

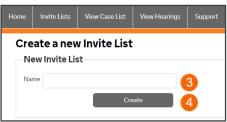
How to create and share an invite list

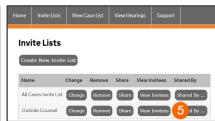
There are two methods for inviting participants to a case; both can be found under the **People** tab. To gain access to a case, you must be invited by the case creator or a current user who has **Invite People** permission. An individual user can be invited to a case via the **Invite New Participant** option. A group of users can be granted access to a case simultaneously via the **Invite A List** option. To grant access to a group of users, you must first pick from a pre-existing list or define a new list.

Create a List

To grant access to a group of users, you must first pick from a pre-existing list or define a new list. Create a new list and view existing lists from the **Invite Lists** tab on your top menu. Select **Create a New Invite List**, name your list and select **Create**. Your new list will appear on the **Invite List** page. From here, you will need to define your users—select **View Invitees**.







Select, **Add New Invitee** and enter the details for the user you wish to include on the list. Select **Add**. Continue with this process until you have entered your entire list. You can edit your list by selecting **Change** or **Remove**.







Share an Invite List

Once a list is created, you can share it with other users who will need the list for their cases. Select the **Share** button next to your Invite list. Enter the usernames of the people you want to share the list with. You can share a list with up to five users—select **Share**.





