Users Overview Transcript

Andrew
Did you see that group of new hires?

Robert
Yeah, we've added some to all teams… I'm supposed add them to the system, but I haven't done that in a while.

Andrew
Why don't we go do that together now? I can walk you through setting up the user groups and assigning everyone correctly. Pick a topic and we'll get started!

Topics

- Users Overview
- User Group Settings
- Adding a User

Users Overview

User settings give you the flexibility to allow or restrict access based on your management guidelines.

You can summarize user setup in 3 steps.

First, you create User Groups based on the roles within your organization and the actions they perform.

Once set, the second step is to assign Permissions to the groups.

With Groups and Permissions set, you then add Users and assign them to the User Groups.

A Best Practice is to create as many User Groups as needed and assign Permissions to them.

Users can belong to multiple User Groups so add them to the ones that give them the permissions needed for their role.

Several User Groups and Permissions have been pre-set for you.

User Group Settings

From within System Manager and the General view, select User Groups.

To view an existing one, highlight it, right click, and then select Properties.

If you need to add one, click the New icon.

On the General tab, enter a descriptive Name.

When you select the Members tab, you can see a list of users assigned to this group.

Select the Add button to add another to the Group.

To delete a User, select one, and then choose Remove.

Remove All clears all members listed.

You define what the User Group can and cannot do on the Permissions tab.

Permissions are also organized into Groups.

General Setup and Operations have many settings for consideration.

The list of Permissions is shown in the left column.

Permissions are categorized into types: Read, Update, Add, Delete, and Yes.

Read allows the user to see information only.

Update allows the user to edit an existing record.

Add allows the user to create a new record and Delete permits the removal of a record.

Use the Yes column to control the users' ability to perform an action or see additional details.

In keeping with best practices, pre-set user groups also have pre-set permissions.

Review and modify these as needed.

You use the Negotiation tab settings to control Group Members ability to negotiate prices for product groups.

Choose OK to complete the review and close the User Group.

Adding a User

You enable users for the people in your company that need access to the system.

From the General view, select Users.

To see existing Users, choose Go.

To add a new User, right-click and select New.

On the General tab, create the Logon username.

It's not case sensitive and may be the same as the log in name for your network or the users email account.

Enter their First and Last name, and middle Initial if applicable.

The Staff number may be alphanumeric and up to 10 characters.

The User type is General.

The Control tab identifies the Default branch for this user.

On the Branch Access tab, select the Name field ellipsis and choose the Branches this user should have access to, or enable the check box to allow them access to all branches.

When you select a Division or Region, the system automatically selects all subordinate Branches.

Choose the Access level for each Branch. When the User logs on, they can only select from the list of Branches they have access to.

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