Users Overview

BisTrack User settings provide flexibility to allow or restrict access based on management guidelines.

In this training we will review the relationship between User Groups, Permissions and Users.

Then we will look at the settings for User Groups and the steps to Adding a User.

Setting up Users can be summarized in 3 steps.

First, User Groups are created 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, add Users and assign them to the User Groups.

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.

A number of User Groups and Permissions have been pre-set for you.

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’.

On the ‘Members’ tab, Users that belong to this Group are shown.

Use 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.

On the ‘Permissions’ tab you can define what the User Group can and cannot do.

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 only see information.

‘Update’ allows for editing of an existing record.

‘Add’ permits the creation of a new record and ‘Delete’ the removal of a record.

The ‘Yes’ is used to control the ability for Users to perform an action or see additional details.

In keeping with best practices, Permissions have been defined for each pre-set User Group.

Review and modify these as needed.

The ‘Negotiation’ tab settings control Group Members’ ability to negotiate prices for product groups.

Product Groups will be addressed in the course titled ‘Product Setup’.

Click ‘OK’ to complete the review and close the User Group.

Users are set for the people in your company that need access to BisTrack.

Go to the General view and select ‘Users’.

To see existing Users, click ‘Go’.

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

On the ‘General’ tab create the ‘Logon user name’.

It is not case sensitive and may be the same as the log on name for your network or the user’s email account.

Enter the users ‘First’ and ‘Last’ name and middle ‘Initial’.

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

The ‘User type’ is ‘General’.

On the ‘Branch Access’ tab, click in the ‘Name’ field ellipsis and select the Branches this user should have access to [pause] or check this box to allow them access to all.

If you select a Division or Region, such as Southern California, all subordinate Branches will also be selected.

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

Click ‘OK’.

The ‘Control’ tab identifies the ‘Default branch’ for this user.

The ‘Financial’ tab is used to enter values that limit this user’s ability regarding customer credit related activities.

The default, 0, indicates no limit rather than a literal limit of $0 or 0 days.

Manage the Users ‘Account’, by disabling it temporarily or permanently changing the password or preventing the resetting of the User’s password.

The ‘Member Of’ tab is used to assign the User to User Groups.

They can be assigned here or on the ‘Members’ tab of User Group

Click ‘Add’ to select the groups this User is a member of.

Users can be in more than one group to give them the right combination of Permissions.

When in multiple groups, they inherit the combination or superset of Permissions.

User Permissions can be assigned on the individual User.

You can give an individual full access by clicking ‘Has administrative rights’ on the ‘Permissions tab.

The Permissions settings are ‘Not Set’, ‘Granted’, ‘Revoked’, or ‘Inherited’.

If the User has been assigned to a User Group, those inherited Permissions display.

Individual Permission settings, including ‘Revoked’ override any ‘Inherited’ User Group Permissions.

Permission changes and all User settings are effective immediately upon clicking ‘Save and Close’.

If the User is already logged in, any changes are not going to be reflected or activated until they refresh.

Some Permission changes that affect displays and views do not take effect until the User logs out and back in.

Understanding User Groups, Permissions and Users and how they control access is critical to creating data security within your business.

Spending some time to organize your branch, allows you to easily manage who has access to specific BisTrack functions.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

EPICOR

Corporate Office
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean
Blvd. Antonio L. Rodriguez #1882 Int.104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298