Bellefield

User Management
For iTimeKeep

User Management Guide - Version 1.0

Table of Contents

INTRODUCTION

We have created this guide to assist you in managing your iTimeKeep users. If you have any questions or experience any issues please do not hesitate to contact us as support@bellefield.com

Before using or installing this product please read the license agreement. By installing or using this software you are agreeing to all of its terms. If you do not agree to be bound by the terms of the agreement please do not install or use the software.

ADDING AND REMOVING USERS

You can add and remove iTimeKeep users at any time. The most important thing to remember is that for a user to have access to your Time and Billing System it needs to be registered and authorized in two separate locations:

1) In Bellefield Connect's local registry of users
2) In Bellefield's Portal at http://portal.bellefield.com

Important: if a user is not authorized on BOTH locations she will not be able to access your Time and Billing System. It does not matter in which order you register the user, but the user must be authorized on BOTH locations.

The next two sections explain how to add and remove users in each of the two locations indicated above.

MANAGING BELLEFIELD CONNECT USERS

This section explains how to manage the local registry of authorizes users. To learn how to manage the users registered in the Bellefield User Portal please check the next section in this guide.

Bellefield Connect for iTimeKeep includes an easy-to-use configuration wizard, which will guide you through the steps necessary to get up and running. This configuration utility is called "iTimeKeepConfiguration.exe" and you can find it in the installation folder. Alternatively, there should also be an icon on your desktop that you can use to run the configuration utility. NOTE: for additional details about the configuration wizard please check the main Bellefield Connect installation guide.

Important: The configuration utility must be run with administrator privileges. Please right-click on it and select "Run as Administrator".

Important: Only iTimeKeep administrators can successfully run Bellefield Connect for iTimeKeep. This guide assumes the reader is the firm's iTimeKeep administrator. If this is not the case please contact your iTimeKeep administrator and ask them to follow the steps in this guide.

The main screen simply displays the current status of your connection. To manage users simply click the "Configure" button, which will start the configuration wizard:
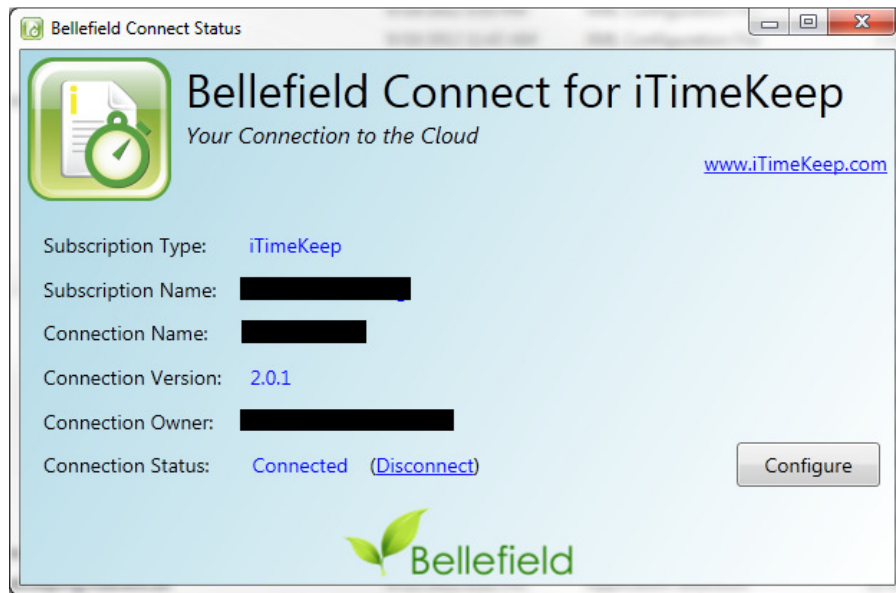

Advance the Wizard until you reach Step 5, where you will be able to add or remove users as needed:

ADDING A USER

Each iTimeKeep user account must be mapped to a specific user account in your Time and Billing system. Let's say you have a user called "Steve Chance" (steve@bakerchance.com) and you want to grant him access to iTimeKeep. Simply click the "Add User" button and a popup like the one below will display.
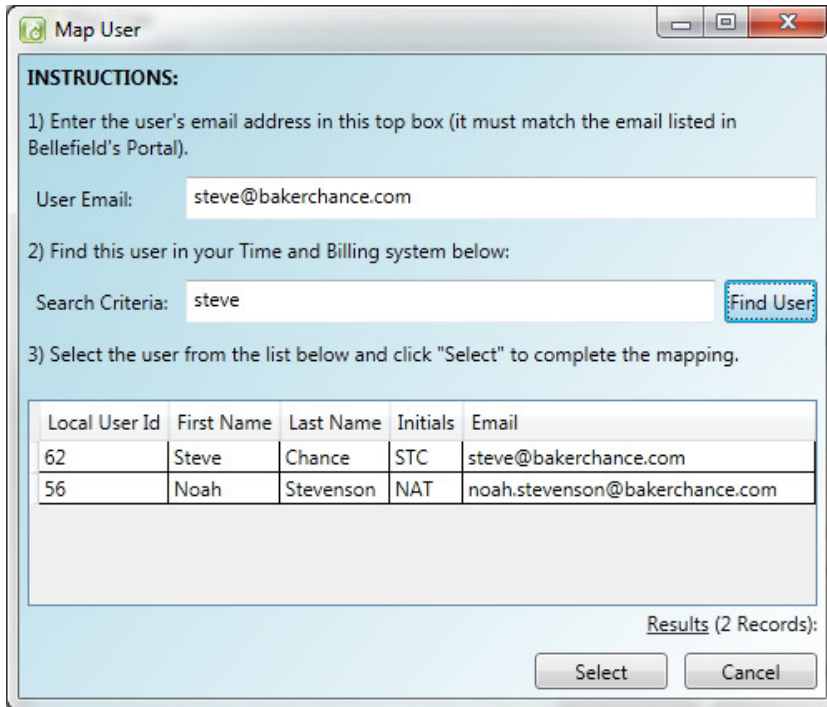
Type Steve's email address in the "User Email" box (NOTE: this must match the email address that Steve used – or will use- when registering on the Bellefield Portal as explained on the next section). Next, locate Steve's account in your Time and Billing System by doing a quick search.

In this screenshot we typed "steve" and clicked "Find User". The list of matching users in your Time and Billing system is displayed at the bottom. Simply select Steve from the list and click the "Select" button.
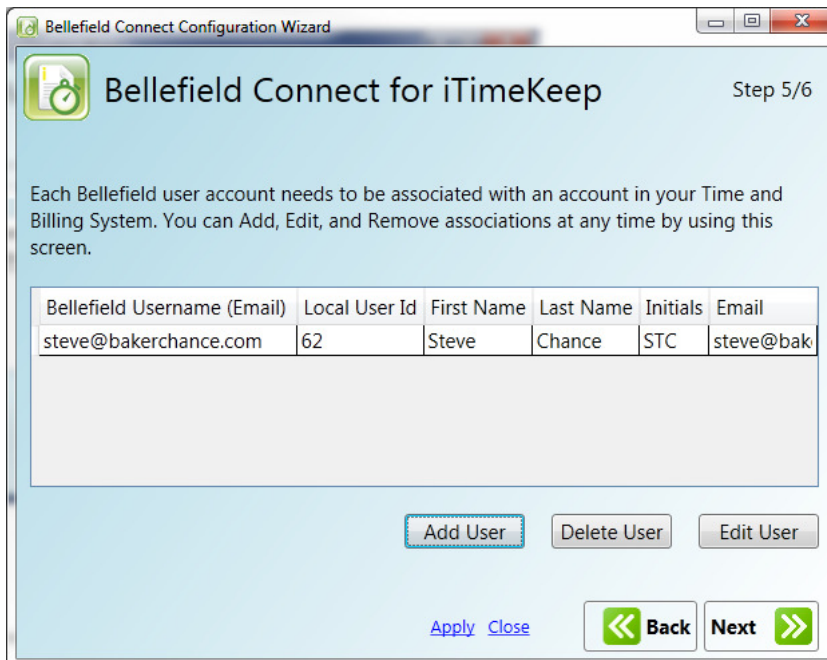
Steve is now mapped and authorized in the local Bellefield Connect registry of users and you will be taken back to Step 5 of the configuration wizard.

You can repeat this process as necessary to add additional users.
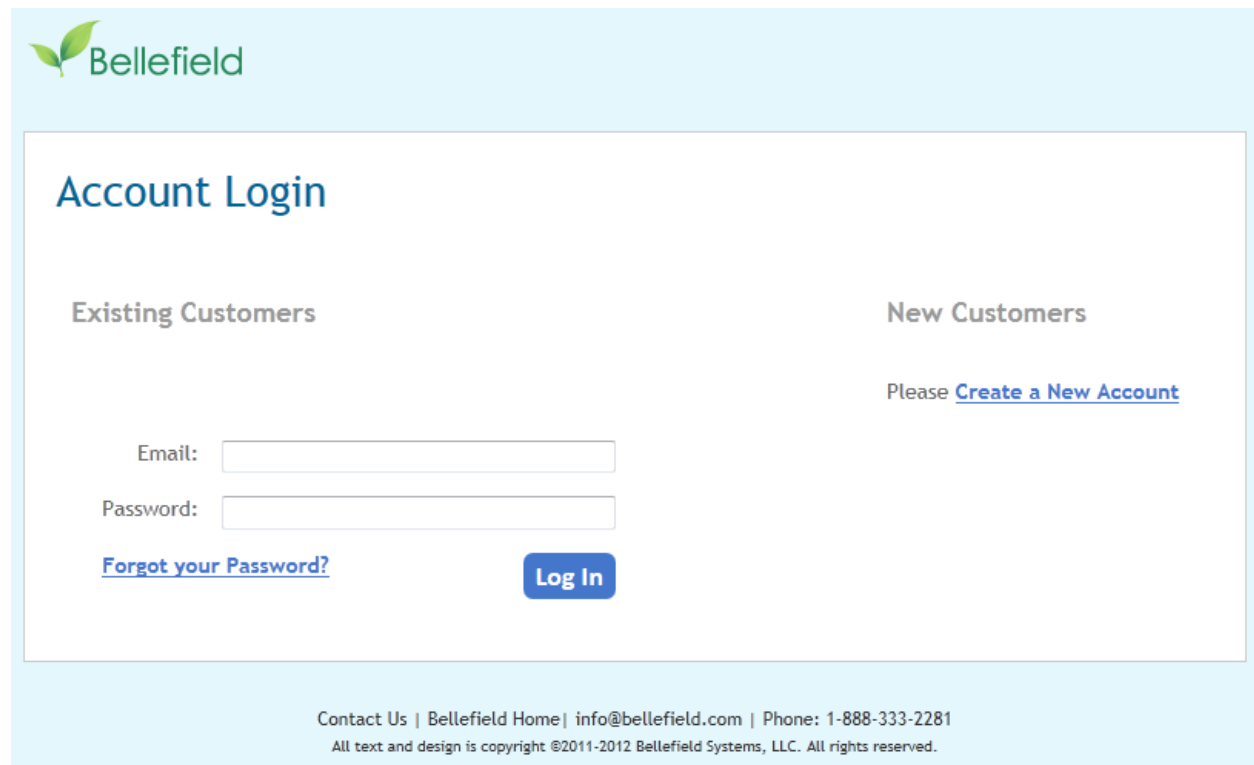
DELETING A USER

To delete a user simply select it and click the "Delete User" button. Please note that this user will no longer be able to access iTimeKeep. To reauthorize simply follow the steps in the "Adding a User" section.

CHANGING A USER MAPPING

In the event that you need to map a user to a different user account in your Time and Billing system simply select the user, click on "Edit User" and select a new mapping as indicated in the "Adding a User" section"

CREATING USER ACCOUNTS IN THE BELLEFIELD PORTAL

Our Portal gives you the ability to manage your iTimeKeep subscription, including adding and removing users. To access the Bellefield Portal you should open your browser and navigate to http://portal.bellefield.com. You will be presented with the login page as shown below. Please login using the Bellefield credentials you chose when you signed up for an account:

Right after login you will be taken to the portal's homepage, which at the bottom lists all the subscriptions to which you have access. If you are an administrator for the subscription, you will be able to access the subscription details by clicking on the "Settings" link as shown below:
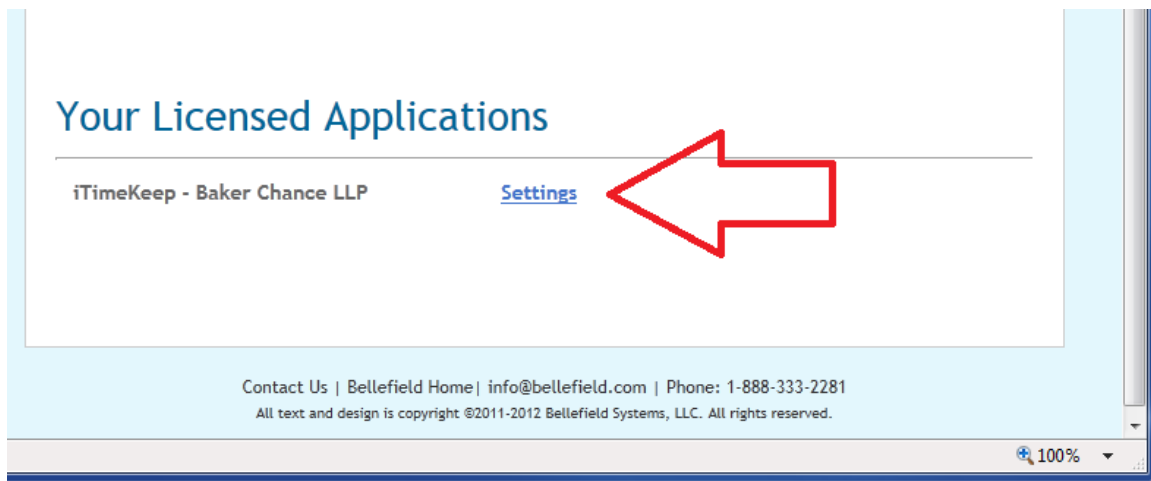
Once on the settings page, scroll down until you see the list of currently authorized users. To add a user, press the "Add User" button and follow the wizard steps.
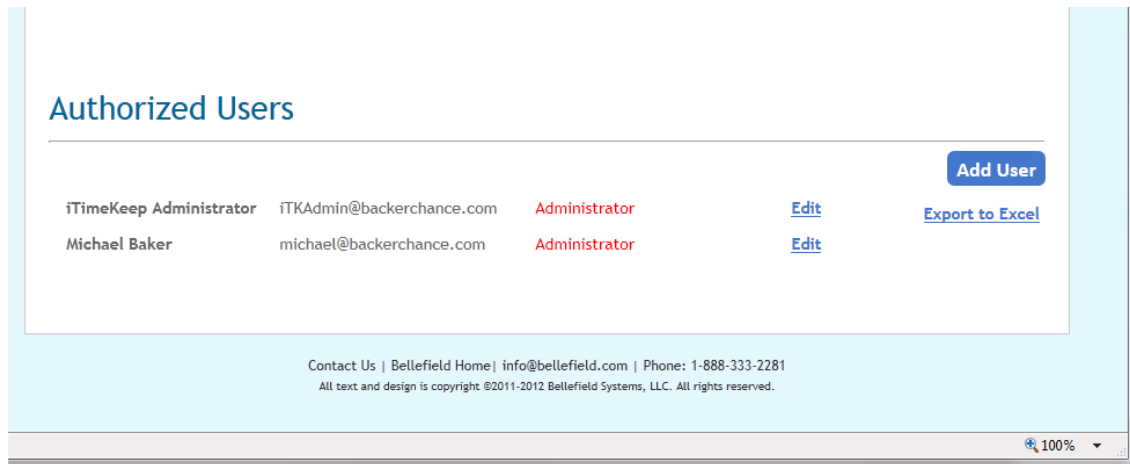
The first step is to determine the type of user you would like to add. For a regular timekeeper please chose to add a regular user and press "Continue".

Next you should identify the user by their email address:

If this is a brand new user (i.e., the user did not previously have a Bellefield account), you will be asked to create an account for this user. Simply provide the information and press the "Create Account" button. If the user already had an account you will skip this step.

Important: When the account is created the user will receive a welcome email with their username, a randomly-generated password, and a link to change this password should they chose to do so.

Finally, confirm that you want to grant access to this user to your subscription. The user will receive a "Welcome to iTimeKeep" email with instructions explaining how to download iTimeKeep on their devices, links to tutorial, etc.

You are here: **Home** > **iTimeKeep - Baker Chance LLP** > **Add User**

Add User Wizard

Application Type: iTimeKeep

Friendly Name: Baker Chance LLP

Please review the information below and confirm that you would like to grant access to this subscription.

Name: Steven Chance

Email: steve@backerchance.com

Country: USA

Zip Code: 15228

Time Zone: Eastern Standard Time (GMT-5:00)

☑ Send Welcome Email

Grant Access

Once the process completes you will receive a confirmation message like the one below:

You are here: **Home** > **iTimeKeep - Baker Chance LLP** > **Add User**

Add User Wizard

Application Type: iTimeKeep

Friendly Name: Baker Chance LLP

Congratulations! You have granted Steven access to this subscription. **Continue.**

CHANGING USER ACCESS PERMISSIONS

The Bellefield Portal also allows administrators to give other users administrative rights or to revoke access altogether. To do this, go back to the settings page and scroll down until you can see the list of authorized users:

To change the permissions for Steven Chance, click on the "Edit" link for Steven. This will take you to the user access page for Steven:

In this screen you can perform the most common user actions:

- If you would like to prevent Steven from accessing this subscription at all click on the "Revoke All Access Now" button.

- If you would like to grant Steven administrator privileges (so that he can also add/remove other users) you should click on the "Grant Admin Privileges Now".

- If Steven has forgotten his password and is asking you for help, you can send Steven an email with instructions to reset it

- If Steven's account has been locked due to too many invalid login attempts you will also be able to unlock him right from this page

If you experience any issues or need any help please do not hesitate to contact us at support@bellefield.com.

TECHNICAL SUPPORT

Please contact Bellefield at support@bellefield.com or at 1-888-333-2281 then Select 0

CHANGE HISTORY

VERSION 1.0.0 - 2012-SEPTEMBER-20

- Original Version Document