

Creating or editing customer users (for staff users only)

Requirements: You must have a customer role that includes the Manage Access and View Users rights.

You can create customer users only from the **Customers** component of the software, but you can edit existing Customer Users through the **Users** component.

Note: If the user needs to work on jobs for more than one customer, create the user in one customer account and then add the user to the other customer accounts.

1. On the home page, click **Administration**.

From this component of the software	Do this
Customers	a. On the home page, click Administration b. In the Administration area, click Customers. c. In the Customers area, right-click the customer's row and select Manage Users and Groups. d. In the Users area, click Create Customer User or Create Staff User. You can also click a User name to edit.
Users	a. On the home page, click Administration. b. In the Administration area, click Users. c. In the Users area, click Create Staff User or click a Customer User name. You can also click a User name to edit.

Tip: To edit your own account, click your name on the toolbar. **Note:** You cannot edit your own roles.

2. In the **Create Customer User** or **Edit Customer User** window, perform any of the following actions:

To create or edit	Do this
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In the left pane, select User Info .	a. In the User Info area, type the unique user name, password, the first name and last name of the user. b. To change an existing password, click Change Password, and type the current and new passwords. c. Type the user's contact information--e-mail address and phone number. Note: Due to security reasons, users are prevented from changing their own email address. Contact the system administrator if the email address change is required. d. If an account has been locked out because the wrong password was used X' number of times, clear the Locked Account check box to enable the user to log in. e. If you want the user to have a temporary account, select the Account Expires In _ Days check box, and type the number of days in the box. f. Select the Enforce Two-Factor Authentication box if the user is to be enabled for Two-Factor Authentication. g. Select the Active Directory Authentication check box, if it is being used.
In the left pane, select Email Subscriptions .	By default, the system sends an e-mail notification containing the user name and password to a new user. See Setting up e-mail notifications .
In the left pane, select Default User Role .	To give this user access to other customers: a. Click Customer Access. b. Select the check box beside each customers to which this user should have access, and click OK.
The roles	Select the appropriate roles for the user. Tip: To see which rights are included in a role, hover your cursor over each role. Note: You cannot edit your own roles.
Access to jobs	- To give the user access to all jobs, select the Access All Jobs check box. - If users only have access to specific jobs, clear the Access All Jobs check box. Later, you give customer users access to the specific jobs.
In the left pane, select Comments .	(Optional) In the Comments box, type your comments.

Note: If you selected the **Disable All Email Notifications** check box in the **Email Subscriptions** area, the user will not receive an e-mail notification.

3. Click **Create**.

Note: New and forgotten password users are required to reset their password during first login. Enter your username and pre-assigned password then click the **Login** button. Click the **Change Password** link to reset your password.

4. (If licensed) Give the user access to projects or to specific projects.

5. (If licensed) Give the user access to libraries or to specific libraries.