

Adding Users

Prevail 9

1. Click Administration > Employee Setup . Then, click "Add" in the upper-left area of the "Employee Setup" window.
2. Enter as much Contact information as desired on the right-hand side of the window.
 - a. The "Login" field is required, and defaults to an ALL CAPS display.
 - b. You will also want to enter the First Name, Last Name, and Initials, as this information may be needed in merge document templates.
3. Click "Save" in the upper-right corner of the window.
4. Next, click on the "Security" tab to define that user's level of Administrative Access to Prevail. When finished, click "Save" in the upper-right corner of the window.
5. Directly below the "Administration Security", you'll see "Group Security." Click "Attach To Group"
6. In the popup window, select the appropriate Security Group that user will belong to. Use the "Action" menu to define that user's role in the Security Group.

*Note – if you do not assign a user to a Security Group, they will not be able to access any matter in Prevail.