

ADMIN TRAINING

Manage Users For Search, E-Submit or both in CAS Account

Search 2.0 was automatically added for all users in your organization with the role of Admin. As an Administrator of your organization's account, you'll be responsible for managing existing users and adding new users. Please follow the steps below to manage new and existing user permissions as needed. Log onto your account [HERE](#).

Page 1 - 2 Existing Users

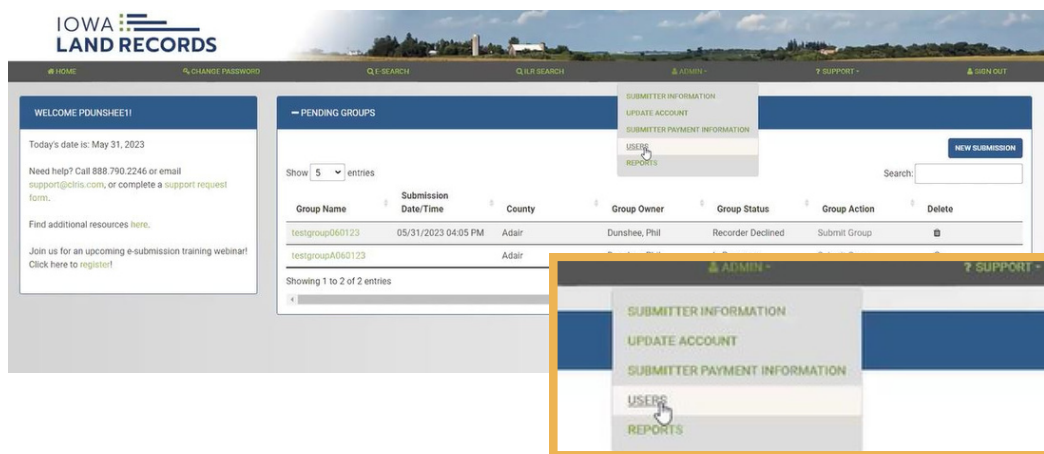
Page 3 - 6 New Users

1

-Login

-Click ADMIN

-Select USERS

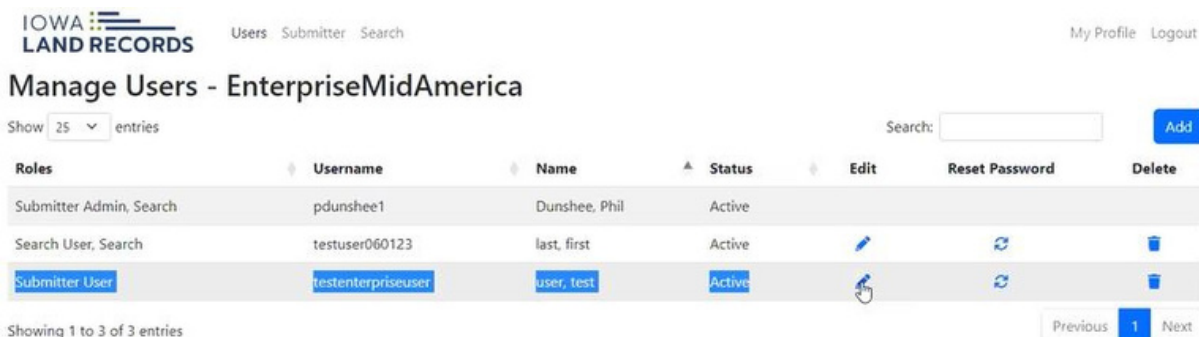


2

EXISTING E-SUBMISSION-ONLY USERS

-Select Existing User

To add the Search 2.0 feature to any other existing E-Submission user, simply edit the user and check the "Enable Search" box. After access has been added, please provide the user with the instructions on how to navigate between Search and Submit using a single login.



(CONTINUE TO STEP 3)

ADMIN TRAINING

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--CONTINUED-- "EXISTING E-SUBMISSION-ONLY USERS"

3

-Select "ENABLE SEARCH"

-Click "SUBMIT"

IOWA LAND RECORDS Users Submitter Search My Profile Logout

Edit User - testenterpriseuser

First Name: test ✓

Last Name: user ✓

Email Address: phil@clris.com ✓

Phone Number: ✓ Ext: ✓

Roles: Submitter User ✓

Enable Search

ESubmission Attributes

By default, use party name information from the first document for all subsequent documents in a group?

Cancel Submit

END

Roles	Username	Name	Status
Submitter User Search	testenterpriseuser	user, test	Active

SUCCESS!
Search permissions have been added!



EXISTING SEARCH-ONLY USERS

-Add As A NEW USER

-See "NEW USER" instructions on next page

If you have users in your organization that had been logging into the legacy search application, please add them as a new user following the steps on **PAGE 3-6** for New Users. NOTE: You can still restrict these users to the Search 2.0 application only.

(CONTINUE TO ADD NEW USERS)

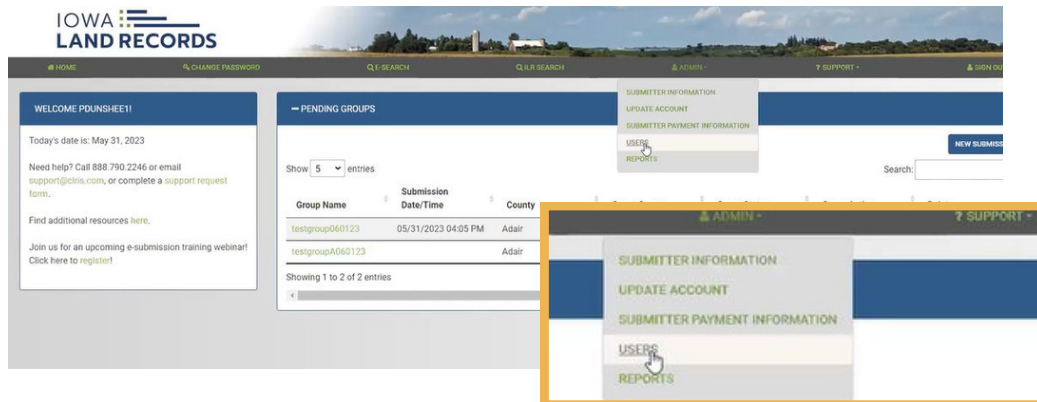
ADMIN TRAINING

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NEW USERS

1

- Login
- Click ADMIN
- Select USERS



2

ADDING NEW USERS

If you need to add new users for E-Submission and/or Search 2.0, please follow these steps:

- Create USERNAME



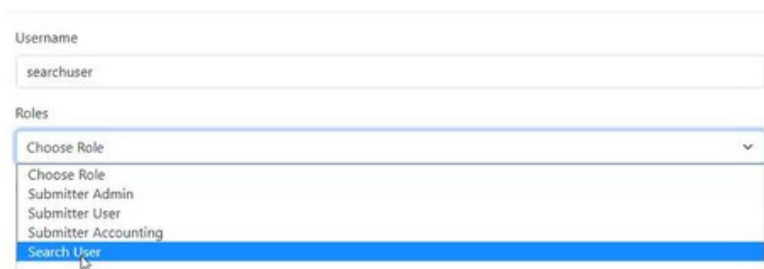
- Keep track of it for user

3

CHOOSE A ROLE

Add User

- Select ROLE from drop down menu



(CONTINUE TO NEXT STEP)

ADMIN TRAINING

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--CONTINUED-- "NEW USERS"

3

CHOOSE A ROLE - continued

Username
searchuser

Roles
Choose Role
Submitter Admin
Submitter User
Submitter Accounting
Search User

ROLES DEFINED:

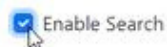
- **Submitter Admin:** can work with submissions, run reports, manage payment information and add/edit/remove users
- **Submitter User:** can only work with submissions
- **Accounting:** can only view reports and manage payment information
- **Search User:** can only search records (no submissions)

(optional examples)

Scenario 1

User ONLY needs access to SEARCH

- Select **SEARCH USER**
- Check "Enable Search"



Scenario 2

User needs access to SEARCH & E-SUBMISSION

- Select **SUBMITTER USER**

-Check "Enable Search" below the role

Enable Search
First Name
first
Last Name

(CONTINUE TO STEP 4)

ADMIN TRAINING

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--CONTINUED-- "NEW USERS"

4

ENTER USER INFORMATION

-Enter all other
USER INFO



Username
searchuser

Roles
Search User

Enable Search

First Name
first

Last Name
last

Email Address
support@clris.com

Phone Number
5555551212 Ext

ESubmission Attributes
 By default, use party name information from the first document for all subsequent documents in a group?

5

CREATE A STRONG PASSWORD

-Create
PASSWORD

-Keep track of
it for user

-Click SUBMIT

Cancel Submit

Password
.....

Confirm Password
.....

Good

- Upper Case
- Lower Case
- Number
- Special (\$@!%*?&#_) or spaces
- No invalid characters
- Length (14 to 50)

PASSWORD REQUIREMENTS:

- Upper Case
- Lower Case
- Number
- Special (\$@!%*?&#_) or spaces
- No invalid characters
- Length (14 to 50 characters)

(CONTINUE TO STEP 6)

ADMIN TRAINING

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--CONTINUED-- "NEW USERS"

6

SHARE INFO & INSTRUCT USER TO LOGIN

-NEW USER Information

1. username
2. temporary password
3. login URL
<https://iowalandrecords.org/cas/login>

Example message:

You have been added to the organization's Iowa Land Records account to search for records. Please see your temporary login information below, login and update your password.

(insert info here)

-Status of NEW USER will appear as "PENDING" until they access their account for the first time

END

USER LOGIN SUCCESSFUL, STATUS IS ACTIVE

CONTACT SUPPORT

(888)790-2246

support@clris.com

<https://iowalandrecords.org/contact>

SEARCH & SUBMIT LOGIN PAGE

<https://iowalandrecords.org/cas/login>

(END)