External Users

Overview

In this document, we'll be looking at External Users in CMPOnline. External Users are a specific type of user in CMPOnline, with defined privileges that limit their access to editing and viewing information in CMPOnline. External Users are typically categorized as Clients, Outside Counsel, or any other individual that may need to view case files directly.

Accessing External User Settings

- Navigate to Administration > Security > Users and select the External option at the top of the screen.
- Select the user you wish to access, then either double click or click Edit.
- The User Category allows you to select whether the user is a Client or Outside Counsel.
- Once the User Category is selected, you may select from the drop down menu to the right of the user category, labeled Client if client is the selected user category or Local Counsel if Local Counsel is selected, the corresponding client or outside counsel. This determines which case files the user is able to access once they are logged in.
- The general section includes basic information, including:
  - User Name
  - First Name
  - Middle Name
  - Last Name
  - Email Address
  - 2FA Cell Phone Number
- Below are further configurations including:
  - Time Zone
  - User Group

Logging in as an External User

- Navigate to the URL provided to you by your case manager.
- Log in using the username provided to you.
- Enter your password if you have already set one. If you have not already set a password, please click the Forgot Password button to set your password for your account.

Questions?

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