



Proof Check

Creating New Users and User Groups

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Getting Started

Things To Know

If this is the first time you've used Proof Check, please see the How To document **Proof Check, Qualifying your system and other things to know.** All How To documents can be found at <http://www.rightfromthestart.com>.

Admin Roles

New users can register for a free Proof Check user account at <http://www.courierfastpath.com>, via an Email request to your respective Courier CSR or your internal Customer Administrator.

In order for you to internally create a new Proof Check User or User Group you must have an Admin Role of Customer Administrator. Users with the basic Admin Role of Customer User cannot create new users. Every publisher typically has at least one Customer Administrator within their list of Proof Check users.

Job Roles

Job Roles are a collection of user rights associated with a given job. Default Job Roles area assigned when creating a new Proof Check user. There are four Default Job Roles: Uploader, Reviewer, Final Approver and Customer Administrator.

Compositors are typically assigned a Default Job Role of Uploader. Uploaders can do functions like create jobs, upload files and request users to review or approve pages. They cannot actually approve a page though.

Designers, for example, are typically assigned a Default Job Role of Reviewer. Reviewers can do everything an Uploader can do, with a few more functions. Reviewers can set a page to Reviewed OK or Reviewed Not OK, but cannot actually approve a page.

Print Buyers are typically assigned a Default Job Role of Final Approver. Final Approvers can do everything an Uploader and Reviewer can do, plus actually approve and reject pages.

NOTE: For a detailed list of rights associated with each Default Job Role click on the information icon ⓘ to the immediate right of the role name.

User Roles

Customer: Company Name

User has access to specified jobs

Admin Role

- None
- Customer Administrator
- ✓ Customer User ⓘ

Allow access to all current and future jobs

Default Job Role

- None
- Level 1 - Uploader
- ✓ Level 2 - Reviewer ⓘ
- Level 3 - Final Approver
- Level 4 - Customer Administrator

Create New User

How To Create A New User

Creating a new user is a simple process. The most important bit of information you'll need to know about the user you are about to create is what their Default Job Role will be. If the user will approve some jobs and simply review other jobs, you'll want to set their Default Job Role to the higher level of Final Approver.

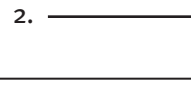
Job Roles can be reduced on a per-job basis, but they cannot be increased. In other words, a person with the Default Job Role of Reviewer cannot be made an Approver on a selected job. However, a person with a Default Job Role of Final Approver can be made a Reviewer on a selected job.

By default, the majority of users will not have access to all current and future jobs for easier job management. Their access will be displayed as Restricted from the Access To Jobs list within the Administration window.

1. Click on the **Administration** link found near the top left of the page.



2. Click on the **Create User** button. (Figure 3a)



The screenshot shows the "Users And Groups" interface. At the top, there are four buttons: "Import Users", "Manage Access", "Create User", and "Create User Group". Below these buttons is a table with the following data:

User/Group Name	Admin Role	Default Job Role	Access To Jobs
Bob Wright (bwright)	Customer Administrator	Level 4 - Customer Administrator	Restricted
Jessica Samson (jsamson)	Customer User	Level 2 - Reviewer	Restricted
Sally Wilson (swilson)	Customer User	Level 1 - Uploader	Restricted
Zach Jones (zjones)	Customer User	Level 3 - Final Approver	Restricted

Figure 3a

3. Complete **User Information** as outlined in Figure 4a below.

NOTE: It is recommended that all new users be given a username of first initial last name like in the example below. In the event that name is already taken, please enter first name immediately followed by last name.
Example: "alexsmith" vs. "asmith"

Also, passwords are strong and case-sensitive. They must contain at least eight characters. And, they must contain at least one character from three of the following classes: upper-case, lower-case, digits, non-alphanumeric "special characters" such as punctuation.
Example: Sharks38

4. Complete **User Roles** by selecting their required **Default Admin Role** and **Default Job Role**.

NOTE: It is recommended that all new users **not** have access to all current and future jobs for easier job management, reducing unnecessary Emails. In the event the user does need to see all active jobs, please select **Allow access to all current and future jobs**.

The screenshot shows the 'Create Customer User' form with the following sections and fields:

- User Information:** Unique Username (asmith), Password, Confirm Password, First Name (Alex), Init., Last Name (Smith).
- User Roles:** Customer: Company Name, Admin Role (Customer User), Allow access to all current and future jobs (unchecked), Default Job Role (Level 2 - Reviewer).
- Email Options:** Email (asmith@publisher.com), Email Language (English), Disable all Email notifications (unchecked), Disable event notifications (unchecked), Subscribe to Events button.
- Contact Information:** Title (Editorial), Office Phone (260-555-1212), Cell, Home Phone, Pager, Fax.
- Expiry:** Account Does Not Expire (selected), Account Expires In 0 Day(s).

Annotations:

- 3. Points to the Unique Username field.
- 4. Points to the Admin Role dropdown menu.
- 5. Points to the Subscribe to Events button.
- 6. Points to the Create button.

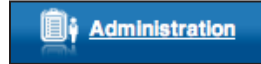
Figure 4a

Create User Group

How To Create A User Group

User Groups are useful for streamlining the process of setting job access and requesting user reviews when you have several people working on the job. Instead of having to select each user's name and job role for a given job you simply need to select the group and select User Member's Default Role from the Default Job Role list.

1. Click on the **Administration** link found near the top left of the page.



NOTE: You must have an Admin Role of Customer Administrator to internally create a new Proof Check User Group.

2. Click on the **Create User Group** button. (Figure 6a)



The screenshot shows the "Users And Groups" interface. At the top, there are four buttons: "Import Users", "Manage Access", "Create User", and "Create User Group". Below the buttons is a table with the following data:

User/Group Name	Admin Role	Default Job Role	Access To Jobs
Bob Wright (bwright)	Customer Administrator	Level 4 - Customer Administrator	Restricted
Jessica Samson (jsamson)	Customer User	Level 2 - Reviewer	Restricted
Sally Wilson (swilson)	Customer User	Level 1 - Uploader	Restricted
Zach Jones (zjones)	Customer User	Level 3 - Final Approver	Restricted

Figure 6a

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3. Give your group a name.
4. Select the users you want associated with the group from the **Members** list.
5. Select the **Admin Role**. (Customer User recommended)
6. Always select **Use Member's Default Role**.
7. Click the **Create** button.

The screenshot shows the 'Create User Group' interface. At the top, there is a header 'Create User Group' with a red warning message: 'Fields marked with * are required.' Below this, the form is divided into two main sections: 'Group Information' and 'Group Roles'.

Group Information:

- Group Name:** A text input field containing 'Designers', marked with a red asterisk (*). Callout 3 points to this field.
- Members:** A list of users with checkboxes. Callout 4 points to the list. The list includes:
 - Alex Smith (asmith)
 - Bob Wright (bwright)
 - Jessica Samson (jsamson)
 - Sally Wilson (swilson)
 - Zach Jones (zjones)

Group Roles:

- Customer: Company Name:** A dropdown menu with options: 'None', 'Customer Administrator', and 'Customer User'. Callout 5 points to the 'Customer User' option.
- Admin Role:** A dropdown menu with options: 'None', 'Member's Default Role', 'Level 1 - Uploader', 'Level 2 - Reviewer', 'Level 3 - Final Approver', and 'Level 4 - Customer Administrator'. Callout 6 points to the 'Use Member's Default Role' option.
- Allow access to all current and future jobs:** An unchecked checkbox.

At the bottom right of the form, there are two buttons: 'Cancel' and 'Create'. Callout 7 points to the 'Create' button.

Figure 7a

