

MindView Suite User Management

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Revision: 1.02

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MATCHWARE

MindView Suite offers enhanced user management making it easy for administrators to create and manage users. This guide describes how to perform some of these operations.

1. Inviting users with a link

An easy way to create users is by using the "Invite Users" feature.

Steps:

- 1. Log into your MindView Account as an administrator.
- 2. Click "Users" under Admin.

MatchWare 🕅	AindVieW ^{Account}
Applications	Users
A Profile	USEIS
mation	
Billing Information	Invite Users 🔉 Add User 🖓 Delete User 🖓 Edit User
Invoice History	Name - Email
Licenses Overview	
🐅 Admin	
Users	
User Management	
User Groups	
Settings	

3. Click the "Invite Users" button.

MATCHWARE 🕅	Account				
Applications	Users				
A Profile	Users				
E Account Information			_		
Billing Information	Invite Users	우 Add User)	∫∑ Delete User	Se Edit User	
Invoice History	🗆 Name -		Email		
Licenses Overview					
🐅 Admin					
Users					
User Management					
User Groups					
Settings					

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4. Copy the link and distribute it to potential users.

MatchWare 🕥	MindView Account						
Applications	User Management						
8 Profile	oser Management						
magnetic Account Information							
Billing Information	Invite Users						
Invoice History	Users who create an account using the following link will be added to your account.						
Licenses Overview	You can be the link shown to prevent its use and create a new link by clicking Create New Link.						
狩 Admin							
Users	https://accounts.matchware.com/Register/ Copy Create New Link						
User Management							
User Groups							
Settings							

The link will allow users to be created and associated with your Account. The users created through the invitation will also automatically be associated with a product license if any is available.

The "Create New Link" button will invalidate the old link and create a new one. This is useful if you want to make sure that any outstanding invitations are deleted or if you feel the old link is being misused.

2. Entering users manually

You can create users manually too:

Steps:

- 1. Log into your MindView Account as an administrator.
- 2. Click "Users" under Admin.
- 3. Click the "Add User" button.

	МатснW	ARE N	Aind	View [°] Acc	ount					
	Applications			Users						
	A Profile			USEIS						
	🛅 Account Inforn	nation					1			
	Billing Inform	ation		Invite	Users	우 Add User	S / Delete U	lser 🏾 🎤 Edit User		
	Invoice Histor	ry		🗆 Nam	e -		E	mail		
	Licenses Overv	/iew		_						
	🖓 Admin									
	Users									
	User Manage	ment								
	User Groups									
	Settings									
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4. Enter the user's name and email.

Add User	×
Name	
Email	
Role User ~	
License	
Assign License ~	
Assign License	
Do Not Assign License Cancel	ite

- 5. Select whether the user should be a standard "User" or an "Admin".
- 6. By default, the new user will be assigned a product license (if any are available). If the new user should not be given a license, select "Do Not Assign License" and the user will not have access to any of the products.
- 7. Click "Create" and the user will receive a welcome email.

3. Importing users

You can also "bulk" import users by using the CSV or Excel template under "User Management".

Steps:

- 1. Log into your MindView Account as an administrator.
- 2. Click "User Management" under Admin.

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3. Click "Import Users".

MATCHWARE 🕅	MindView Account
Applications	User Management
A Profile	
🕎 Account Information	
Billing Information	Import Method
Invoice History	A Invite Users
Licenses Overview	<u>Љ Import Users</u>
Admin Admin	유 Manage users through Active Directory
Users	≫ Manage users through email domain
User Management	P_Auto-delete inactive users
User Groups	
Settings	<u>User Management Guide</u>

4. Download the template and populate the file with the users to import.

MATCHWARE 🕅	
Applications	Import Users
A Profile	
Account Information	
Billing Information	Excel Import
Invoice History	You can import users from a CSV or Excel file. The file must contain the headers Email and Name. All users imported are given 'Non-Admin' right as default.
R Licenses Overview	Evisiting users will be ignored. Download template for <u>CSV</u> or <u>Excel</u> .
🖓 Admin	
Users	Choose File No file chosen. Import
User Management	
User Groups	
Settings	

5. When the template is filled with the users to import click "Choose File", select the file and click "Import".

All imported users will receive a welcome email from the system.

4. Managing users through Active Directory (Azure AD)

If an organization is using Microsoft Account (MSA) it is possible to associate the entire Tenant to the MatchWare Account to make it easier to associate new users to the same Account.

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Steps:

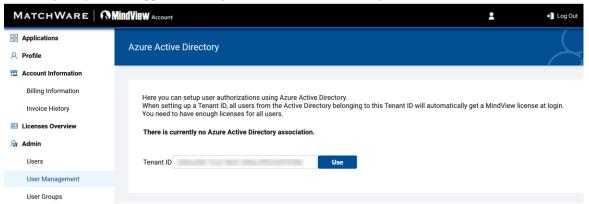
1. Login with your Microsoft Account by clicking the Microsoft Login icon.

MATCHWARE MindVigw [®] Account	t
Log in	
Email	
Password	
Forgot your password?	Create an account
Log in	
or connect with the of these services	

2. Enter your credentials and you will be logged in or redirected to the SSO login page.

Can't access your account?	Sign in				
	Email, phone, or Sky	ype			
	No account? Create on	ne!			
Sign-in options	Can't access your account?				
	Sign-in options				

3. Once logged in go to "Admin" -> "User Management" -> "Manage users through Active Directory". If you are logged in then you will see the Tenant ID prefilled.



Click "Use" to associate the Tenant ID with the MatchWare Account. 4.

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Now all users at the same Tenant can just click the Microsoft Login icon to login. New users will be associated with the Account and given a product license (if any is available).

Limiting users based on a Security Group

As an enhanced feature it is possible for the administrator to limit the number of users who have access. This is done by creating a Security Group in the Microsoft Azure Portal and assigning the security group ID into the Active Directory Setup page.

Once the Security Group is associated with the MatchWare Account, only the users from the associated Security Group are able to login.

MATCHWARE 🕅	AindView Account 2	🕂 Log Out
Applications	Azure Active Directory	
A Profile		
Account Information		
Billing Information	Here you can setup user authorizations using Azure Active Directory.	
Invoice History	When setting up a Tenant ID, all users from the Active Directory belonging to this Tenant ID will automatically get a MindView license You need to have enough licenses for all users.	eat login.
Licenses Overview	You are now associated with:	
🐅 Admin	Tenant ID Remove	
Users	Tenant ID Remove	
User Management	If you enter an Active Directory group, only users from this group will be associated with your company account.	
User Groups	Setting or changing the Tenant ID or group has not effect on existing users.	
Settings	Active Directory Group ID Save	
	Azure Active Directory association added	

5. Managing users through email domain

If you have entered into a Subscription Agreement for a school district, university or company where potential users have an email associated with their organization, users may be able to create their own user account belonging to the organization.

MatchWare will need to setup the email domain.

Steps:

- 1. Request that an email domain is associated with your Account by contacting a <u>MatchWare</u> <u>Office.</u>
- 2. Once the email domain is associated with the Account, new users which are signing up to a trial will be associated with the Account and assigned a product license (if any is available).

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6. Inviting users via third party authorization

You can associate different types of third-party authorization services. Currently supported services are:

- Google Login
- Microsoft Login
- Facebook Login

You can choose the external login service in the login screen or associate a service once logged in.

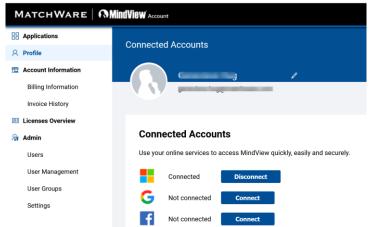
Select the external login provider when logging in or when signing up for a trial.

MATCHWARE MindView Account	t
Log in	
Email	
Password	
Forgot your password?	Create an account
Log in	
G Google	

OR associate an external login provider with your existing login.

Steps:

- 1. Log into your MindView Account as an administrator.
- 2. Go to "Profile" -> "Connected Accounts".



3. Click "Connect" for the service you want to associate with your Account.

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7. Data location

By default, each user can choose where their data is located. The administrator can select a specific organization storage location and thereby force all the organization's users to use that location.

Steps:

- 1. Log into your MindView Account as an administrator.
- 2. Go to "Admin" -> "Settings" -> "Storage Location".

MATCHWARE N	MindView' Account
Applications	Settings
8 Profile	Settings
Account Information	
Billing Information	Storage Location
Invoice History	
Licenses Overview	Select a storage location below to force where files should be stored for all users belonging to this account. If no location is selected, each user can decide where their files are stored.
🏦 Admin	The user can select the storage location. Change
Users	
User Management	
User Groups	Merge Accounts
Settings	Invite an organization's account Administrator and users to join your account. This will move all users to your account. Enter the Administrator's email address and click Verify to check that it is valid for merging, i.e. that the user exists, has
	Email

3. Click "Change" and if required, set a specific storage location for all users.

MATCHWARE 🕅	MindView Account					
Applications	Company Storage Location					
A Profile	Company Crotage Location					
Account Information						
Billing Information	Current storage location: User selected					
Invoice History	If you change the storage location, all the files will be queued for movement. This should happen within 24 hours.					
Licenses Overview	When you force a specific location, the users within the company will not be able to change their storage location.					
Admin Admin	Save					
Users						
User Management						
User Groups						
Settings						

By default, the storage location is set to "User selected", which means that each user can choose their storage location under their Profile settings. If the administrator selects a storage location, it will force the selected location for all users in the organization.

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The storage locations currently made available by MatchWare at the Microsoft Azure data centers are:

- East US (Virginia)
- France Central (Paris)
- Germany West Central (Frankfurt)
- UK South (London)
- West Europe (Netherlands)

8. Merging accounts

If you have purchased a subscription and would like to share it with someone who previously created a separate demo account, you must merge the two accounts.

Merging accounts will move all users and any licenses from the account belonging to the invited user over to your account.

Steps:

- 1. Log into your MindView Account as an administrator.
- 2. Go to "Admin" -> "Settings" -> "Merge Accounts".
- 3. Enter the email address of an Administrator for the account you would like to merge with your account and click "Verify".
- 4. (Optional) Add a personal message to the invitation.
- 5. Click "Invite".

A merge invitation is then sent to the email address you specified.

Merge Accounts

Invite an organization's account Administrator and users to join your account. This will move all users to your account. Enter the Administrator's email address and click Verify to check that it is valid for merging, i.e. that the user exists, has Admin rights and does not already belong to the same account.

demouser@matchware.com Verify

Click "Invite" to send an invitation to demouser@matchware.com

(optional) invitation:	a personal	. message	with	your
Cancel	Invite			

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T: 1-800-880-2810		F: +44 (0)20 8332 2170		F: +33 (0)810 811 121		F: +49 (0) 40 543789		F: +45 87 303 501
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The invitation email contains a link to a confirmation page where the invited user must enter his or her password to accept the merge.



Merge Accounts

By clicking "Merge" below, you agree to the following:

- You accept to join the organization: MatchWare Inc.
- All 1 users in the Demo Customer organization will be added to the MatchWare Inc. organization.
- ᢞ The organization Demo Customer will be deleted.

Enter your password to continue



Merge

or accept with one of these services



9. Limiting login types

Administrators can limit the different login types to be allowed within the organization.

Steps:

- 1. Log into your MindView Account as an administrator.
- 2. Go to "Admin" -> "Settings" -> "Allowed Login Types".
- 3. All available login types are selected by default. Uncheck the types which you do not want to allow in your organization.

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Replications	Settings						
8 Profile	Setungs						
Account Information							
Billing Information Invoice History ILicenses Overview	De-activate MindView Drive and MindView Online This will prevent users from accessing MindView Online. Users will also be unable to use MindView Drive to save documents in the cloud, share or collabu Users will no longer have access to their documents on MindView Drive. Please inform users to download online documents before de-activating.						
Mar Admin	De-activate						
Users							
User Management User Groups	Delete Account						
Settings	Delete your account including all users and their data.						
	Continue						
	Allowed Login Types						
	This section lets you enable or disable certain login types for all your users.						
	C Standard login Microsoft login Google login C Facebook login						

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