Updating the Owner of a Document in Customer Connect (CC)

Changing a PDF's Owner

In Customer Connect (CC) when you upload a new document, you are automatically added as the owner of the document. However, if a document changes ownership, you will need to change the owner of the document on CC. Without this change, the new owner will not have permission to make changes to or upload their PDFs in CC. Keep in mind that only CC admins can change this and give the new owner permission. If you do not see the Owner text box, go to the How to Add the Owner Text Box if it is Missing in CC section below to learn how to get CC admin access. If you do have CC admin access, follow the steps below to change the owner of a document.

- 1. Navigate to the document you want to change ownership of.
- 2. Press the Actions dropdown, then select Edit.



a. Note that the **Actions** button is currently hidden. If you hover over the blank space above Statistics, the button will appear and you can complete this step.



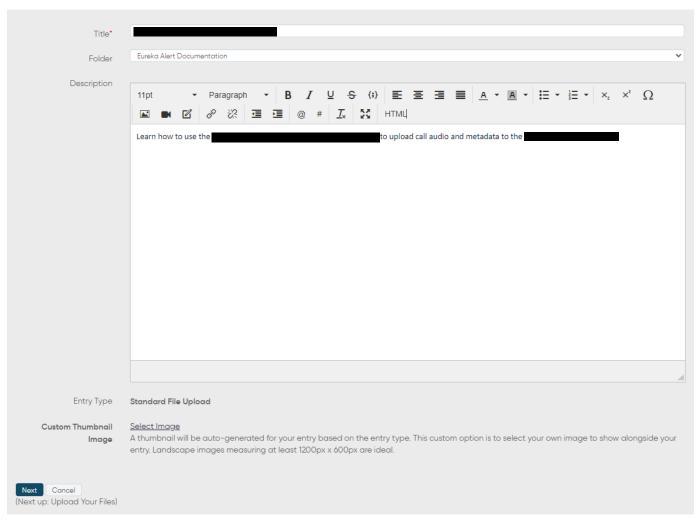
3. On the next screen, you will see the Owner text box for your document.



6. Press Next, and then press Finish. You've successfully changed the owner of the document.

How to Add the Owner Text Box if it is Missing in CC

If you do not have the *Owner* text box when you look at a PDF in CC like in the following image, you do not have the correct admin access in CC. You can still upload a PDF if someone else makes you the owner of a document, but you will not be able to change ownership of a document.

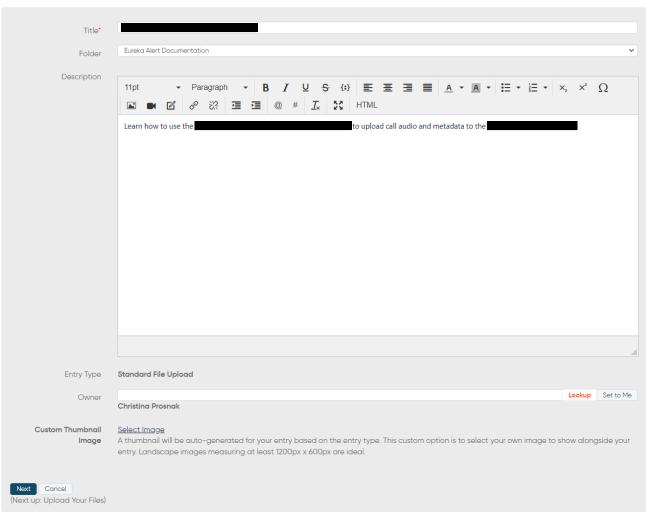


To gain admin access, you will need to do the following:

- 1. Email the Marketing team at MarketingTeam@callminer.com to ask for someone who has access to CC, such as the Customer Marketing Manager.
- 2. Once you have found the correct contact, ask them to create a support ticket to make you an admin of the Tech Doc community within CC.
- 3. Once you are added as an admin, you should see the Owner text box when you upload a document to CC.

Add to a Library





4. Once you see the *Owner* text box, you can change the owner of any of your documents.