

## How to Add and Manage Users

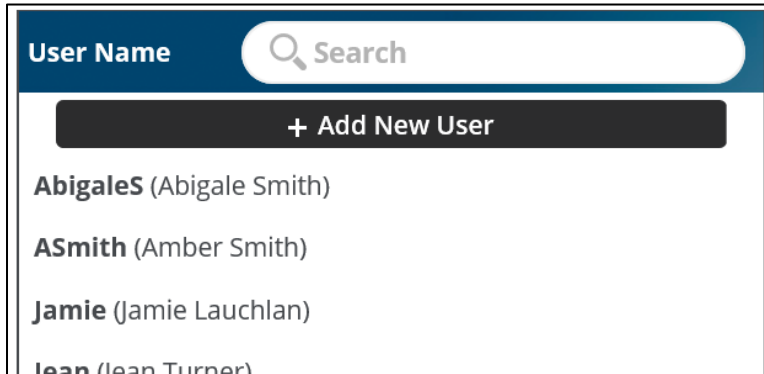
### User Access Section

The User access section is used to create user accounts and manage access rights to files and documents.

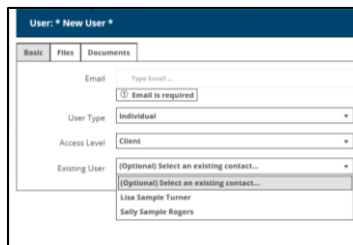
### Adding a New User

If you would like to grant access to the Legal Kiosk™ to someone, you will need to create a User Account for that person. This is a two-step process using email verification, and is the same for both internal and external users.

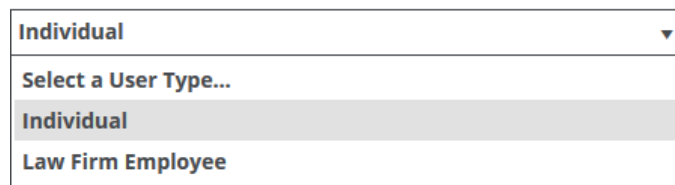
In the User name section, click the **+ Add New User** button



The **User: \*New User\*** form now appears – this consists of three tabs – Basic, Files, and Documents.



On the **Basic** tab, enter the email address and select the **User Type** from the dropdown



There are two types:

- Law Firm Employee** – an internal user, such as a member of the firm
- Individual** – an external user, such as a client or accountant

Select the **Access Level** for the user

Individual Access Level	Law Firm Employee Access Levels
Client	Administrators
Select group...	Select group...
Client	Administrators
	Read-Only (Internal)

For Law Firm Employees, two choices are available:

**Administrators**

- Administrators can add users, files, documents, contacts, and also change aspects of the Legal Kiosk™ configuration itself, as well as being granted access to all files/documents (unless specifically denied access to a file or document).

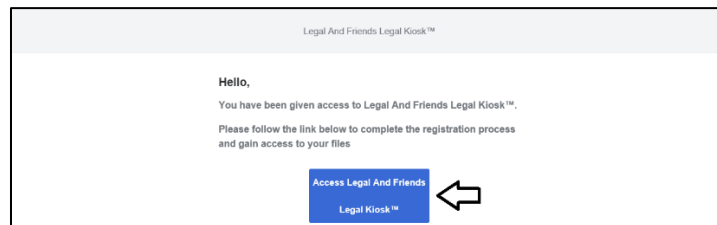
**Read-Only (Internal)**

- Users have access to ONLY view all files/documents and contacts by default

For Individuals, there is only one choice – Client. This allows that user to view only the files/documents they have been specifically granted access to.

To grant such access, click the Files or Documents tab to grant access to a file, or to specific documents as explained in Granting Access to Files and Documents

The user will receive a welcome email with instructions on how to complete the registration process.



When they click the blue access button, they will be taken to the Registration Page:

**Register**

User Name: Abigale

Password: .....

Confirm Password: .....

First Name: Abigale

Middle Name: Sample

Last Name: Smith

Address: 123 Main Street, Erin, Ontario N0B 1T0

**TERMS OF USE**

USE AGREEMENT

This Use Agreement (the "Agreement") is entered into between 2028505 Ontario Ltd. o/a Emergent Technologies ("Licensor") and the firm, corporation, partnership, individual or other legal entity who purchased the license or right to use the Product ("Customer").

1. **Definitions** : In addition to any definitions in the body of this Agreement, the following definitions shall apply to this Agreement:

a. " **Active File** " means all existing or added files within a Product which have a File status other than "Closed".

b. "Files" mean all files in a Product including, without limitation, active, inactive, closed and deleted files. A File can include any electronic book of documents related to a matter, commonly referred to as a virtual minute book, a virtual vault, eBook or any other file related to a practice area of law firm activity.

c. "Order" means a written, online or electronic quotation, order, invoice or other document from the Licensor, and acknowledge by the Customer, setting out the Product being provided to Customer;

I Accept

**Register**

They will then be able to create their own Username and Password, as well as fill in First, Middle, Last name and Address. The Contact is created automatically by this registration process. If the individual does exist as a contact in Legal Kiosk™, they will only have to create their User Name and Password.

Check the **I Accept** box and click **Register**

The user's browser then opens the firm's Legal Kiosk™ Login Page, where Username and Password can be entered.

If file or document access was not granted during the initial setup process, the process of granting access to files and documents can be continued in the **Admin Management** Tab. The new user will be visible in the **User Name** column.

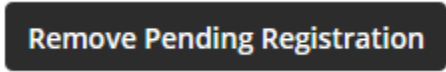
## Resending a Registration

Click on the email address associated with the registration (pending or expired). Once the user page appears displaying the Pending User details, you can change the mail address and/or simply resend by clicking **Resend Registration** at the bottom right of the screen.

**Resend Registration**

## Removing a Registration Expired User

Click on the email address associated with the expired registration. Once the user page appears displaying the Pending User details, click **Remove Pending Registration** at the bottom right of the screen.



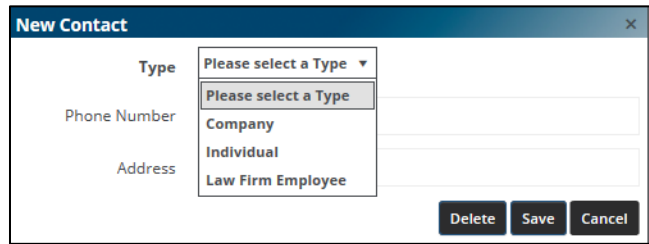
## Deleting a User

Select the User to be deleted in the Admin Management>User Access section. In the User Name and when the Contact Information window opens, click **Delete**. Note that Users and Contacts are independent of each other and must be deleted from each area individually.

## Adding a New Contact

Note: This section is reserved for future features and creating the contact in this manner will not start the registration process or generate any email notification.

New Contacts can be added in the Contact Section for reference purposes, however, until they are added as a New User as set out above, they will have no access to Legal Kiosk™ files.



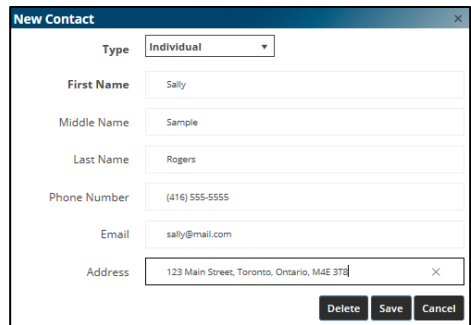
There are three types available:

**Individual** – an external user, such as a client or accountant

**Law Firm Employee** – an internal user, such as a member of the firm

**Company** – has no Legal Kiosk™ functionality beyond reference. This feature will be activated in a future version of Legal Kiosk™

1. Select the contact type for the proper information fields



2. Enter the necessary information

## Deleting a Contact

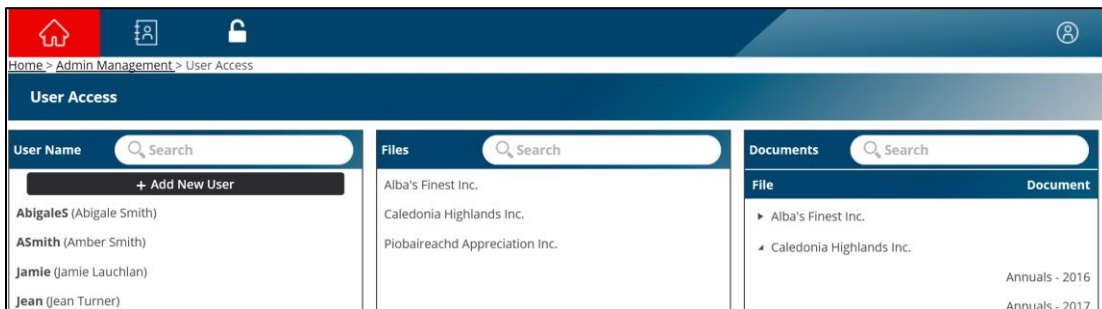
Select the Contact to be deleted on the Contact List and when the Contact Information window opens, click Delete. *Note that Contacts and Users are independent of each other and must be deleted from each area individually.*

## Granting Access to Files and Documents

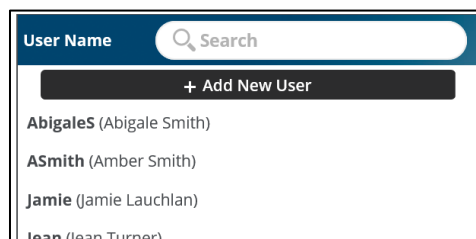
**Law Firm Employees** have access to ALL files and associated documents by default. For most firms, once Access Level has been set for firm users, all setup is complete and you can click the **Save** button at the bottom right-hand corner of the screen.

**Individual** users have NO default access to any file or document. Each Individual user will need to have file/document access specifically granted. This can also be done during the initial setup of the Individual.

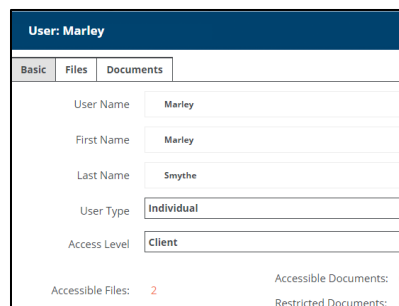
All types of permissions start from the **Admin Management > User Access** screen

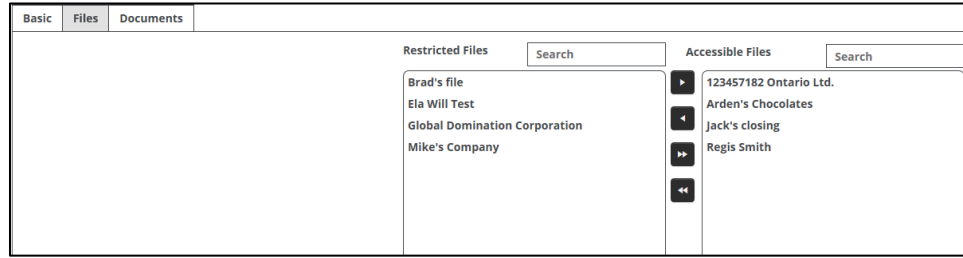


### To a Specific User (One User to Many Files)



1. Click on the user name you wish to assign a file to and then click on the **Files** tab





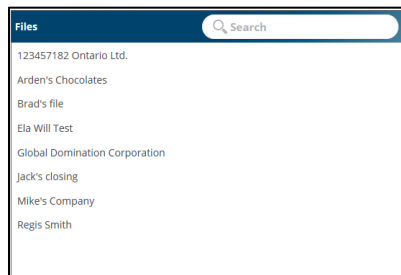
Two columns detail the following:

- Restricted Files** – files in the Legal Kiosk™ this user does NOT have access to
- Accessible Files** – files the user has access to

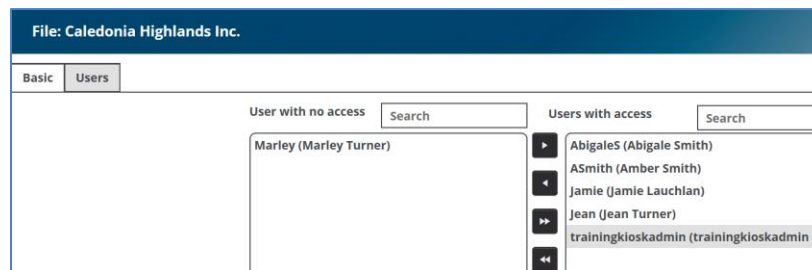
Select the file you wish to grant/remove access for and click the appropriate arrow button. The double arrow button will add/remove all files in the column.

Click **Save**

### For a Specific File (One File to Many Users)



- Click on the file name you wish to allow access to and then click on the **Users** tab



Two columns detail the following:

**Users with no access** – users who do NOT have access to the file

**Users with access** – users that have access to the file

Select the user you wish to grant/remove access for and click the appropriate arrow button. The double arrow button will add/remove all files in the column.

Click **Save**