Client Training HQ

Setting Up a New Firm User

Adding a New User

This document provides how to set up a new Firm user and offers recommendations for configuring their personal settings and dashboard.

1. From the Administrative Settings, select the **Users** tab.
2. Then, click **Add New User**.
3. Enter the user's information.
    a. **User Type:** If the user is an attorney or DOJ Rep, they must be given either the Lawyer or Partner User Type to be assigned as an attorney to a case and listed on the G-28. Otherwise, the remaining User Type options are for labeling purposes only and have no functional impact.
    b. **External Firm:** If enabled, you may assign the user to an External Firm to limit their access to only cases that are assigned to that firm.
    c. **Division:** If enabled, you may associate the user to one of your Divisions (Offices), which provides the benefit of any new Foreign Nationals (FN) created by this user being automatically assigned to their Division.

4. Click **Create User.**
5. Click the **Security Privileges** tab.
6. Configure the desired Security Privileges. By default, new users have View Only permissions for each privilege set, and can only see cases assigned to them. Update each privilege set appropriately.
    a. **Widget Access:** As a best practice, enable the Process Count privilege so that the user can benefit from various chat/graph dashboard widgets for convenient insights and access to their clients and cases.
    b. **Admin Privileges:** If the user should have access to the Administrative Settings (e.g., be a "Super Admin") set this to **Yes**.
    c. **Can View ALL Reminders:** As a best practice, set this setting to **Yes** so users can access reminders for colleagues' cases in the event they need to assist with their case.

7. If the user is an attorney or DOJ Rep that uses an address or phone number(s) on the G-28 or other forms that differ from the firm's default address and phone number(s), add the user-specific address and phone number(s) from the Addresses & Phones tab.
    a. If adding a G-28 address for the user, select G-28 Address for the Address Type.

8. Review the user's **General** tab and input any missing information as desired.

9. Click **Update Info**.
    a. If the user is an attorney or DOJ Rep, consider adding their USCIS Online Account Number and/or EOIR ID Number, which will populate on their forms automatically.
    b. If the user is an attorney or DOJ Rep, review and complete the G-28 Defaults sections appropriately.
        i. If the user is an attorney, enter their Court of Bar Assoc (e.g., "Supreme Court of Arizona), and select the Part 3 and Part 4 items appropriately.
        ii. If the user is a DOJ Rep for a non-profit organization (NPO), enter the NPO name in the Organization Name field.

Finalizing the User's Personal Settings

1. When ready, click **Send Welcome E-Mail** from the user's General tab to email them their login information.
2. Have the user log in and assist them with configuring their personal settings.
3. Then, click **Update Info**.
    a. **Themes:** Select the desired color theme (Redmond is recommended).
    b. **FN Search: Default FN Filter:** All Foreign Nationals recommended.
    c. **FN Search: Cases Filter:** All Cases – All Divisions recommended.
    d. **FN Search: FN Summary Template:** If configured, select an appropriate template.
    e. **Default OnDocs Sort:** Most Recent First recommended.

Configuring the User's Dashboard

Assist the user with configuring their dashboard. To customize the dashboard:

1. Click the icon at the top-right of the dashboard to enter Edit mode.
2. Drag-and-drop the desired widgets from the bottom of the screen to the desired position on the dashboard.
3. Click the icon at the top-right of each individual widget and configure the settings as desired.
4. Click the icon at the top-right of each individual widget to save your settings.
5. Click the icon at the top-right of the dashboard to lock in all your changes.

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