Users, Administrators and Company Administrators

1. Manage, View, Add, Edit and Delete Users

1.1. What users can see and do is based on their role and the companies they belong to.
1.2. Unless they are listed as administrators for more than one company they will only see their company listed.
1.3. Unauthorized persons can't change a user's status. Administrators continue as users.
1.4. From Manage User (Blade at left) click on Roles to organize users by their Roles. It groups the same ranks together e.g. Company Administrators, Administrators, and Users.
1.5. Only HKMK Law Corporation can add new companies and portals for new clients.
1.6. Any person sent a contract that is not in the system is automatically added as a user.
1.7. Users are not able to log in on their own and can't publish contracts or documents. They can only sign.
1.8. Users provide their name, email address and password information.
1.9. If a username is associated with more than one company then they will see a list of the companies and all of the contracts and templates the username is associated with.
1.10. To view users in your company, go to the Manage Users slider and click the search button.
1.11. From the new tab you will be able to see all users within your company.
1.12. Users with a lock beside their name can unlock secure fields. Users with a green shirt person icon have registered while those with blue shirt person icons have not.
1.13. The security profile column is used to give more personalized access than what their role provides.
1.14. Use Icons at bottom to Add, Edit or Delete Users and follow instructions. Check boxes as required.
1.15. Check the boxes for all lower roles as well to insure that the user has all necessary permissions.
1.16. After clicking Submit, a welcome document is then sent to the user to allow them to register and log in.
1.17. Changes to a role are immediate and changes to a user's name only affect documents signed after the change.
1.18. To find a person that has signed before and needs to be upgraded you can't search for their contract and do the edit/upgrade. You must go to the list of Users, find the name and Edit the User.
1.19. To reset a password Choose the user, administrator or company administrator and choose Reset password. This sends an interim/random password they can change when they get the email. The link in the email allows them to change it. The username is the email.

2. Administrators and Company Administrators

2.1. Administrators can publish documents and add users but can only view documents they published or signed.
2.2. Administrators can't see another administrator's contracts.
2.3. Administrators can add users for companies that see associated companies, contracts and templates.
2.4. Users are added or deleted for the one selected company only.
2.5. Administrators can't change themselves to Company Administrator. They can demote themselves to User.
2.6. Administrators can't create other administrators but Company Administrators can.
2.7. If an Administrator created a template while logged in as an administrator that acts for two companies then even if the template was created for a specific company the administrator would see all of the templates created under that username. The template is assigned to a company and the Company column indicates this.
2.8. An Administrator's user name will generally only be associated with one company so when they log in with that username they will only see a list of the contracts and templates that their username is associated with.
2.9. Company Administrators are similar to administrators except they can see everything in the company portal and edit/delete users. Company Administrators should have all three roles to avoid problems.
2.10. Users can be upgraded to Administrators or Company Administrators by Company Administrators and this allows them to publish contracts and templates. You can have any number of company administrators.