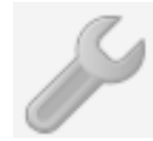


ADDING NEW USERS

SCAN WORX

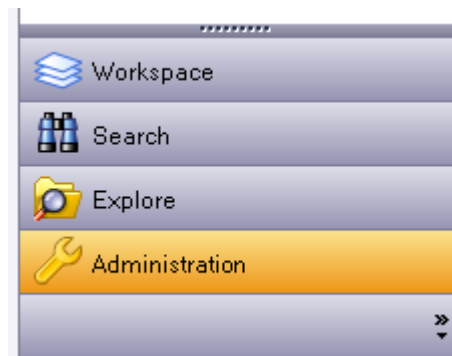


Adding New Users

- This quick reference guide will show you how to add new users into series 6 and also look at the configuration needed in getting them started.
- **NB:** The following can only be done by a System Administrator. The new users must be on the active directory before they can be added into Invu.

Adding a new user from Active Directory

- Log into Invu Series 6
- Click on the **Administration** option



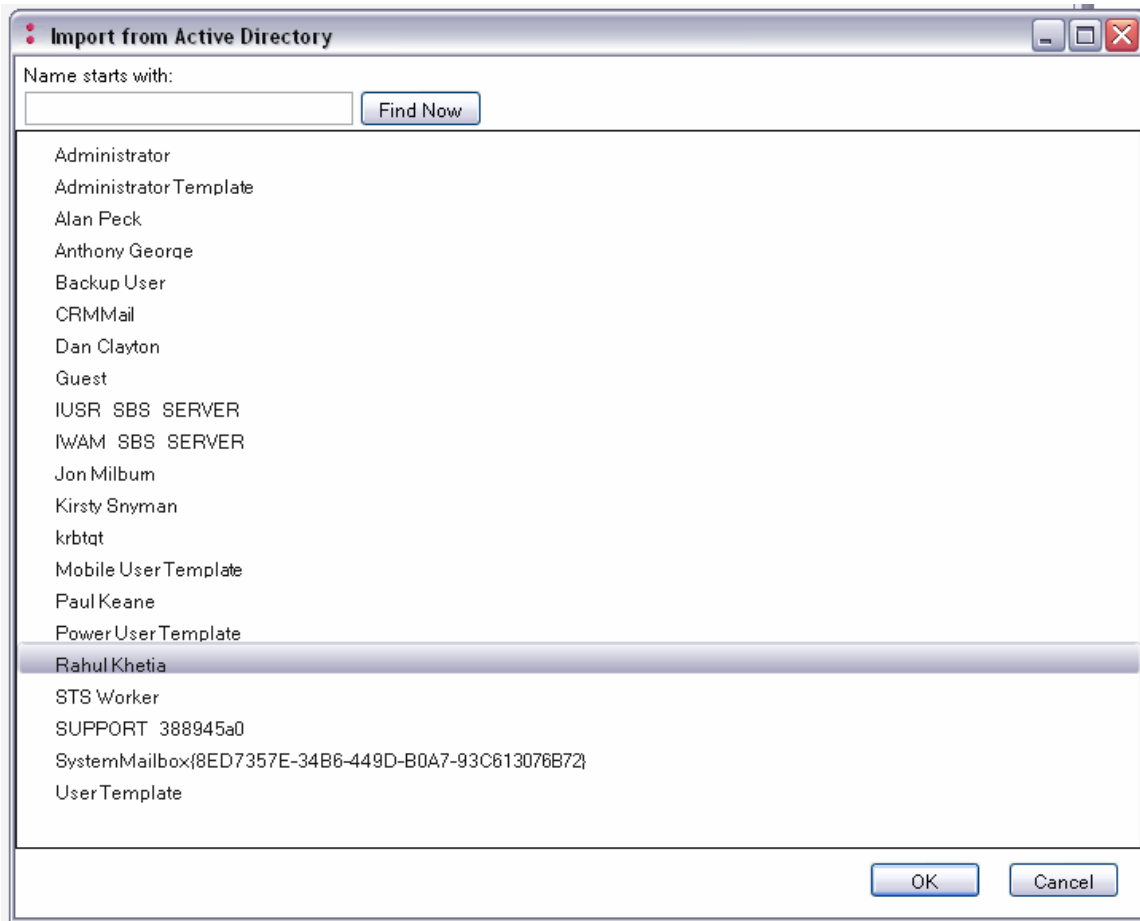
- Click on the **Users** option



- From the expand options click on **Import users from Active Directory**



- This will bring up a screen which will show you all the users in the active directory
- Select the user you wish to add into Invu and then click on **“OK”**

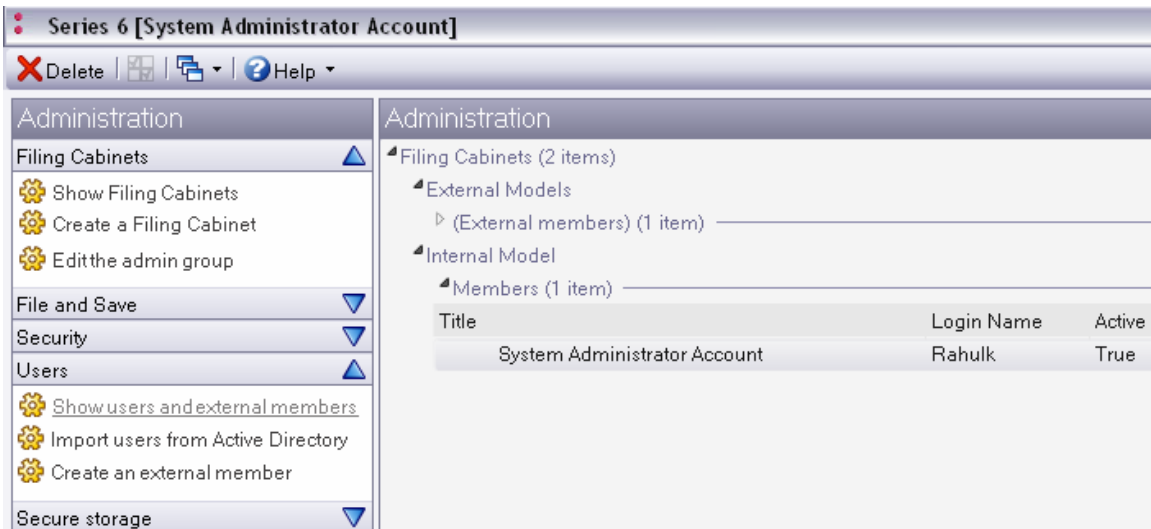


- The new user is added into the system from the active directory

TIP: Hold down the <ctrl> button to highlight more than one user. Only highlighted users will be added into Invu once you click on the “OK” button. If user does not appear in the list then type the users name in the “Name starts with:” box and then click on the “Find Now” button. This will search through your active directory and bring back all matches for that name.

Setting up new user

- From the “Users” options click on “Show users and external members”
- This will bring up all the Invu users



- Select the newly added users and double click on them
- This will open a Members Details dialogue box with 5 tabs; **General**, **Login**, **Security**, **Contact** and **Products**
- The default tab is the **“General”** tab which shows the system details for the user brought through the active directory.

Member Details - System Administrator Account

General | Login | Security | Contact | Products

User details

Domain name: SCANWORX [New]

Login name: Rahulk [Undo]

Name: System Administrator Account

Default Storage Location: Default Store

Description: System Administrator Account

Enable Workflow Notification

Hours: 0 Mins: 0

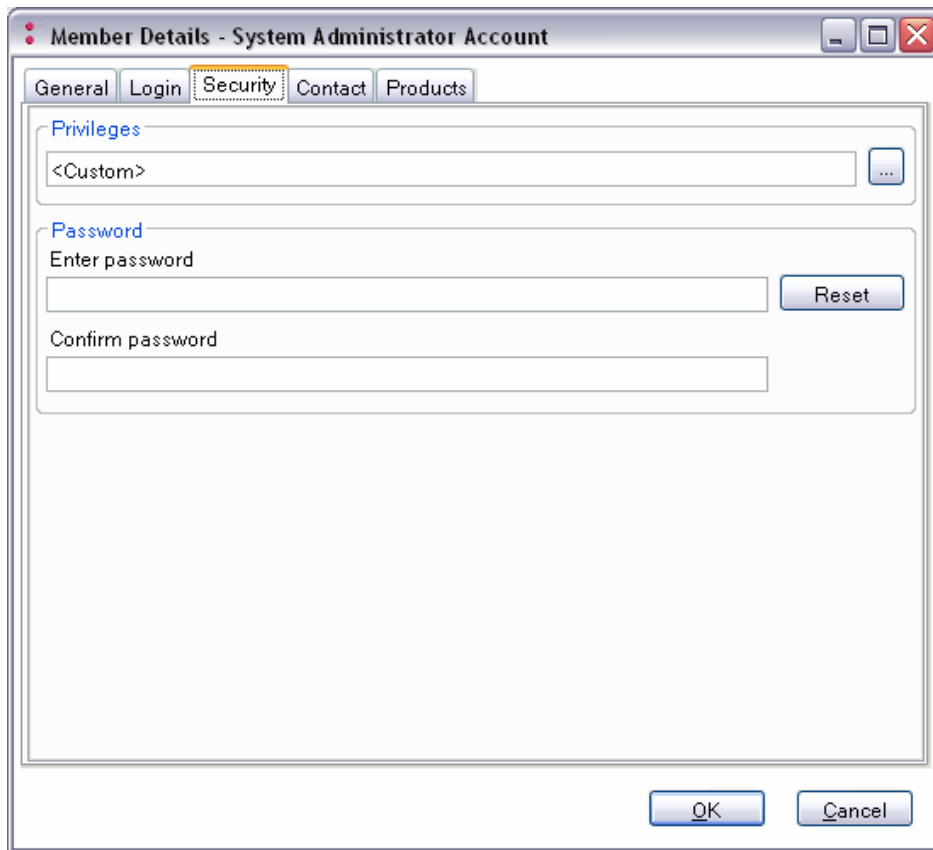
[OK] [Cancel]

- The above information will be pre-populated

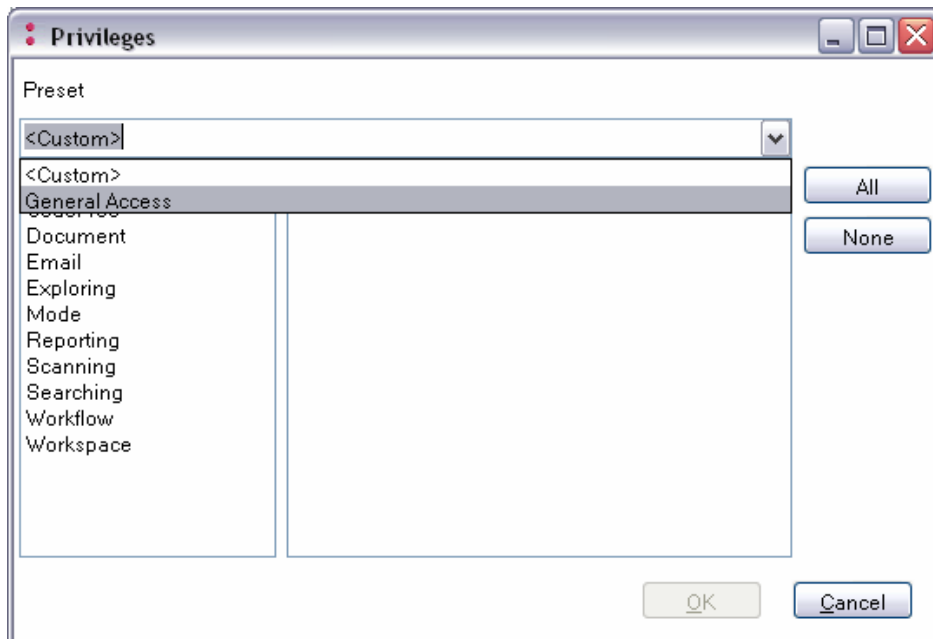
NB: After importing a user into Invu and double clicking on them. The **“New”** option (as seen above) is for creating External Members only. To import new users, the above steps need to be taken.

- Click on the **“Security”** tab

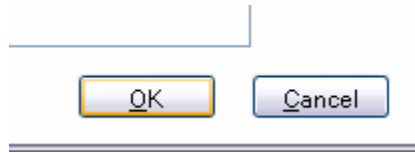
NB: The password is set through the Active Directory and cannot be changed from this dialogue box. The password changes are there for External Member only.



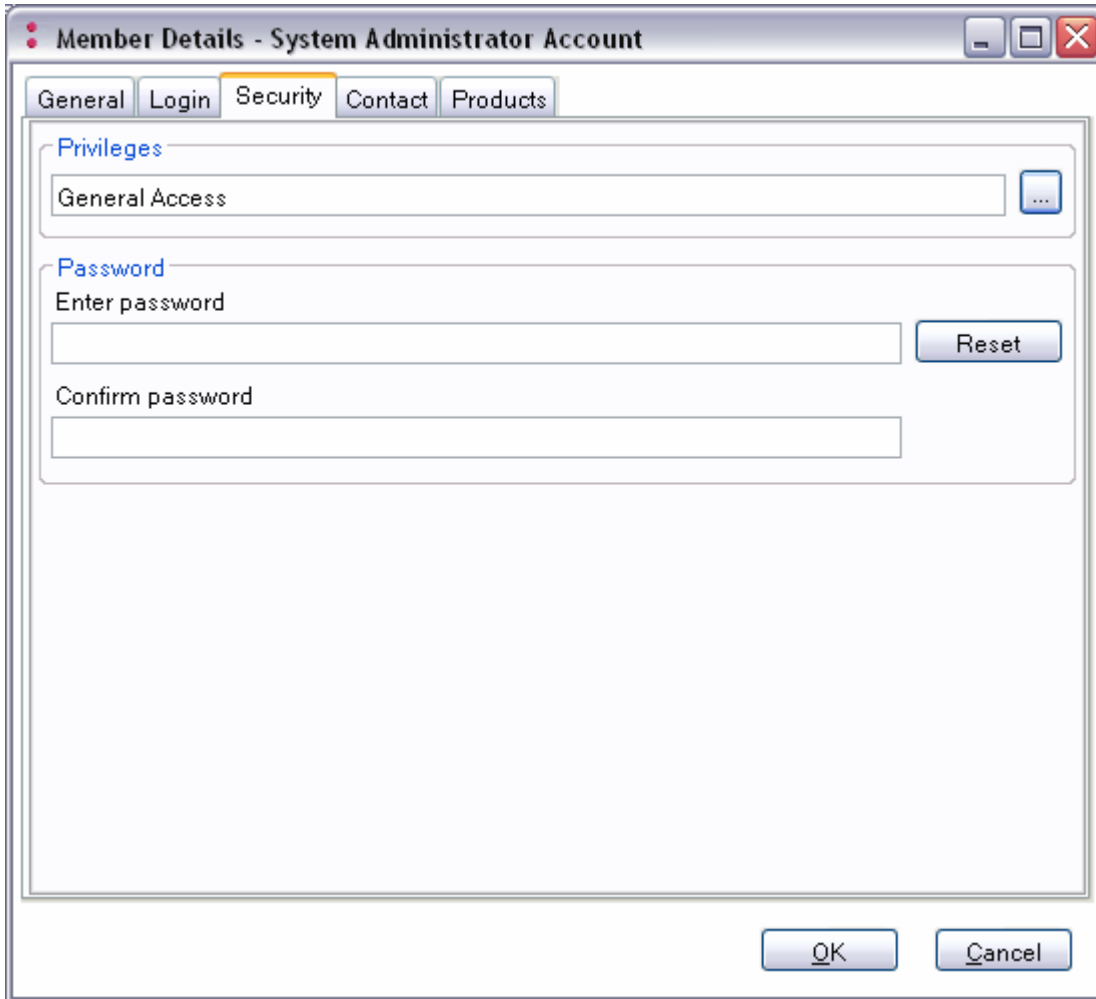
- Click on the ... (the dots next to the <Custom> Privilege option) and this will bring up another dialogue box called ***“Privileges”***
- From the drop down list chose the “Preset” for this user. The privilege preset will give the user their access rights for Invu.



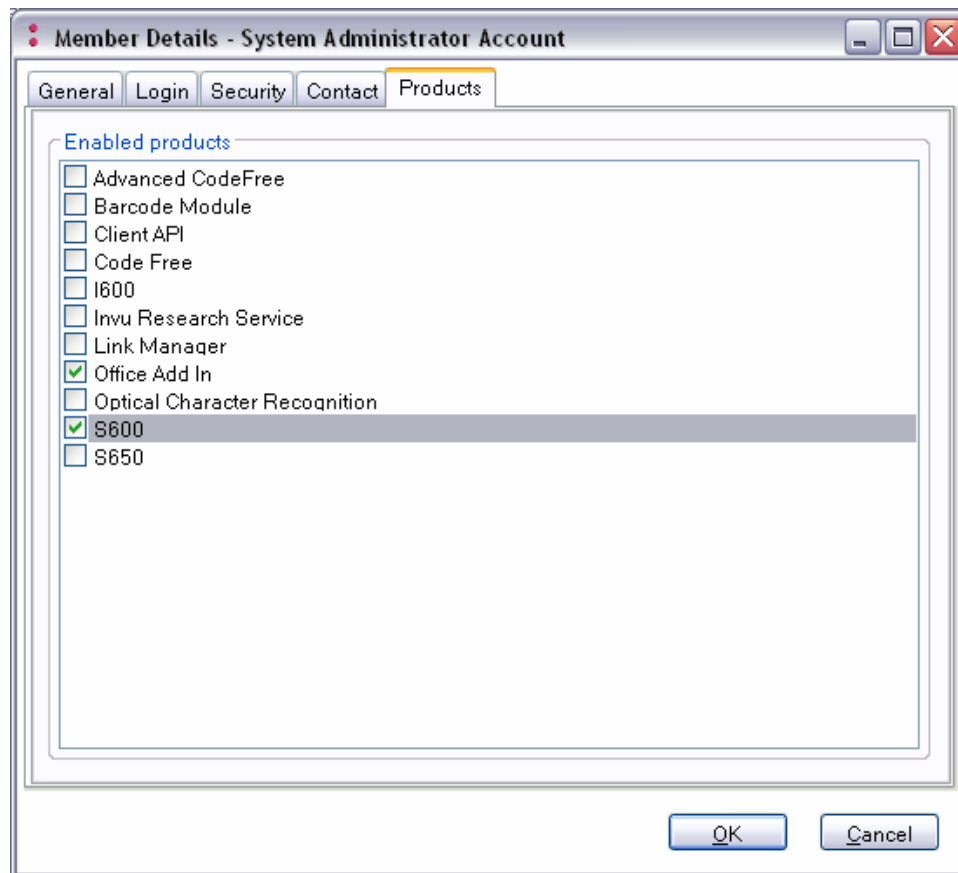
- After chose the preset click on **“OK”** to save the changes and take you back to the **“Security”** tab



- The Security tab will now have the pre-selected Privilege level



- Now click on the **“Products”** tab to allocate the user with licences* on Invu by clicking on the version of Invu (i.e. s600) and the Office Addin boxes.



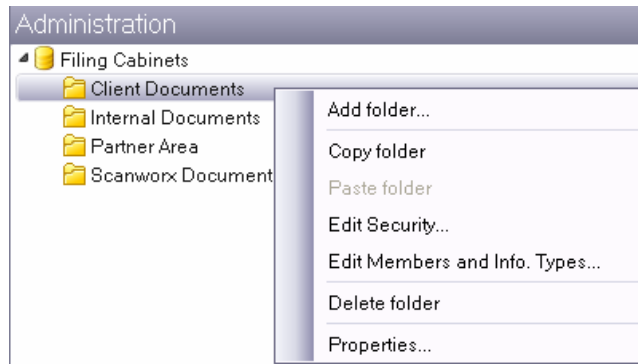
- Once they are ticked click on “**OK**” to save all the above changes.

Adding the new user to the filing cabinet

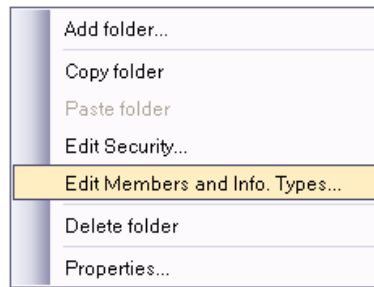
- After creating the user within Invu and setting up the privileges (see above), the user needs to be added to the filing cabinet so they can access files from within that area.
- Click on the **Administration** option
- Click on Show Filing Cabinets



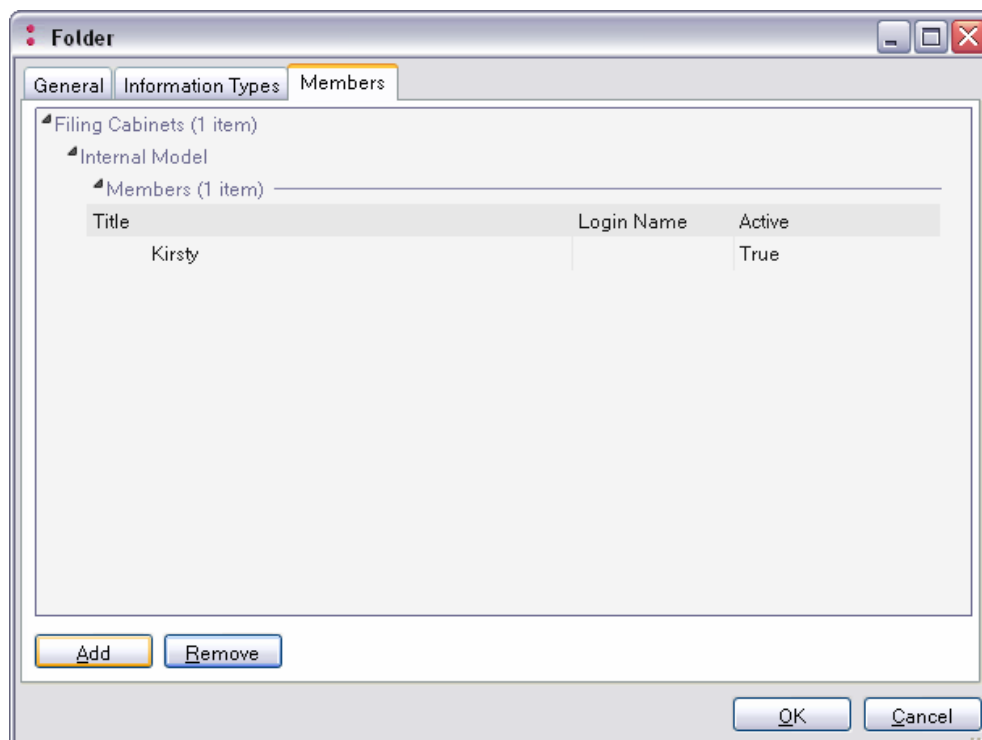
- This will bring up all the filing cabinets in the system
- Chose the appropriate filing cabinet and right mouse click



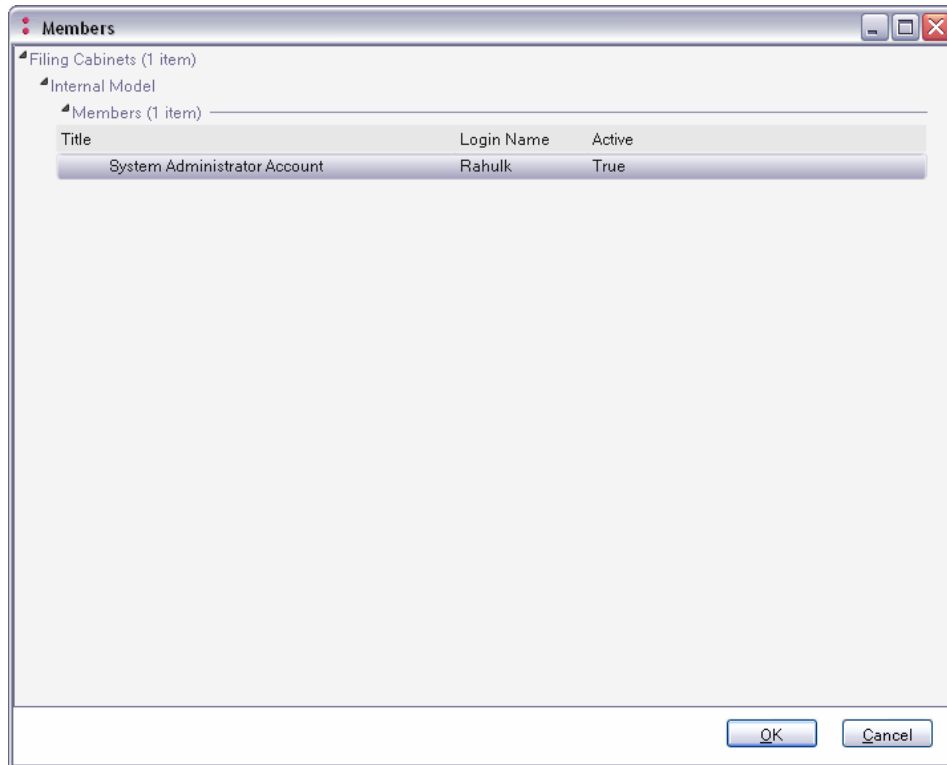
- Click on the **“Edit Member and Info. Types”** option



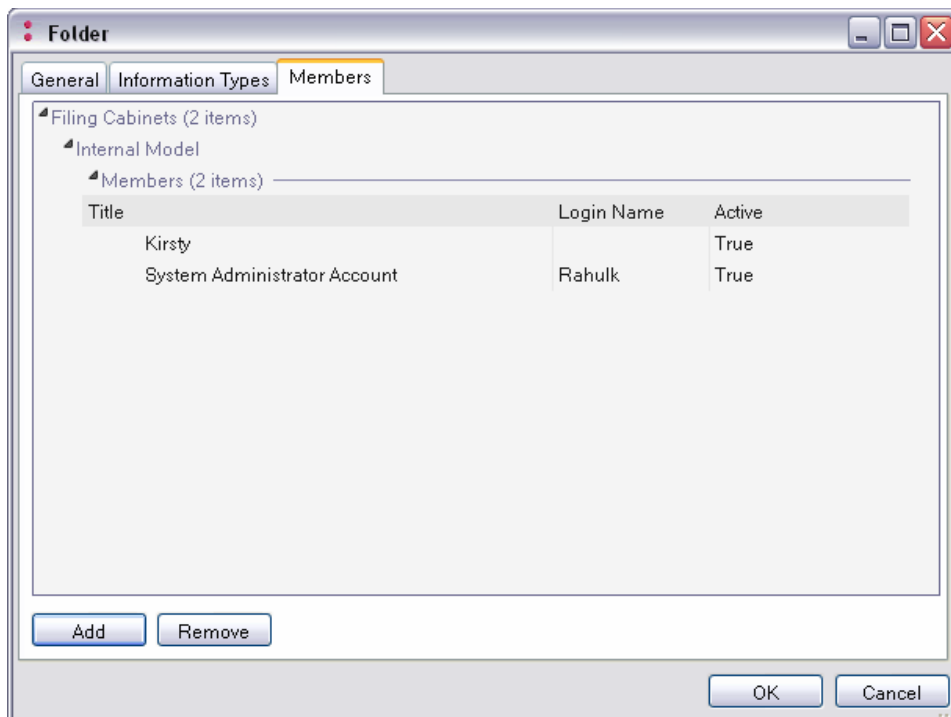
- From the **“Members”** tab you will see all user who have access to this cabinet



- Click on the “Add” this will let you select the newly created user who needs to be added to this cabinet



- Select the user which you wish to add and click “OK”
- You will notice the user has been added to the cabinet



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- Click on the “OK” button to save the changes

Repeat the above steps for additional users.

* When activating new users make sure you have not exceed your Invu licences. For additional Invu licences call Scan Worx sales team on: 01223 597 808.