Purpose

Use this procedure to create a new user or modify an existing standard user, assign their access in ***OSRconnect***, and create their initial login password.

Trigger

Perform this process when you need to create additional standard users for your firm, or edit an existing standard user's credentials and/or access.

Handy hints

- Ensure that complete contact details (e.g. phone number) are entered for the user, as OSR's system support team will use these to contact the user for their password set up.
- The **Valid To** date determines when the user's access will expire. If setting up a new user for an indefinite period, we recommend using a date of 31/12/9999.

Procedure

1. Adding or editing users is performed in the **Update Details** tab.
2. Click the **Update Details** tab.
3. Select **Additional Users**.
4. The **Maintain Additional Users** screen is displayed.
5. Click **Add**.
6. Complete the **Details** fields for the additional user.
7. Enter the **Valid from** date.
8. Enter the **Valid to** date.
9. **Note:** The **Valid to** date sets the expiry date for the additional user's ***OSRconnect*** access.

   If you are setting up an additional user for indefinite access, we recommend a date of **31/12/9999** (this can be changed later if required using the **Edit** function).
10. Enter the **First Name** of the additional user.
11. Enter their **Last Name**.
12. Enter the **Street** name.
13. Enter the street number in the **Bldg. No** field.
14. Enter the suburb/town in the **City** field. Complete this field using **CAPITALS** only.
15. Enter the **Post Code**.
16. Click the **Country Code** list arrow.
17. Scroll through the list.
18. Select the country from the list.
19. Click the **State** list arrow.
20. Select the state from the list.
21. Enter the contact details for this additional user (e.g. phone and email contacts).
22. These details will be used by our support team in the event we need to contact the user.
23. Click **Apply**.

24. The new user is now displayed in the **Contact Persons** list.
25. You can now assign the roles specific to this user's access.

    If the roles are **not** specified, this user will automatically have access to **all** the revenue types and activities available to the super user for this client.
26. Scroll down to the **Assignments for Contact Person** section.
27. The default assignments are displayed.
28. Click **Edit**.
29. Click the **Tax Type** list arrow.
30. Select the **Tax Type** to be assigned to this user.
31. Click the **Activity** list arrow.
32. If **All** is selected, the user will have access to file and pay transactions.
33. If **File** is selected, the user will have access to file (create and lodge) transactions only.
34. If **Pay** is selected, the user will have access to pay transactions only.
35. Select the required **Activity** level for this user.
36. Click **Apply**.
37. The modified **Tax Types** and **Activity** for this user are now displayed.
38. Scroll to the top of the screen.
39. Click **Save**.
40. Click **OK** to confirm.
41. The status message advises a successful data save.
42. Return to **Additional Users** to view the new user's ***OSRconnect*** **User ID**.
43. To add another user, click **Add** and repeat the set up process.
44. To update an existing user's details (e.g. name, access levels, valid to date), click **Edit** and make the required changes.
45. To end a user's access, select the user by clicking the adjacent grey box, and then perform one of the following:
    - click the **End Relationship** button
    - select **Edit**, and amend the user's **Valid to** date.

46. Note the **User ID** created for the new user. This is the user ID that this person will use when they log on to ***OSRconnect***.

47. **Note:** Before the new user can log on to ***OSRconnect*** with their new User ID, their password must be set.

    The process for creating a password for a new user is shown later in this tutorial.

48. Start the transaction using the menu path or transaction code.

49. Return to the ***OSRconnect*** login screen. **Note:** Disregard the **User ID** and **Password** fields on this screen—these are not used for the initial password setup.

50. Click the **OSRconnect Password—Request** link.

51. The **Request Password** screen is displayed.

52. Click the **Id Type** list arrow.

53. Select **Client Number**.

54. Enter the User ID in the **Number** field.

55. Click the **User Type** list arrow.

56. Select **Standard User**.

57. The **Verification** field is now displayed. To complete this field you will need either the Confirmation ID that was generated when you submitted your registration form, or a previous Assessment Transaction Number (available in your Lodgement History).

58. Enter the Confirmation ID or Assessment Transaction Number in the **Reference Number** field.

59. Click **Next**.

60. The new user must now specify their initial login password.

    Note: When the new user logs in to ***OSRconnect*** for the first time, they are prompted to change this password.

61. Enter the initial password in the **Password** field.

62. The password is case sensitive, must be 8 to 14 characters long, and contain both letters and numbers.

63. Re-enter the password in the **Confirm Password** field.

64. Click **Submit**.

65. Click **OK** to confirm.

66. The status message advises the password creation is being processed.

67. Wait 15 minutes before allowing the new user to log into ***OSRconnect.***
If they are unable to log in, please call the Client Contact Centre on **1300 300 734**.

68. Click **Close** to exit the password confirmation screen.

69. End of process.