

There are 2 steps to complete this task:

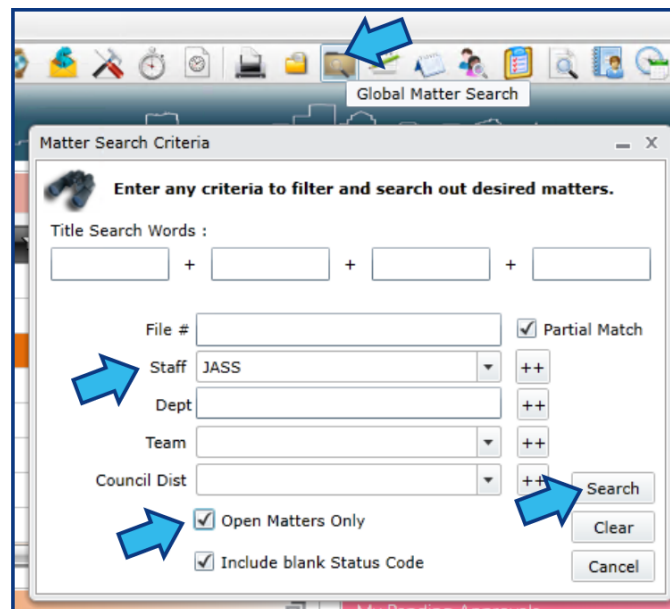
1. Reassign all open matters assigned to user.
2. Inactivate user's contact record.

Standard Guide

Step 1. Reassign all open matters assigned to user.

Before inactivating a user, perform a **Global Matter Search** for all open matters to which that user may still be assigned and reassign them to the appropriate staff member.

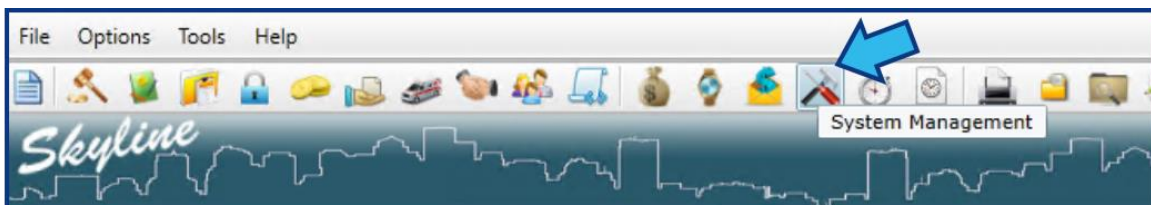
To do that, open **Global Matter Search** by pressing the **Global Matter Search** icon on the **Global Toolbar**. In the **Matter Search Criteria** window, select the user from the **Staff** field drop-down, check **Open Matters Only**, then press **Search**.



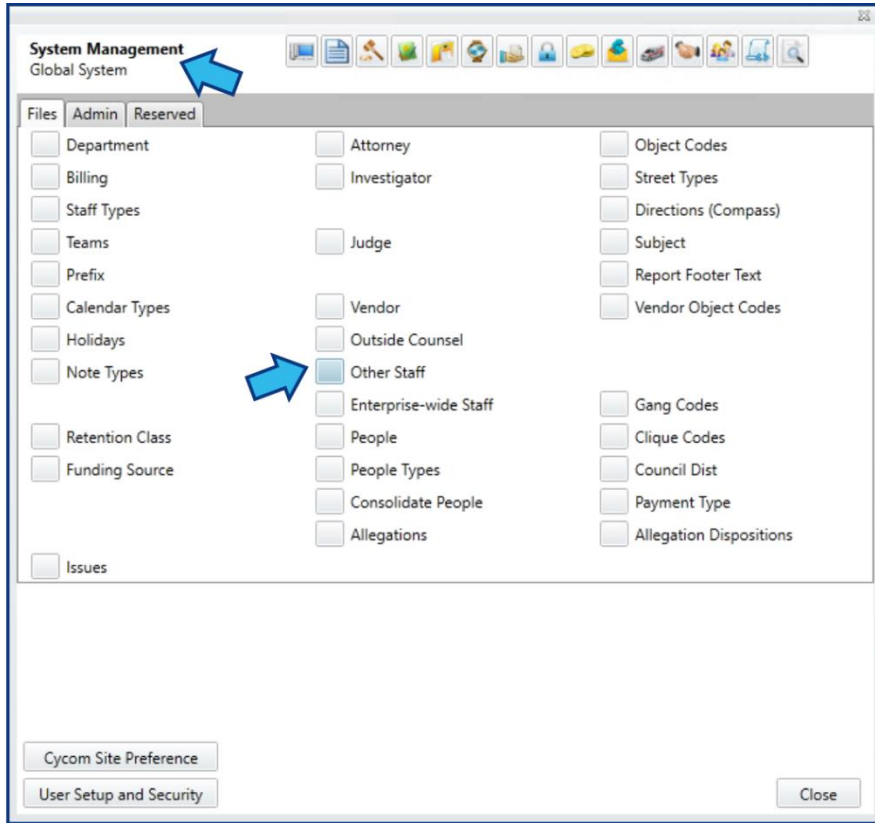
Step 2. Inactivate user's contact record.

Once a **Global Matter Search** returns no open matters for a user, you can safely inactivate a user.

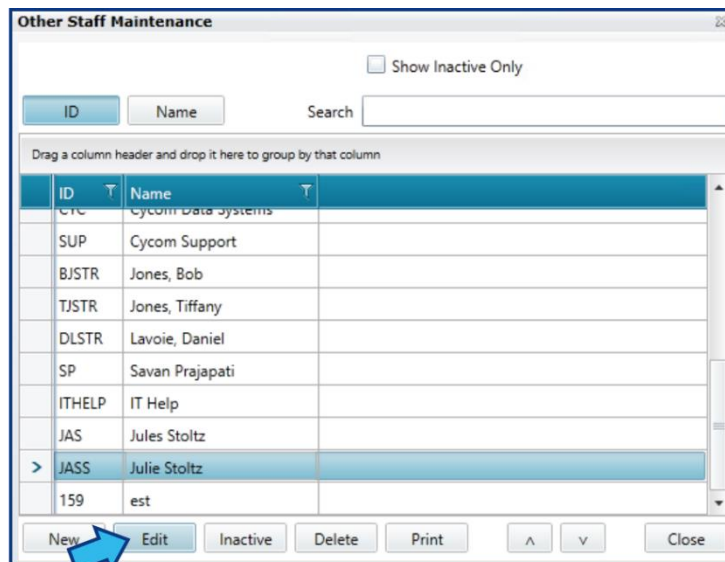
Open **System Management** by pressing the **System Management** icon on the **Global Toolbar**.



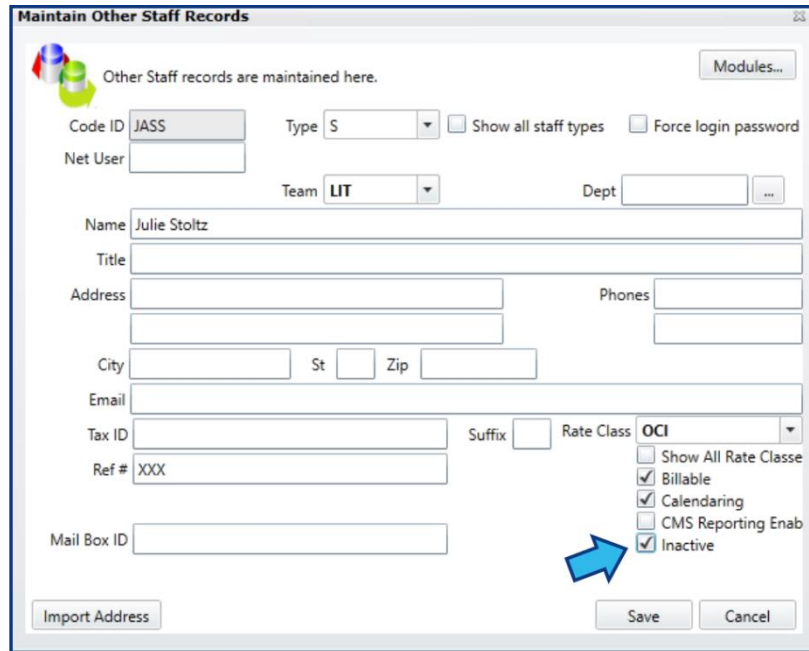
In the **System Management: Global System Files** tab, select the type of user you wish to inactivate. In this example, we will select **Other Staff**.



In the **Maintenance** window, select the user and press **Edit**.



In the **Maintain Records** window for the user, place a check in the box for **Inactive** and press **Save**.



Other Staff records are maintained here. Modules...

Code ID: JASS Type: S Show all staff types Force login password

Net User:

Team: LIT Dept:

Name: Julie Stoltz

Title:

Address: Phones:

City: St: Zip:

Email:

Tax ID: Suffix: Rate Class: OCI

Ref #: XXX

Mail Box ID:

Show All Rate Classe

Billable

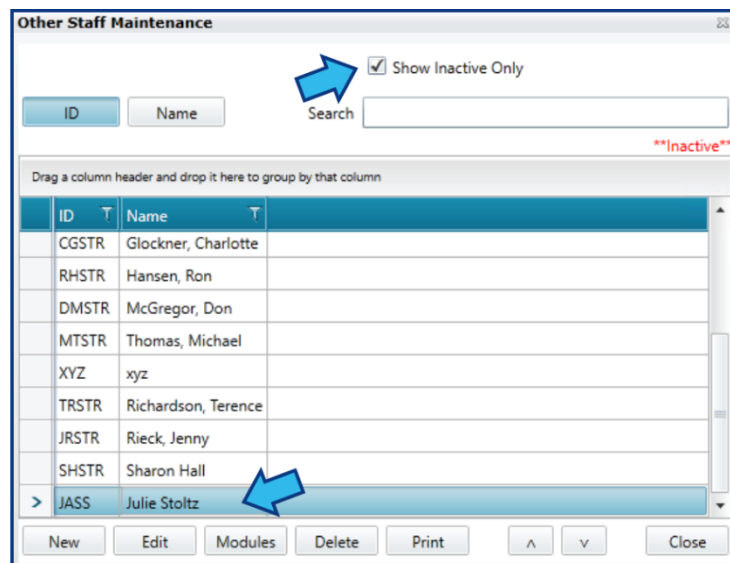
Calendaring

CMS Reporting Enab

Inactive

Import Address Save Cancel

The user is now inactive and will no longer be able to log onto **CLW**. They will no longer be displayed by default in drop-down lists. They will remain discoverable for searches and reporting whenever an option to **Show Inactive** is selected, such as in the **Maintenance** window for users (see below).



Other Staff Maintenance 23

Show Inactive Only

ID Name Search:

****Inactive****

Drag a column header and drop it here to group by that column

ID	Name
CGSTR	Glockner, Charlotte
RHSTR	Hansen, Ron
DMSTR	McGregor, Don
MTSTR	Thomas, Michael
XVZ	xyz
TRSTR	Richardson, Terence
JRSTR	Rieck, Jenny
SHSTR	Sharon Hall
> JASS	Julie Stoltz

New Edit Modules Delete Print ^ v Close