

How to Manage User Licenses for Employee Transitions

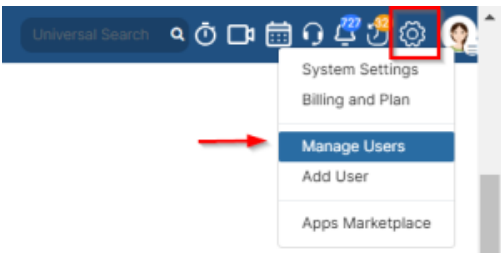
Objectives:

- Replace the user's license with a new user

Steps:

When you purchase a specific number of licenses for products (either Core or Contra) and an employee using one of the licenses leaves the company during the subscription period, you can still utilize the same license for any new joiner. To do this, you must first deactivate the account of the previous user and add the new user's account.

Begin by navigating to the "Manage Users" page. From the top right corner of the screen click on the **Settings icon Manage Users**



Next to the user's name, click on the actions and select **"Activate/Deactivate"**

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Create

Universal Search

Settings / Search Users / Add User

The number of licenses purchased for "Core" is (10) and the number of licenses used is (10)
The number of licenses purchased for "Contra" is (10) and the number of licenses used is (10)

Customer Number : 7691

Users

Search

Advanced Search

Actions

ID	First Name	Last Name	Email	User Code	User Group	Status	Type	Seniority level	Teams	Lawyer?	User Directory	De
U24	Training	Lexzur	traininglexzur@gmail.com	UC24	Administrator	Active	Both	Lawyers		No	Local Directory	
U23	Maria	Dave	marial.zeldan@lexzur.com	UC23	Administrator	Active	Both	Lawyers		No	Local Directory	
U18	Jimmy	Peterson	omran.hariri@app4legal.com	UC18	Administrator	Active	Both	Lawyers	Corporate Team	No	Local Directory	
U8	James	Marven	elise.khoury@lexzur.com	James UC8	Administrator	Active	Both	Lawyers	M&A	No	Local Directory	
U6	Alice	Jones	JonesAAlice21@gmail.com	UC6	Administrator	Active	Both	Lawyers	Contract Team, Corporate Team	No	Local Directory	
	Micheal	Cavino	MichealCavin@outlook.com	UC5	associate	Active	Both	Consultants	Corporate Team	No	Local Directory	
	Sam	Marven	carolinemraved@outlook.com	UC4	User	Active	Both	Lawyers	Litigation Team	No	Local Directory	
	Maysa	Hakim	carolinemraved@gmail.com	UC3	Accountant	Active	Both	Lawyers		No	Local Directory	
	Aleen	Peterson	mravedcroline2@gmail.com	UC2	Administrator	Active	Both	Lawyers	Procurement Team	No	Local Directory	
	Carolina	Robinson	caroline.morad@lexzur.com	UC1	Administrator	Active	Both	Senior Associates	M&A, Contract Team, Procurement Team, Corporate Team	No	Local Directory	

Once deactivated, you will notice a decrease in used licenses indicated at the top of the page, showing the total number of purchased and used licenses for both core and contra products.

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Settings / Search Users / Add User

The number of licenses purchased for "Core" is (10) and the number of licenses used is (9)
The number of licenses purchased for "Contra" is (10) and the number of licenses used is (9)

Customer Number : 7691

Users

Search

Advanced Search

ID	First Name	Last Name	Email	User Code	User Group	Status	Type	Seniority level	Teams	Lawyer?	Us
U24	Training	Lexzur	traininglexzur@gmail.com	UC24	Administrator	Active	Both	Lawyers		No	Local Directory
U23	Marla	Dave	maral.zeldan@lexzur.com	UC23	Administrator	Active	Both	Lawyers		No	Local Directory
U18	Jimmy	Peterson	omran.hariri@app4legal.com	UC18	Administrator	Active	Both	Lawyers	Corporate Team	No	Local Directory
U8	James	Marven	elise.khoury@lexzur.com	James UC8	Administrator	Active	Both	Lawyers	M&A	No	Local Directory
U5	Michael	Cavino	MichaelCavino@outlook.com	UC5	associate	Active	Both	Consultants	Corporate Team	No	Local Directory
U4	Sam	Marven	carolinemraved@outlook.com	UC4	User	Active	Both	Lawyers	Litigation Team	No	Local Directory
U3	Maysa	Hakim	carolinemraved@gmail.com	UC3	Accountant	Active	Both	Lawyers		No	Local Directory
U2	Aleen	Peterson	mravedcroline2@gmail.com	UC2	Administrator	Active	Both	Lawyers	Procurement Team	No	Local Directory
U1	Carolina	Robinson	caroline.moraod@lexzur.com	UC1	Administrator	Active	Both	Senior Associates	M&A, Contract Team, Procurement Team, Corporate Team	No	Local Directory

Actions

- Add User
- Export to Excel
- Import Users from "Azure AD"
- Add User

The licenses are calculated based on the number of active users.

You can then add a new user with new credentials for the new employee without making changes to the old user's account or affecting the existing data.

Adding a new user is straightforward. Click on the actions to add a new user, fill in the necessary information, and save.

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Settings / Search Users / Add User

The number of licenses purchased for "Core" is (10) and the number of licenses used is (9)
The number of licenses purchased for "Contra" is (10) and the number of licenses used is (9)

Status: Active

Basic Information Personal Information Address Comments

First Name* Adam

User Code* UC25

Password*

Access type* ☒ Core ☒ Contra

Save

Last Name* Christopher

Email* ademchristopherr@gmail.com

User Group* User

Seniority level* Associates

The new user can now access and use the system normally, and you'll observe that the remaining license is now assigned to the newly added user.

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Settings / Search Users / Edit User

The number of licenses purchased for "Core" is (10) and the number of licenses used is (10)
The number of licenses purchased for "Contra" is (10) and the number of licenses used is (10)

Status: Active

Basic Information Personal Information Address Comments

First Name* Adam

User Code* UC25

Password* Confirm Password

Access type* ☒ Core ☒ Contra

Save Clone

Last Name* Christopher

Email* ademchristopherr@gmail.com

User Group* User

Seniority level* Associates

Success
User "Adam Christopher" Saved Successfully

It's important to note that deactivating a user doesn't mean deleting the account. You can still find it under the list of deactivated users. Click on **"Advanced Search"** and filter by status **"inactive"** to access the list of all deactivated accounts.

The number of licenses purchased for "Core" is (10) and the number of licenses used is (10)
The number of licenses purchased for "Contra" is (10) and the number of licenses used is (10)

Customer Number : 7691

Search Users Filters

First Name	contains		Last Name	contains	
Email	Equal				
User Code	Equal		User Group	Equal	Select
Status	Equal	Inactive	Ban Reason	contains	
Seniority level	Equal	Select	Teams	=	All
Is Lawyer	Equal	either	User Directory	Equal	
Department	Equal		Position	Equal	
Phone	Equal		Mobile	Equal	
Foreign First Name	contains		Foreign Last Name	contains	
Group Description	contains		Type	contains	

More Filters Criteria (35)Reset **Submit**[\[Hide\]](#)

Users

Search

Advanced Search

Here, you can reactivate and manage them as needed.

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Settings / Search Users / Add User

The number of licenses purchased for "Core" is (10) and the number of licenses used is (10)
The number of licenses purchased for "Contra" is (10) and the number of licenses used is (10)

Customer Number : 7691

Users

Search [Advanced Search](#) [Actions](#)

ID	First Name	Last Name	Email	User Code	User Group	Status	Type	Seniority level	Teams	Lawyer?	User Directory	De
 View / Edit Activate / Deactivate Permissions List	Alice	Jones	JonesAAlice21@gmail.com	UC6	Administrator	Inactive	Both	Lawyers	Contract Team, Corporate Team	No	Local Directory	

Furthermore, all work related to the deactivated user will remain visible in the system. You won't lose any data, as the system will display an "(inactive)" message next to their name on all matters, cases, contracts, and any other items in the system they were assigned to or contributed to.

Corporate Matters

All

Save as

1 - 50 of 158 items

Search

Advanced

Columns

<input type="checkbox"/>	ID	Practice Area	Assignee	Name	Arrival Date	Client Name	Workflow Status	Requested by	Assigned Team	Important Development
<input type="checkbox"/>	M00000304	Civil	Carolina Robinson	legal opinion for BLP	2023-10-17	BLPC	In Progress		All Teams	[2023-10-17 11:25:06]: legal docs a
<input type="checkbox"/>	M00000299	Legal opinion	Carolina Robinson	Legal Opinion on Service Agreement	2023-10-11	Mesfin	In Progress	App4Legal -	All Teams	
<input type="checkbox"/>	M00000295	Legal opinion	Jimmy Peterson	Legal Opinion on Service Agreement	2023-09-18	Damac Properties	Pending	Elise Khoury	All Teams	
<input type="checkbox"/>	M00000294	Legal Opinion- اشتراط	Carolina Robinson	Legal Opinion on Service Agreement	2023-07-04		In Progress	Elise Khoury	All Teams	[2023-09-14 10:42:14]:here are the
<input type="checkbox"/>	M00000293	Agreement	Alice Jones (Inactive)	Risk Manag. Operational Readiness	2023-09-14	BLP industry	1-Review		All Teams	
<input type="checkbox"/>	M00000290	Civil	Carolina Robinson	PIRONOI	2023-09-08	Maria Smith	Closed	Adam Christopher	All Teams	[2023-09-08 10:20:43]: we finalize.
<input type="checkbox"/>	M00000288	Legal opinion	James Marven	Legal opinion	2023-08-31	LNP	Open	Jim Bats	All Teams	
<input type="checkbox"/>	M00000287	Legal opinion	Carolina Robinson	Legal Opinion on Service Agreement	2023-07-04	BLP industry	Closed	Elise Khoury	All Teams	[2023-09-08 13:51:31]:converted to
<input type="checkbox"/>	M00000285	Banking & finance	James Marven	Legal Advice for Banking Issue	2023-08-23	Maria Smith	2-In Progress		All Teams	
<input type="checkbox"/>	M00000284	Legal opinion	Carolina Robinson	Legal Opinion on Service Agreement	2023-07-04	BLP industry	In Progress	Elise Khoury	All Teams	
<input type="checkbox"/>	M00000279	Consultation		POA Review for BLP	2023-08-21		Open	Micheal Cavin	Corporate Team	
<input type="checkbox"/>	M00000276	Consultation	Alice Jones (Inactive)	Administrative Consultation for Albert	2023-08-16	ABC Services	Under Review	Adam Christopher	Corporate Team	
<input type="checkbox"/>	M00000271	Administrative	Alvah Zarzour (Inactive)	Administrative Matter	2023-08-02	ABC Services	Open		All Teams	
<input type="checkbox"/>	M00000270	Legal opinion	James Marven	Legal opinion for SLC	2023-08-02		Open		All Teams	
<input type="checkbox"/>	M00000265	Consultation	Jimmy Peterson	Legal Risk Assessment Finance	2023-07-26	BLP industry	In Progress	Adam Christopher	All Teams	

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!