

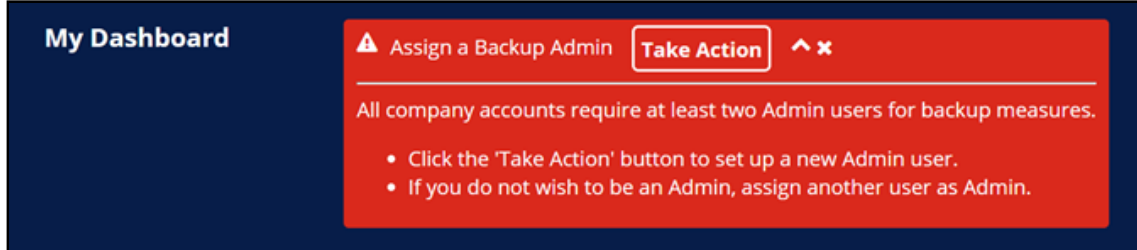
Adding, Editing, and Inactivating a User

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If your user role allows, you can manage your organizations platform users. In the Users page you can add a user, update user information, or inactivate a user. Access **user menu** > **Settings** > **Users**.

If you need to add many users, contact Collaboration Center support to request a bulk upload.

Starting with the 1.10 release, all accounts must assign a backup account admin to mitigate disruptions in platform maintenance and support if the primary admin is unavailable. Until the primary admin assigns a backup, the system displays a pop-up notification indicating the incomplete assignment.



The screenshot shows a dark blue dashboard header with the text "My Dashboard" on the left. On the right, there is a red notification box with a white triangle icon containing an exclamation mark. The notification text reads: "Assign a Backup Admin" followed by a "Take Action" button and a close icon. Below this, it states: "All company accounts require at least two Admin users for backup measures." and lists two bullet points: "Click the 'Take Action' button to set up a new Admin user." and "If you do not wish to be an Admin, assign another user as Admin."

Adding a User

To add a new user from within your organization, proceed with these steps in the Users page:

1. In the **Select an Organization** drop-down list, select the parent or child organization for the user. Collaboration Center does not display this field if your organization does not use parent child structure.
2. Click **Add New** to create a new user account.
The User Information fields activate.

3. In the User Information section, complete the following fields:
 - a. In the **First Name** field, enter the user's first name.
 - b. In the **Last Name** field, enter the user's last name.
The **User Name** field is inactive. When you save the page information, Collaboration Center defaults this field content to display the user's email address. Users can later change this field content from an email address to a personal user name of their preference.
 - c. In the **Email** field, enter the user's email address.
The email domain you choose must be one of your organization's reserved domains. The system populates the email you enter in the Email field in the **Username** field.
 - d. In the User Role field, select one of the following options:
 - **Standard User.** The user only requires access to basic functionality.
 - **Standard User Plus.** Users can view all the contents of a folder they have access to.
 - **Admin.** The user requires access to the administrative functionality.
If your organization uses parent child structure and you are parent organization administrator, you can also work with organization access. When you select **Admin** in the **Select User Role** drop-down list for a parent organization, the Organization Access section displays in the User page. Parent organization administrators can select organizations in the Available list and move them to the Selected list by clicking the right caret.
 - e. In the **User Status** drop-down list drop-down list, select **Active**.
 - f. In the **Mobile Phone** field, enter the user's phone number.

- g. In the **Mobile Provider** drop-down, select the user's service provider.
 - h. In the **Time Zone** drop-down list, select the user's time zone.
4. In the User Password Action section, select one of the following radio buttons:
 - **None.** Collaboration Center does not update the password. This option enables you to edit a user's information without changing the user's password.
 - **Force user to change password on next login.** Collaboration Center prompts new users to change their password on the next log in.
 - **Set a temporary password and send an email to the user.** When changes to the page are saved, Collaboration Center sends a message to the user containing a temporary password.
 7. Click **Save Changes**.

The system generates a message to the user containing a link to Collaboration Center and a temporary password. Using the link and password, the user can sign into the system.

Editing a User

You can also edit a user's information in the Users page – such as when a user needs a password change.

To edit a business user's information, proceed with these steps in the Users page:

1. In the Select a User list, select a user.
The user's information displays in the the Users fields.

2. Modify the user's information as needed.
3. Click **Save**.

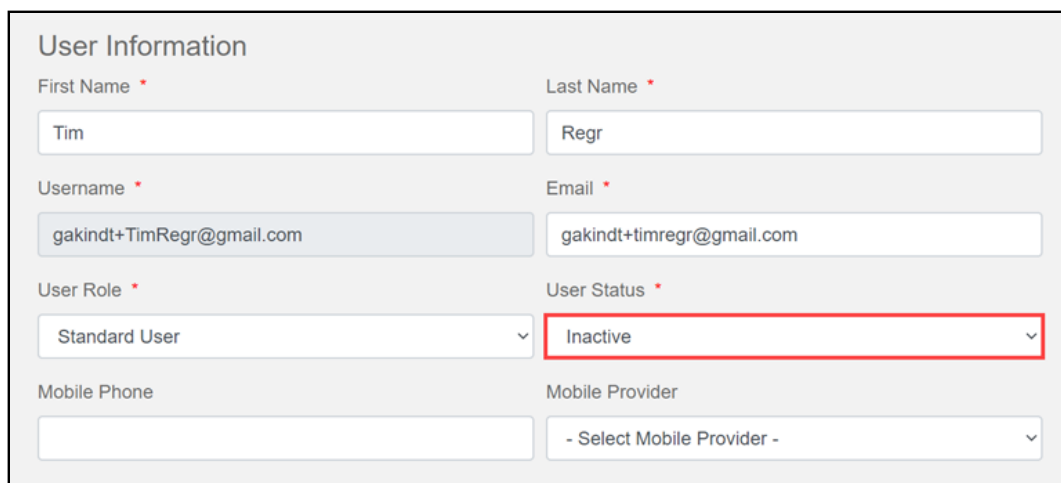
The system sends the user an automated email indicating that the user's Collaboration Center account has been updated.

Note: Collaboration Center displays a warning if you attempt to save changes to a user's information in the User page when that user is logged into the system. If you decide to save the changes, the system automatically logs out the user.

Inactivating a User

To inactivate a user, proceed with these steps in the Users page:

1. In the Select a User list, select a user.
2. In the **User Status** drop-down list, select **Inactive**.



The screenshot shows a 'User Information' form with the following fields and values:

Field	Value
First Name *	Tim
Last Name *	Regr
Username *	gakindt+TimRegr@gmail.com
Email *	gakindt+timregr@gmail.com
User Role *	Standard User
User Status *	Inactive
Mobile Phone	
Mobile Provider	- Select Mobile Provider -

3. Click **Save**.

User accounts cannot be deleted in Collaboration Center. They can only be inactivated.

When you inactivate a user, Collaboration Center automatically removes the user from all teams of which the user is a member.

Moving Users Between Child Organizations

Collaboration Center enables Professional account administrators to move users between child organizations. To ensure folder integrity, the system retains that user's folders within the current organization and updates the folder status to **Unassigned**.

To move a user, proceed with these steps:

1. Click **Settings > User Manager > Users** to access the Users page.
2. Select an organization.
3. Select a user.

4. Click the new **Move User to Different Organization** button.

Users

Select an Organization

Umbrella Child.BB Title

Select a User: child, UCPro.Child4 View: Active Users **+ Add User**

User Information

First Name *	UCPro.Child4	Last Name *	child
Username *	UCPro.Child3@secretdomains.com	Email *	ucpro.child4@umbrella.com
User Role *	Admin	User Status *	Active
Mobile Phone		Mobile Provider	- Select Mobile Provider -
Timezone *	(UTC-06:00) Central Time (US & Canada)		

Move User to Different Organization

The Move User to Different Organization dialog displays.

Move User to Different Organization

Select the organization that you would like to move the user to:

- Select an Organization -

Select the role you want to assign this user:

- Select User Role -

Note:
The user will no longer have access to their old organization. Any folders they had access to will remain in their previous organization.

Cancel Move User

5. In the Move User to Different Organization dialog, select a new child organization in the **Select an Organization** drop-down list.
6. In the **Select User Role** drop-down list, select a role.
7. Click **Move User**.

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