

Adding & Managing Users Manual

This manual is designed to help you through the process of adding, managing and removing users from the system.



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NOTE: Access to the Administration tab and the administration of users is permission-based.

Creating a New User

1. Select the 'Administration' tab (see Figure 1 below)
2. Select 'Users'

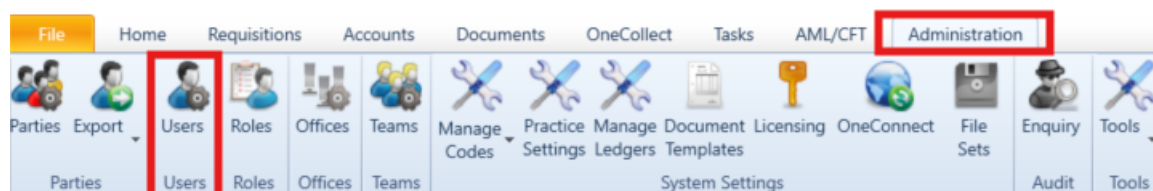


Figure 1.

Active Users are displayed in the top section, Inactive Users are hidden but can be accessed using the dropdown in the bottom right-hand corner (see Figure 2 below).

Initials	Full Name	Office	Job Title	Main Email Address	Main Phone Number	Default Time Rate	Budget
BC	Bex Craig	Office	Head of Shenanigans	b.craig@clarkecooperlaw.co.nz		\$440.00	
BF	Bex Falconer	Office	Person of Interest	bex@clarkecooperlaw.co.nz		\$400.00	
BK	Bob Knight	Office	Developer	bob@clarkecooperlaw.co.nz			
CD	Caleb Davies	Office	IT	c.davies@clarkecooperlaw.co.nz			
CS	Caio Souza	Office	The Latin American IT dude	c.souza@clarkecooperlaw.co.nz	021 145 3672	\$400.00	
DAB	Daniel Boyle	Office	Solicitor	d.boyle@clarkecooperlaw.co.nz		\$400.00	
DB	Dale Burton	Office	HighLordOverseer	dale@clarkecooperlaw.co.nz			\$22,000.00
DC	David Cooper	Office	Partner	david@clarkecooperlaw.co.nz			
DM	Danie Meissel	Office	OneAuthor	d.meissel@clarkecooperlaw.co.nz			
EJG	EJ Gray	Office	Dream Catcher	ej.gray@clarkecooperlaw.co.nz		\$400.00	
HC	Hannah Christie	Office	OneAuthor Co-Ordinator	H.Christie@ClarkeCooperLaw.co.nz		\$350.00	\$25,000.00
HJB	Harry Hazza	Office	Chief	Phillipa@clarkecooper.co.nz			
IAD	Isabel Aimee Duncan	Office	Secretary	isabel@clarkecooperlaw.co.nz		\$360.00	
JH	James Hendrix	Office	Lead	james@clarkecooperlaw.co.nz		\$350.00	
JLS	Jackson Liam Grant Smith	Office	General Manager	jenny@clarkecooperlaw.co.nz		\$300.00	
JMC	Jo Maree Cleminson	Office	Support Manager	jo@clarkecooperlaw.co.nz		\$220.00	\$15,000.00
JVC	John Clarke	Office	Partner	john@clarkecooperlaw.co.nz			
MAA	Marcus	Office	Solicitor	Marcus@clarkecooperlaw.co.nz			
MC	Mark Conant	Office	Lawyer	Mark@clarkecooperlaw.co.nz	22 609 7091	\$300.00	
MM	Marky Mark	Office	Solicitor	MarkyMark@Clarkecooperlaw.co.nz		\$375.00	
NB	Nadine Banfield	Office	QA	nadine@clarkecooperlaw.co.nz		\$800.00	
PB	xPhillipa Brothersx	Office	Trainer	philippa@clarkecooperlaw.co.nz		\$350.00	
RB	Rob Nob Bob	Office	Serf	Rob@clarkecooperlaw.co.nz	022 609 7091	\$200.00	
RBC	Robert The Bruce	Office	Solicitor	Rob.Bruce@clarkecooperlaw.co.nz			
RBR	Rupert Bear	Office	Solicitor	rbr@clarkecooperlaw.co.nz			
RS	Robyn Smillie	Office	OneLaw	robyn.smillie@clarkecooperlaw.co.n		\$300.00	
SCM	Sandy Carol Murray	Office	IT	scott@clarkecooperlaw.co.nz			
SMD	Sam Mark Dunn	Office	IT	stephanie@clarkecooperlaw.co.nz			
SR	Sally Rossiter	Office	OneAuthor Manager	sally@clarkecooperlaw.co.nz	03-339 5032	\$200.00	
TEH	Tracey Elizabeth Hadwin	Office	Accounts Manager	tracey@clarkecooperlaw.co.nz	03-339 5032	\$400.00	\$37,000.00
TH	Tom Holland	Office	PA	tom@clarkecooperlaw.co.nz		\$300.00	
TR	Tim Recorder	Office	TimeKeeper	Tim@clarkecooperlaw.co.nz		\$430.00	
WIP Wj	WIP Write Off Author	Office	WIP W/O	wip@clarkecooperlaw.co.nz			

Figure 2.

3. Click the green plus to add a new user (see Figure 4 below)
4. Full Name – this name will appear on documents
5. File As – will populate automatically using the tab key
6. Initial – type in name initials
NOTE: Users can't have the same initials/username as another user - the following message will appear (see Figure 3 below)

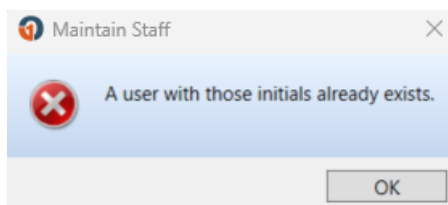


Figure 3.

7. Job Title – this will appear on documents
8. Active – this will automatically be ticked on
9. Office – select the appropriate office (if there is only one Office set up, this will be the default)
10. User Name – same as name initials
11. Roles - select the role/s for the user

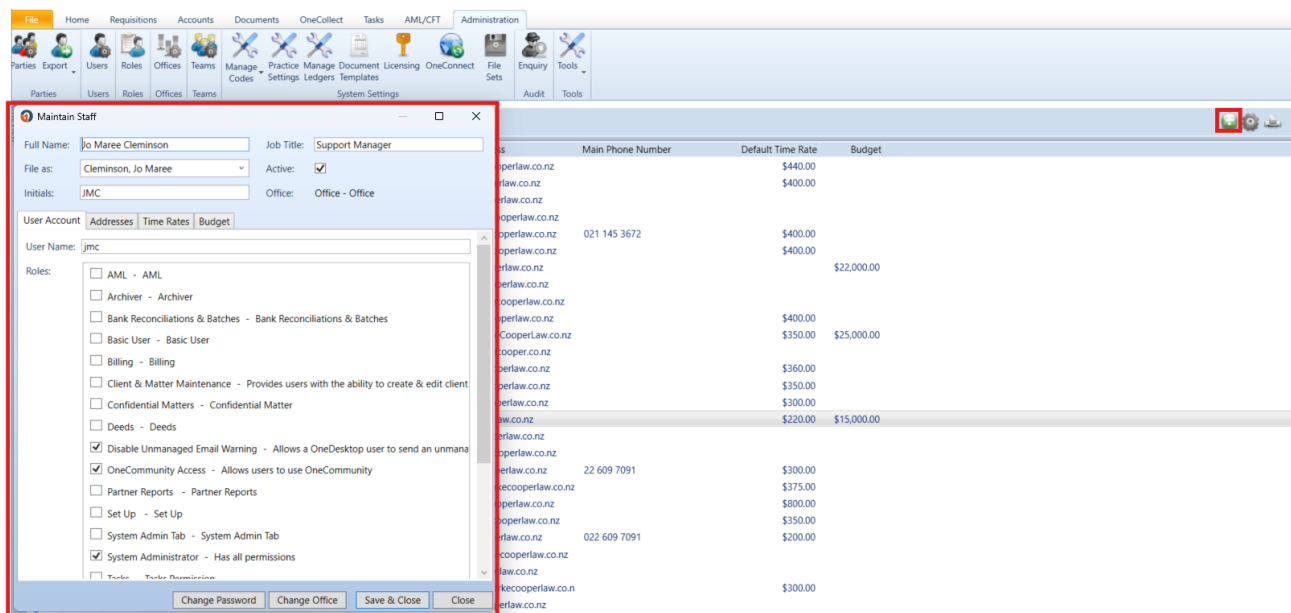


Figure 4.

Adding Addresses

1. Click the green plus to add addresses (see Figure 5 below)
2. Address – can be a home address for your records only
3. Phone Number – direct dial can be added to documents
4. Email – can be added to documents, please ensure this is correct or the user cannot log in (ensure 'Main Email' is ticked on)

Maintain Staff

Full Name: Jo Maree Cleminson Job Title: Support Manager

File as: Cleminson, Jo Maree Active:

Initials: JMC Office: Office - Office

User Account **Addresses** Time Rates Budget

Addresses + -

Phone Numbers + -

DDI (NZ) 03-359 4919

Emails + -

Email jo@clarkecooperlaw.co.nz

Change Password Change Office Save & Close Close

Figure 5.

Time Rates

Double-click on the rate to add/edit the current time rates or click on the cog icon (see Figure 6 below).

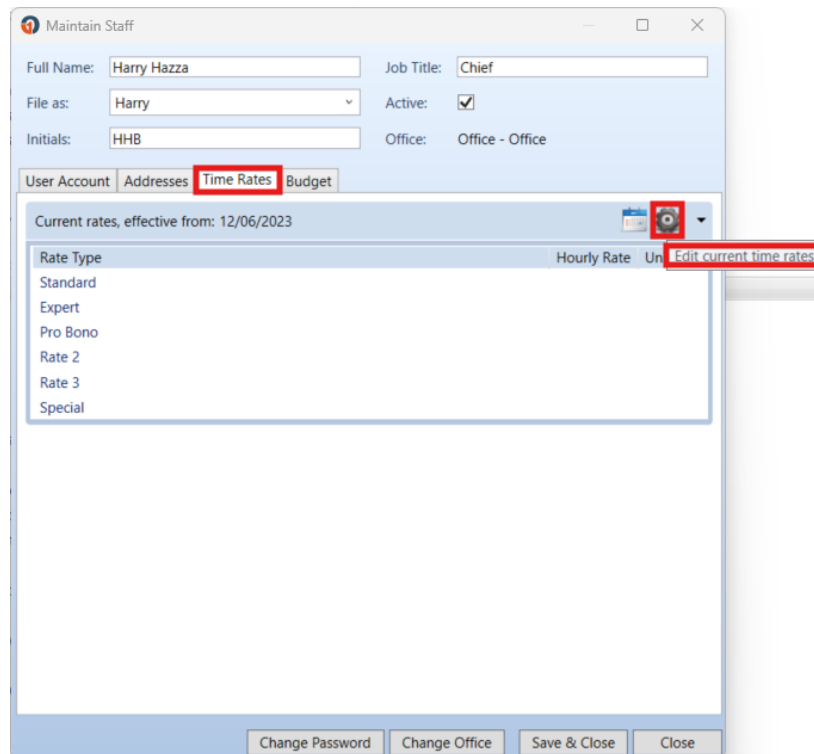


Figure 6.

Choose the date the time rates are to be effective. Type in the Hourly Rate. The Unit Rate will be automatically calculated from this – each user should have a Standard rate, all other rates are optional (NOTE: firms customise their own rates) – click 'OK' (See Figure 7 below).

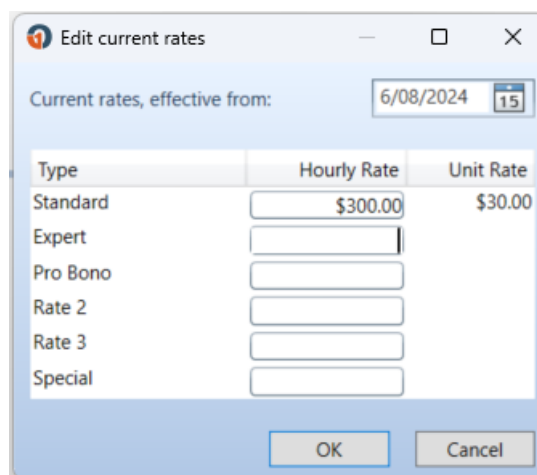


Figure 7.

A warning message will appear as below (Figure 8), even if you choose today's date, click 'Yes.'

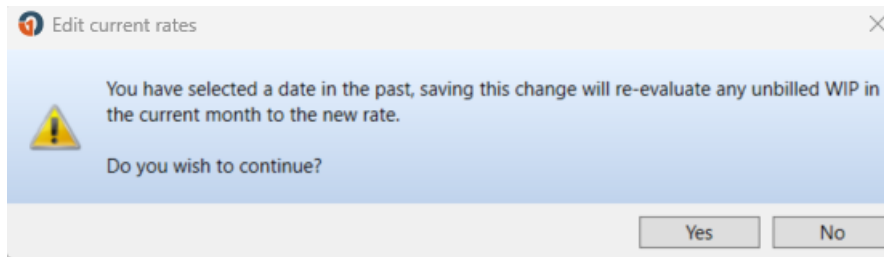


Figure 8.

If setting up a user that will start (say) next week, use the calendar icon to set Time Rates instead (see Figure 9 below).

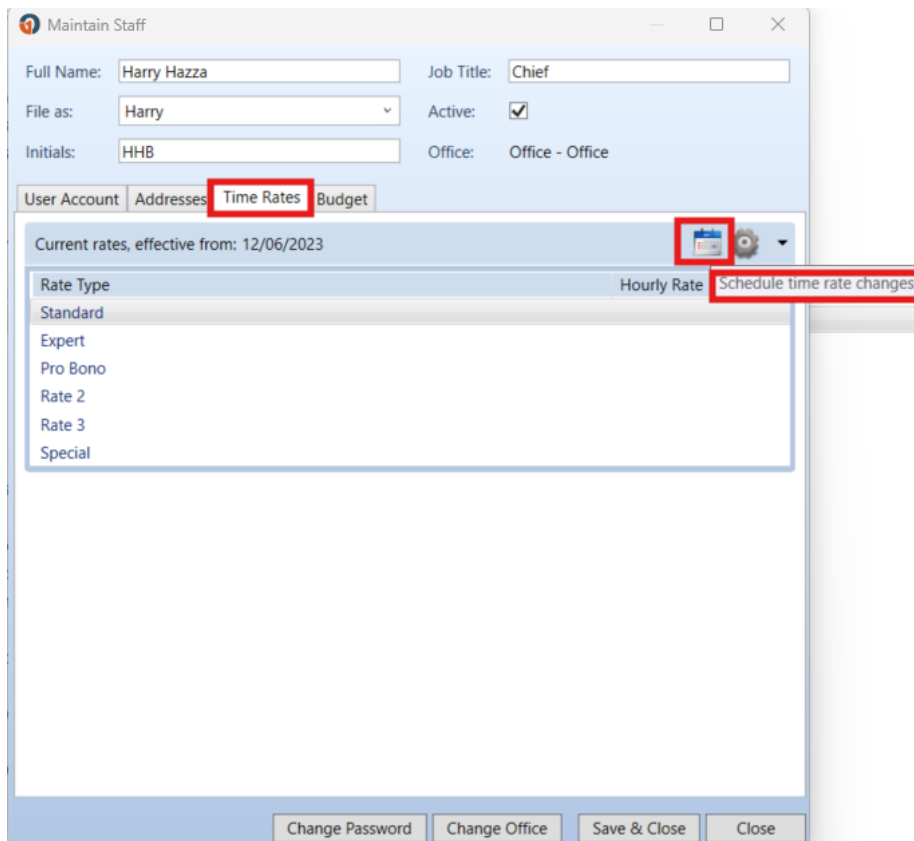


Figure 9.

Select the date, add hourly rates as above and click 'OK' (see Figure 10 below).

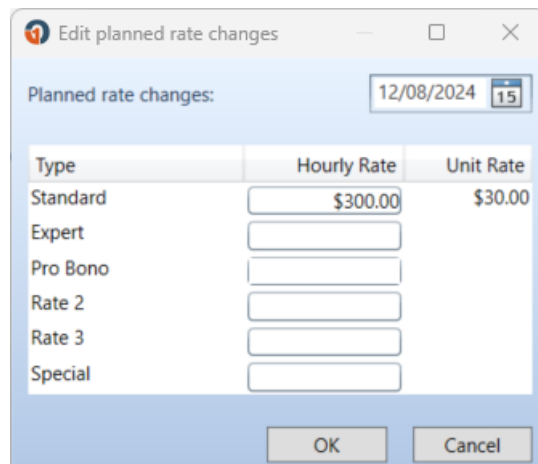


Figure 10.

TIP: Use this option near the beginning of the new calendar year to ensure that time rate changes take place seamlessly.

The Rate types are set in the Administration Tab > Manage Codes > Time Rate Types (see Figure 11 below).

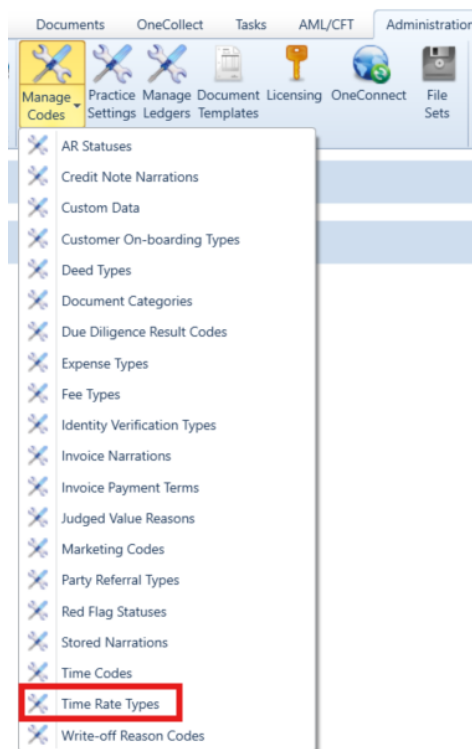


Figure 11.

Budget

1. Select the green plus to add (see Figure 12 below)
2. Select the month and the year
3. Time – monthly hours
4. Fees – monthly fees
5. Save & Next to add next month
6. Figures will carry over, make changes as necessary
7. Select 'Save & Close' when finished

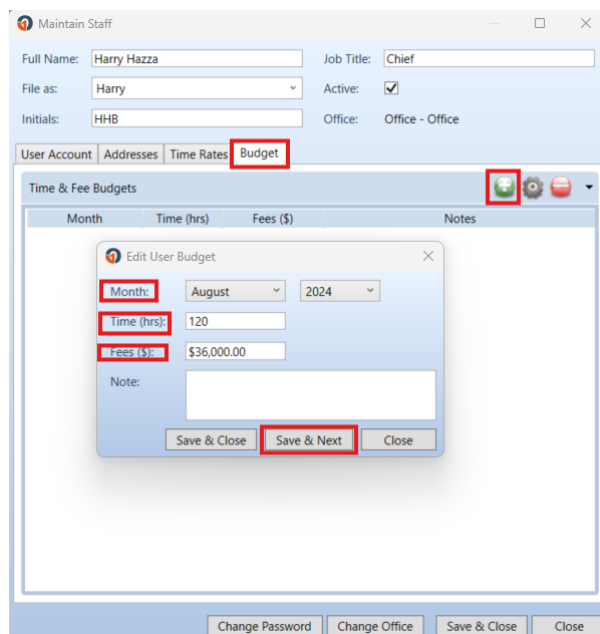


Figure 12.

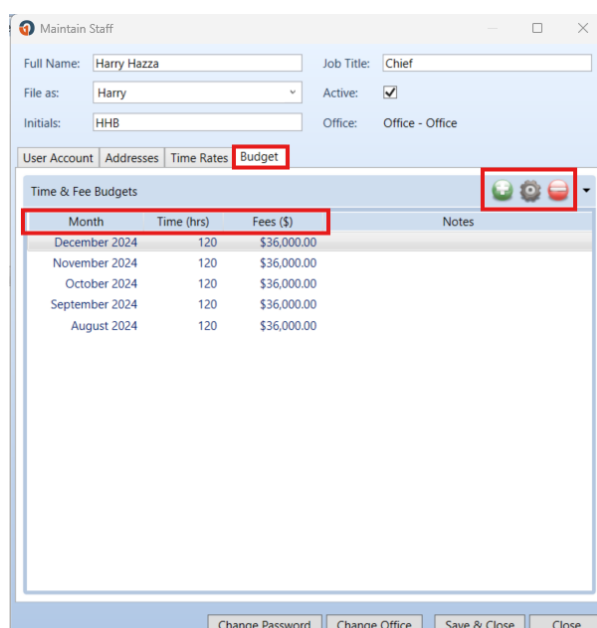


Figure 13.

Save & Close

If no email address for the user has been added, the following message will appear upon Save & Close (see Figure 14 below). Select 'Yes' to continue editing and add the user's email in the address tab.

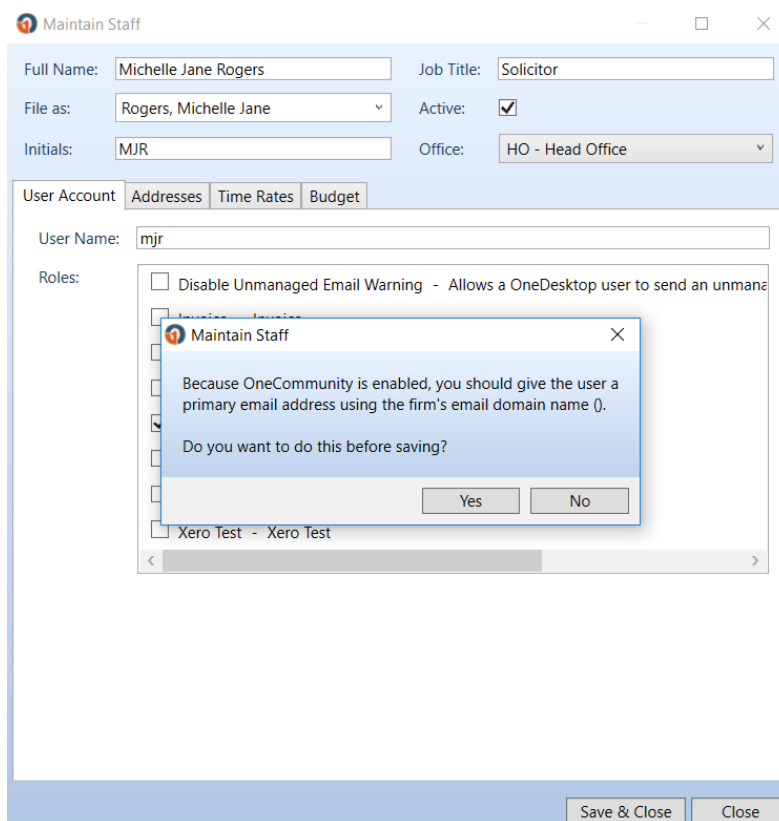


Figure 14.

On-premise clients will be prompted to set the login password for the user (see Figure 15 below). Please make a note of this password.

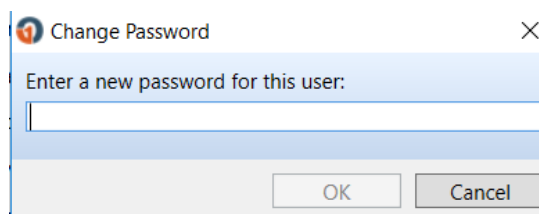


Figure 15.

The user's login for OnePractice is the User Name (usually initials) and the password you have set (see Figure 16 below).

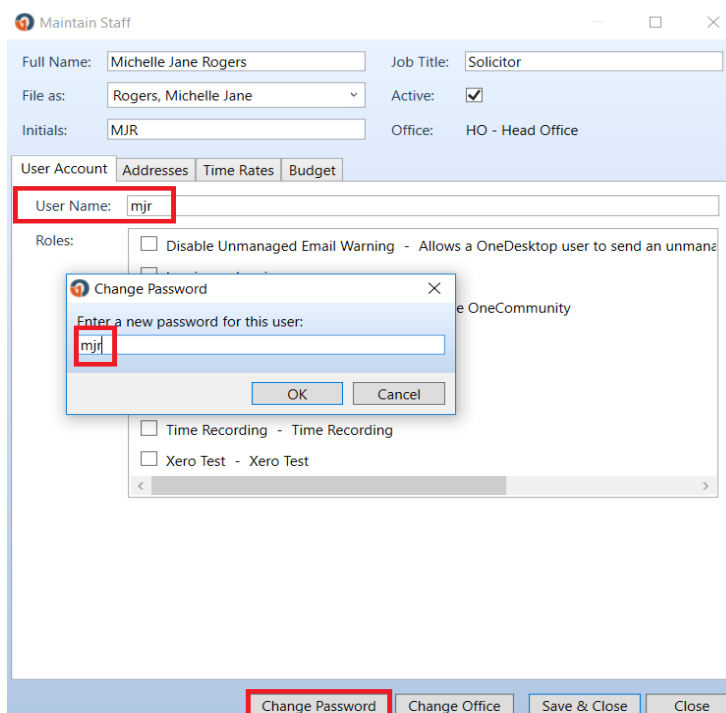


Figure 16.

Cloud clients will be presented with the following message (see Figure 17 below).

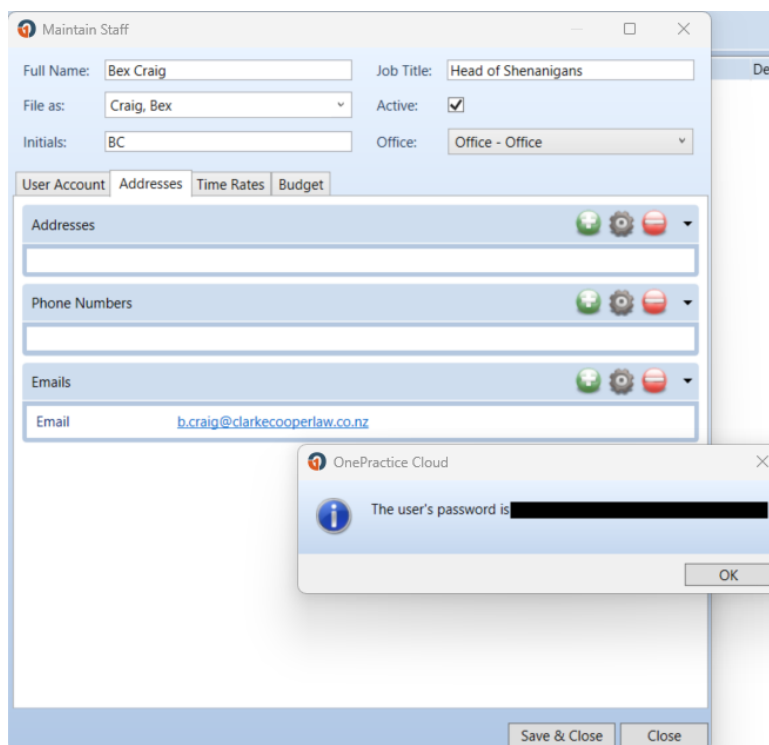


Figure 17.

NOTE: Please record the password given before clicking 'OK' as the new user will require this password to log in for the first time. The user can change the password after the first login.

Change User Password

On-premise Clients

Go to the Administration Tab > Users (see Figure 18 below).
 Double click on 'User' to open and edit, click 'Change Password'

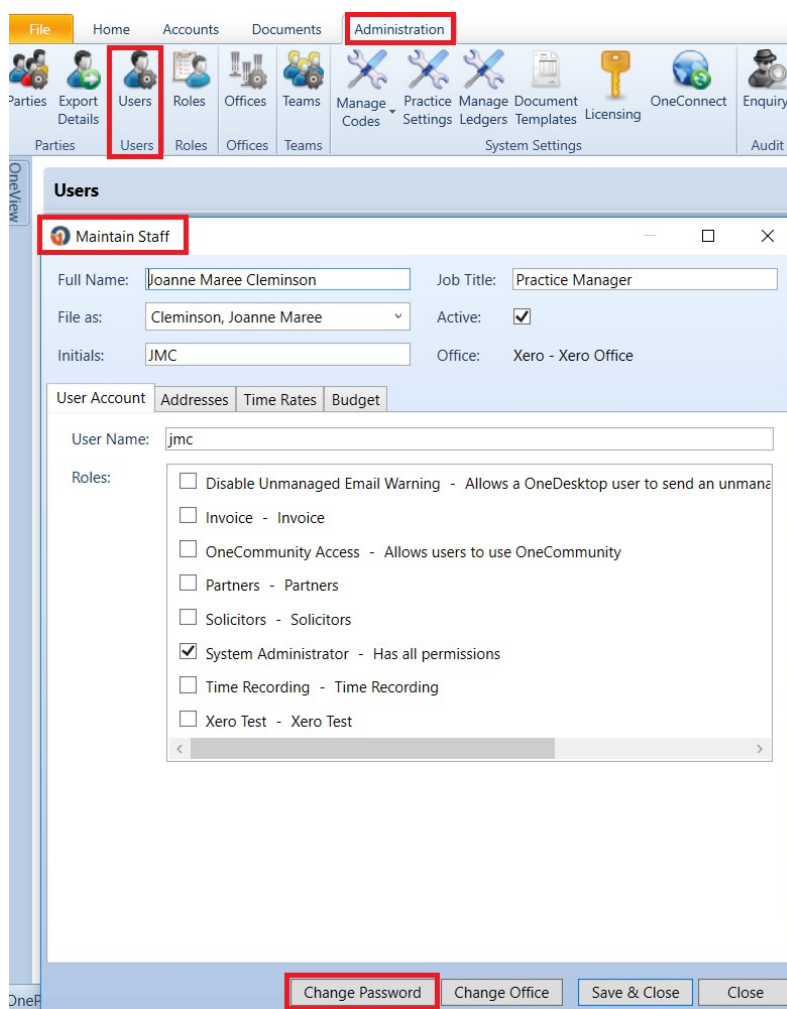


Figure 18.

Cloud Clients

Only the user can change their password, as the passwords are not held in the Administration Tab. To do this go to File > Account > Change Password and follow the steps (see Figure 19 below).

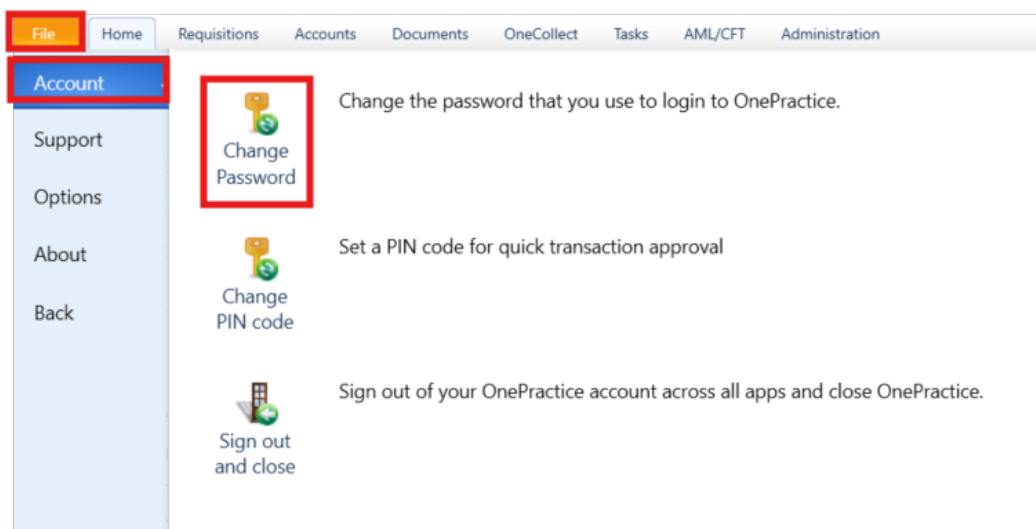


Figure 19.

Removing a User/Staff Member

Make a user Inactive so the login can't be used.

1. Go to the Administration Tab > Users (see Figure 20 below)
2. Select user – double click or click on grey cog
3. Untick the Active box
4. Save & Close

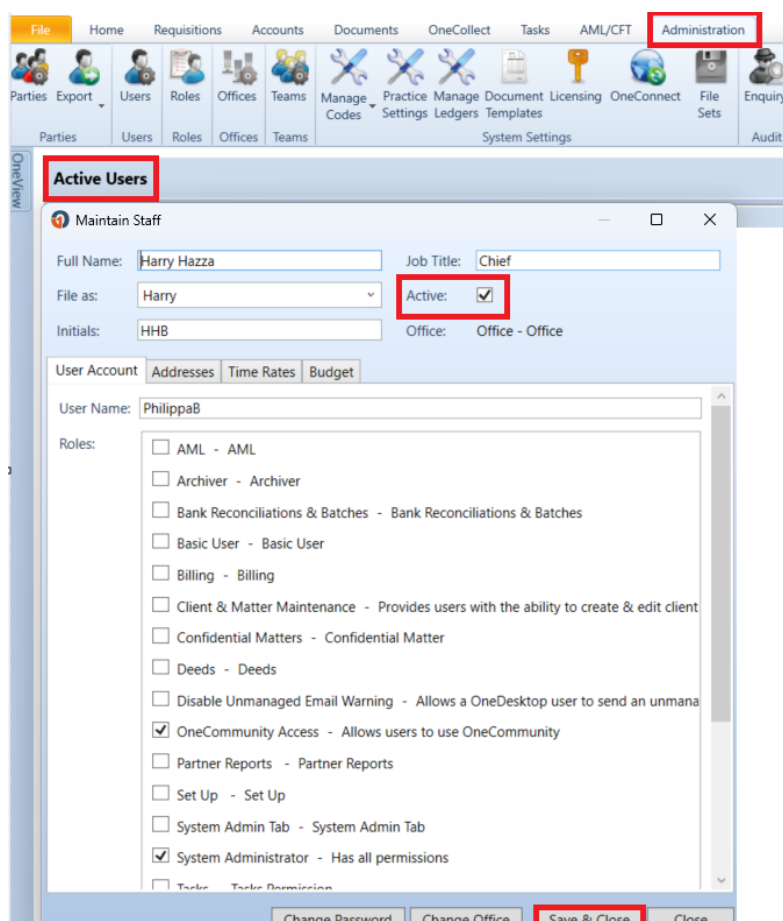


Figure 20.

Creating a New Role

Go to the Administration Tab > Roles (see Figure 21 below).

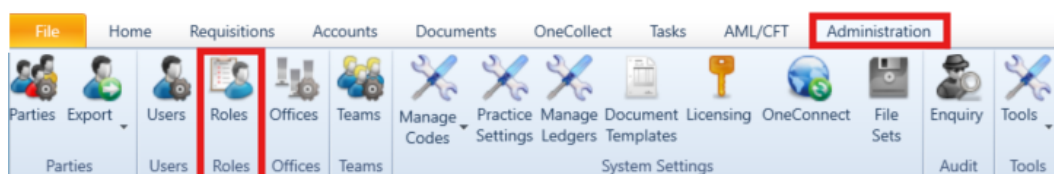


Figure 21.

1. Click the green plus (see Figure 22 below)
2. Name the new role and add a description
3. Click 'Choose Permissions'

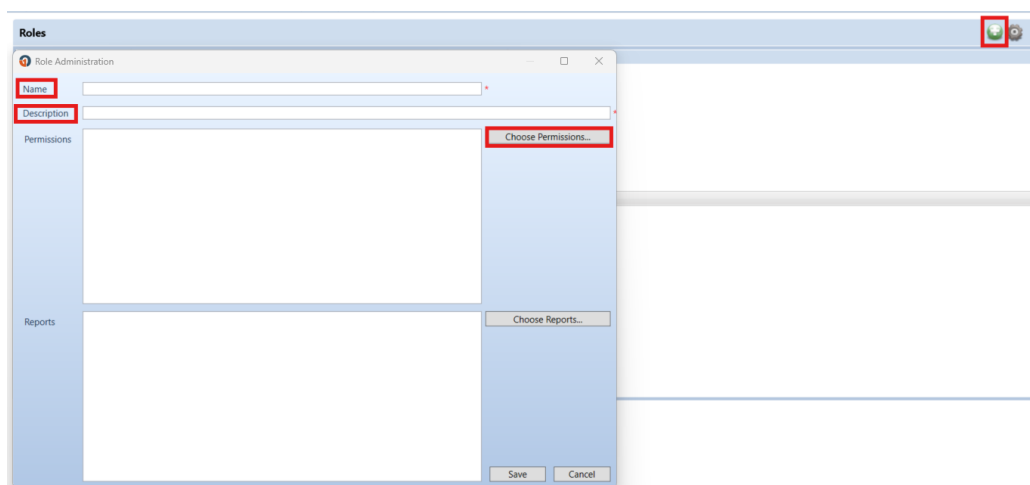


Figure 22.

4. Set role permissions by ticking on the appropriate boxes in the Role Permissions list, then click 'OK' (see Figure 23 below)

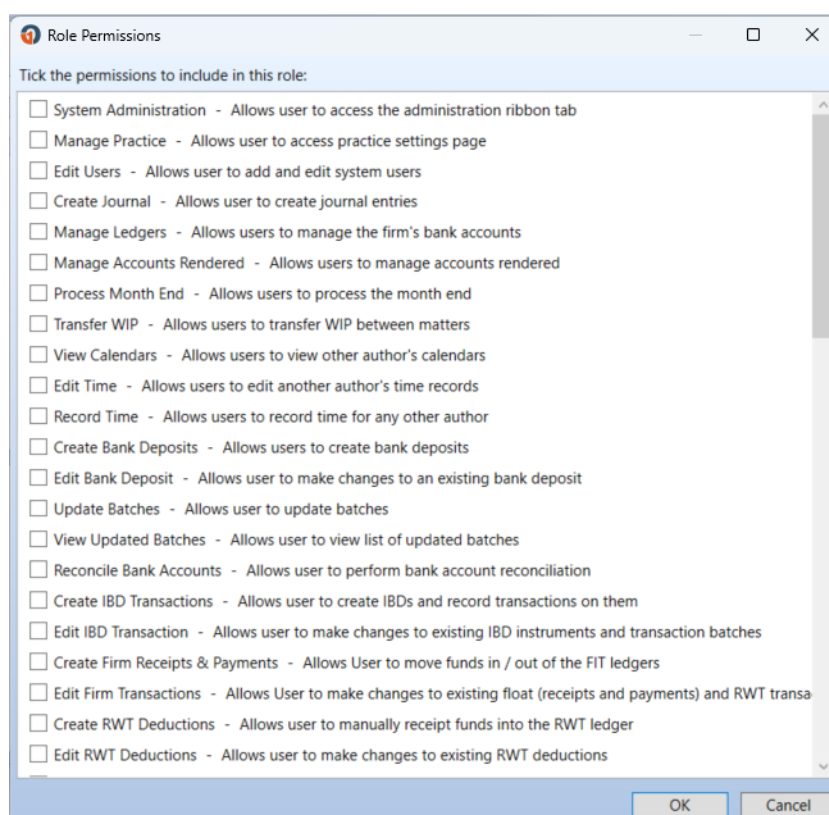


Figure 23.

5. Click 'Choose Reports' (see Figure 24 below)

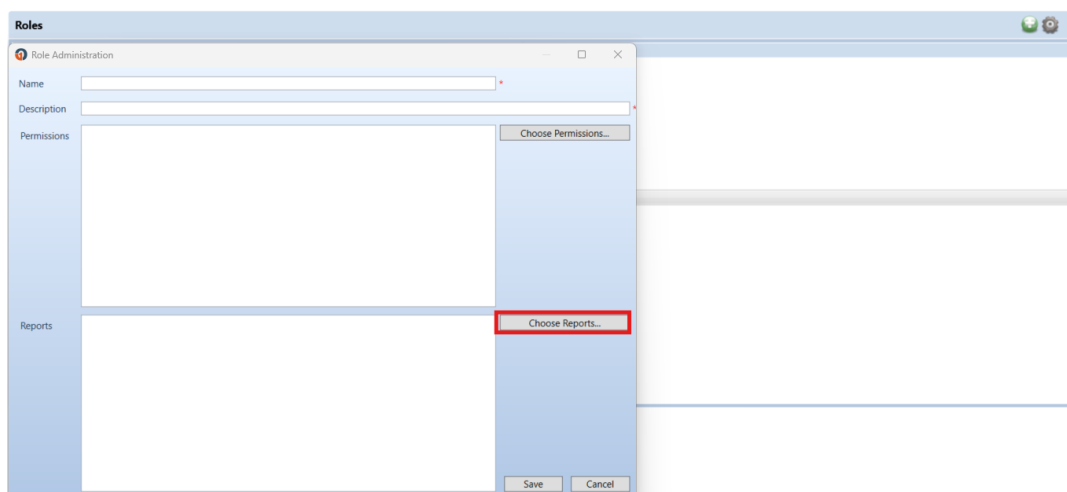


Figure 24.

6. Tick the reports to include in this role and click 'OK' (see Figure 25 below)

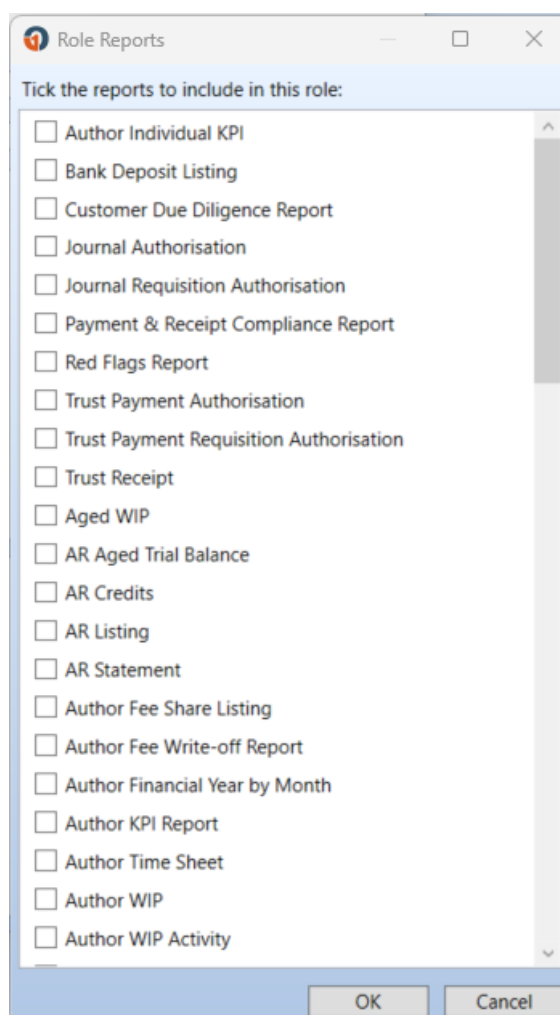


Figure 25.

Edit a Role or Check Permissions/Reports

1. Go to the Administration tab > Roles (see Figure 26 below)
2. Click 'Roles' and double click or click on the grey cog
3. Check permissions and reports, click 'Choose Permissions' or 'Choose Reports' to edit

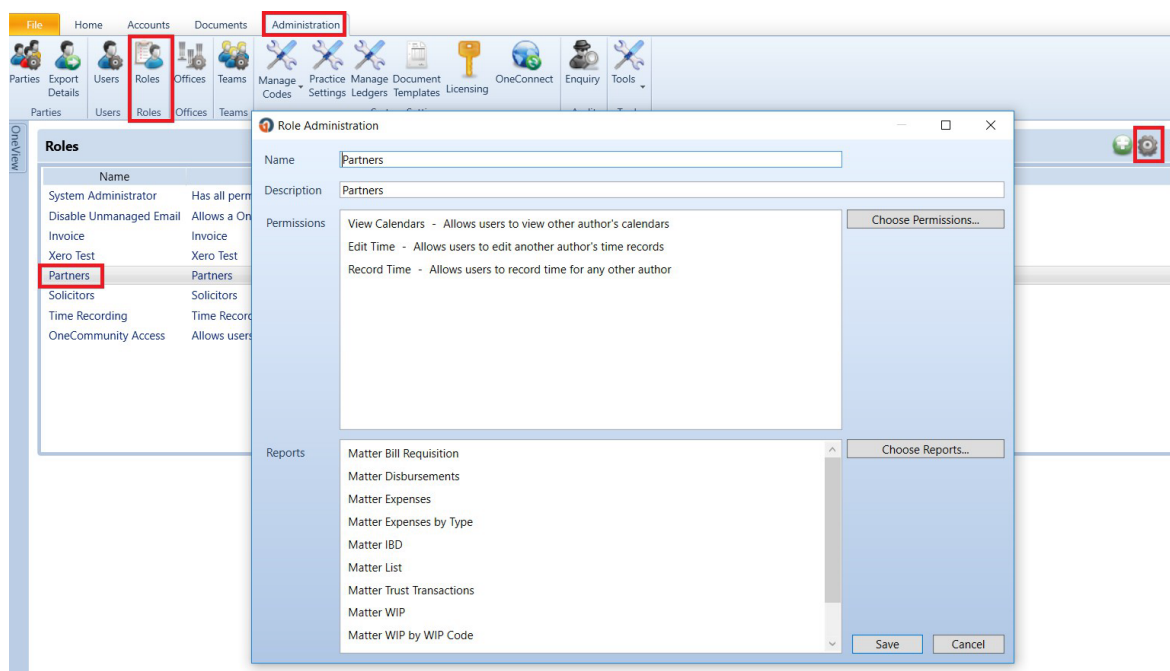


Figure 26.