

Creating or editing customer users

You add new users to the system within the customer account.

1. On the home page, click **Administration**.
2. In the **Administration** area, click **Users**.
3. In the **Users** area, click **Create Customer User** or click a customer user name.
Tip: To edit your own account, click your name on the toolbar.
Note: Staff users need to first right-click a customer, select **Manage Users and Groups**, and then click **Create Customer User**.
4. In the **Create Customer User** or **Edit Customer User** window, perform any of the following actions:

In	To create or edit	Do this
User Info	The logon credentials	a. In the User Info area, type the user name, password, the first name and last name of the user, and the user's contact information. 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. b. To change an existing password, click Change Password, and type the current and new passwords.
	Account status	If an account has been locked out because the wrong password was used X' number of times, clear the check box to enable the user to log in.
	The account expiry	If you want the user to have a temporary account, select the Account Expires In _ Days , and type the number of days in the box.
	Two-Factor Authentication	To exempt a user from Two-Factor Authentication (if in use), uncheck the Enforce Two-Factor Authentication box.
E-mail Subscriptions	E-mail notifications	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 .
Default User Roles	Roles	Select the appropriate roles for the user. Tip: To see which rights are included in a role, hover your cursor over the specific 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.
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Notes:

- If you selected the **Disable All Email Notifications** check box in the **E-mail Subscriptions** area, the user will not receive an e-mail notification.
- You can only have one e-mail address per user account. If you want to add another e-mail addresses, use the **Other Email Recipients** field. For more information, see [Creating and editing customers](#).

5. 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.

- 6.** (If licensed) Give the user access to projects or to specific projects.
- 7.** (If licensed) Give the user access to libraries or to specific libraries.