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# Creating and Editing Users and User Groups

Version 1.0

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# Revision History

Name	Date	Reason For Changes	Version
MDH	01-Jul-10	Initial document	0.1
MDH	07-Jul-10	New Section Reports	1.0

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### 1. Adding new login

- a. Click tools, Users.
- b. The users window will open, click edit

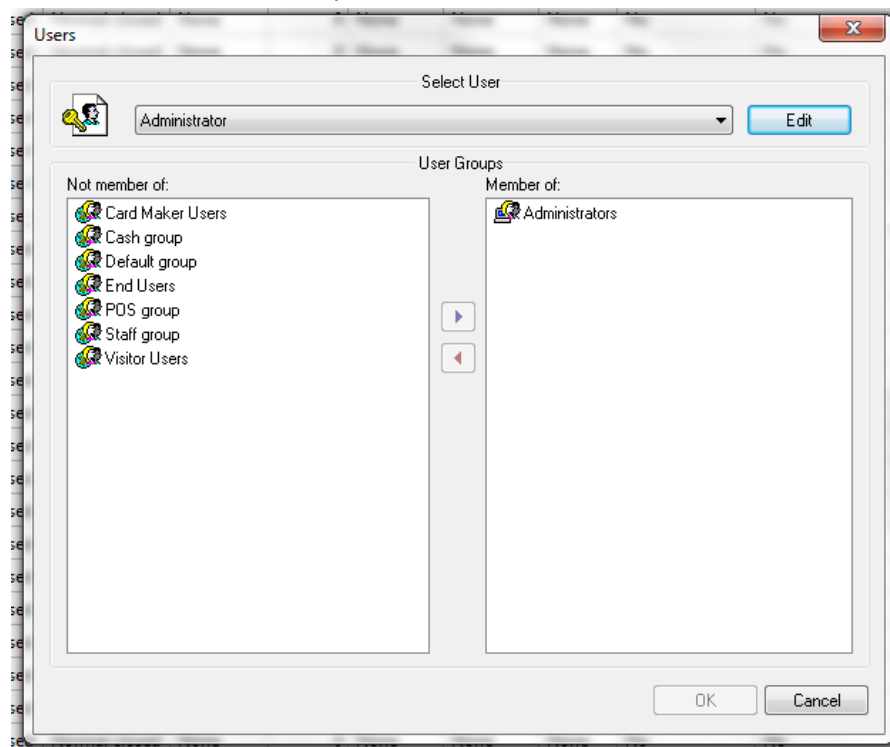


Figure 1: Users

- c. click Edit

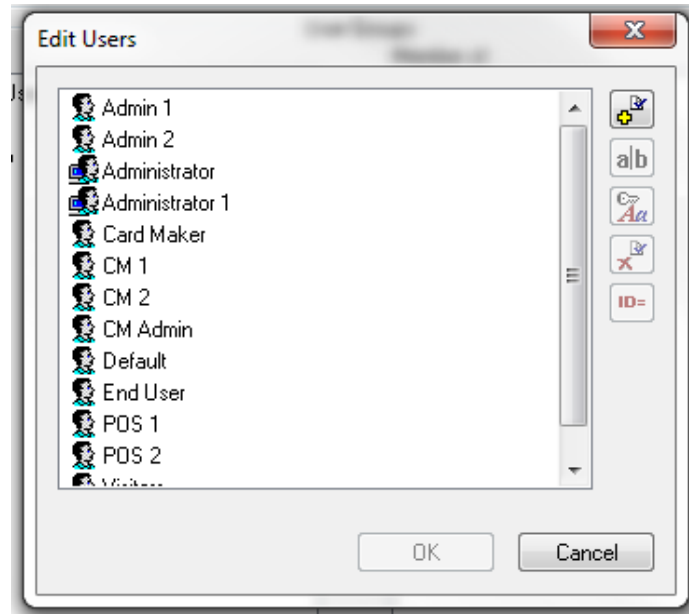



Figure 2:Edit Users

- d. Click the add Button 
- e. Enter the details: Username, New Password, Confirm New Password. There are no minimum password requirements. Click OK

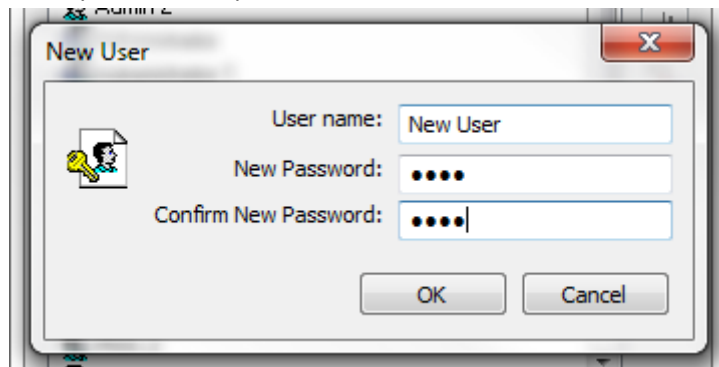






Figure 3: New User

- f. Other buttons are
  - i. Rename 
  - ii. Change Password 
  - iii. Delete User 
  - iv. Set the user ID( Card Number) 
- g. Click OK
- h. In the Users the New user should be selected. If the user group exists select it from the right hand side and move it across. If it does not exist continue to next step

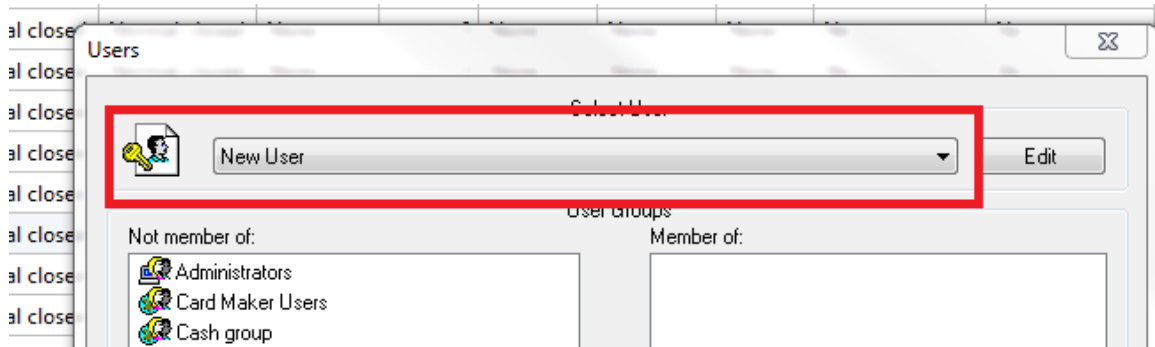



Figure 4: Users

## 2. Adding User groups

- a. Click tools, User Groups

- b. Click Edit, ADD 

- c. A new blank groups will be added

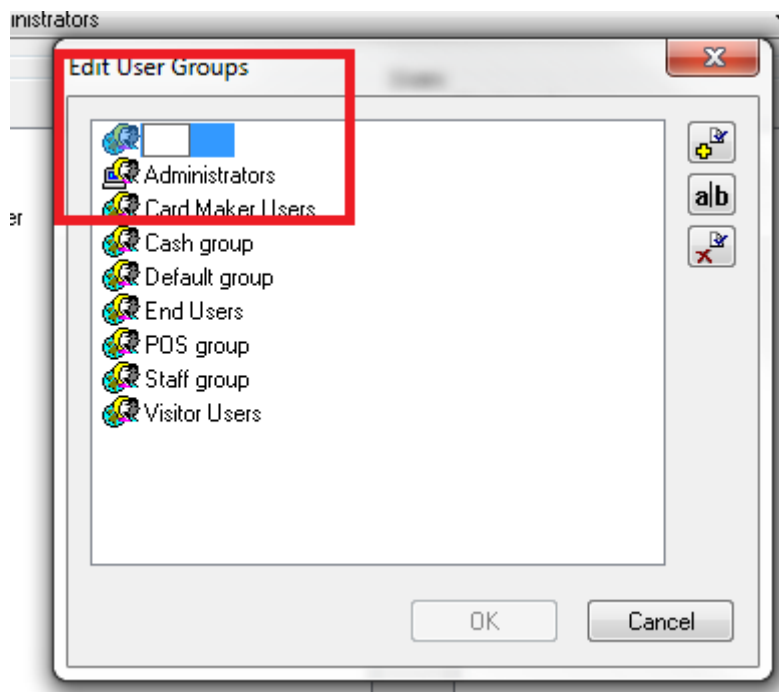


Figure 5: Edit Users

- d. Fill in the required name for the group.

- e. Other buttons are:

- i. Rename 

- ii. Delete 

- f. The New User Group will be selected. Move the new user from the 'Not Member of' (Left) to 'Member of' (right) click OK

### 3. Changing Group access rights

- a. Click tools Menu Access

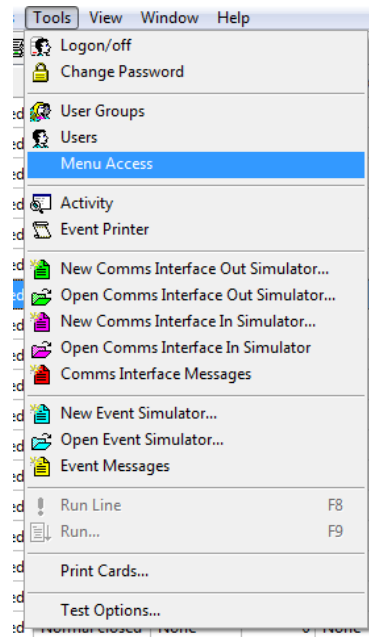


Figure 6: Tools Menu

- b. Select the group from the drop down list box

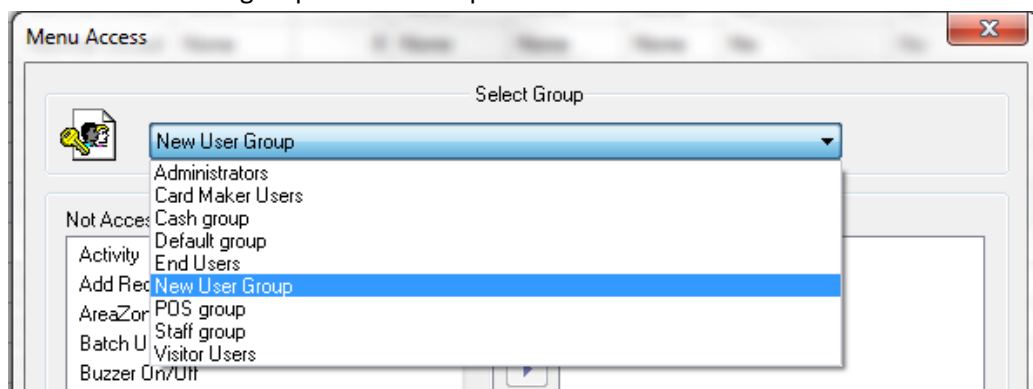


Figure 7: Menu Access

- c. Move the required records from the 'Not Accessible' (Left) to 'Accessible' (Right). This will give access to the menu items. For example the option card editor will only provide access to the select editor but not the **Card Admin**.
- d. To give access to the option within the select editor, open the table whilst logged in as administrator.

User: Administrator - [Card admin]

	Status	Card	Name	First Name	Title	Area Group	Compa
1	Enabled	6748	zCard 001		None	zArea group 01	
2	Enabled	99	zCard 002	aaa	None	zArea group 01	
3	Enabled	1	zCard 003		None	zArea group 01	
4	Enabled	82	zCard 004		None	zArea group 01	
5	Enabled	88	zCard 005		None	zArea group 01	
6	Enabled	93	zCard 006	bbb	None	zArea group 01	
7	Enabled	2	zCard 007	ccc	None	zArea group 01	
8	Enabled	94	zCard 008	ddd	None	zArea group 01	
9	Enabled	67	zCard 009	hhh	None	zArea group 01	
10	Enabled	66	zCard 010	ggg	None	zArea group 01	
11	Enabled	64	zCard 011	ddd	None	zArea group 01	
12	Enabled	70	zCard 012	fff	None	zArea group 01	
13	Enabled	76	zCard 013	eee	None	zArea group 01	

Figure 8: Card Admin

- e. Right click on the column heading and select Group Access (administrator)

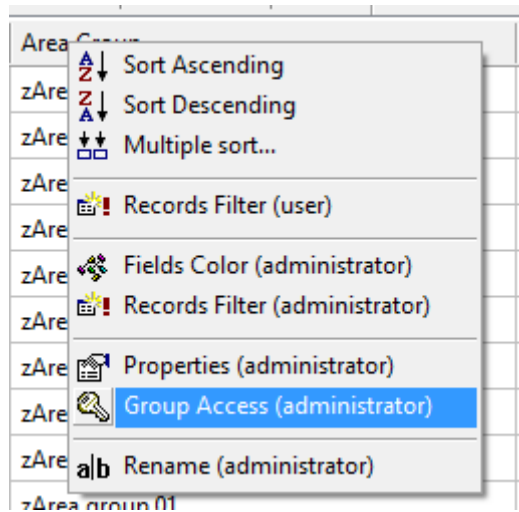


Figure 9: Right click Card Admin

- f. Move the required user group from the Not member of(Left) to Member of(right), and click OK

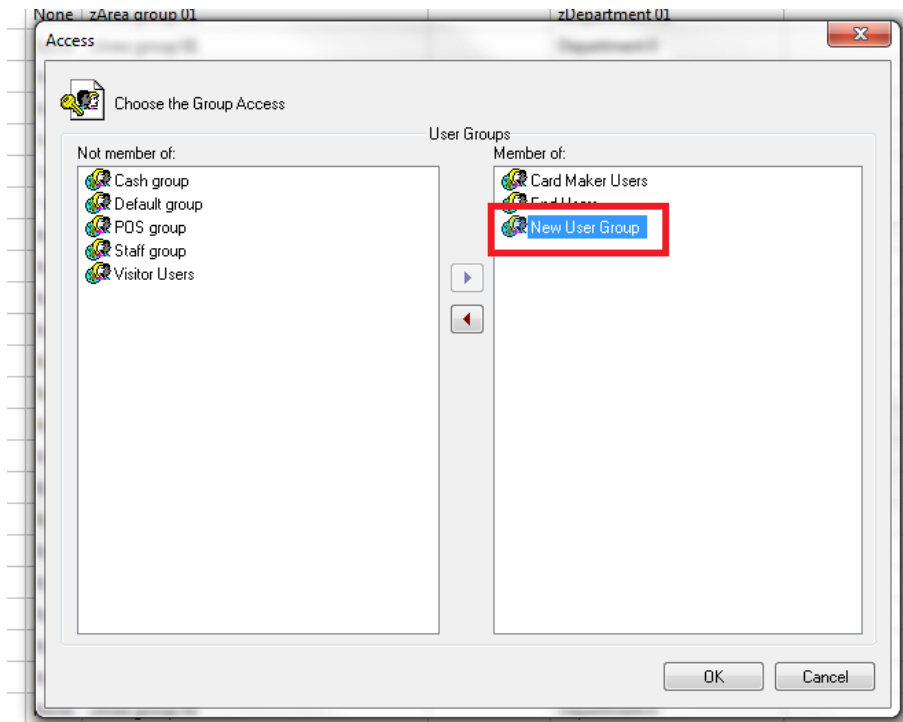


Figure 10: Access

- g. This will allow the user access to the Table but not properties.
- h. As administrator right click on any record and select properties.

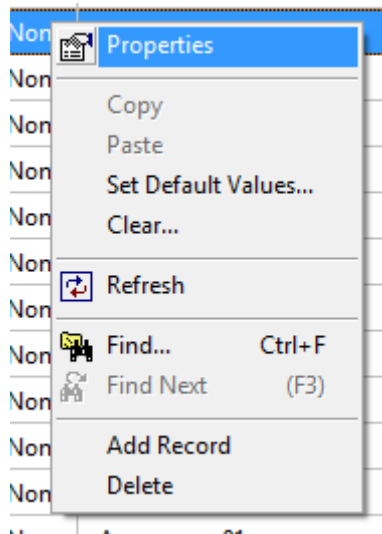


Figure 11: Right click Card

- i. Once in properties right click in a vacant area and select Access to Dialog Controls By User Groups

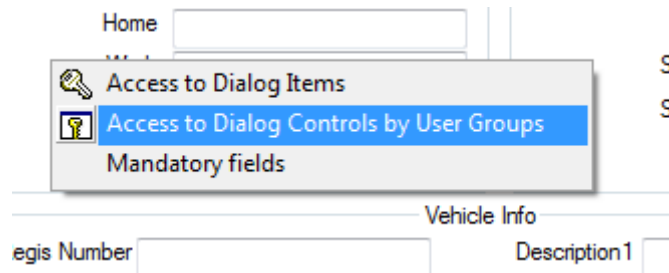


Figure 12: Right Click Card Properties

- j. In the drop down list box select the user group
- k. Move the required options across from **Not member of** to **Member of**

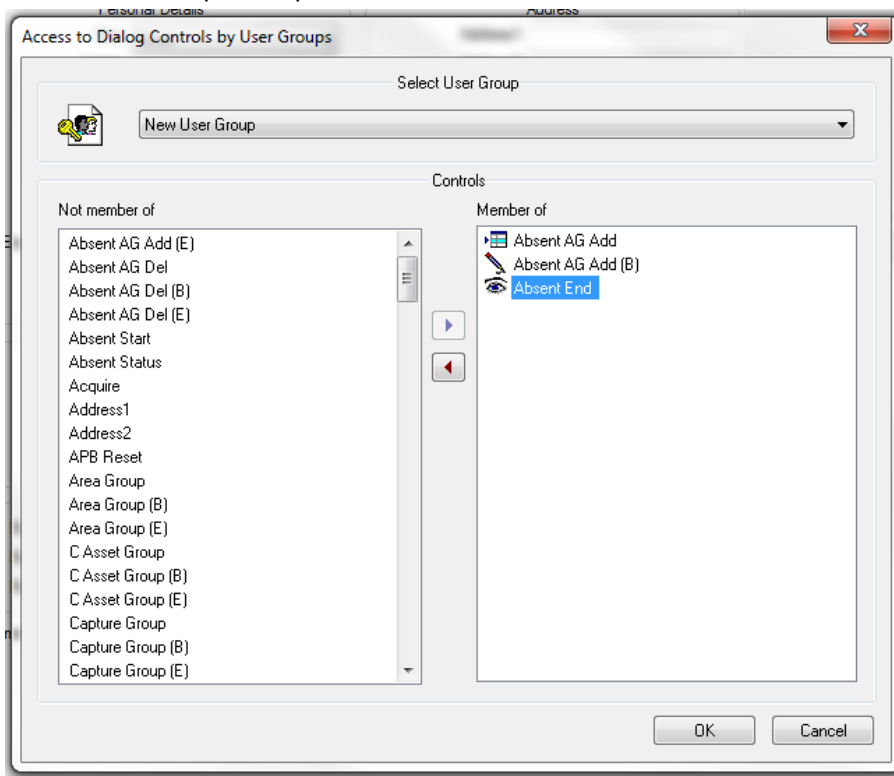





Figure 13: Access to Dialog Controls

- l. The symbols next to the options are for different editing options
  - i. An Eye  : View only, the field cannot be edited
  - ii. Pen  : Text Editable.
  - iii. Drop Box  : Drop down list box containing selectable options
- m. All tables that are needed will need to be done, as well as the Properties views.

## 4. Permissions in reports

- a. Click tools Menu Access



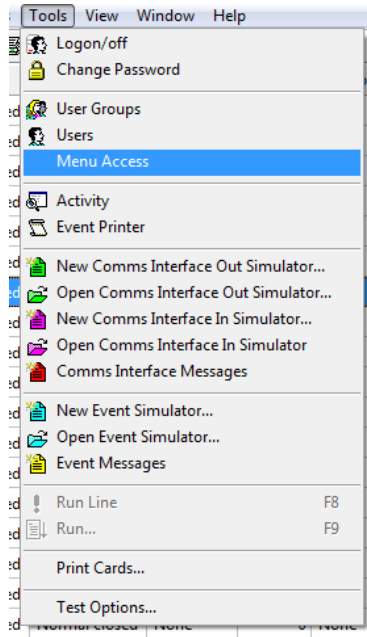


Figure 14: Tools Menu

b. Select the group from the drop down list box

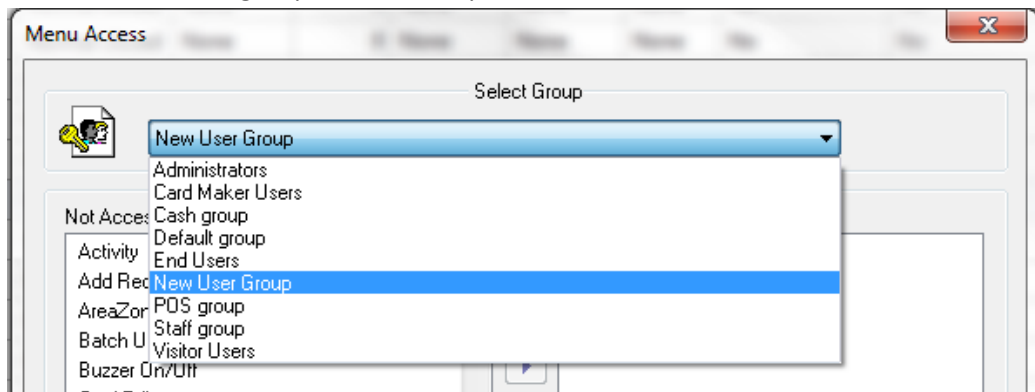


Figure 15: Menu Access

- c. Move the required records from the 'Not Accessible' (Left) to 'Accessible' (Right). This will give access to the menu items. Once done click the close button.
- d. Click tools, Dialog access report by Group.

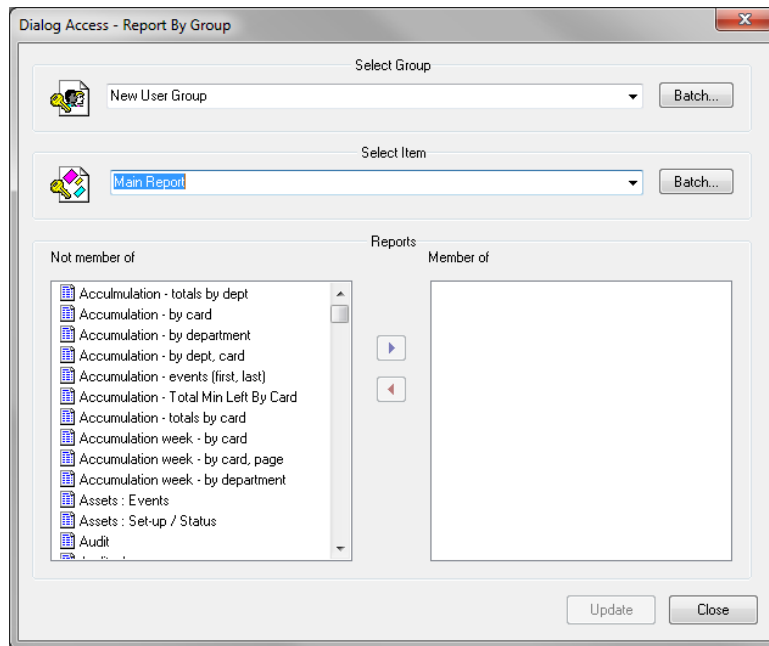


Figure 14: Dialog access- Report By Group

- e. Under 'Select Group' select the user group.
- f. Under 'Select Item' select 'Main Report'
- g. Move the reports that the users should have access to, to the Member of column, and click on update
- h. Without closing the window click on the second Batch button, in the select item section.
- i. Select all the required parameters and move them to 'Items to Modify' column.

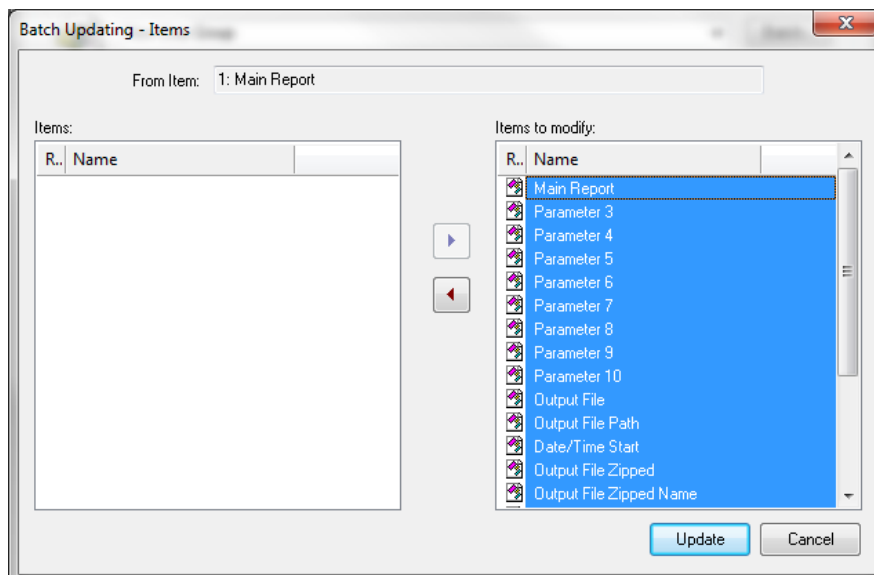


Figure 15: Batch Update

- j. Click on Update, this will close the current screen. Click close.
- k. Logon the new user and test.