

## MindView Suite User Management

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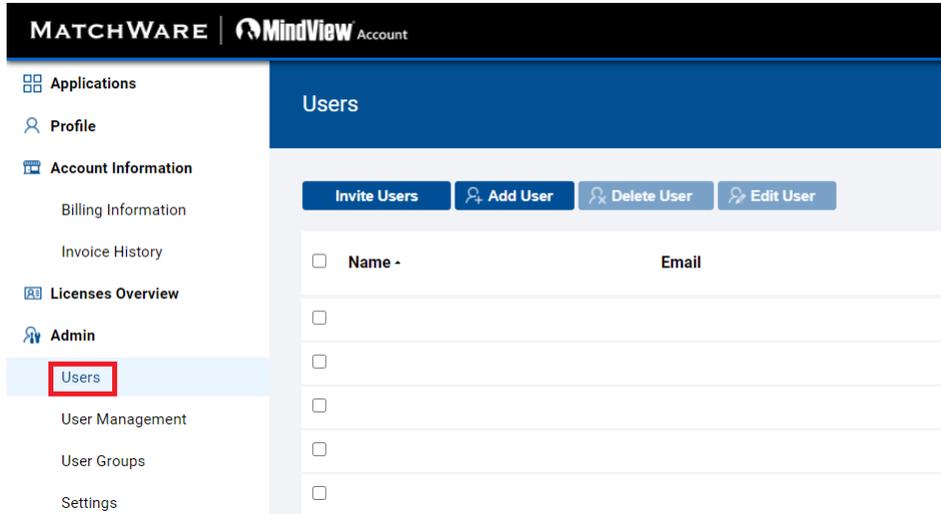
MindView Suite offers enhanced user management making it easy for administrators to create and manage users. This guide describes how to perform some of these operations.

## 1. Inviting users with a link

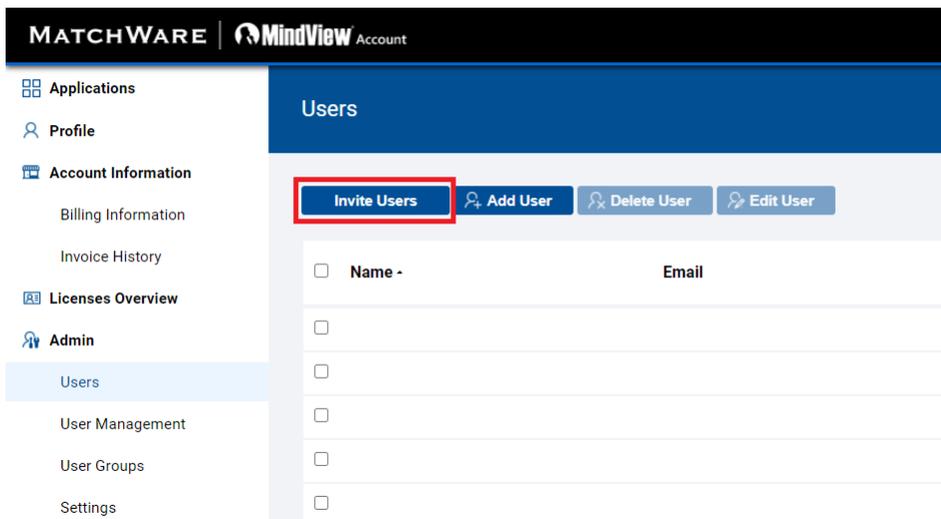
An easy way to create users is by using the "Invite Users" feature.

Steps:

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



3. Click the "Invite Users" button.



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

The screenshot shows the MatchWare MindView Account interface. On the left is a navigation menu with options: Applications, Profile, Account Information (Billing Information, Invoice History), Licenses Overview, and Admin (Users, User Management, User Groups, Settings). The main content area is titled 'User Management' and contains an 'Invite Users' section. This section includes instructions: 'Users who create an account using the following link will be added to your account. You can post this link on your intranet, or send it to your users in an email. You can disable the link shown to prevent its use and create a new link by clicking Create New Link.' Below the text is a text input field containing a URL: 'https://accounts.matchware.com/Register/[redacted]'. To the right of the input field is a 'Copy' button, which is highlighted with a red box. Further right is a 'Create New Link' button.

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.

The screenshot shows the MatchWare MindView Account interface. On the left is a navigation menu with options: Applications, Profile, Account Information (Billing Information, Invoice History), Licenses Overview, and Admin (Users, User Management, User Groups, Settings). The main content area is titled 'Users' and contains a toolbar with buttons: 'Invite Users', 'Add User' (highlighted with a red box), 'Delete User', and 'Edit User'. Below the toolbar is a table with columns 'Name' and 'Email'. The table is currently empty, with only the headers visible.

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- Enter the user's name and email.

- Select whether the user should be a standard "User" or an "Admin".
- 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.
- 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:

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

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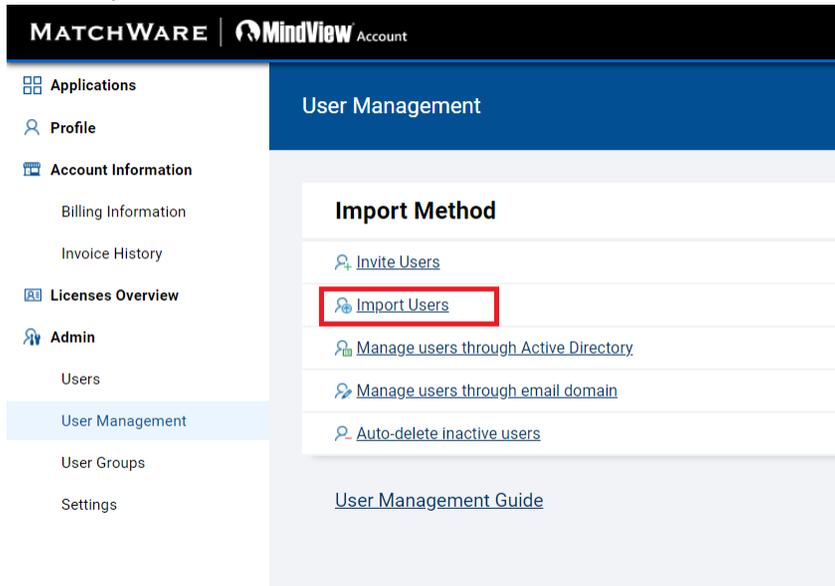
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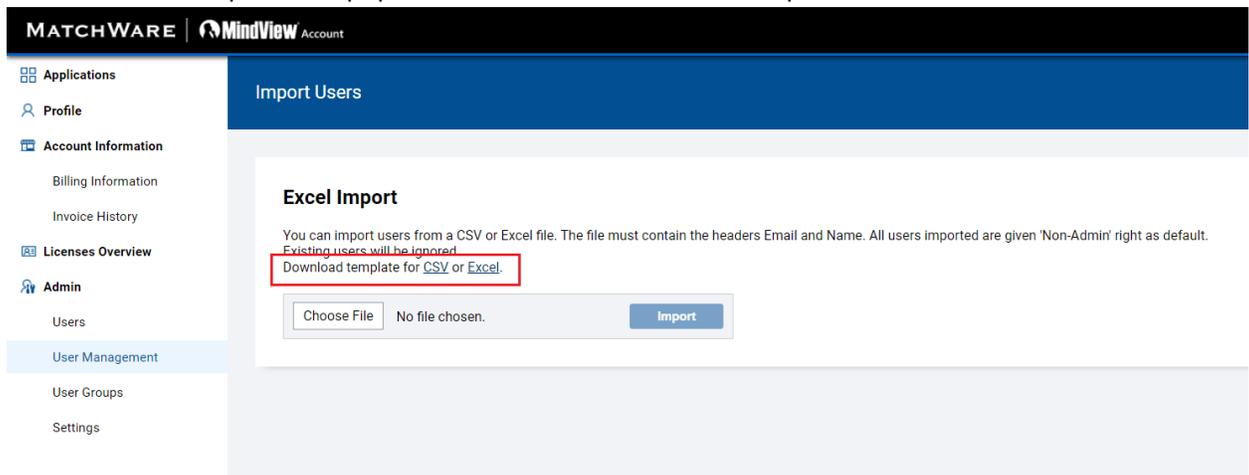
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- Click "Import Users".



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



- 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.

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

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.

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

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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** | MindView Account Log Out

**Azure Active Directory**

Here you can setup user authorizations using Azure Active Directory. When setting up a Tenant ID, all users from the Active Directory belonging to this Tenant ID will automatically get a MindView license at login. You need to have enough licenses for all users.

**You are now associated with:**

Tenant ID  Remove

If you enter an Active Directory group, only users from this group will be associated with your company account.

Setting or changing the Tenant ID or group has not effect on existing users.

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 [MatchWare Office](#).
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.

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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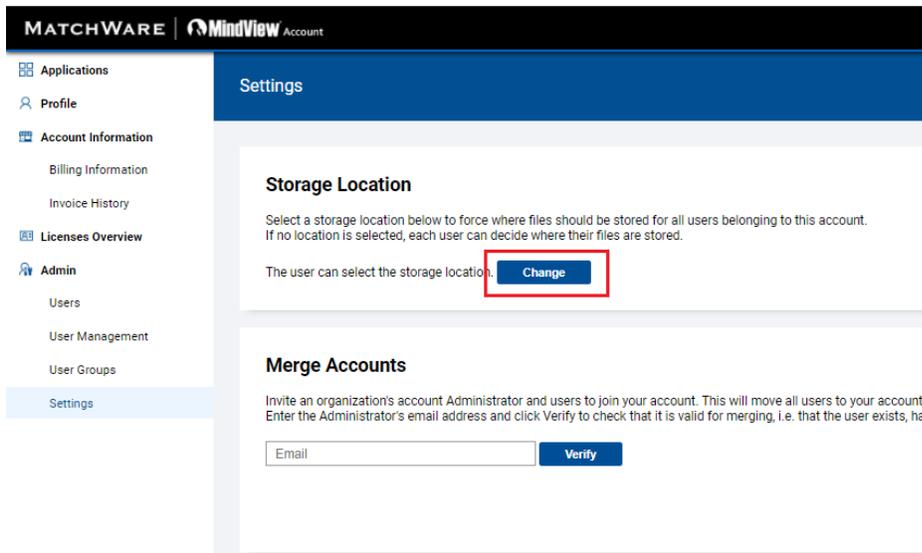
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## 7. Data location

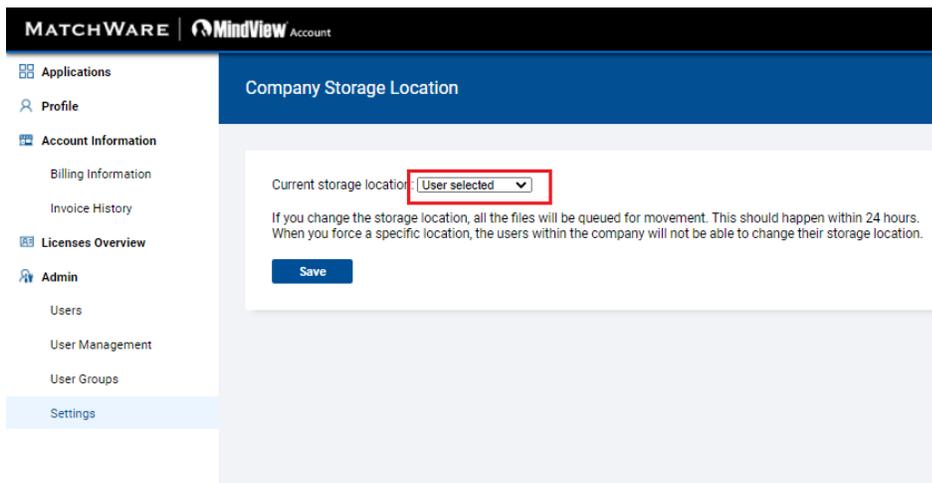
By default, each user can choose where their data is located. The administrator can select a specific organization storage location and thereby force all the organization's users to use that location.

### Steps:

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



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



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.

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

(optional) Send a personal message with your invitation:

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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.
- ✓ 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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**MATCHWARE** | MindView Account

Applications

Profile

Account Information

- Billing Information
- Invoice History

Licenses Overview

Admin

- Users
- User Management
- User Groups
- Settings

### Settings

#### 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 collaborate. Users will no longer have access to their documents on MindView Drive. Please inform users to download online documents before de-activating.

De-activate

#### Delete Account

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.

- Standard login
- Microsoft login
- Google login
- Facebook login

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