

User administration

This section describes the user administration. In order to manage user and user groups you need administrator rights to manage users. Authorizations can be set up for user groups or individual users. If the same authorizations are to be set up for many users, it is recommended to use user groups.



Important: Deactivate the user accounts of employees who leave the company.

Create user

This section describes how to create a user.



Restriction: To create a user, you need administrator rights.

1. Select the menu entry **Administrator > User Maintenance**.
2. Click in the area **Related actions** on the entry **New User**.
This opens the **Edit user** tab.
3. Fill out at least the mandatory fields.

Field	Description
Username	User name of the user. Der user name is require for the log-in.
Real Name	The complete name of the user.
Password expires	Date on which the user is asked to enter a new password.
Phone Number	Telephone number of the user
Email	Email address of the user
Work Org Unit	Assigned branch of the user
Permission Company Master	<p>If the check box is activated, the user is authorized to perform the following functions:</p> <ul style="list-style-type: none"> • Manage printers • Manages branches and the associated addresses • Manage company code mappings (implementation of foreign codes from an interface in internal codes)



Tip: In the Email field, enter a valid **Email** address so that the user can send and receive notifications.

4. Optionally, enter additional telephone numbers or email addresses in the **Communication** area. To add a new communication channel, click on the icon **+**.
5. Define the authorizations of the user on the following 2 tabs. You can find instructions in section [Assign permissions](#) on page 2.
The authorizations granted via the **Permissions** and **User Groups** tabs are displayed on the **Effective Permissions** tab.
6. To assign an automatic action for an event to the user, click on the **Event handler** tab. You can find further information on event handling in section [Event handling](#).
7. For instructions on how to set a password for the user, see section [Set password](#).
8. To save the user, click the **Save** button in the **Actions** area.

Assign permissions

This section describes how to assign permissions to a user. If the company does not use permission control, the **Permissions** and **Effective Permissions** tabs are not displayed. In this case, the administrator rights are assigned via the **Administrator** check box on the **General** tab.



Restriction: To assign a permission to a user, you need administrator rights.



Tip:

New companies are set up without permission control. If you would like to use the permission function, please contact servicedesk@dakosy.de.

1. Select the menu entry **Administrator > User Maintenance**.
2. Double click on the user in the table.
This opens the **Edit user** tab.
3. Click on the tab **Permissions**.
4. To expand a permission group, click on the **+** symbol.



Tip: To assign a permission group, select the group heading.

5. To assign a permission, you must move the permission from the **Unassigned Rights** column to the **Assigned Rights** column. To remove an assigned permission, you must move the permission from the **Assigned Rights** column back to the **Unassigned Rights** column.
 - To drag a single permission, highlight the permission. Click on the **>** or the **<** button.
 - To drag several permissions, hold down the Ctrl key and highlight several permissions. Click on the **>** or the **<** button.
 - To drag several consecutive permissions, highlight the first permission, hold down the Shift key and select the last permission. Click on the **>** or the **<** button.
 - To drag all permissions, click on the button **>>** or **<<**.



Tip: You can also drag permissions by clicking on one permission, holding the mouse button down and moving the mouse.



Tip: You can temporarily revoke a permission by selecting the **Deny** check box for a permission in the **Assigned Rights** area.

6. To assign a user group to the user, click on the tab **User Groups**.



Important: To display available user groups, save the user.

7. To assign a permission, you must move the permission from the **Unselected UserGroups** column to the **Selected UserGroups** column. To remove an assigned permission, you must move the permission from the **Selected UserGroups** column back to the **Unselected UserGroups** column.
8. In the area **Actions**, click on the entry **Save**.