



## Manage **Internal Users** Guide for Administrators

*This guide shows you how to:*

- *Add a new administrator or support operator, and define their access to features*
- *Terminate an employee's access*
- *Change an employee's access rights*
- *Change an employee's email address*
- *Change an employee's password*

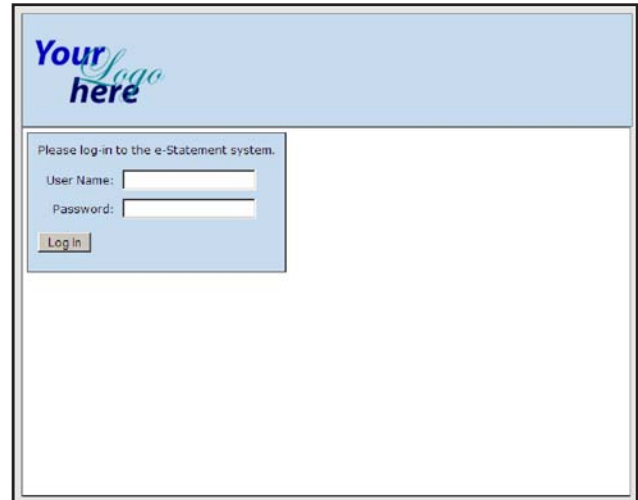
## Manage Internal Users

As a Doculivery administrator, you can use **DOCULIVERY** to assist customers (external users) with a variety of issues, including forgotten passwords and account lockouts.

By using the **Manage Internal Users** tab, you can also grant, terminate, or update system access for a number of support operators as well as update their email addresses and passwords on **DOCULIVERY**.

### To access the Manage Internal Users tab:

1. Type the web address:  
**www.doculivery.com/internal/(your company)**  
into your Internet browser window.
2. Log in using the account number and password that were assigned to you and click on the **Log In** button. Passwords are NOT case-sensitive.



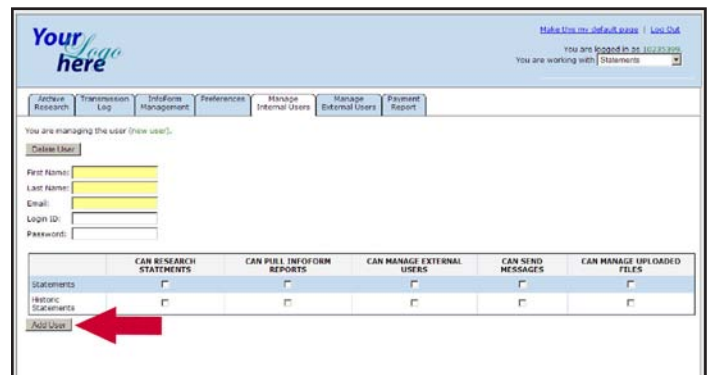
3. Click on the **Manage Internal Users** tab.



### To add a new administrator or support operator:

1. Click on the **Add a New User** link.
2. Enter the employee's first name, last name, email address, login id and password as indicated.
3. Determine which features you would like the employee to be able to access.

For example, if you check the box underneath **Can Research Statements**, the employee will have access to customer statements containing private customer information, including customer names and account numbers as they are displayed on the statements.



	CAN RESEARCH STATEMENTS	CAN PUBLISH INFOFORM REPORTS	CAN MANAGE EXTERNAL USERS	CAN SEND MESSAGES	CAN MANAGE UPLOADED FILES
Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Historic Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add User					

Granting access to **InfoForm Reports** means that the employee will be able to access the **InfoForm** queue, which will display common forms received by customers under the **InfoForm Management** tab.

If you check the box underneath **Can Manage External Users**, the employee will also be able to assist customers with password issues, including forgotten passwords that need to be changed, and accounts that need to be unlocked after they've exceeded a certain number of incorrect login id and/or password attempts.

If you want the employee to be able to send messages directly to the customer from the **DOCULIVERY** system, check **Can Send Messages**.

If the employee will be acting as an administrator and therefore responsible for either uploading statement files or handling the upload process in someone's absence, check **Can Manage Uploaded Files**.

4. Once you have made all of your selections, click on the **Add User** button.

**To edit employee information using the Manage Internal Users tab:**

1. Select the employee from the dropdown list by clicking on the arrow to the right of their name and clicking on the **Go** button.

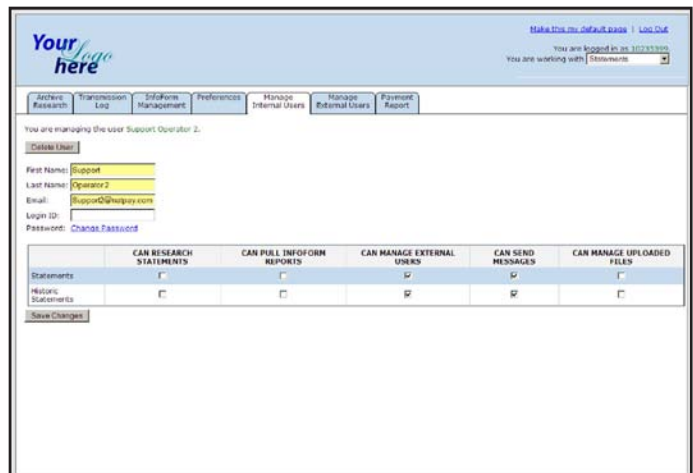
2. **To terminate the employee's DOCULIVERY access, click on the Delete User button above their name.**

A message will appear and ask you to confirm that you want to delete that employee. Click on **OK** to confirm the deletion.

3. **To grant or remove that employee's access to specific features on the DOCULIVERY system, place a check mark in the box below each entitlement by clicking directly into it.**

For example, if you check the box underneath **Can Research Statements**, the employee will have access to customer statements containing private customer information, including customer names and account numbers as they are displayed on the statements.

Granting access to **InfoForm Reports** means that the employee will be able to access the InfoForm queue, which will display common forms received by customers under the **InfoForm Management** tab.



If you check the box underneath **Can Manage External Users**, the employee will also be able to assist customers with password issues, including forgotten passwords that need to be changed, and accounts that need to be unlocked for exceeding the number of allowable incorrect login id and/or password attempts.

If you want the employee to be able to send messages directly to the customer from the **DOCULIVERY** system, check **Can Send Messages**.

If the employee will be acting as an administrator and therefore responsible for either uploading statement files or handling the upload process in someone's absence, check **Can Manage Uploaded Files**.

4. Click on the **Save Changes** button to update that employee's access.
5. **To change the employee's email address on DOCULIVERY**, enter their new or corrected email address into the **Email** field and click on the **Save Changes** button.
6. **To change an employee's DOCULIVERY password**, click on the **Change Password** link, and a **New Password** box will open. Type in the employee's new password, and then click on the **Save Changes** button.

The screenshot shows the user management interface for 'Support Operator 1'. The user's details are as follows:

- First Name: Support
- Last Name: Operator 1
- Email: Support@thebay.com
- Login ID: [empty]
- New Password: [empty]

A red arrow points to the 'Change Password' link. Below the form is a table of permissions:

	CAN RESEARCH STATEMENTS	CAN PULL INFO OF OWN REPORTS	CAN MANAGE EXTERNAL USERS	CAN SEND MESSAGES	CAN MANAGE UPLOADED FILES
Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Historic Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

At the bottom of the form is a 'Save Changes' button.

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