

# IMM eSign Cloud

## Managing Microsoft Azure Users

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### Introduction

This guide will help you manage users in your Microsoft Azure Directory Portal.

This guide will review:

- Microsoft Azure User Directory Roles
- How to create a user
- How to elevate a typical user to a Limited Administrator User
- How to delete a user

Please review the following video for more information about the above Microsoft Azure settings. Refer to [IMM eSign Cloud Azure Training](#).

### User Directory Roles

- **Global Administrator (GA):** GA user has full control and can manage all aspects of the Azure Active Directory Portal.
- **Limited Administrator (LA):** LA users are password and user administrators. A password administrator can reset passwords for a non-administrator/regular user, can manage all aspects of users and groups and can reset passwords for other Limited Administrators.
- **User:** User has no administrative control.

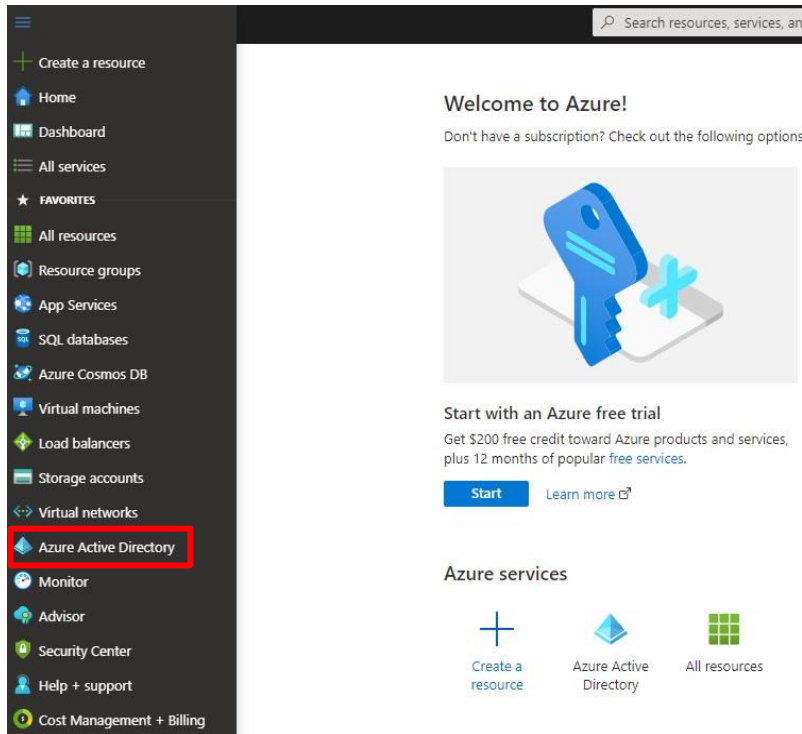
**Note:** Each person at your financial institution that will be processing documents in IMM eSign will need a Microsoft Azure account.

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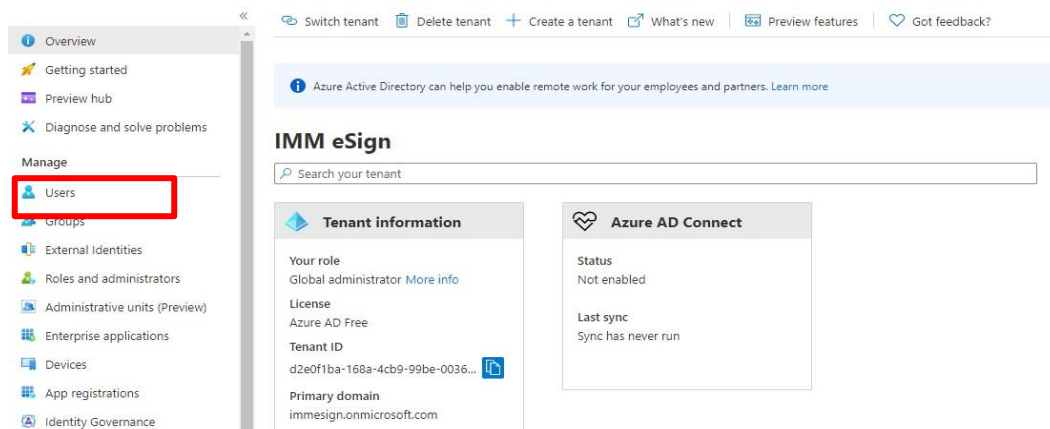
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### How to Create a User

- Navigate to <https://portal.azure.com> and login with your Azure credentials.



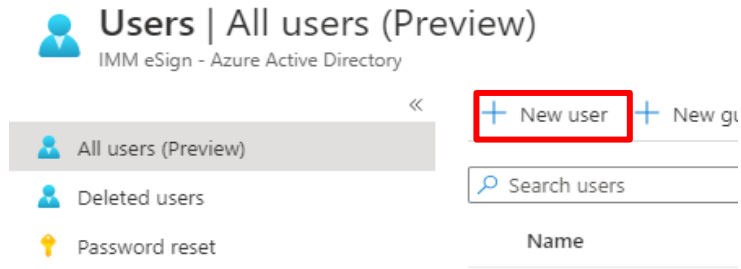
- Click on “Users”



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- Click on “New User”



- Fill out “Name” and “Username.” Ensure the “Directory Role” is set to User. Then, click “create” at the bottom of the screen.

### New user

IMM eSign

[Got feedback?](#)

**Create user**  
Create a new user in your organization. This user will have a user name like `alice@immesign.onmicrosoft.com`.  
[I want to create users in bulk](#)

**Invite user**  
Invite a new guest user to collaborate with your organization. The user will be emailed an invitation they can accept in order to begin collaborating.  
[I want to invite guest users in bulk](#)

[Help me decide](#)

#### Identity

@

#### Groups and roles

Groups 0 groups selected

Roles User

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- Click “Show Password.” Make a note/save this password as you will need to share this password with the User. The User will be prompted to use this password during the initial login process.

**Note:** If you forget to copy this password, the Global Administrator or Limited Administrator can click on this User on the “Users-All users” page and reset the password.

## Password

- Auto-generate password
- Let me create the password

Initial password

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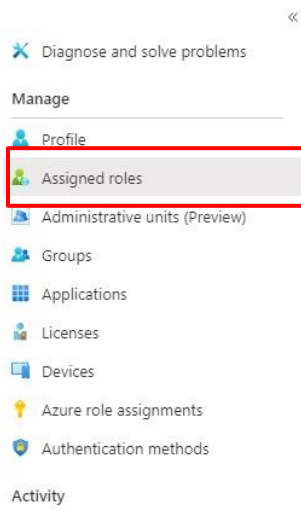
Show Password

## How to Elevate a User to Limited Administrator

- Click on the user name on the “Users-All Users” page that you wish to elevate to a Limited Administrator role.

Home > IMM eSign > **Users | All users (Preview)** >

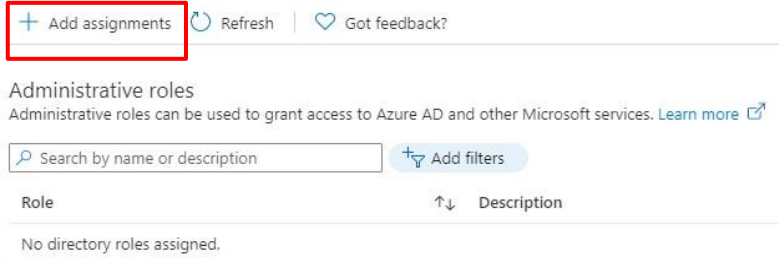
- Once you have clicked on the user that you want to promote to Limited Administrator. Click “Assigned Roles.”



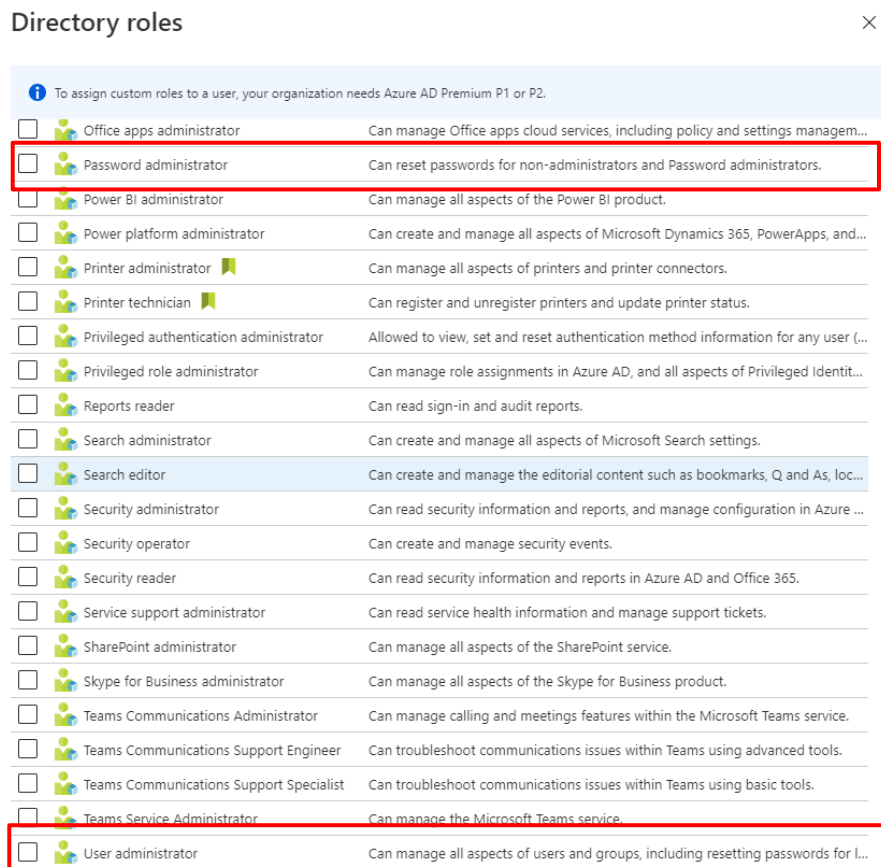
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- Click “Add Assignments”



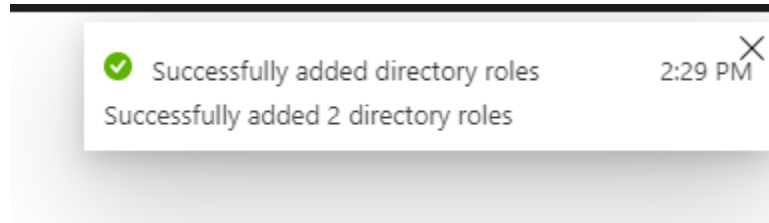
- You will see a list of Director roles on the below screen. In order to elevate the user to Limited Administrator, you will need to select “Password administrator” and “User administrator.” In order to elevate the user to Global Administrator – select Global Administrator only. Then click “Add” at the bottom of the screen.



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## Managing Microsoft Azure Users

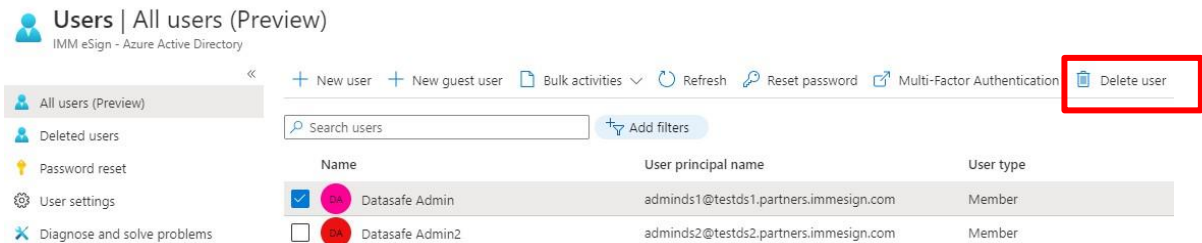
- You will then see the below screen which will confirm you have successfully added the necessary directory roles in order to make the user a Limited Administrator.



Role	Description	Resource Name
User administrator	Can manage all aspects of users and groups, including resetting passwords for limited admins.	Directory
Password administrator	Can reset passwords for non-administrators and Password administrators.	Directory

### How to Delete a User

- Navigate to the “Users-All users” page and select the User you want to delete. Click “Delete User.”



- A screen will populate and ask you “Delete selected users?” Click “Yes.”
- You will see the below screen which will confirm you have successfully deleted the User.