

## New User Setup Walkthrough

This document provides a walkthrough of setting up a new Equifax ICM Firm User and offers recommendations for configuring their Personal Settings and Dashboard.

- 1) From the **Administrative Settings > Users** tab > click **Add New User**.



- 2) Enter the User's information and click **Create User**.
  - 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 the External Firm.
  - c. **Division:** If enabled, you may associate the user to one of your Divisions (Offices), which provides the benefit of any new FN's created by this user being automatically assigned to their Division.

- 3) Click the **Security Privileges** tab for the User > configure the desired Privileges > click **Update Info**.

User's Cases (FN's)	Processes	Companies	Billing
<input checked="" type="radio"/> View Only <input type="radio"/> Modify <input type="radio"/> Modify, Add, & Retire <input type="radio"/> Modify, Add, Delete, & Retire	<input checked="" type="radio"/> View Only <input type="radio"/> Modify <input type="radio"/> Modify & Add <input type="radio"/> Modify, Add, & Delete	<input checked="" type="radio"/> View Only <input type="radio"/> Modify <input type="radio"/> Add, Modify, & Retire <input type="radio"/> Modify, Add, Delete, & Retire	<input type="radio"/> None <input checked="" type="radio"/> View Only <input type="radio"/> Add Only <input type="radio"/> Modify <input type="radio"/> Modify & Add <input type="radio"/> Modify, Add, & Delete
Other's Cases (FN's)	Forms	Document Templates	Widget Access
<input checked="" type="radio"/> Hide <input type="radio"/> View Only <input type="radio"/> Modify & Retire	<input checked="" type="radio"/> View Only (Review Forms) <input type="radio"/> Modify <input type="radio"/> Modify & Add <input type="radio"/> Modify, Add, & Delete	<input checked="" type="radio"/> None <input type="radio"/> View & Use Templates <input type="radio"/> Modify Templates <input type="radio"/> Modify & Add Templates <input type="radio"/> Modify, Add, & Delete Templates	<input type="checkbox"/> Process Count

By default, new users have only **View Only** permissions for each privilege set, and also cannot see cases not assigned to them. Ensure you update each privilege set appropriately.

- a. **Widget Access:** It is recommended to 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:** It is recommended to set this to **Yes** so users can access the Reminders for colleagues’ cases in the event they need to assist with their case.

Security Access	
Admin Privileges:	<input type="radio"/> Yes <input checked="" type="radio"/> No Only users given Admin Privileges (i.e. check "Yes") have access to these firm setup screens and receive instructions on how to set-up your firm (like you received).
Can View ALL Reminders:	<input checked="" type="radio"/> Yes <input type="radio"/> No Users with this privilege can view ALL reminders in the firm.
Prevent Access to Reports:	<input type="radio"/> Yes <input checked="" type="radio"/> No Set to Yes to prevent user from viewing reports.
Restrict Assignment Modifications:	<input type="radio"/> Yes <input checked="" type="radio"/> No Set to Yes to prevent user from modifying Process-level Assignments.

Update Info Cancel Retire This User

- 4) 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 Default address and phone number(s), add the user-specific address and phone number(s) from the **Addresses & Phones** tab.

Firm Administration / Smith, John / Addresses Phones

Update Info Cancel

General **Addresses Phones** Security Privileges E-File Sites Calendar

Addresses Add Address

No Addresses Entered

Personal Phones Add Phone Number

No Phone Numbers Entered

Update Info Cancel Retire This User

- a. If adding a G-28 address for the user select **G-28 Address** for the **Address Type**.

Address

Address Type: **Billing** (dropdown menu open)

Address Line 1:

Address Line 2:

Type:  Mailing  Ste.  Fir.

Number:

City:

State:

Zip Code:

Country:

Dropdown menu options: Billing, C/O Address, Foreign, Mailing, Primary, Prior, Satellite, **G-28 Address**

- 5) Review the user’s **General** tab and input any missing information as desired > click **Update Info**.

General | Addresses Phones | Security Privileges | E-File Sites | Calendar

Personal Information

User Type: Lawyer  
 External Firm: None  
 Division: All  
 Last Name: Smith  
 First Name: John  
 Middle Name:  
 Suffix (Sr, Jr, Esquire, etc):  
 Company Title: Attorney  
 Short Name ( Shows On Reports): JS  
 State(s) Licensed: AZ  
 License Number: 12345678  
 License Expires:  
 USCIS Online Account Number:  
 EOIR ID Number:  
 E-mail Address: jsmith@test.com  
 Default Time Zone: Eastern (relative to GMT)  
 Observe Daylight Savings Time?:  Yes  No (leave set all year long)

Send Welcome E-Mail

- 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 their forms automatically.
- b. If the user is an Attorney or DOJ Rep review and complete the **G-28 Defaults** sections appropriately.

G-28 Defaults

First Name:  
 Last Name:  
 Middle Name:  
 Court of Bar Assoc.:  
 Organization Name:  
 Attorney Associated with:

Others (Explain Fully):

Part 3 Item 1.a:  Unselect  I am an attorney eligible to practice law in...  
 Part 3 Item 1.d:  Unselect  I am not /  I am subject to any order of any court...  
 If you are subject to any orders, explain:  
 Part 4 Item 2.a:  Unselect  I request DHS send any notice (including Form I-94) on...  
 Part 4 Item 2.b:  Unselect  I request that DHS send any secure identity document, such as...

- 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, enter the NPO name in the **Organization Name** field.
- 6) When ready, click **Send Welcome E-Mail** from the user's **General** tab to email them their login information.

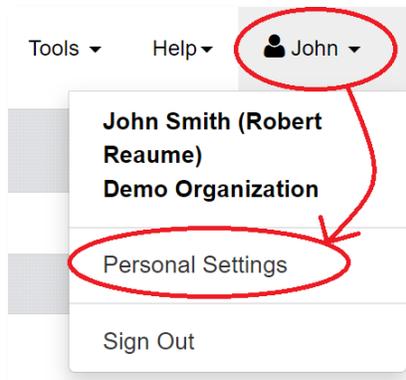
General | Addresses Phones | Security Privileges | E-File Sites | Calendar

Personal Information

User Type: Lawyer  
 External Firm: None  
 Division: All  
 Last Name: Smith  
 First Name: John  
 Middle Name:  
 Suffix (Sr, Jr, Esquire, etc):  
 Company Title: Attorney  
 Short Name ( Shows On Reports): JS  
 State(s) Licensed: AZ  
 License Number: 12345678  
 License Expires:  
 USCIS Online Account Number:  
 EOIR ID Number:  
 E-mail Address: jsmith@test.com  
 Default Time Zone: Eastern (relative to GMT)  
 Observe Daylight Savings Time?:  Yes  No (leave set all year long)

Send Welcome E-Mail

7) Have the user log in and assist them with configuring their **Personal Settings** > click **Update Info**.



- Themes:** Select the desired color theme (**Redmond** is recommended).
- FN Search: Default FN Filter:** **All Foreign Nationals** recommended.
- FN Search: Cases Filter:** **All Cases – All Divisions** recommended.
- FN Search: FN Summary Template:** If configured, select an appropriate template.
- Default OnDocs Sort:** **Most Recent First** recommended.

8) Assist the user with configuring their **Dashboard**. To customize the Dashboard:

- Click the  icon at the top-right of the Dashboard to enter Edit mode.
- Drag-and-drop the desired widgets from the bottom of the screen to the desired position on the Dashboard.
- Click the  icon at the top-right of each individual widget and configure the settings as desired, referring to the screenshot below.
- Click the  icon at the top-right of each individual widget to save your settings.
- Click the  icon at the top-right of the Dashboard to lock in all your changes.

See the below sample Dashboard configuration:

Dashboard

#### NEWS FROM LAWLLOGIX

Date Posted	Subject
09/28/2023	System Updates as of Thursday 09/28/2023
09/22/2023	Receipt Lookup- USCIS preventing processing of ICM requests
09/18/2023	Visa Bulletin for October 2023
09/14/2023	Register now for the FREE October 2023 Power User Workshop!
09/14/2023	System Updates as of Thursday 09/14/2023
08/31/2023	System Updates as of Thursday 08/31/2023
08/22/2023	Resolved- Outlook Integrator Issue

#### MY ACTIVE CASES

Date range: 01/01/2003 to 12/31/2023

#### MY RECENTLY OPENED CASES

Date range: 10/03/2023 to 10/09/2023

#### PAST DUE REMINDERS

Due Reminder	Subject	FN/Client
10/19/2016	Case Note - Call regarding case fee's	Sonia Robles Cruz
02/03/2017	Expiration Date - Current Status	Pablo MORALES
03/06/2017	Receipt Date	Elvia Escobar
03/20/2017	EAD Issued	Elvia Escobar
09/18/2017	Meeting with Gabriel	Gabriel Morales
10/24/2017	Meet with Gabriel	Gabriel Morales

#### REMINDERS DUE SOON

Due	Reminder	Subject	FN/Client
10/01/2023	Expiration Date - I-94		John Smith
10/03/2023	Expiration Date - Current Status		Clark Abbott

#### UPCOMING REMINDERS

Due	Reminder	Subject	FN/Client
11/02/2023	Expiration Date - NIV Max		John Smith
11/02/2023	Expiration Date - EAD		test Jacob test Long
11/03/2023	Expiration Date - Current Status		John Smith
11/03/2023	Expiration Date - I-94		John Smith
11/13/2023	Expiration Date - I-94		Clark Abbott
01/02/2024	Expiration Date - I-797		John Smith

#### DATE CALCULATOR

Enter any 2 values to solve missing value

Start:

End:

Days:

#### REPORTING

Report Name	View	Edit	Created By	Last Generated	Record Count
Visa Priority - Recently Changed Eligibility	On-Screen Excel	Edit	RJR	10/06/2023	5
All Consultations	On-Screen Excel	Edit	RJR	10/03/2023	5
No future reminder	On-Screen Excel	Edit	RJR	09/18/2023	429
Undefined # 620043340	On-Screen Excel	Edit	SW	09/14/2023	6997
Robert's Active Cases	On-Screen Excel	Edit	RJR	09/07/2023	291
Expirations - Next 180 Days	On-Screen Excel	Edit	RJR	09/07/2023	0

#### NEWS FROM DEMO ORGANIZATION

Date Posted	Subject
05/10/2023	How to contact Support
10/07/2022	On-Demand Training Videos

Dashboard Dashboard layout: 3 columns

#### NEWS FROM LAWLLOGIX

Date Posted	Subject
08/08/2023	Visa Bulletin for September 2023
08/04/2023	System Update Monday, August 7, 2023 - August 11, 2023
07/24/2023	System Updates as of Friday 07/19/2023
07/17/2023	Visa Bulletin for August 2023
07/07/2023	System Updates as of Friday 07/07/2023
07/05/2023	Update regarding the new ETA-9089 Paper and Electronic form
06/22/2023	System Updates as of Thursday 06/22/2023
06/09/2023	Visa Bulletin for July 2023
06/08/2023	System Updates as of Thursday 06/08/2023
06/05/2023	Client Alert: DOL DELAY IN PUBLISHING REVISED ETA-9089
05/26/2023	System Updates as of Thursday 05/25/2023
05/15/2023	Visa Bulletin for June 2023
05/11/2023	System Updates as of Thursday 05/11/2023
05/11/2023	Update from OFELC regarding PERM - Postponed to June 1, 2023
05/09/2023	Update regarding the new DOL/FLAG e-file platform
04/28/2023	System Updates as of Friday 04/28/2023

#### MY ACTIVE CASES

Widget Title: My Active Cases

Filter By: Role Type

Role Type: --Select-- **Select all Role types**

Users (Optional): **Select your name**

Process Status: Open

Group By: Process Type

Chart Type: Pie

Date Opened Range: c&-20y Calculate ?

01/01/2003 to 12/31/2023

#### MY RECENTLY OPENED CASES

Widget Title: My Recently Opened Cas

Filter By: Role Type

Role Type: --Select-- **Select all Role types**

Users (Optional): **Select your name**

Process Status: All

Group By: Day of Week

Chart Type: Column

Date Opened Range: -6 Calculate ?

08/03/2023 to 08/09/2023

#### FUTURE REMINDERS

Widget Title: Future reminders

Assigned To: Mine

Status: Future Reminders

#### DUE REMINDERS

Widget Title: Due reminders

Assigned To: Mine

Status: Due Reminders

#### EXPIRED REMINDERS

Widget Title: Expired reminders

Assigned To: Mine

Status: Expired Reminders

TOP TEN REMINDERS

DATE CALCULATOR

CALENDAR EVENTS

PROCESS COUNT

NEWS FROM YOUR FIRM

EXPIRING FORMS

REPORTING