User Roles

The User Roles module allows for additional roles to be added that can be configured according to requirements, limiting or blocking access to certain areas or features within the program.

Roles

There are 4 default roles provided for all versions of the program:-

Administrator - with access to all parts of the application. At least one User must have an Administrator role.

Read Only - can run reports but make no changes to entries or codes.

Entry Only - can enter data but not run any reports.

Basic User - can enter data and run reports but has no access to Admin menus.

Setting up a New Role

An Administrator can maintain and create non-standard roles which provide one of 3 options for each section of the application: Read/Write, Read Only or No Access.

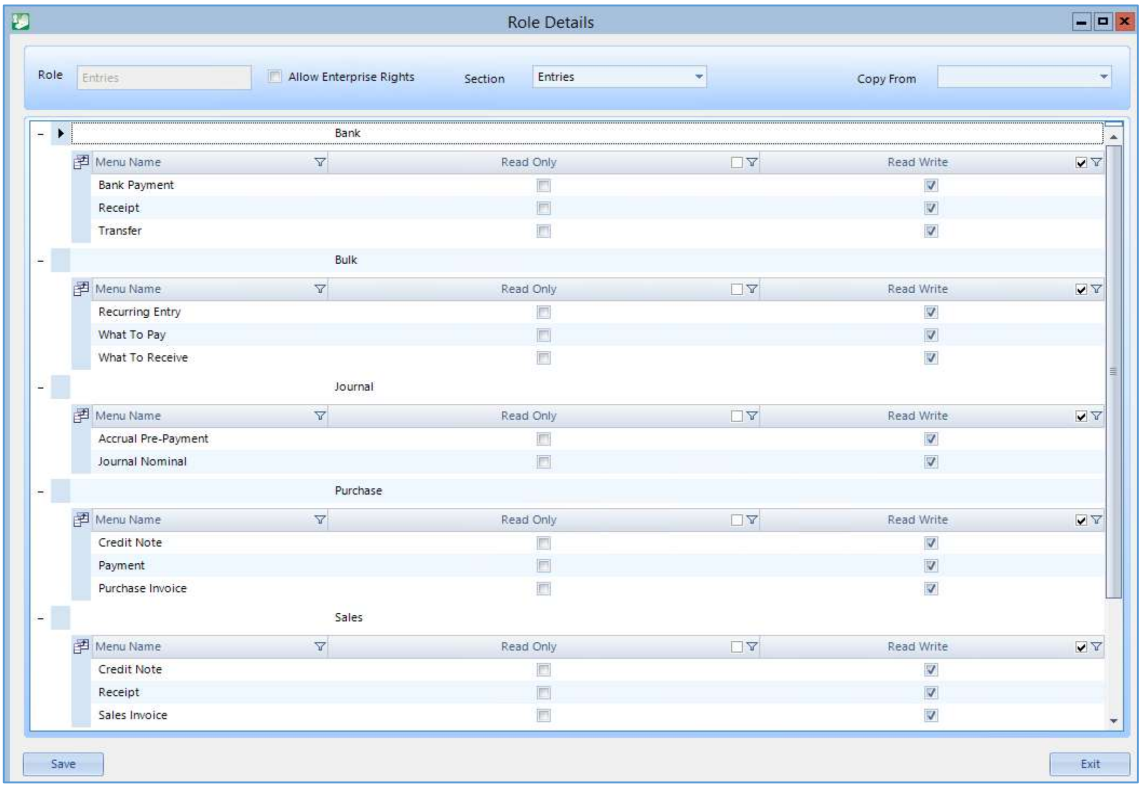
In the role section of Setup, a list of existing roles is shown. Select New to add roles. Existing roles (other than defaults) can be amended through Edit and the changes made will apply to any user set to that role when they sign in.

In either case the role is maintained in the Role Details Screen which shows each section of the program and its setting for the role.

Role Details Form

Role	Enter the name of a Role to be set up, e.g. Clerk.	Once it has been setup this role can be assigned to a user.
Allow Enterprise Rights	Indicates that the role is Enterprise restricted.	Where the optional Enterprise Rights module is enabled a role can be set to restrict a user to report only on selected enterprises.
Section	Choose the section. This is listed by Menu Ribbon section, e.g. Entries, Daybook, Management etc.	After selecting a section the Screen will display all the menu items within that section.
Copy From	Choose an existing role to copy.	This is useful for setting up roles with similar access, e.g. the Read Only role can be copied, and then if a user needs Write Access to certain screens amend as necessary.

Use the mouse and Click in the Read Only or Read Write column for the relevant screen. means access and is no access.

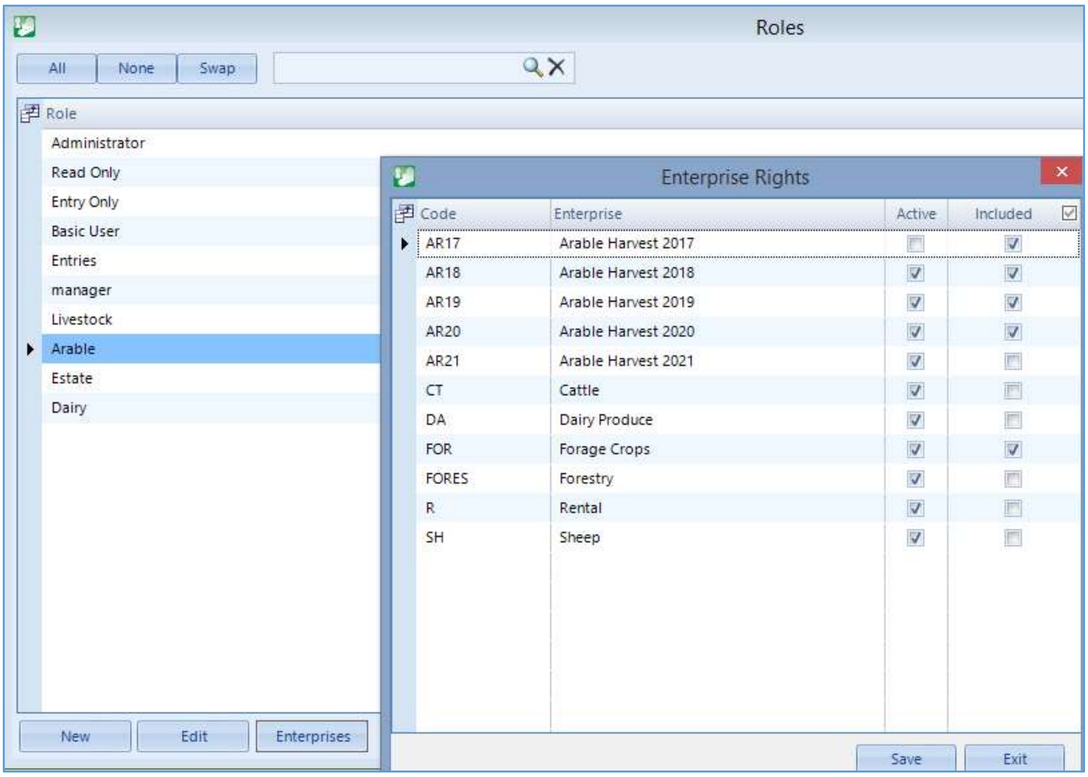


Enterprise Rights (optional module)

The optional Enterprise Rights module allows a further level of restriction so a user can only access areas of the program which include certain enterprises.

Once the Role is set up, click on the Enterprises button at the bottom of the Roles listing screen. This shows a list of Enterprises and whether they are Active.

Tick the Included field to add them to the selected role. Only these Enterprises will be available for reporting for the user with this role.



Roles Report (All Versions)

This report lists all Users and the access they have to the program. It is grouped by User and also gives details of which Enterprises the user has access to if the Enterprise Rights module is being used. Where a section is not listed the Role has no access to that section.

Users

Additional users can be added to a company and each User must be assigned a role. Choose Users from the 

section and click New. Enter the relevant details:

User Name Short name the User will sign in with, this can be up to 10 characters but must not contain spaces or other special characters.

Name This name will appear as the user name on Audit reports. A Contact Address can also be setup, for example for contractors; this address is not linked to the accounts.

Contact Address Includes the telephone number, postal and Email address details of the user.

The User email address can be used to replace the Reply To address when sending emailed stationery, provided that the email address used is a valid From address for the Outlook profile.

Password A user must have a password. It is recommended that the password is a minimum of 6 characters long and that it is changed regularly. It is required to be typed "blind" on Launchpad and is case sensitive.

Confirm Password Check to confirm password is entered as intended.

Role Select the appropriate role for the user from the drop down list; see Roles on page 1. There must always be at least 1 Admin user in a company. Only an Admin user can backup and restore data.

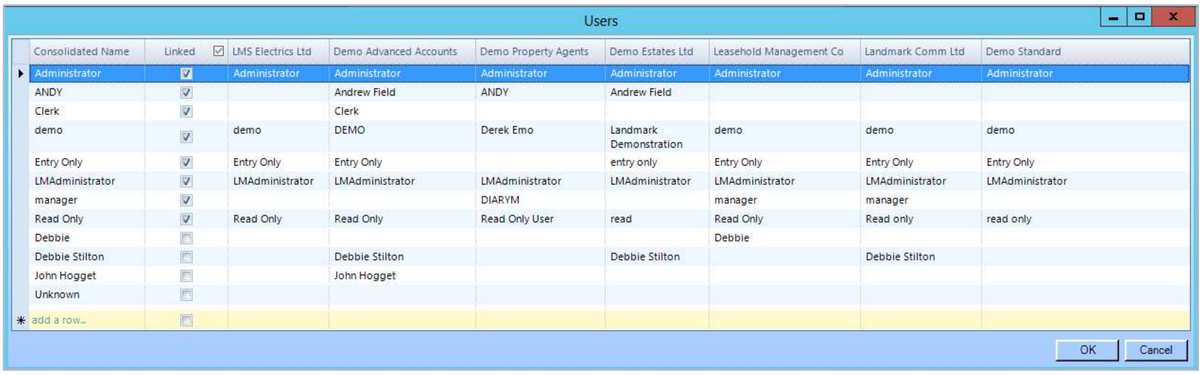
Non Active User codes need to be retained for Audit purposes and cannot be deleted; however, they can be made non active which will then prevent access to the company.

There is no restriction on the number of users that can be added to a company, however the licence will limit the number of users that can access a company at the same time.

To allow a user to open several separate companies under the same Licence without using up multiple access licences, set up the Linked User option on the Launchpad. 

The Linked User option shows a list of users for each company in the selected database. It allows them to be linked to a single physical user record by ticking the link column next to the physical user name and then dragging the individual companies' user name into the same row.

For example the user name 'Debbie Stilton' comes up as a user in more than 1 company. Also the user 'Debbie' is in Leasehold Management, these user names are for the same physical user so can be linked.


Users

Consolidated Name	Linked	LMS Electrics Ltd	Demo Advanced Accounts	Demo Property Agents	Demo Estates Ltd	Leasehold Management Co	Landmark Comm Ltd	Demo Standard
Administrator	☑	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator
ANDY	☑		Andrew Field	ANDY	Andrew Field			
Clerk	☑		Clerk					
demo	☑	demo	DEMO	Derek Emo	Landmark Demonstration	demo	demo	demo
Entry Only	☑	Entry Only	Entry Only		entry only	Entry Only	Entry Only	Entry Only
LMAdministrator	☑	LMAdministrator	LMAdministrator	LMAdministrator	LMAdministrator	LMAdministrator	LMAdministrator	LMAdministrator
manager	☑			DIARYM		manager	manager	
Read Only	☑	Read Only	Read Only	Read Only User	read	Read Only	Read only	read only
Debbie	☐					Debbie		
Debbie Stilton	☐		Debbie Stilton		Debbie Stilton		Debbie Stilton	
John Hogget	☐		John Hogget					
Unknown	☐							
add a row...	☐							

OK Cancel

By dragging the word Debbie into the row below and ticking the linked box Debbie with Debbie Stilton are then treated as the same user and will only use one licence no matter how many companies she has open.

Conversely, if you had two names who are users in different companies and are not allowed access to other companies you can split them by dragging and dropping them in a new slot at the bottom and enter a different physical user name.