



Get the most out of



User Guide
Management Settings

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Managing Staff Profiles

Click on **Settings** on the right of the screen in the blue bar (Fig 1) . This is also accessible under the current username on the top right of the screen then settings. (Fig 2)

Fig 1

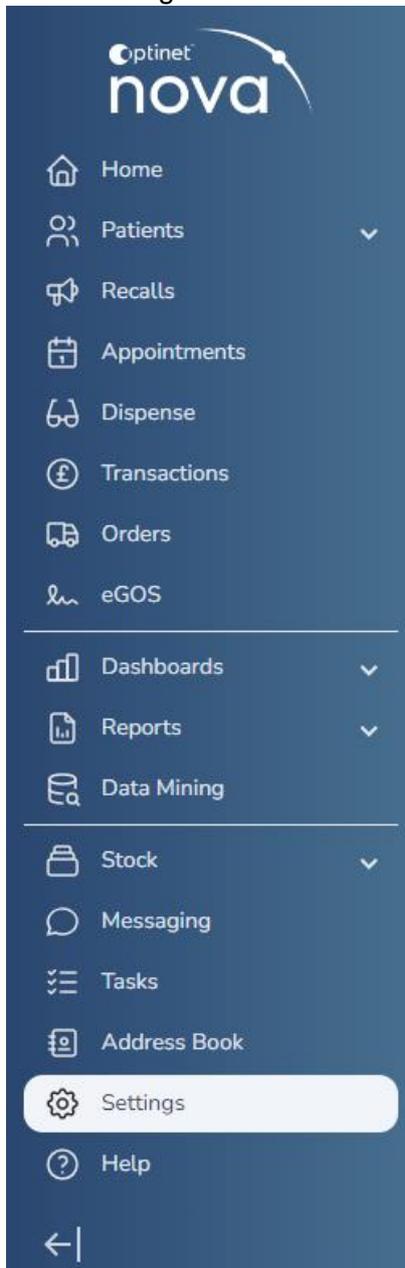
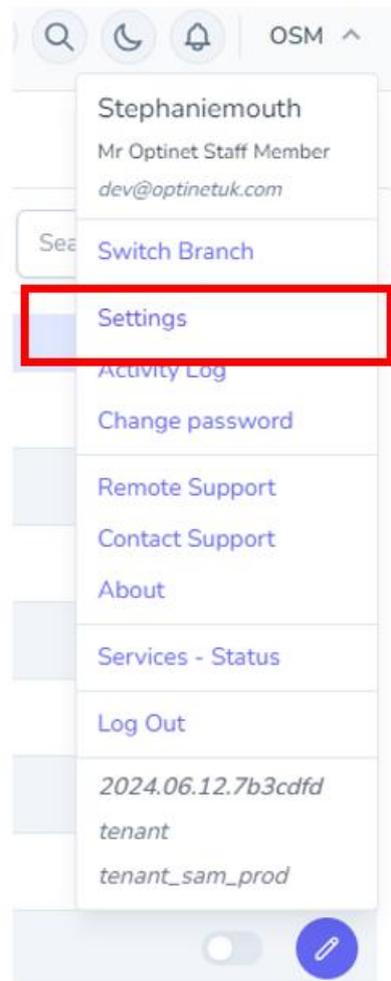


Fig 2



Once in Settings, there are several tabs across the screen. Click on **Staff**

User Details

Staff members will be listed here.

TITLE	FIRSTNAME	SURNAME	ROLE GROUP	EMAIL	ACTIVE
Mr	Optinet	Staff Member	Optinet Staff Member	[redacted].com	<input checked="" type="checkbox"/>
Master	Imogen	Clarke	Dispense Optician	[redacted]@example.com	<input checked="" type="checkbox"/>
Miss	Sam	Heath	Optinet Staff Member	[redacted].uk.com	<input checked="" type="checkbox"/>
Mr	Wayne	Harris	Dispense Optician	[redacted]@example.net	<input type="checkbox"/>
Mr	Max	Miller	Practice Manager	[redacted]@example.org	<input checked="" type="checkbox"/>
Master	Gavin	Scott	Receptionist	[redacted]@example.net	<input checked="" type="checkbox"/>
Mr	Ignacio	Muniz	Optinet Staff Member	[redacted].com	<input checked="" type="checkbox"/>

Title, Name, Role Group, Email address and **Active** and **Edit** controls. **Active** is also available with in the users screen, by clicking on

The Active button simply turns the **users access** on or off.

The button will allow edits for each user.

Title: Mr, Role Group: Optinet Staff Member, Staff Code: OSM

Firstname: Optinet, Surname: Staff Member, Salutation: Mr Optinet Staff Member, List Number: 01-10709, GOC Number: [empty]

Username (email): dev@optinetuk.com

Branch Access: Brownbury, South Maisieberg

Default Branch: Brownbury

Eyeplan Username: matt.dickson, Eyeplan Password: [masked]

Buttons: Save, Cancel, Change password

When a is shown, by clicking on it will add information in relation to the location of the circle. In this case an address or phone number.

To the right a branch must be selected for the user to have access. If there is only one branch that should be selected, if there are multiple branches then click on those that the user requires access to.

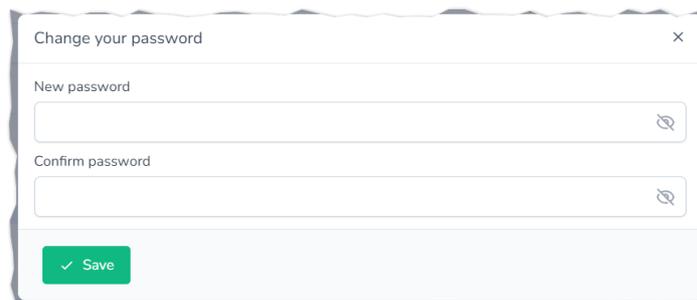
Also select a default branch for that user.

If using **EyePlan** enter the username and password beneath the default branch.

Click **Save** when happy with the details entered.

Passwords

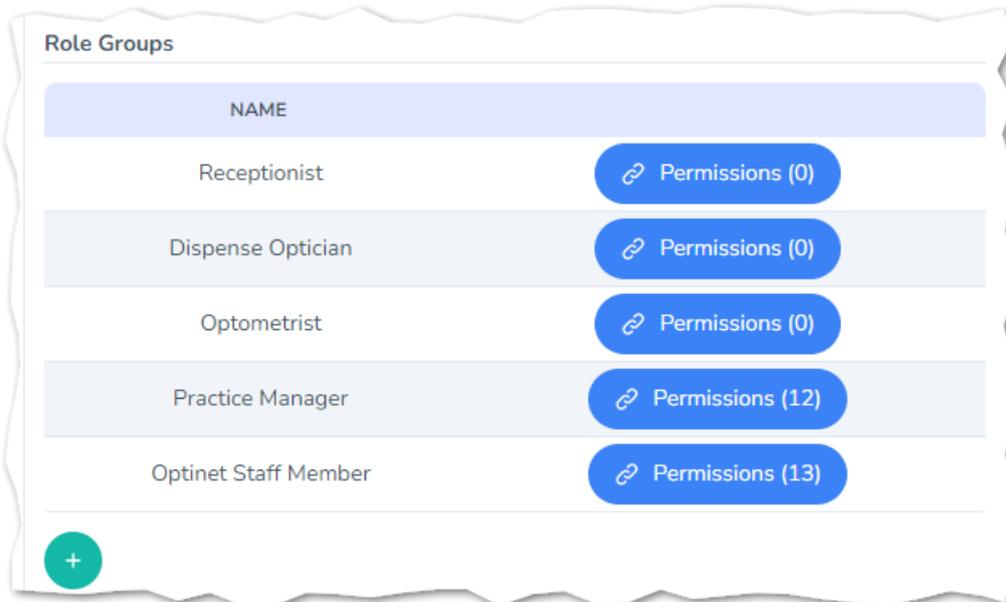
To change a password for a user, select them from the list, click on the edit button and at the bottom of the screen next to the **Save** and **Cancel** buttons, there is a **Change Password** button.



The image shows a modal dialog box titled "Change your password" with a close button (X) in the top right corner. Inside the dialog, there are two text input fields. The first is labeled "New password" and the second is labeled "Confirm password". Both input fields have a small icon on the right side, likely for toggling password visibility. At the bottom left of the dialog, there is a green button with a white checkmark and the text "Save".

Enter the New Password and then Confirm it. Click **Save**.

Role Groups



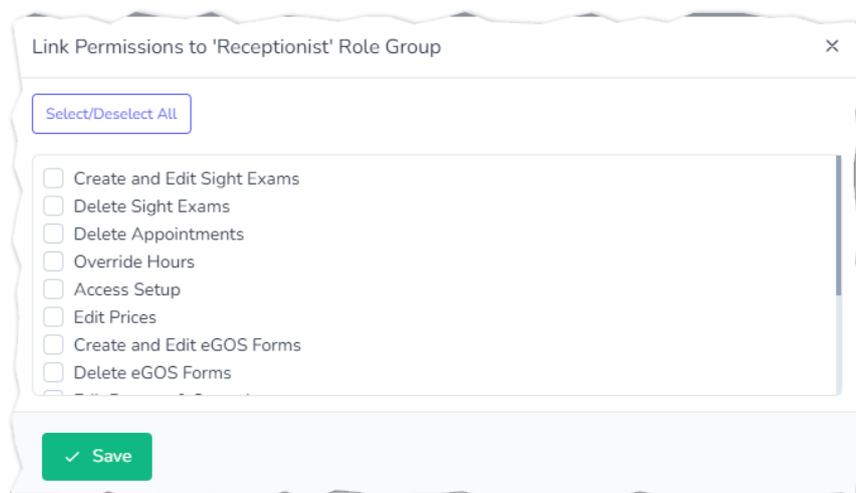
Role Groups	
NAME	
Receptionist	Permissions (0)
Dispense Optician	Permissions (0)
Optometrist	Permissions (0)
Practice Manager	Permissions (12)
Optinet Staff Member	Permissions (13)

A green circular button with a white plus sign is located at the bottom left of the interface.

A specific “**Job Role Group**” can be setup which means users with the same job role who need the same level of access can be grouped together.

Any permissions added to a role will be behind the blue permissions button. In brackets will show how many permissions the users group has.

When the blue button is clicked on the following will be displayed:



Link Permissions to 'Receptionist' Role Group

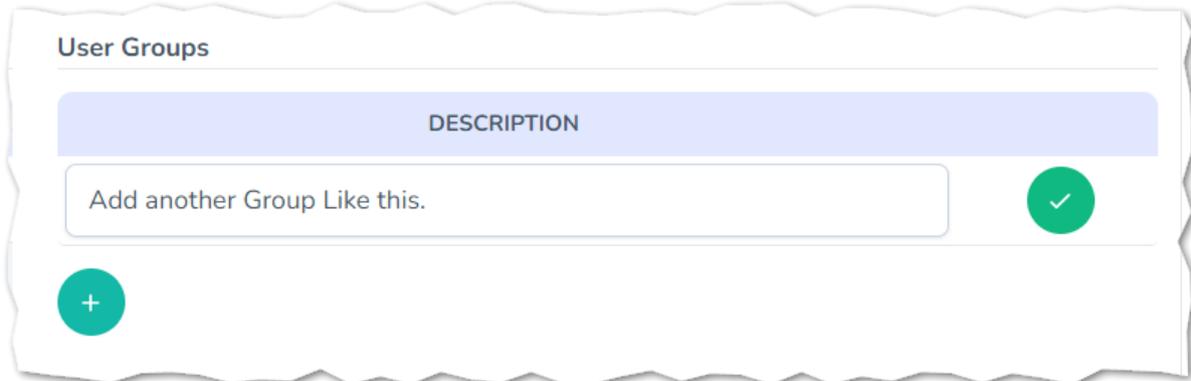
Select/Deselect All

- Create and Edit Sight Exams
- Delete Sight Exams
- Delete Appointments
- Override Hours
- Access Setup
- Edit Prices
- Create and Edit eGOS Forms
- Delete eGOS Forms

Save

Click on the areas that the user group will require access to. (Be aware there is a scroll bar to the right showing further access)

Should any further groups be required, click on the  to add them on the right of the window. Remember that if you add a new group, permissions will be needed.



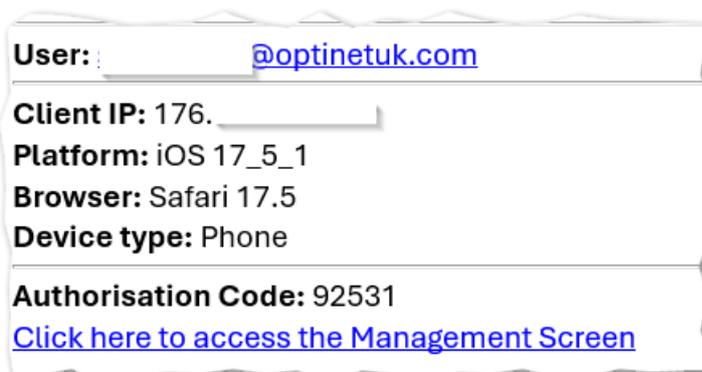
If adding one, to save it click on the green circle with the tick 

(This option would be useful if people with the same job description need different access levels)

Device Settings

When a new device needs to be given permission to use Nova firstly an email will be sent to the registered email address which is selected by the practice when taking Nova initially. This will alert the registered user that someone on a new device is attempting to access the software.

The email will look like the following: It will contain the users email address, and details about the device together with an authorisation code.

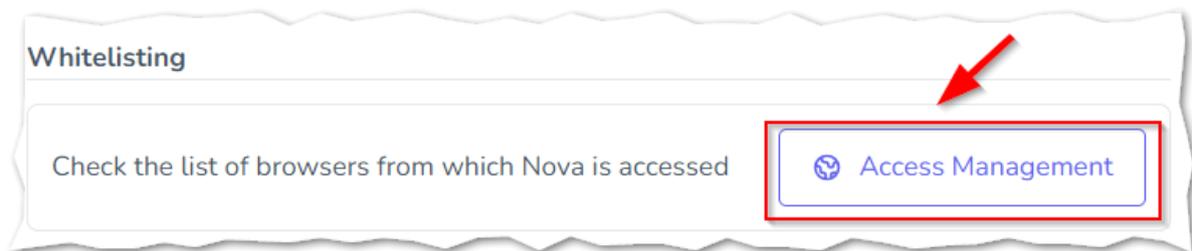


To authorise this device go to **Settings > Device Settings**

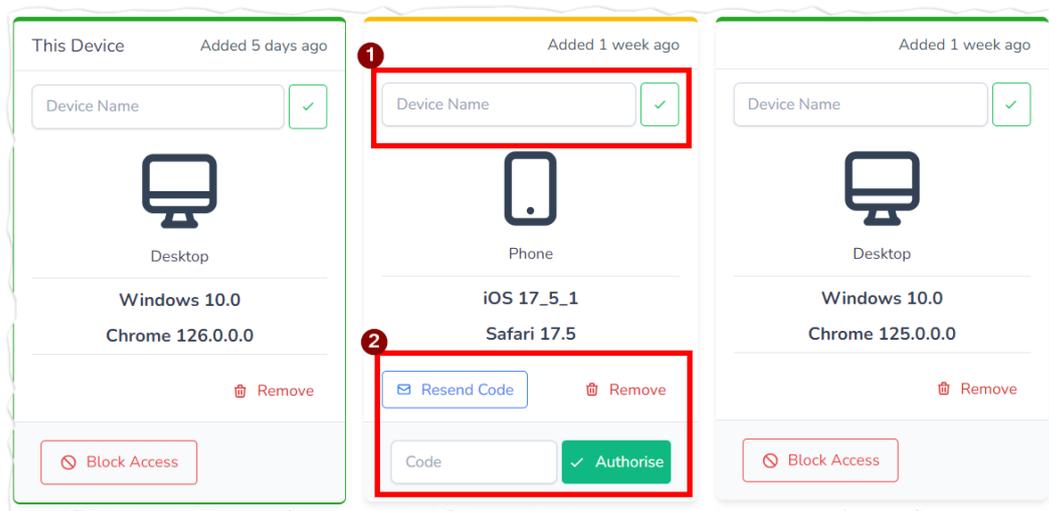
Within here on the right of the screen is a section called **Whitelisting**

Click on **Access Management** (Fig 1) to enter the authorisation screen.

(Fig 1)



Once in the **Access Management** screen, the devices which have been authorised as well as any new ones will be listed.



The device name (1) needs to be entered to be able to identify whose device it is. Then the code from the email will need to be entered (2)

1.

