

MindView Suite User Management

MindView Suite has enhanced user management making it easy for administrators to create users. As an administrator, you have the following ways to create users:

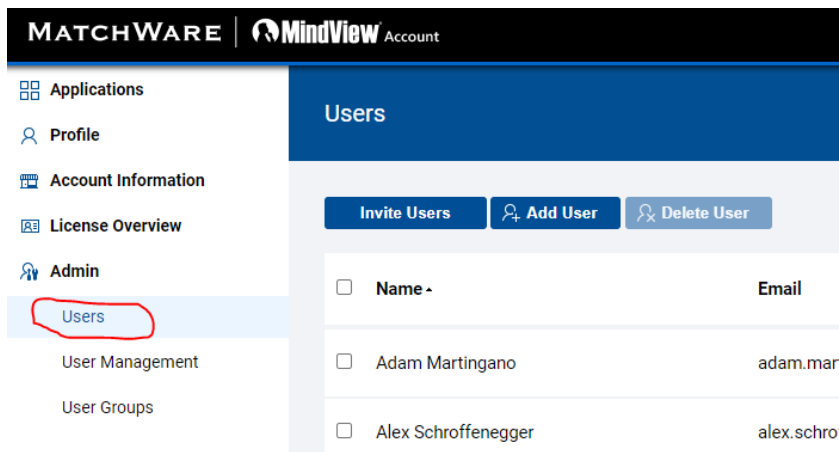
1. Inviting users with a link
2. Entering users manually
3. Importing Users
4. Managing users through Active Directory (Azure AD)
5. Managing users through email domain
6. Inviting users via third party authorization

1. Inviting users with a link

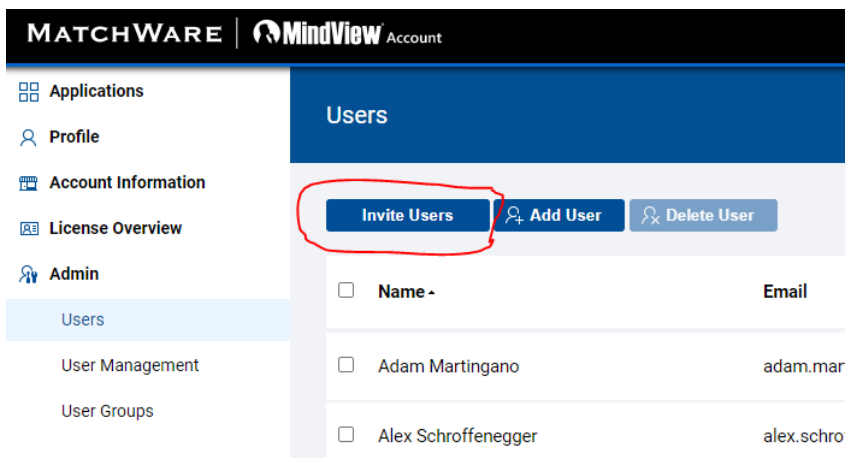
An easy way to create users is by using the “Invite Users” feature.

Steps:

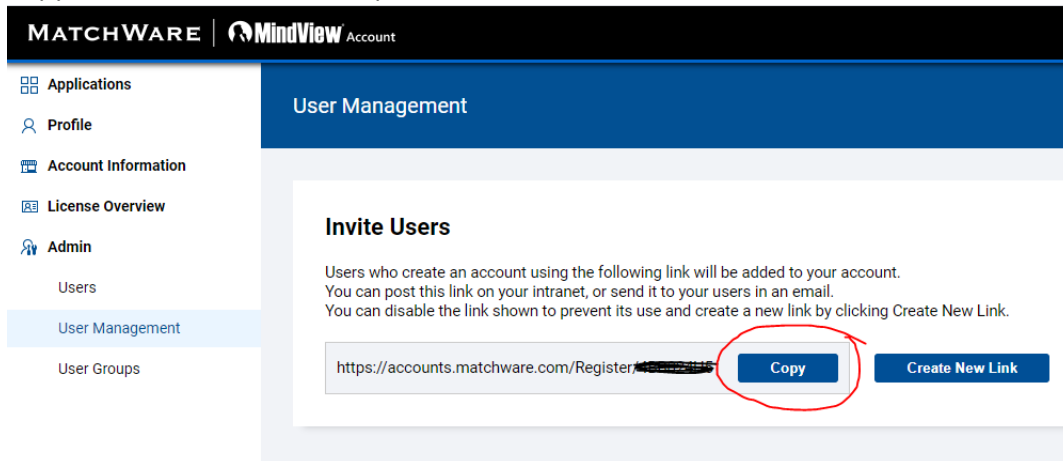
1. Login into your MindView Account as an administrator.
2. Click “Users” under Admin.



3. Click the “Invite Users” button.



4. Copy the link and distribute to potential users.



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.

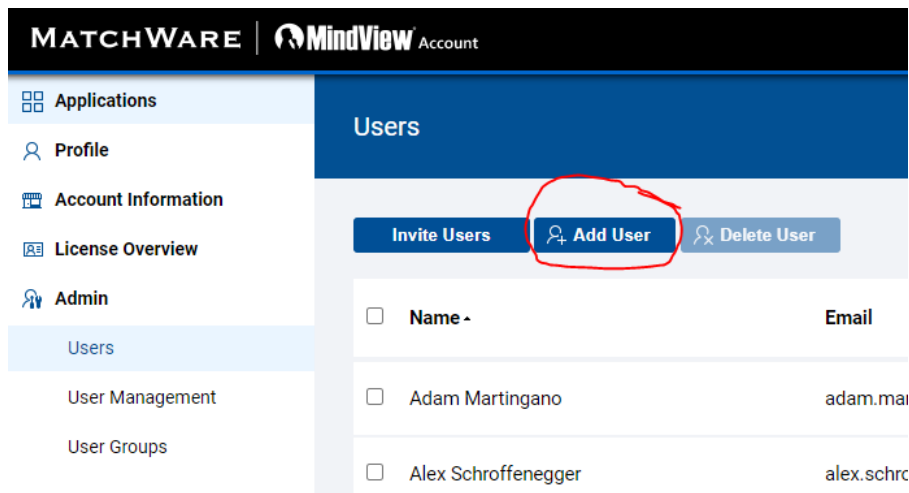
The “Create New Link” button will invalidate the old link and create a new one. This is useful if you want to make sure that any outstanding invitations are deleted or if you feel the old link is being misused.

2. Entering users manually

You can create users manually too:

Steps:

1. Login into your MindView Account as an administrator.
2. Click “Users” under Admin.
3. Click the “Add User” button.



4. Enter the user's name and email.

The screenshot shows a dialog box titled "Add User" with a blue header and a close button (X). The dialog contains the following fields and options:

- Name:** A text input field with a vertical cursor.
- Email:** A text input field.
- Rights:** Two radio buttons: "Admin" (unselected) and "Non-Admin" (selected).
- Auto-Assign License:** Two radio buttons: "Yes" (selected) and "No" (unselected).
- Buttons:** "Cancel" (grey) and "Save" (blue) buttons at the bottom right.

5. Select whether the user should be an "Admin" or "Non-Admin".
6. The "Auto-Assign License" option is set to "Yes" by default, which means that the new user will be assigned a product license (if any is available). If the new user should not be given a license, select "No" and the user will not have access to any of the products.
7. Click "Save" and the user will receive a welcome email.

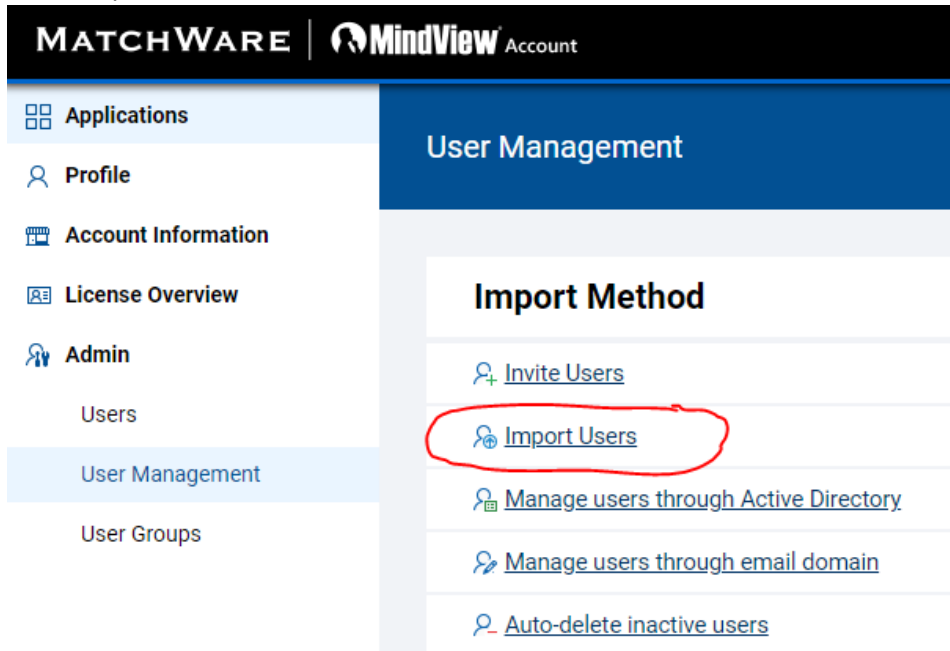
3. Importing Users

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

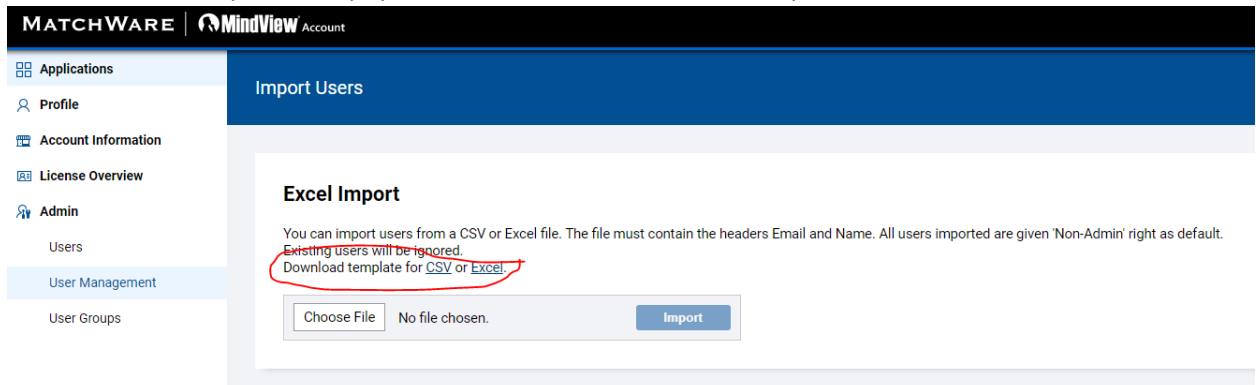
Steps:

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

3. Click "Import Users".



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



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

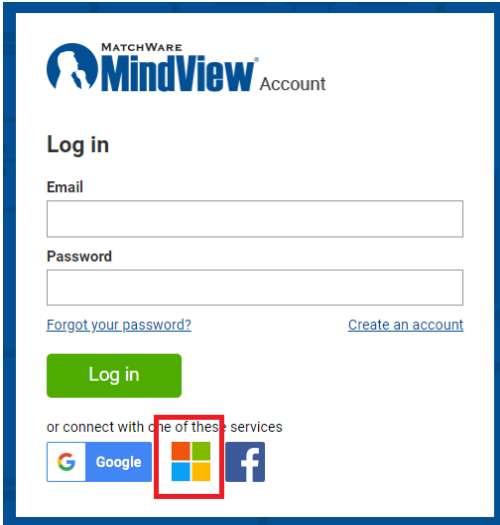
All imported users will receive a welcome email from the system.

4. Managing users through Active Directory (Azure AD)

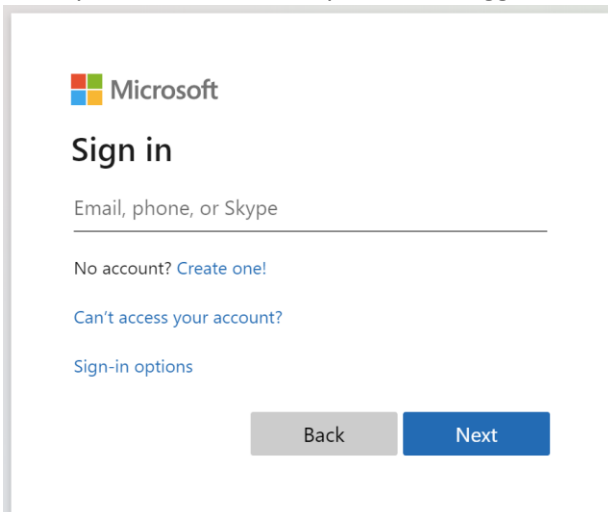
If an organization is using Microsoft Account (MSA) it is possible to associate the entire Tenant to the MatchWare Account to make it easier to associate new users to the same Account.

Steps:

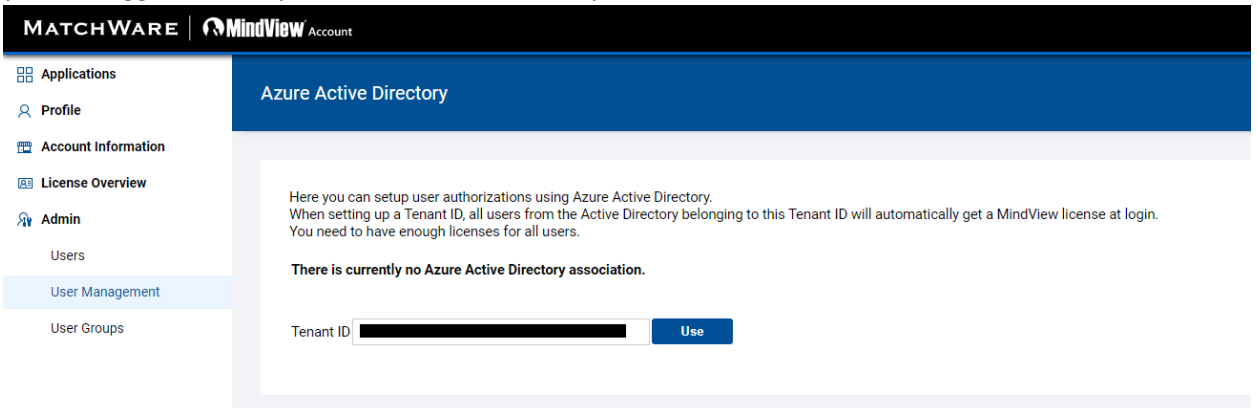
1. Login with your Microsoft Account by clicking the Microsoft Login icon.



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.



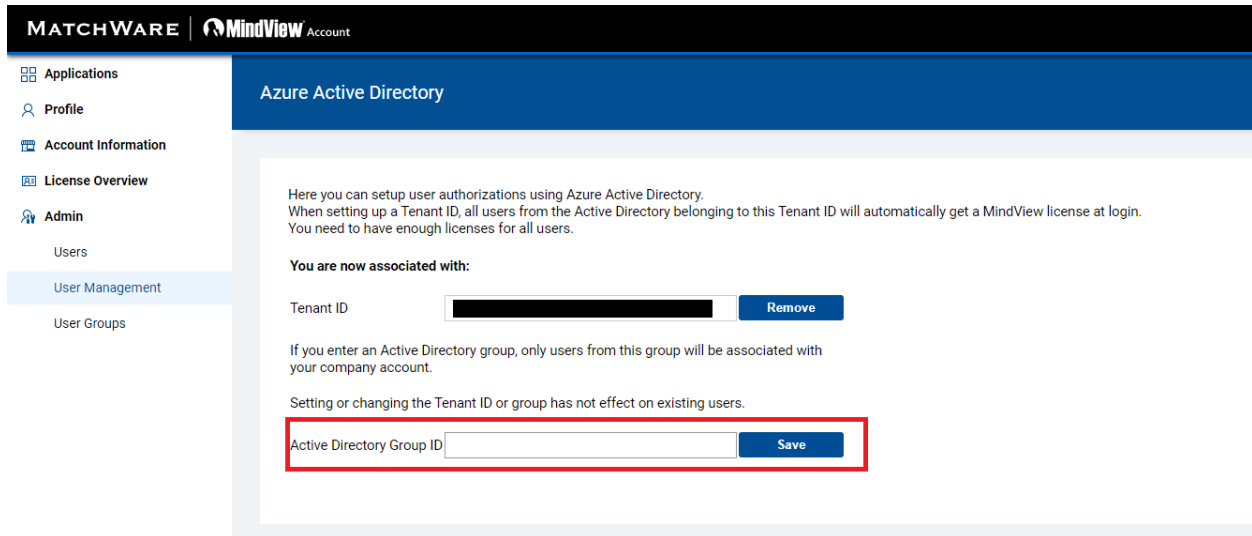
4. Click "Use" to associate the Tenant ID with the MatchWare Account.

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.



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).

6. Inviting users via third party authorization

It is possible to 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 you can associate a service once logged in.

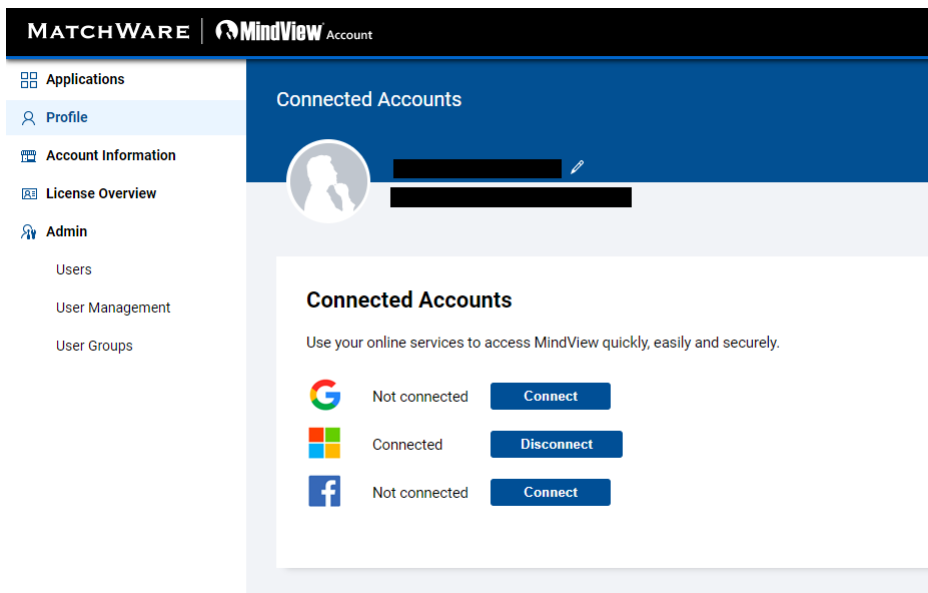
Select the external login provider when logging in or when signing up for a trial.



OR associate an external login provider with your existing login.

Steps:

1. Go to "Profile" -> "Connected Accounts".



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