Adding Users

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1. Click Administration > Employees. Then, click 'Add' in the upper-left area of the window.

2. Enter as much information as desired on the right side of the window.

    a. The "Login" field defaults to an ALL CAPS display.

    b. If a user's name should appear as an option in the "Case Manager" dropdown list for matters, then assign the Attorney/Case Manager or Paralegal/Case Manager in the "Type" field. If a user's name should appear as an option in the "Lead Attorney" or "Hearing Attorney" drop-down list for matters, then assign the type Attorney or Attorney/Case Manager in the "Type" field.

3. You will also want to enter the First Name, Last Name, and Initials, as this information may be needed in merge document templates.

4. Click 'Save' in the upper-right corner of the window.