



[Knowledgebase](#) > [How to guides](#) > [Configuration](#) > [User Permissions in Yao](#)

User Permissions in Yao

Adam Field - 2026-07-01 - [Comments \(0\)](#) - [Configuration](#)

Understanding User Permissions

Link to Video Guide: <https://youtu.be/qmBiXbv7yYI>

A guide to the permission levels available when setting up users in Yao.

Note: Before you begin: only a user with the Admin permission can create new users and assign a permission level to them. If you cannot see the options described in this guide, contact your firm's Yao Administrator.

Overview

Yao uses a permission system to control what each user can see and do within the platform. When an Admin creates a new user, they must select one of four available permission levels. This guide shows where permissions are assigned and what changes in the Yao interface for each permission level, based on what is demonstrated in the accompanying training video.

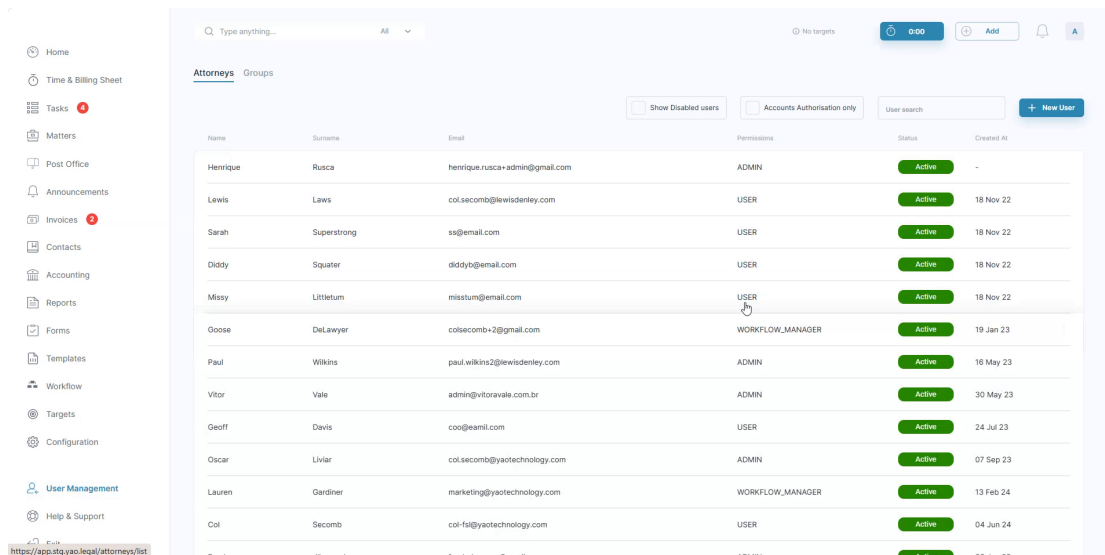
The four permission levels available in Yao are:

- Admin
- Accountant
- User
- Workflow Manager

1. Where User Permissions Are Managed

Users and their permissions are managed from **User Management** in the left-hand sidebar.

1. Select **User Management** from the left-hand sidebar.
2. Select the **Attorneys** tab.
3. The **Attorneys** tab lists all existing users for the firm, showing each user's Name, Surname, Email, Permissions, Status, and Created At date.
4. Two checkboxes are available above the list: **Show Disabled users**, and **Accounts Authorisation only**.
5. A User search field and a **New User** button are also available at the top of this screen.

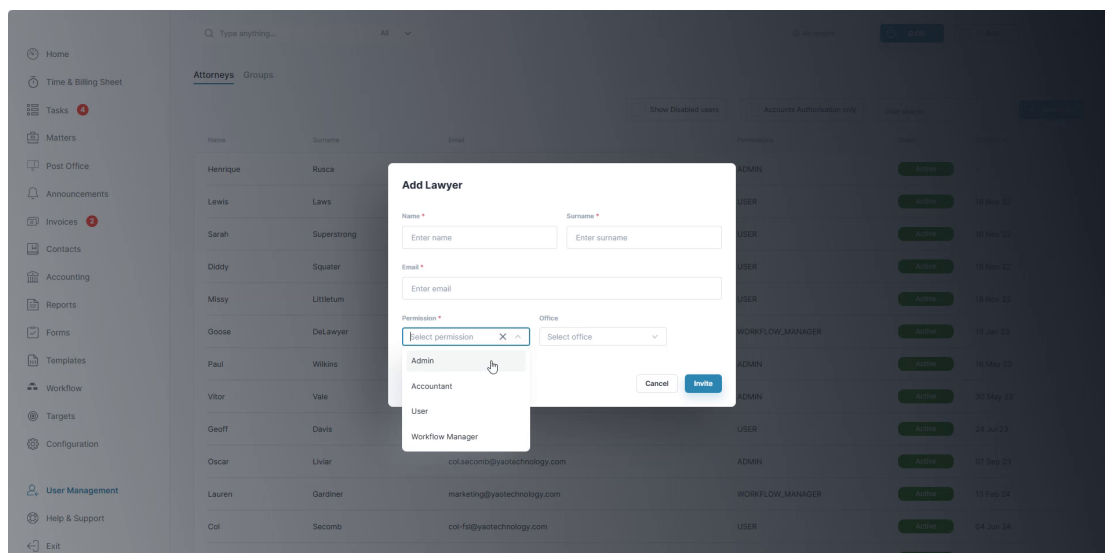


The Attorneys tab within User Management, showing the Permissions column.

2. Assigning a Permission to a User

An Admin assigns a permission to a user when creating that user.

1. From the **Attorneys** tab, select **New User**.
2. The **Add Lawyer** window opens, with fields for Name, Surname, Email, Permission, and Office.
3. Name, Surname, Email, and Permission are marked as mandatory fields.
4. Select the **Permission** field to open a dropdown list of the four available permission levels: Admin, Accountant, User, and Workflow Manager.



The Add Lawyer window, with the Permission dropdown open.

Note: The video does not show a permission being selected and the form being submitted, so this guide cannot confirm what happens after a permission is chosen and the New User form is completed.

3. What Each Permission Level Looks Like

The training video shows the Yao interface as seen by a user with each of the following permissions: Admin, Accountant, User, and Workflow Manager. The tabs on the Home screen and the options in the left-hand sidebar change depending on the permission assigned to the user. Each is set out below.

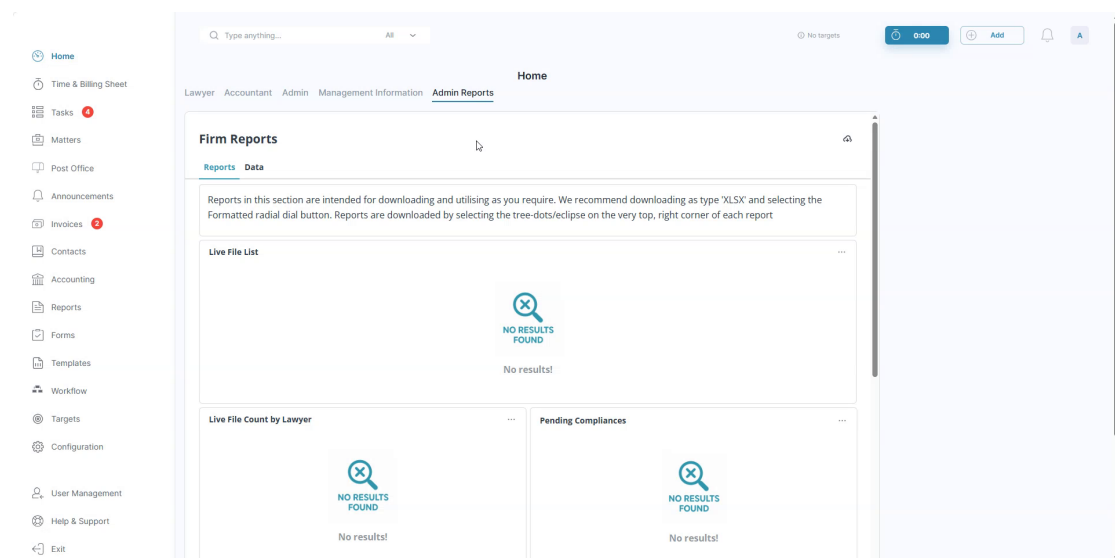
Admin

A user with the Admin permission sees the following on the Home screen tabs:

- Lawyer
- Accountant
- Admin
- Management Information
- Admin Reports

And the following options in the left-hand sidebar:

- Home, Time & Billing Sheet, Tasks, Matters, Post Office, Announcements, Invoices, Contacts, Accounting, Reports, Forms, Templates, Workflow, Targets, Configuration, and User Management.



The Home screen as seen by a user with the Admin permission.

Accountant

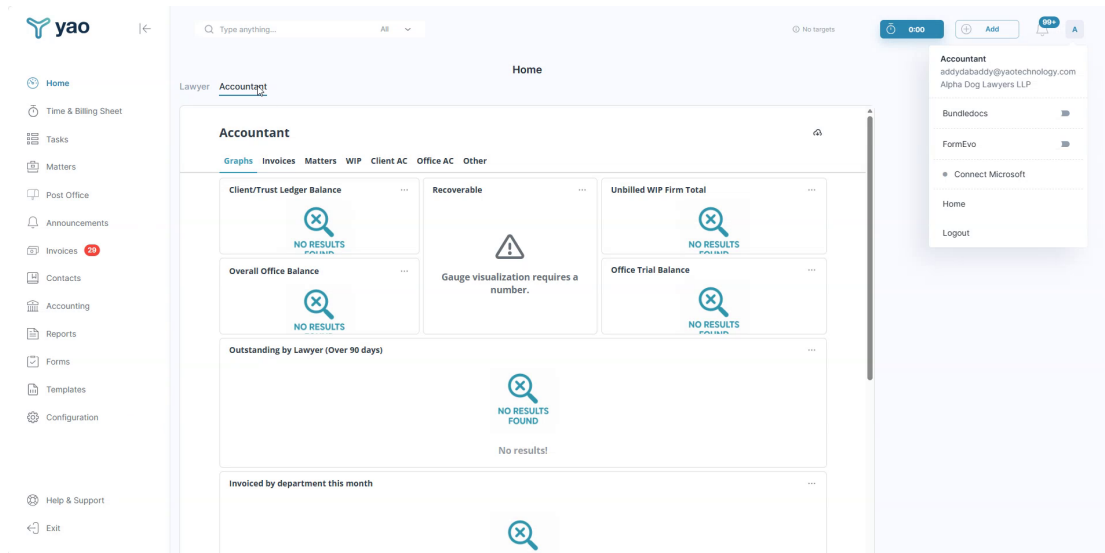
A user with the Accountant permission sees the following on the Home screen tabs:

- Lawyer
- Accountant

And the following options in the left-hand sidebar:

- Home, Time & Billing Sheet, Tasks, Matters, Post Office, Announcements, Invoices, Contacts, Accounting, Reports, Forms, Templates, and Configuration.

The Admin, Management Information, and Admin Reports Home tabs, and the Workflow, Targets, and User Management sidebar options, are not shown to a user with the Accountant permission.



The Home screen as seen by a user with the Accountant permission.

User

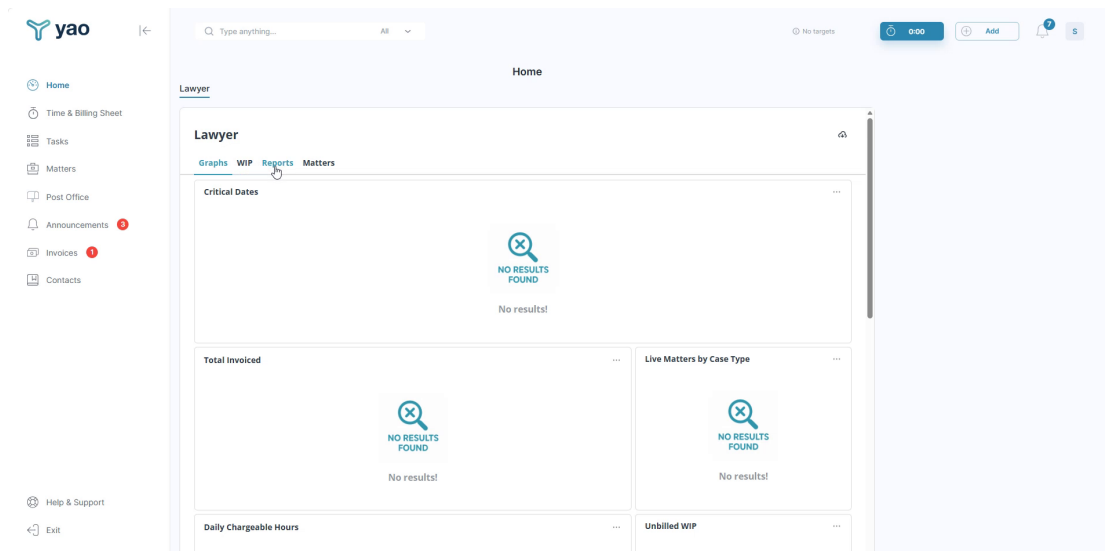
A user with the User permission sees the following on the Home screen tabs:

- Lawyer

And the following options in the left-hand sidebar:

- Home, Time & Billing Sheet, Tasks, Matters, Post Office, Announcements, Invoices, and Contacts.

This is the most restricted of the four permission levels shown in the video. The Accountant, Admin, Management Information, and Admin Reports Home tabs are not shown, and the Accounting, Reports, Forms, Templates, Workflow, Targets, Configuration, and User Management sidebar options are not available.



The Home screen as seen by a user with the User permission.

Workflow Manager

A user with the Workflow Manager permission sees the following on the Home screen tabs:

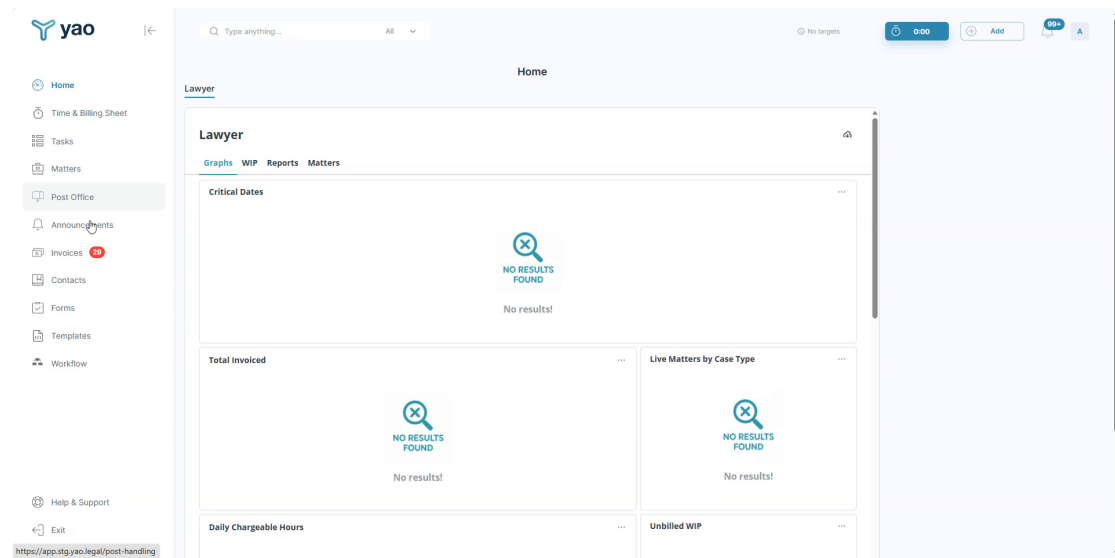
- Lawyer

And the following options in the left-hand sidebar:

- Home, Time & Billing Sheet, Tasks, Matters, Post Office, Announcements, Invoices, Contacts, Forms,

Templates, and Workflow.

Compared with the User permission, a user with the Workflow Manager permission additionally sees the Forms, Templates, and Workflow sidebar options. The Accounting, Reports, Targets, Configuration, and User Management sidebar options are not shown, in line with what was shown for the User permission.



The Home screen as seen by a user with the Workflow Manager permission.

4. Permission Comparison at a Glance

The table below summarises the sidebar options shown in the video for each permission level. A tick indicates the option was visible in the sidebar for that permission.

Sidebar Option	Admin	Accountant	User	Workflow Manager
Home	Yes	Yes	Yes	Yes
Time & Billing Sheet	Yes	Yes	Yes	Yes
Tasks	Yes	Yes	Yes	Yes
Matters	Yes	Yes	Yes	Yes
Post Office	Yes	Yes	Yes	Yes
Announcements	Yes	Yes	Yes	Yes
Invoices	Yes	Yes	Yes	Yes
Contacts	Yes	Yes	Yes	Yes
Accounting	Yes	Yes	—	—
Reports	Yes	Yes	—	—
Forms	Yes	Yes	—	Yes
Templates	Yes	Yes	—	Yes
Workflow	Yes	—	—	Yes
Targets	Yes	—	—	—
Configuration	Yes	Yes	—	—
User Management	Yes	—	—	—

Note: Need help? Please contact your firm's Yao Administrator for further guidance on user permissions.