fax:** [empty]
- Cell:** [empty]
- Pager:** [empty]
- Home Phone:** [empty]
- Comments:** [text area]
- User Options:**
 - ☐ Email user about new account
 - After Login:** Open Default View [dropdown]

Buttons: Create, Cancel

Note: If the system has the **Enforce Two-Factor Authentication** option enabled, the **Enforce Two-Factor Authentication** checkbox appears. You may check/uncheck to enable/disable the feature. In order to check to enable the feature, the user has to have the **Email** field filled in with a valid email address.

5. Click **Create**.
The user name appears in the Manage Access view.
6. From the role lists that appear, select roles for your user.



The Manage Access view shows a table of users and their roles. The first user listed is Robert Doe.

Users/Groups With Access	Customer Role	Project Role	Project Access	Library Role	Library Access
Robert Doe	None	Task Approver	Access All	Content Reader	Access All

7. If you are creating a user at the customer level, under each project and library access, perform one of the following actions:

- a. To allow the user to work with all projects and libraries for the customer, select **Access All**.
 - b. To allow the user to work only with projects and libraries that the user creates, select **Limit Access**.
8. Click **Apply**.

On InSite Creative Workflow system integrated with Prepress Portal, you create users on the Prepress Portal interface. After creating a user, click **Manage Project & Library Access** to assign and apply the project and library roles to the user.

Creating user groups

You can also create user groups to streamline the process of setting project and/or library access and requesting user reviews when there are many people with different roles and responsibilities working on the projects and libraries.

For more information about creating user groups, see the *InSite Creative Workflow User Guide*.