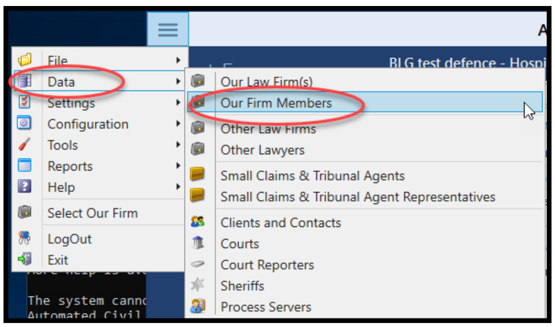
ACL5 | MANAGING FIRM MEMBERS

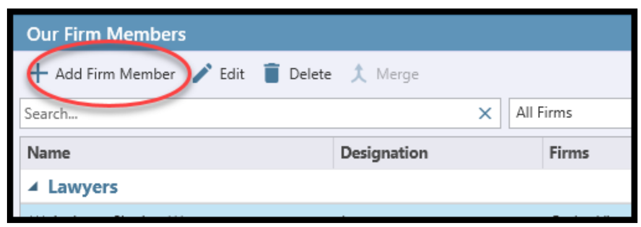
NOTE: Adding ACL users is a two-step process. Review all steps before proceeding.

Firm members must be added to ACL in order to have access to the software, and to be able to select their names for court forms and/or for correspondence.



To access the Firm Member database, please go to **Menu → Data → Firm Members**.

Click **Add Firm Member.**



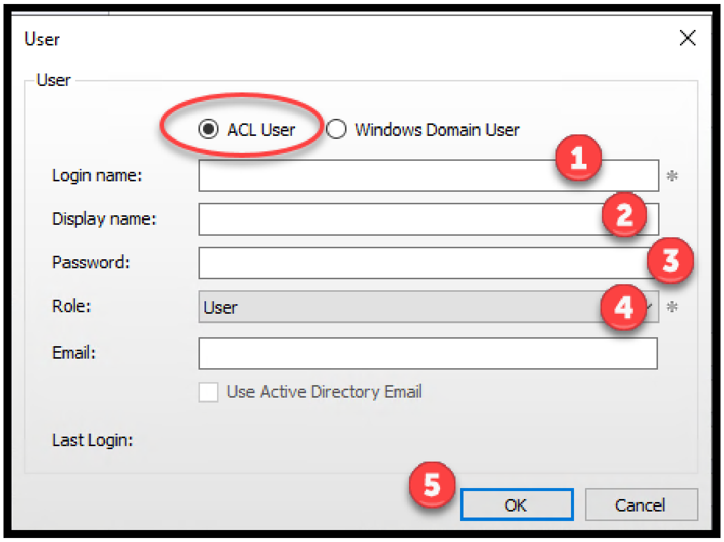
Step One

If Lawyers/Assistants/Paralegals or other firm members need to access ACL, the first step is to create a user profile. **Note**: if the firm member **does not** require ACL access, please go to Step Two.

At the top of the dialog, click **Add User** in the **User Details** section.

Depending on the firm's preference, a user profile can be set up as an **ACL User** (user is required to use a **Login Name** and a **Password** to access ACL) or as a **Windows Domain User** (user will bypass the login screen and ACL will open automatically).

ACL User

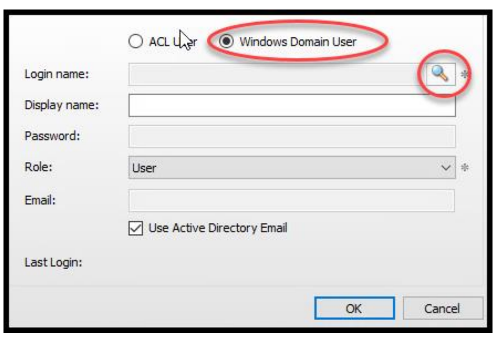


1. Enter the **Login name***.
2. Enter the **Display name***.
3. Enter a **password**, if required. The field can be left blank if the firm does not require ACL users to have a password.
4. Select the **Role** (**User** or **Admin**)
5. Click **OK**.

* **Login name** does not appear in documents. It is just the username to access the software.

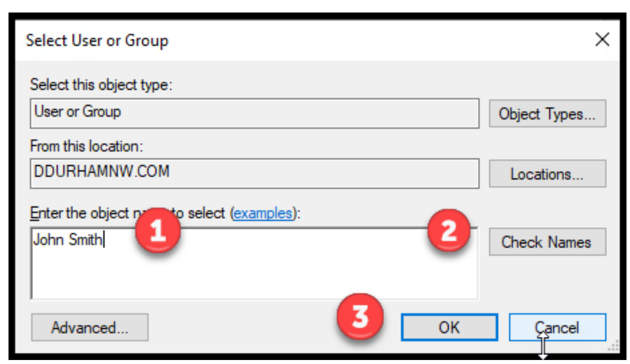
** **Display name** is how a firm member's name appears in documents.

Windows Domain User



Click the magnifying glass to open the **Select User or Group** window.

1. Enter the user's name.
2. Click **Check Names**. If the name does not automatically appear, another window will open for the name to be selected from a list. Highlight the name and click OK. If a user cannot be found, try searching by last name only.
3. Click **OK** in the main window.



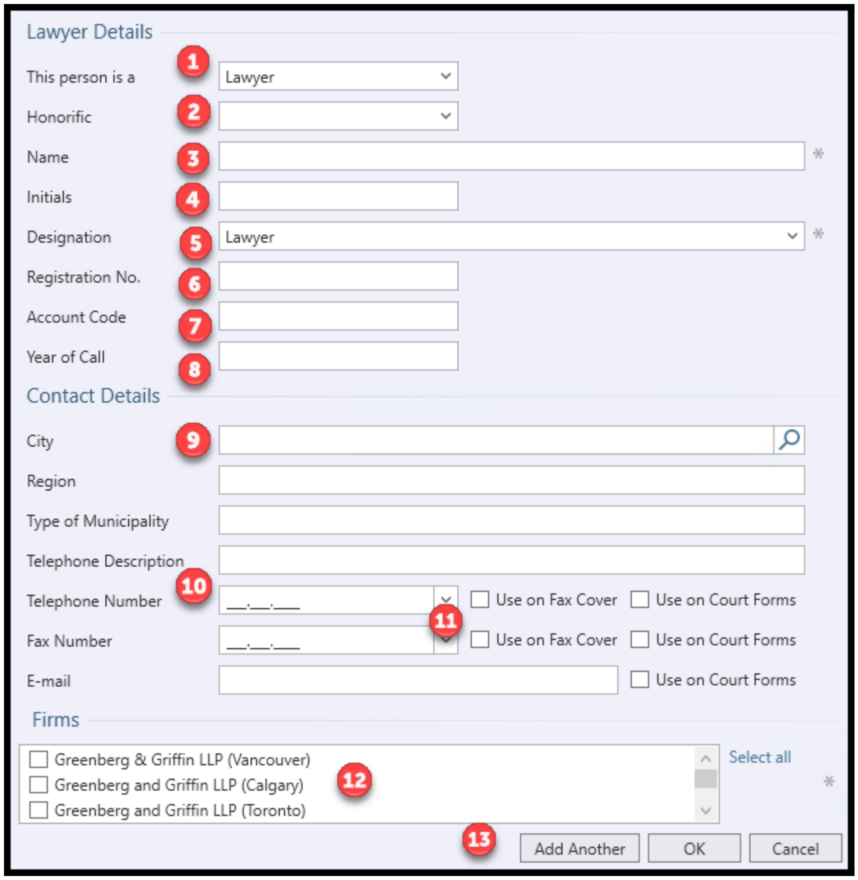
Procced to select the **Role** and enter the user's **Email** (if required) and click **OK**.

For assistance contact:

ACL Support
416.363.1650 x100 / 1.800.340.3234 x100
supportacl@dyedurham.com

Step Two

Once the user profile has been created, the remaining information can be added to the firm member profile.



1. Choose the **Description**. The default is Lawyer. Click the drop-down menu for more options.
2. Enter the **Honorific**.
3. Enter the **Name**.
4. The **Initials** will auto fill based on the name and can be edited, if required.
5. The **Designation** will default to the description chosen. This can be manually edited, for example, Senior Counsel.
6. Enter the **Registration No.**
7. Enter the **Account Code**, if required.
8. Enter the **Year of Call**.
9. Enter the **City** where the firm member resides. The municipality will automatically fill in.
10. Enter the **Telephone** and **Fax Numbers** and **Email**.
11. Select the options for **Use on Fax Cover** and **Use on Court Forms**, as required.
12. If the firm has multiple locations, select which location(s) the firm member should be assigned to.
13. Click **Add Another** or **OK**.