Q-LawE User Licensing Guide

Table of Contents

Summary	2
Before Updating Q-LawE	2
Login to the vPortal	6
Administrator - ADMIN User License	7
Have All Users Log Out of Q-LawE	7
Lock Q-LawE	7
Backup Q-LawE Data	8
Download the Update	9
Run the Q-LawE Update	9
Login to Q-LawE	10

Summary

Vertican Technologies is migrating perpetual Q-LawE users to subscription users. Each Q-LawE named user must have a user license. User licenses can no longer be shared. Enhancements have been made to both the vPortal and Q-LawE to allow firm administrators and authorized users to add and remove user licenses on the vPortal and add DTPs.

Before Updating Q-LawE

Before performing the Q-LawE update, please do the following.

• Click [Maintenance] > [System maintenance Admin] tab > [Firm Preferences]. In the Q-LawE Firm ID field, enter the firm's vPortal vNumber. Click [Exit].

G Firm infor	mation and preferences							
Firm nam	e Accounting	Folder locations	Billing pref	Misc preferences	Reports and printers			
Firm name t	to appear on letter head a	nd billing statements		To change firm name, er	iter passcode			
Firm	Q-law Testing Firm							
	Qlaw Firm ID (vPorta	l vNumber)						
Address and	d phone as they should a	opear on statements, etc		Activate multiple office	locations			
Add1	55 Lane Road			Heln - Multiple office				
Add2	Suite 210			Add new office				
Add3	Fairfield, NJ 07004	1						
Phone&Fax				Edit office				
Phone				Optional Module/DTPs				
Fax				Optional module/D11 3				
Email								
Website	1			Conversion date				
Fed taxid		DevProd						
Total Numbe	er of User Licenses	999						
Q-LawE Lice	ense Expiration Date 12/	31/2022						
Email Website Fed taxid Total Numbe Q-LawE Lice	r of User Licenses ense Expiration Date 12/	DevProd 999 31/2022		Conversion date				

• In [Maintenance] > [System maintenance Admin] tab > click [Users].

Maintenance		
Edit/Add/Delete/Functions	E <u>d</u> i - Custom Modules - Help	System maintenance - Admin
System Maintenance .1	Misc	
<u>U</u> sers	Auto Job Scheduler	
Q-LawE User licenses	Run manual Job from Scheduler	
	Submit non local job to Scheduler	
Eirm Preferences	Download QlawUpdate	
	Website - Whatsnew PDF File	
Security Levels	Whatsbetter in Q-Law	
Backup-Pack-Index	View Misc Databases	
Qlaw Update	View SQL table locks	
Edit Firm Bulletin		
View .Vogs folder		
Replace datafield from csv file		
Code table import - Kimport		
User Groups (LanEmail/Calendar)		
Reset WPdocs Active flag		
Add Ourfile=0 if removed in error		
Qinstaller DTP/Module - status		
Change Tracking		

- Verify User Licenses
 - User licenses are required for Job Scheduler computer(s).
 - Terminated employees should be set to Access Level 11 so they will not be counted as an active user in the license count.

🖸 User and d	esk - user: ZZ_USER									23
Userd	etails	Misc	Calendar	Email/Letter	P	ack&Go	AttyID, Billing	Desk	Add new	E <u>x</u> it
Login Name	ZZ_USER U For new users enter First name Last name	ser login passwo	ord Change Set pw to	password username	A.	ser type	1 = Admin or Owner 2 = Bookkeeper, 4 = supervisor 5 = CashPoster, 9 = Staff 10 = Client access 11 = Terminated Employee 0=Owner, A=SysAdmin - Otherwise leave blank		Delete Edit Print Grid	Active InActive
				A user may be u	ising one or more	desks in task mar	nager		Chg log	
User Initials	Used to rec	ord user activitie	es -	Default desk					Selectuse	r Go
Phone & Ext	Show in In/Out board	Ext /letters		Desk list	Users default de	sk is used in task	manager	(b) KE KE1 KE2)	Name ZZ USER	
Full name					ii usei nas nore	unan one desk, en	ter comma list of desk codes here	(ie. K3, K31, K32)	-	
Alias name	This name is signatur	e for letters as signature on	letters							
Title on letter	This title will annear a	on lettere		Marshan of any						
List name	This name appear wh	ien selecting this	user in lists	member of group	15		Add / Remove			
Start date	Sta	ate Tin	nezone	<u>ا</u>			*			
Termination	Lo	cation		User primary	role					
Logindate:		Logoutda	te:	(Online NOW					
Inout Message	9									

- Create a duplicate report.
 - To determine the number of active users, create a new report. New reports are added by duplicating an existing report.
 - If you have a report that is similar to the report you would like to build, use that report to duplicate.
 - If you do not have a similar report, simply select any report to duplicate and make the needed changes once it is duplicated.
 - **Do NOT use a report that is numbered less than 500** as those reports may have special programming and/or formatting.
 - Here are the steps to create a new report.
 - Exit to the *Main Menu* screen > click [Reports query].
 - When the **Reports and Query** screen opens, highlight a report that you want to duplicate.
 - Click on [Run Report] to open the report.

🖸 Repo	rts and Qu	iery											- ē ×
	DataDictio	nary <u>U</u> serQ	Report distribution	iew Report Lo	9								Exit
Rep#		Double click on a report na	ame to run that report - Click on #, Grou	ip or Report na	ime to sort l	ist in that or	der				Grid	Locate	<u>R</u> un report
#	Group	Rep	oort name	Filename	Sendto	Lastrun	Lastrunby	Output	Autoactive	Maintable			^
10330	Bookkeep	Cait Lotane Test Reversed Reconcile	d Costs		FIRM	06/21/2022	CHARPER	XLS PLAIN	F	TRANS			
10331	Firm	Kat-Cliplist test			FIRM	01/08/2020	CHELSEA	XLS PLAIN	F	TRANS			
10332	PTP	Melanie Test			FIRM	10/27/2022	EMILY	XLS PLAIN	F	DEBT			
10333	firm	Skye Test			FIRM	09/23/2022	SKYE	XLS PLAIN	F	TRANS			
10334	firm	AR AUDIT report # 542 ticket #18107			FIRM	08/04/2022	MICHELLE	XLS PLAIN	F	DEBT			
10335	firm	JB Rep no 1665			FIRM	08/11/2022	EMILY	XLS PLAIN	F	DEBT			
10336	FIRM	SONICVIEW CALL REPORT			FIRM	08/12/2022	BRETTL	XLS PLAIN	F	PHONDIAL			
10337	FIRM	trans batch empty			FIRM	09/02/2022	EMILY	XLS PLAIN	F	DEBT			
10338	FIRM	A.R. Audit Ticket No. 12952 - DO NOT	T DELETE GREAT SQL SYNTAX EXAMPLES	6	FIRM	02/04/2022	MELINDA	XLS PLAIN	F	DEBT			
10339	FIRM	Tasks completed report			FIRM	09/16/2022	MICHELLE	XLS PLAIN	F	DEADLINE			
10340	FIRM	Payment Details			FIRM	09/23/2022	EMILY	XLS PLAIN	F	DEBT			
10341	Firm	Jon's first test report			FIRM	09/21/2022	JON	PDF FILE	F	DEBT			
10342	Firm	michelle testing			FIRM	11/03/2022	MICHELLE	XLS PLAIN	F	UPDATES			
10343	Bookkeep	Userlist report for clients to run for al	I active users	BREGISTR	FIRM	01/20/2015	APRIL	PRINTER	F	USERLIST			
10344	Bookkeep	Userlist report for clients to run for al	I active users	BREGISTR	FIRM	01/20/2015	APRIL	PRINTER	F	USERLIST			
10345	Bookkeep	Userlist report for clients to run for al	I active users	BREGISTR	FIRM	01/20/2015	APRIL	PRINTER	F	USERLIST			
10346	Bookkeep	TRUST ACCOUNT CHECK REGISTER		BREGISTR	FIRM	01/20/2015	APRIL	PRINTER	F	BTRUST			
10347	Bookkeep	TRUST ACCOUNT CHECK REGISTER		BREGISTR	FIRM	01/20/2015	APRIL	PRINTER	F	BTRUST			
10348	Bookkeep	TRUST ACCOUNT CHECK REGISTER		BREGISTR	FIRM	01/20/2015	APRIL	PRINTER	F	BTRUST			

- When the report opens, click on [Edit] to display the [Add new] button. A pop up message Add new job using this job as a template No to cancel? will appear. Click [Yes] to continue. Clicking [No] will take you back to the original report.
- A *New User report added* popup window will display showing the newly created report number. Click on [OK]. The report will be duplicated.



• Delete all the information from the old report, except the Job#, which is automatically assigned and cannot be edited.

💽 Run rep	ports								
Job#	632 F	FIRM Serli	st report for clients to run	for all active users					E <u>x</u> it
Enter value	es for report - S	See notes below for	instructions - Then Run	report					Edit
Report date	11/08/202	2 Report dates fro	m 11/01/2022 !	to 11/08/2022 !					Add new
Client code									
User name		 Desk code 	✓ □	Select clients to process					Edit event
Select rep	ort output	(LS PLAIN V Fi	lename	Passwrd	Rep Dist	Customize selection			Run report
Title							FIRM		
Notes							^		
Database	3 USERLIST	A DataDict SQL	New rept Report form	at filename	Lastrun 10/10	0/2022 ByUser	ADAM		
Fields	name as usern	ame, init as user_initial	s,useclevel as Security_leve	el, case when useclevel<>11 th	en 'ACTIVE' else 'INACTIVE	end as will_be_made Fl	ROM userlist		^
Where _	lleedevel co. 1	1						Sort by	
6	usecievei <> 1	1					^		
Runpre		Runpost		Access 6 Job ty	pe USER Please editiin	e consult with Q-Law s ng or adding/deleting b	staff prior to atch jobs.		•

- **1. Report Type**: Click the dropdown to select **FIRM**.
- 2. Report Name: Enter "Userlist report for clients to run for all active users".
- 3. Database field: Enter USERLIST.
- 4. SQL button: Click SQL and check the box for Remote Executable.

SQL Serv	er Table Link -	right click on item in grid for add/delete option	x
Remote	e Execute		
Report	Table	Where Clause	^
632			
<			

5. Fields box: Enter "name as username, init as user_initials, useclevel as Security_level, case when useclevel<>11 then 'ACTIVE' else 'INACTIVE' end as will_be_made from userlist." After entering the string into Fields, place the cursor at the end and hit delete to ensure no additional characters were added.

6. Where box: Useclevel <> 11.

7. Run Report button: Run the report and in the report window press [#] to see how many active users you have. Compare this to the number of licenses on the vPortal (described below).

Important Details:

- During the update process, all user accounts that are not marked as Access Level 11 will be set to Active and will be assigned a user license; this includes Job Scheduler accounts. An Administrator will need to make sure the number of active user accounts in their system is less than or equal to the number of licenses on the vPortal.
- Advanced password encryption is mandatory in the update. If you have not previously updated to
 the advanced password encryption, you will be prompted to do so. This will require a Chilkat
 upgrade. If you have updated Q-LawE and have CCAM, you have the correct Chilkat. If you have not
 previously updated to the advanced password encryption, when the update is processed it will run
 the password update process. When run, this process will reset ALL user passwords to the user's
 uppercase username. For example, if the user's name is Ken, the password will be reset to KEN.
 When users login for the first time, the system will prompt them to change their password. New
 passwords are case sensitive and must be a minimum of eight characters.
- Before updating, verify that you can login to the ADMIN user if one exists. Go to [Maintenance] >
 [System maintenance Admin] tab > [Q-LawE User licenses]. If an ADMIN user account already
 exists, (the login name must be "ADMIN'), please log in using the ADMIN username and the
 password to confirm the information is correct. This ensures that the ADMIN user will be able to
 login once the update is complete. An ADMIN user account will be created automatically with a
 password of "ADMIN" upon completion of the update.

Login to the vPortal

Access your account on the vPortal to review the following to ensure a smooth transition once the update is completed:

- User licenses Review the number of user licenses to ensure the number of user licenses on the vPortal is equal to or higher than the number in Q-LawE, to be sure there is a user license for each user.
- **ADMIN** license will NOT be included in the license count.

- **DTPs** Select the DTPs that are currently in use to activate. Otherwise, they will not be available in the *Maintenance* menu for selection once the update is completed.
 - If your firm is using a DTP or EDI module, your firm must have a subscription on the vPortal. Please refer to the <u>vPortal Client Access DTP and Module Purchase Guide</u> for assistance.
 - Many modules/some EDIs require registration on vPortal but do not incur a charge.
 - Whether your DTP/EDI requires a paid subscription or free registration, both subscription and registration must be completed prior to the installation of the November release to a Production environment.

Administrator - ADMIN User License

Each firm is provided an administrator (ADMIN) user license with the purchase of Q-LawE. The ADMIN license is not included in the user license count. The ADMIN user will ALWAYS be able to access Q-LawE. When the Q-LawE update is downloaded and run, an ADMIN user account will automatically be added with a password of "ADMIN" if one does not already exist. If there are discrepancies in the number of licensed users or the software license term date, the ADMIN user, Level 1, and 2 Admin users can access Q-LawE License Manager to resolve any issues. The ADMIN user license password will also be used when logging into Q-LawE with the ERROR login. The ADMIN user will type ERROR into the **User name** field and the **Password** is the ADMIN user's password.

Have All Users Log Out of Q-LawE

The only person that can be logged into Q-LawE is the person doing the update. Also, that person can only have one login screen open. If any users are logged into the system, or log in before the update is finished, an error will occur, and the update will not be completed.

Lock Q-LawE

Once everyone is logged out (except the user doing the update), lock Q-LawE to ensure no users log in during the update process. To lock the system, click [Maintenance] > [System Maintenance - Admin] > [Backup-Pack-Index] > [Allow Logins]. From this screen, click [Start lock now] then [Yes] to start the lock.

Lock qlaw and log out users for mainten	ance or update		Σ						
Reset lock info to now Start loc	Chk Exclusive	See force lockouts	Who is online Exit						
Lock system (Y/N) Locked by user Locked start date/time Expected available again date/time Client timer check each X minutes Client warning X minutes	SCHYLON 09/23/2021 15:06:41 09/23/2021 15:06:41 1 FirmprefID: LOCKTIME 1 FirmprefID: LOCKWAR	Before you start Lock p No batch proce No Vendor imp Job Scheduler To start Lock process R Click Reset clock ir N Enter expected ava Change message Click start lock now System prevents	rocess CHECK THIS ess run, remit, accounting, daily jobs port, new claims r is idle, stopped nfo to now ilable date/time if required / button s new login attempts						
System sends 3 minute warning to logged in users Message when user login during lock System Maintenance System admin Unlock system password QRT IF IT want to login while keeping other users out enter pw: LOCK to bypass									
	Start now Confirm to start I	ock now?							

Backup Q-LawE Data

The user should already be in the Backup-Pack-Index screen after locking all users out of the system. To backup:

- Click [Backup].
- Q-LawE will warn the user of the process that is about to begin. Click [Yes].



• If the box below pops up, type **F**.

Pack all	in question appears in dos command box about copying as me or di	ectory	inswer F to
Pack marked			
Index	C:\WINDOWS\system32\cmd.exe -		×
<u>W</u> hoisOnline	Does C:\QLAW\BACKUP\qlaw-rolbackto-20210728.exe specify a file name		^
Del temp files	(F = file, D = directory)?		
<u>B</u> ackup			
Restore			
Error log			
Markall			
Mark all			
Unmark all			
Data REPAIR			
Refresh data			
Q-law Update			
Allow Logins			
Test database			
View maint log			~

- When the backup is done, there will be a popup confirming the completion. Click **[OK]**.
- In File Explorer navigate to the Q-LawE drive, right click on the current Q-LawE.exe file, click copy, and then paste a copy of the Q-LawE.exe into c:\qlawbackup folder

Download the Update

Clients will receive an email from Vertican with a link to download the update executable sharefile.

Run the Q-LawE Update

Run the Q-LawE update executable (for example: QLE_Update_11-2022.exe) in the qlaw directory.

Then start Q-LawE and login as ADMIN. You must log in as ADMIN, as the update hasn't been fully applied yet, attempting to login at this point as any other user will generate errors.

***Important - Do not go to any Q-LawE screens. Go straight to the Q-LawE Update. Click
[Maintenance] > [System maintenance Admin] tab > [Backup-Pack-Index] > [Q-LawE Update] and
process the update.***

• During the update process all users not marked as Access Level 11 will be checked as Active user. Below is a screenshot of the added fields in the **User details** screen.

User det	tails	Misc		Calendar/Email/	Letter		Pack&Go		AttyID, Billing	Desk	<u>A</u> dd new	E <u>x</u> it	
Login Name		User login pa	ssword	Change passw	ord		Access Level		1 = Admin or Owner 2 = Bookkeeper, 4 = supervisor		Delete		
F	For new user	rs enter below		Set pw to usern	ame				5 = CashPoster, 9 = Staff		<u>E</u> dit		
F	First name								11 = Terminated Employee		Print	Active	
, i	Last name						User type		O=Owner, A=SysAdmin - Otherwise leave blank		Grid	InActiv	e
				Auser	may be	using one or	more desks in task	man	ager		Chg log		
User Initials	Use	ed to record user ad	ctivities	Defaul	t desk						Select use	r	
Phone & Ext		E	kt			Users defa	ult desk is used in ta	ask r	manager		Nem	Go	2
	Show in In/O	ut board/letters		Deskli	st	lf user has	more than one desk	en	ter comma list of desk codes here	(e: KS KS1 KS2)	Nalli	8 1	
Full name	This name is a	signature for letters						.,		,			
Alias name		alginatore for fottore											
Ĩ	f not blank w	ill show as signatur	e on letters										
Title on letter	This title will	appear on letters		Mamba	r of grou								
List name		appear en lettere		membe	rorgrou	ups			∧ Add / Remove				
1	This name ap	pear when selectin	g this user	in lists									
Start date		State	Timezon	•					~				
Termination		Location		Use	er primar	ry role							
Logindate:		Log	outdate:			Online NOW							
inout Message													
Licensing													
This user	is active												
Q-LawE us	ser license	active 2											
Q-LawE license	e type STAN	IDARD 3											
												-	
											AND		

- 1. **This user is active**: Must be checked for all active users. If an employee is terminated, it should be unchecked to be excluded from the license count.
- 2. User license active: This indicates the license is an active license in the vPortal.
- 3. License type: All Licenses are Standard.

Login to Q-LawE

Once the update process is complete, log back into Q-LawE click [Maintenance] > System maintenance – Admin tab > click [Q-LawE User Licenses].

Edit/Add/Delete/Functions	E <u>d</u> i - Custom Modules - Help	System maintenance - <u>A</u> dmin	Fixes	Ex
ystem Maintenance .1	Misc			
<u>U</u> sers	Update to Fix Gross Remittance			
QLaw User Licenses	MiniQ Report			
Eirm Preferences	Auto Job Scheduler			
Security Levels	Run manual Job from Scheduler			
Backup-Pack-Index	Submit non local job to Scheduler			
Qlaw Update				
	Download QlawUpdate			
User Groups	Website - Whatsnew PDF File			
	View Misc Databases			
Edit Firm Bulletin	Website - Qlaw Manual Ver11			
Reindex Debt and Dname				
View .Vogs folder				
Edit user memberof list				
Replace datafield from csv file				
Code table import				

During login, the user's account is validated (this does not apply to the three hard coded logins ADMIN, ERROR, AIS). This account validation confirms the following:

- The user's account is active.
- It has an active license.

If any of these conditions do not exist, the user will not be allowed access.

If there are discrepancies i.e., more users than user licenses, all users will receive **User licensing issue-Access Denied** popup and users will not be able to login.

User licensing issue-Access Denied	×
More user licenses have been assigned then are available. This will have to be fixed before access is granted. Please contact Vertican Technologies, Inc. Email: support@vertican.com	
ОК	

The ADMIN user, Level 1, and 2 Admin users will be able to bypass the above message and log in to the License Manager to resolve the issue. Click **[OK]**

Ор	License Manager?	×
w ne	uld you like to open the license manager and try to reso ?	lve this
I.	Yes	No

Clicking **[Yes]** will open the Q-LawE License Manager. You can get to this same screen by clicking **[Maintenance]** > *System maintenance* – *Admin* tab > click **[Q-LawE User Licenses]**.

Edit/Add/Delete/Functions	Edi - Custom Modules - Help	System maintenance - <u>A</u> dmin	Fixes	Exi
System Maintenance .1	Misc			
Users	Update to Fix Gross Remittance			
QLaw User Licenses	MiniQ Report			
Eirm Preferences	Auto Job Scheduler			
Security Levels	Run manual Job from Scheduler			
Backup-Pack-Index	Submit non local job to Scheduler			
Qlaw Update				
	Download QlawUpdate			
User Groups	Website - Whatsnew PDF File			
	View Misc Databases			
Edit Firm Bulletin	Website - Qlaw Manual Ver11			
Reindex Debt and Dname				
View .Vogs folder				
Edit user memberof list				
Replace datafield from csv file				
Code table import				

The license count below is 15, with 16 licenses currently in use, so one user will need to be made inactive or at least one additional user license will need to be purchased. Job scheduler machine(s) also require user license(s).

lect a use	r, then click on t	Select level to ch	ange	Filter by	y name	Filter by level					E <u>x</u> it
							No licer	se See cha	inge Cl	lear filter	
icactive	Name	Fullna	me		Title	Department	Useclevel	Curlevel	Newle	evel ^	Select level
~	ADAM	ADAM PEPLAU		TESTING	TITLE	AP	1	Standard			No change
/	ADAM4			ULTIMATE	TESTER	1	9	Standard			
	ADAM5			ULTIMATE	TESTER	1	10				Inactive
	ANDREW					AA	1				Standard
]	ANTHONY	ANTHONY GUZ	MAN			AG	1				Standard
]	ATT	JACKIE CHILES	Esq.			JC	1				
]	AUDIT						10				
	BANK9					B9	10				
-	BARNABY	BARNABY BOY	SAMLASK	1		BBS	10	Standard			
	BASICTEST	BASIC TEST				BT	9				
	BEN	BEN MYERS				BM	1				
	BENTEST						6				
	BRANDONT	BRANDON TOP				BT	1				
	BRIANS	BRIAN SHAPIR	D			BS	11				
	BUGS	BUGS BUNNY				BB	7				
	BUGS1234	BUGS BUNNY				BB	2				
	BUGS54321	BUGS BUNNY				BB	4				
	BUGS7894	BUGS BUNNY				BB	4				
7	BULLETIN	BULLETIN BOA	RD				10			~	
Groupna	ime Level	Lic Count	Used	Available		Lindate lic	ense from	Vertican			Calculate
standard	3	15	16	-1		opulate inc	inse nom	vortican			Apply
					Licensed to:	QLAW TEST	SYSTEM				1
						05/04/0004					
					Expiration	05/31/2021					
					Vnumber	433333141	4				

Once additional licenses are purchased or enough user licenses were made inactive, click [Update license from Vertican].

				Filter b	y name	Filter by leve	1				E <u>x</u> it
							V No lice	ense See ch	nange	Clear filter	
Licactive	Name	Fullna	ime	1	Fitle	Department	Useclevel	Curlevel	New	/level ^	Select level
\checkmark	ADAM	ADAM PEPLAU		TESTING T	ITTLE .	AP	1	Standard			No chang
\checkmark	ADAM4			ULTIMATE	TESTER	1	9	Standard			
	ADAM5			ULTIMATE	TESTER	1	10				Inactive
	ANDREW					AA	1				Standard
	ANTHONY	ANTHONY GUZ	ZMAN			AG	1				otaridare
	ATT	JACKIE CHILES	, Esq.			JC	1				
	AUDIT						10				
	BANK9					B9	10				
\checkmark	BARNABY	BARNABY BOY	Y SAMLASK	J I		BBS	10	Standard			
	BASICTEST	BASIC TEST				BT	9				
	BEN	BEN MYERS				BM	1				
	BENTEST						6				
	BRANDONT	BRANDON TOP	ł			BT	1				
	BRIANS	BRIAN SHAPIR	D			BS	11				
	BUGS	BUGS BUNNY				BB	7				
	BUGS1234	BUGS BUNNY				BB	2				
	BUGS54321	BUGS BUNNY				BB	4				
	BUGS7894	BUGS BUNNY				BB	4				
	BULLETIN	BULLETIN BOA	RD				10			¥	
Groupna	me Level	Lic Count	Used	Available		Lindate li	cense from	Vertican			Calculate
Standard	3	16	16	0		Opdate II	cense non	venticali			Apply
					Licencedte		TEVETEM				1.444
					Licensed to	GLAVY TES	I STSTEW				
					Expiration	05/31/2021					
					Voumbor	433333444	14				

The license count is updated.

Q Q-Law Select a us	Subs er, th	cription U en click o	lser Lico on Sele	ense Ma ct level	inager to change	Filter I	by name 🕕	Filter by leve	el (2)	3	4	•	n n Exit
									✓ No lic	ense See	change Clea	r filter	
Licactive		Vame		Fullna	me		Title	Department	Usecleve	Curlevel	Newlevel	^	Select level
\checkmark	ADA	M	ADAM	PEPLAU		TESTING	TITLE	AP	1	Standard			No change 7
\checkmark	ADA	M4				ULTIMAT	E TESTER	1	9	Standard			
	ADA	M5				ULTIMAT	E TESTER	1	10				Inactive 🥵
	AND	REW						АА	1				Standard 9
	ANT	HONY	ANTHO	DNY GUZ	MAN			AG	1				Stanuaru
	ATT		JACKIE	CHILES	Esq.			JC	1				
	AUD	п							10				
	BAN	К9						B9	10				
\checkmark	BAR	NABY	BARNA	ABY BOY	SAMLAS	C)		BBS	10	Standard			
	BAS	ICTEST	BASIC	TEST				вт	9				
	BEN		BEN M	YERS				BM	1				
	BEN	TEST							6				
	BRA	NDONT	BRAND	OON TOR	t			BT	1				
	BRIA	NS	BRIAN	SHAPIR	D			BS	11				
	BUG	S	BUGS	BUNNY				BB	7				
	BUG	S1234	BUGS	BUNNY				BB	2				
	BUG	S54321	BUGS	BUNNY				BB	4				
	BUG	S7894	BUGS	BUNNY				BB	4				-
	BUL	LETIN	BULLE	TIN BOA	RD				10			Y	
Groupna	ame	Level	Lic	Count	Used	Available	6	Lindate I	icense fror	n Vertican	12		Calculate 10
Standard		3	16		16	0		opulater	cense noi	riventican			Apply 11
													נוקקה
							Licensed to	C QLAW TES	ST SYSTEM	1			
							Expiration	05/31/202	1				
							Vnumber	43333314	14				
													1.

- 1. **Filter by name** type in the name of user to quickly locate a specific user. This pulls from the Name field.
- 2. Filter by level click on the dropdown to view inactive users or standard users.
- 3. No license click to view a list of inactive users.
- 4. See change click to see only users with level changes.
- 5. Clear filter will clear all filters and show all users.
- 6. License summary:
 - a. Lic Count number of licenses purchased.
 - b. Used the number of licenses assigned to users.
 - c. Available number of licenses not assigned to a user.
- 7. No change scroll through the list of users one by one.
- 8. Inactive used to assign the user as inactive.
- 9. **Standard** used to assign a user a standard license.
- 10. **Calculate** will add changes to the Newlevel field.
- 11. **Apply** will confirm and apply the changes.
- 12. Update license from Vertican connects to v-Portal to update licenses.