casebook

Adding New Users Individually

Administrators can add their colleagues into the system as users.

Note: Only administrators can add new users. However, users will need to take part in the process when they are being added. Administrators should complete steps 1 through 5 while other users should complete steps 6 through 11.

Note: The email address is case sensitive.

1. In cb Admin, administrator clicks "Users" under "Global."
2. Administrator hovers over the plus sign in the purple circle.
3. Administrator clicks "Add user."
4. In the new window that appears, administrator enters the user's
   - First name
   - Last name
   - Email address
   - Role (see Roles and Permissions for more information on roles)
5. Administrator clicks "Create new user."
6. User checks his email inbox and finds an email with a temporary password.
7. The login page loads automatically. On the login page, user enters his email address and the temporary password.
8. User clicks "Let's Do It" when prompted to change his password.
9. User types in and re-types a new password.
10. User clicks "Change password."
11. Back on the login page, user enters his email address and the new password. Then user clicks "Sign in."