

iTWOcx – Retire (Remove) Users from a Company

Retiring a User / Company them from the project instance. Associated contact information will be retained meaning a user / Company may be reinstated at a later date if required.

1. On the Project Toolbar, click **Contacts**.



2. Search by **Company** or **Role**. Once located, click the contact **Display Name**.

Contacts

Find a project contact by filtering on a column. You can also filter the list by company or role.

Group by

A-Z **COMPANY** ▼ ROLE ▼

Photo	Display Name	Email	Phone	Title	Status	Admin
	Eddie Low	edmund.holo@icloud.com			ACTIVE	COMPAN
	Test2 User	abe@mirvac.com		Tester	NOT VERIFIED	
Avadis Architects (All CNS staff)						
	Andrew Axham	andrew.axham@mailinator.com			ACTIVE	
	Architect User	Architect.User@mailinator.com			ACTIVE	
	George Green	rosey00002134@mail.com			NOT VERIFIED	

The **Contact Detail** screen is displayed.

3. Click **Retire**.

Contact Detail

basic info

Anna Amante Training Manager Staff
 amarante@mirvac.com
 Level 2B, 200 George St, Sydney, NSW, 2000

PROJECT ADMIN

POSTAL ADDRESS Level 2B, 200 George St, Sydney, NSW, 2000
 PHONE +61 2 9080 8000
 FAX
 ADMINISTRATOR CA Project Admin
 Register Admin
 Correspondence Admin
 Config Admin
 Contacts Admin

Rename Restrict **Retire** History Save

4. From the Retire User screen, complete the following fields:

- a. Select one of the three options from the **Please select an option to proceed dropdown**:
 - Retire from only this project
 - Retire from all projects where the current [XXX] project was the template
 - Retire from all projects where I am an Admin
- b. **Change The Ownership = Yes**
- c. Select the **Company** from the dropdown
- d. Select the new user from the list
- e. Click **OK**
- f. **Remove User from Groups = Yes**

ITWOcx - Select Consultant - Goo... - [X]

mirvac.itwoocx.com/cxR/cx.aspx?page=cons...

Select Contact

ArchWorld (AWC) [c]

James Brown (AWC-JB)
 John Architecture (AWC-JA)
 Rosie Neal (AWC-RN)
 Sam Smith (AWC-SS) [d]

Cancel OK [e]

Retire User

Once the user is Retired, they will no longer be able to Log in to the Project and will no longer be displayed in the Address Book

Name: Sam Smith (AWC-SS)

Company: ArchWorld

Please select an option to proceed

Retire from only this project [a]

Select project(s)

Change The Ownership

This user is the author, and is in the action / info, of a number of Forms. Do you wish to change the ownership of all forms where the user is either the author/action/ info to another user after retiring them?

Yes [b]

AWC-RR [c]

Select forms to update

All forms [d]

Remove user from Groups

Would you like to remove this user from User Groups they are currently in for the projects selected above

Yes [f]

Cancel Retire User

5. Click **Retire User**.