

Creating a new user involves two steps. The first step, creating a **CLW** user record, can be done by anyone with access to the **System Management** module. The second step, assigning a security profile, can only be done by a **System Administrator** with access to the **Admin Password**.

Contents:

- [**Create a User Record**](#)
- [**Assign a User a Security Profile**](#)

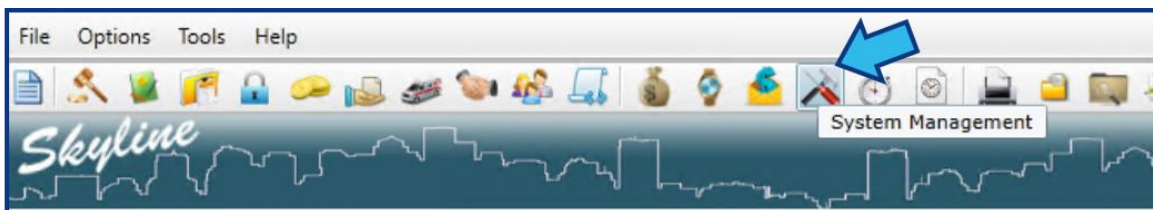
Create a User Record

There are three steps to complete this task:

1. [Open System Management](#)
2. [Select the User Type](#)
3. [Create and Save a New User Record](#)

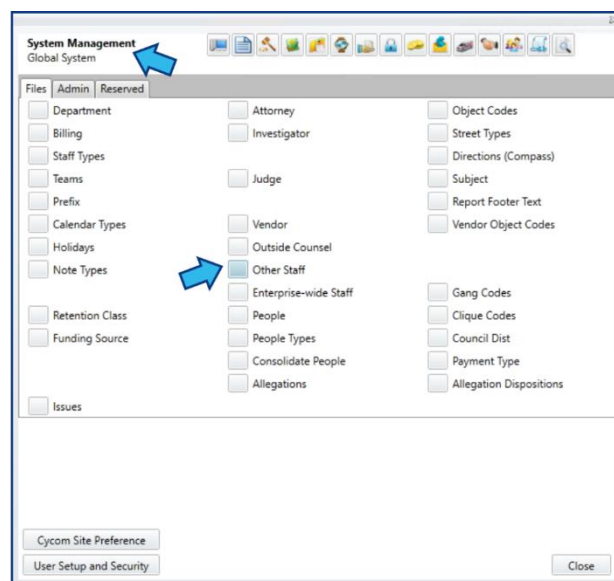
Step 1. Open System Management

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



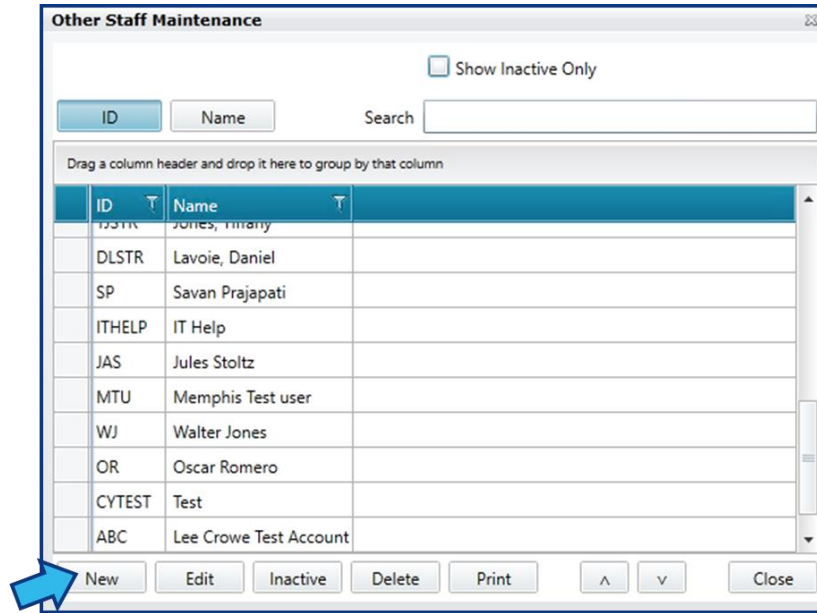
Step 2. Select the User Type

In the **Files** tab, select the type of user you wish to create. In this example, we will select **Other Staff**.

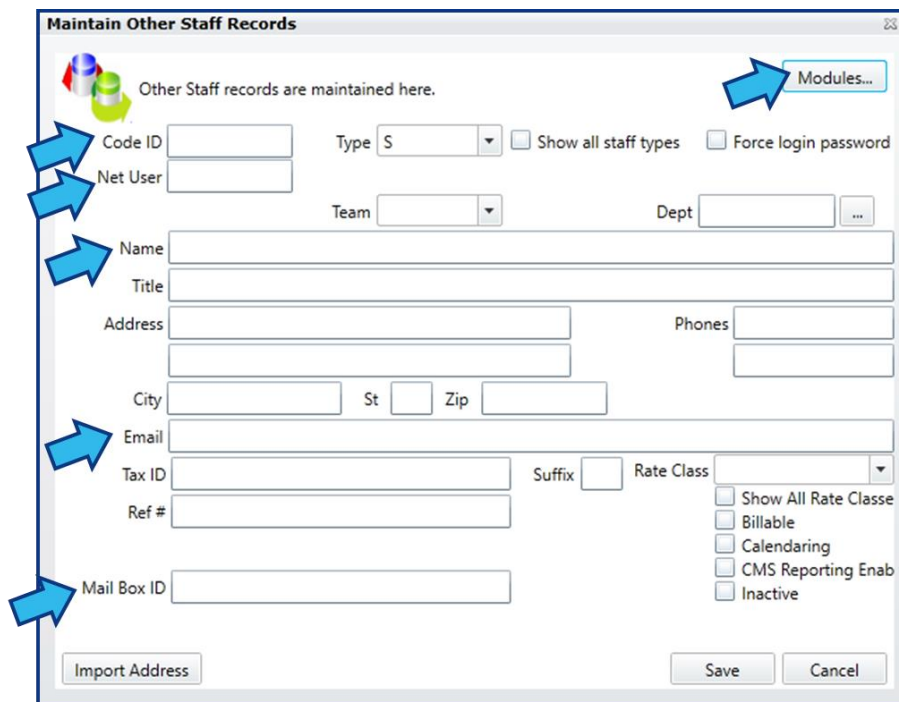


Step 3. Create and Save a New User Record

In the **Maintenance** window, select **New**.



Enter the user's details. Minimally, enter the following fields (descriptions follow image):



Code ID

This is a short character string representing the new user's name. This is typically the user's initials, or the first letter of their first name followed by the first three or four letters of their last name. It is **CLW Best Practice** to try to use the same code naming strategy for all users so that codes are consistent through all displays and reports, and so that users can quickly learn and identify a given code.

Net User

This is the user's **Windows** username and it is case-sensitive. Filling in the **Net User** field will bypass the **CLW** login screen if the user is already logged in to **Windows**, unless **Enforce Password** is enabled. To find a user's **Net User ID**, either contact your IT department or person responsible for setting up the user's **Windows** account, or else refer to this article: [Find a User's Net User ID](#)

Name

The name of the new user. This should be entered as it would appear in proper mailing format.

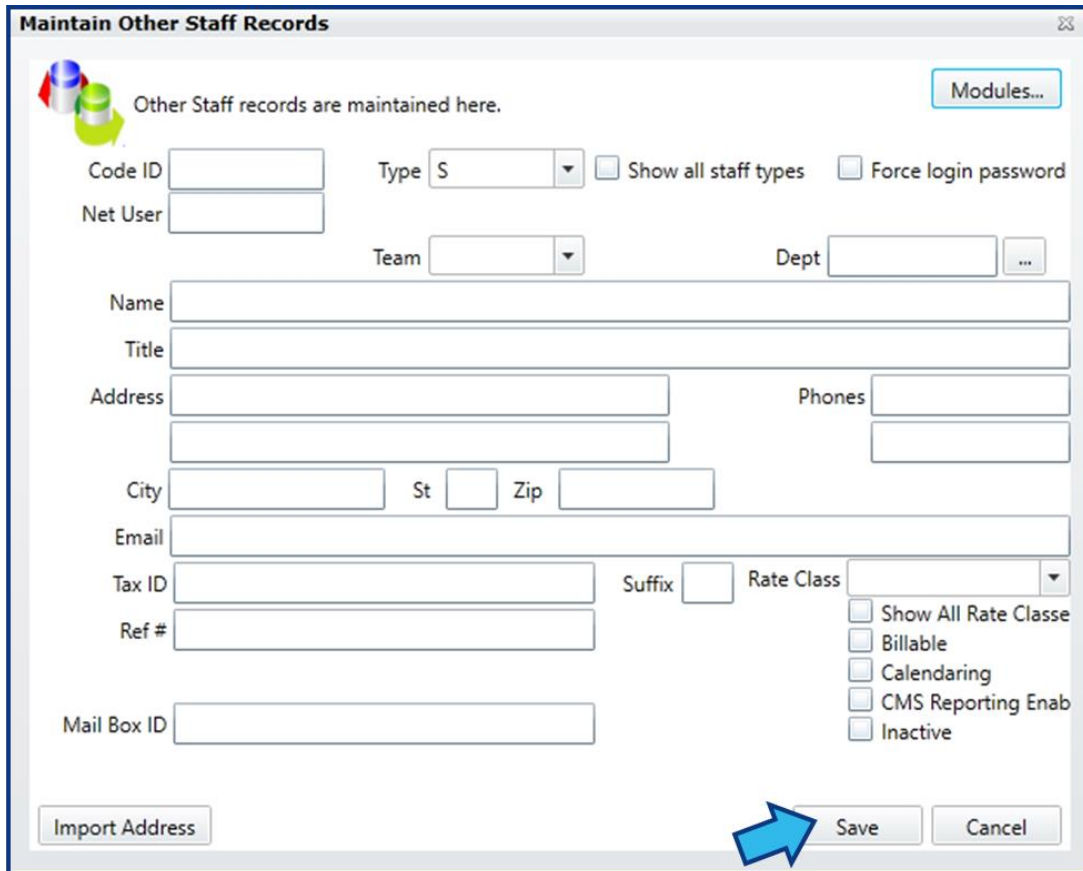
Email

A valid email address is required for **CLW** email functionality. If the **Outlook Calendar** add-in is also used, the email address should be entered into the **Mail Box ID** field. If you are not sure if your site uses this add-in, enter the email address in both places.

Modules...

Press the **Modules...** button and check all the modules for which this user should be included as assignable staff. This is usually the same modules to which this user will have access. Press the **Save** button to return to the previous window.

Once all required and desired information is entered for the user, press the **Save** button to save the new user record.



Maintain Other Staff Records

Other Staff records are maintained here. [Modules...](#)

Code ID Type Show all staff types Force login password

Net User

Team Dept

Name

Title

Address Phones

City St Zip

Email

Tax ID Suffix Rate Class

Ref #

Mail Box ID

Show All Rate Classe
 Billable
 Calendaring
 CMS Reporting Enab
 Inactive

IMPORTANT: The user will still not be able to log in at this point. A security profile must be assigned. Refer to the section below.

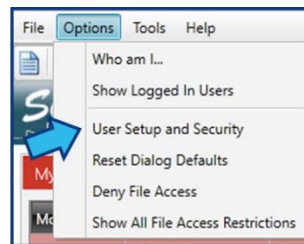
Assign a User a Security Profile

There are five steps to complete this task:

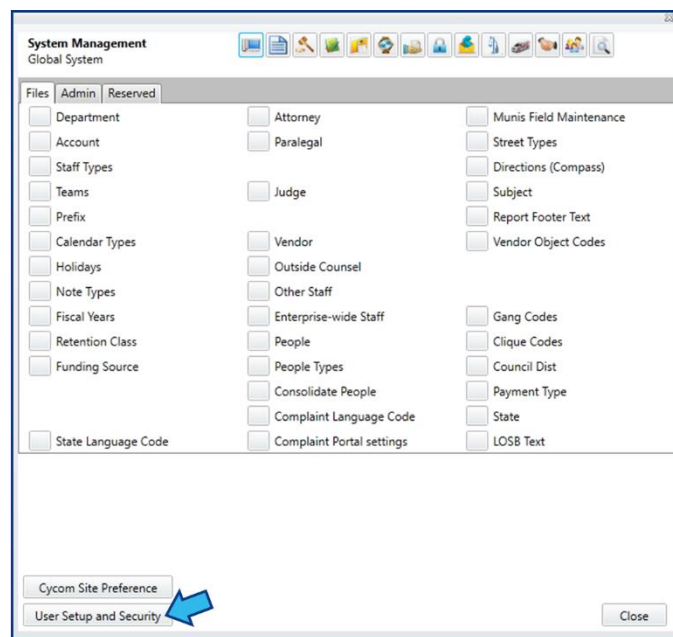
1. [Open User Setup and Security](#)
2. [Enter the Admin Password](#)
3. [Assign a Security Profile](#)
4. [\(Optional\) Set a User's Temporary Password](#)
5. [Save the Security Settings](#)

Step 1. Open User Setup and Security

Open **User Setup and Security** from the **Options** menu.



User Setup and Security is also accessible from the **System Management** module at the bottom-left of the screen in more recent versions.



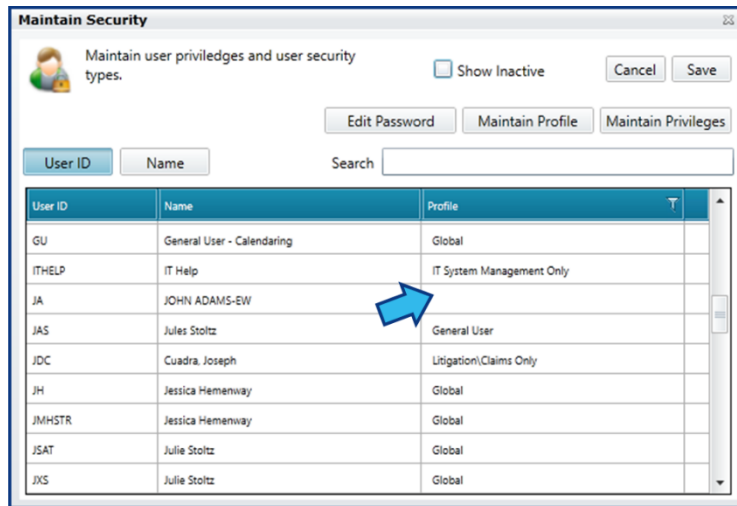
Step 2. Enter the Admin password

Enter your **Admin Password** and press **OK** to continue.

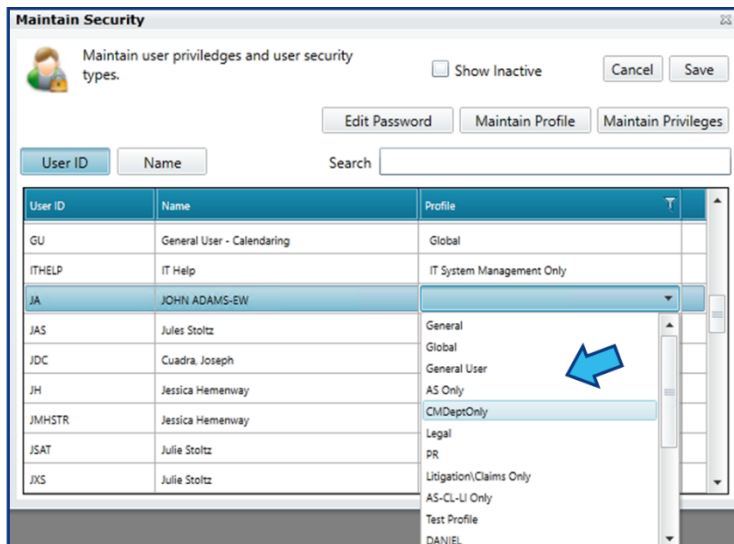


Step 3. Assign a Security Profile

You will see a grid listing your **CLW** users. The **Profile** column displays each user's current **Security Profile**. Locate the user you created and select the box in the **Profile** column next to their name to open a list of your configured security profiles.

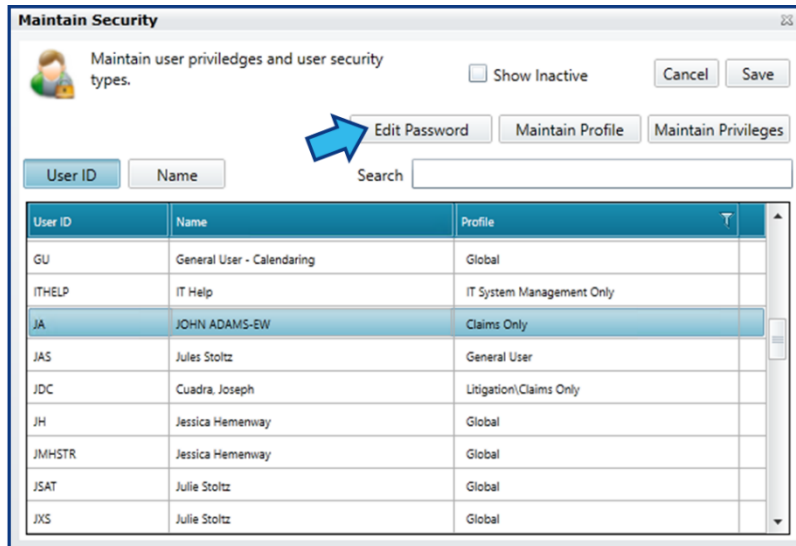


Select the appropriate security profile for the new user from that list.



Step 4. (Optional) Set a User's Temporary Password

This step only applies if your site requires a password to login to **CLW**. With the user selected, press the **Edit Password** button.



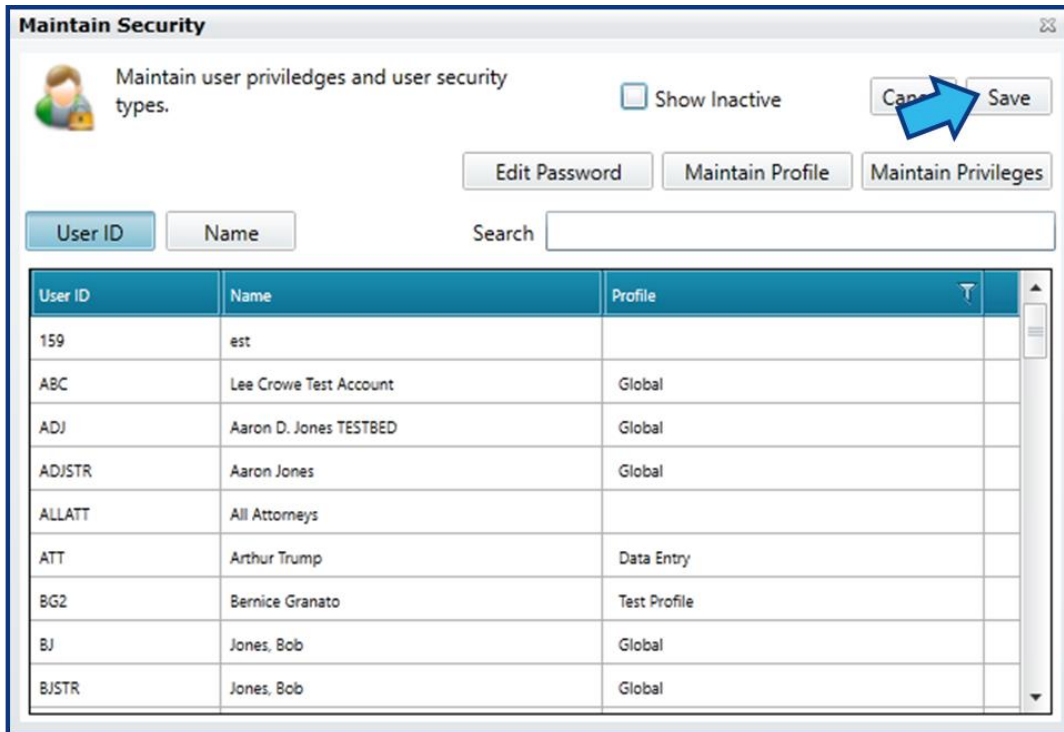
Enter a new password in the window that appears. Press **Tab** and then re-enter the password to confirm. Press the **Save** button to save and close.



Communicate the temporary password to the user. When they first log into **CLW**, they will be prompted to reset their password. They will need to first enter the temporary password you just created.

Step 5. Save the Security Settings.

After completing **Steps 1 to 3** and **4**, if applicable, be sure to select **Save** in the **Maintain Security** window to save the profile assignment you have just made.



The screenshot shows the 'Maintain Security' window with the following elements:

- Header: **Maintain Security**
- Sub-header: Maintain user privileges and user security types.
- Buttons: **Edit Password**, **Maintain Profile**, **Maintain Privileges**, **Cancel**, and **Save** (highlighted with a blue arrow).
- Checkbox: Show Inactive
- Search: **User ID** and **Name** dropdowns, and a **Search** text box.
- Table:

User ID	Name	Profile
159	est	
ABC	Lee Crowe Test Account	Global
ADJ	Aaron D. Jones TESTBED	Global
ADJSTR	Aaron Jones	Global
ALLATT	All Attorneys	
ATT	Arthur Trump	Data Entry
BG2	Bernice Granato	Test Profile
BJ	Jones, Bob	Global
BJSTR	Jones, Bob	Global