

Ops Doc 12 Creating a New User 7jan2020

A 4 step process as follows

Step 1. Create a Network, Windows user using local convention rules eg steve or steveg
Note lower case is best and unique to your system, normally create by network administration and the same name as local email service.

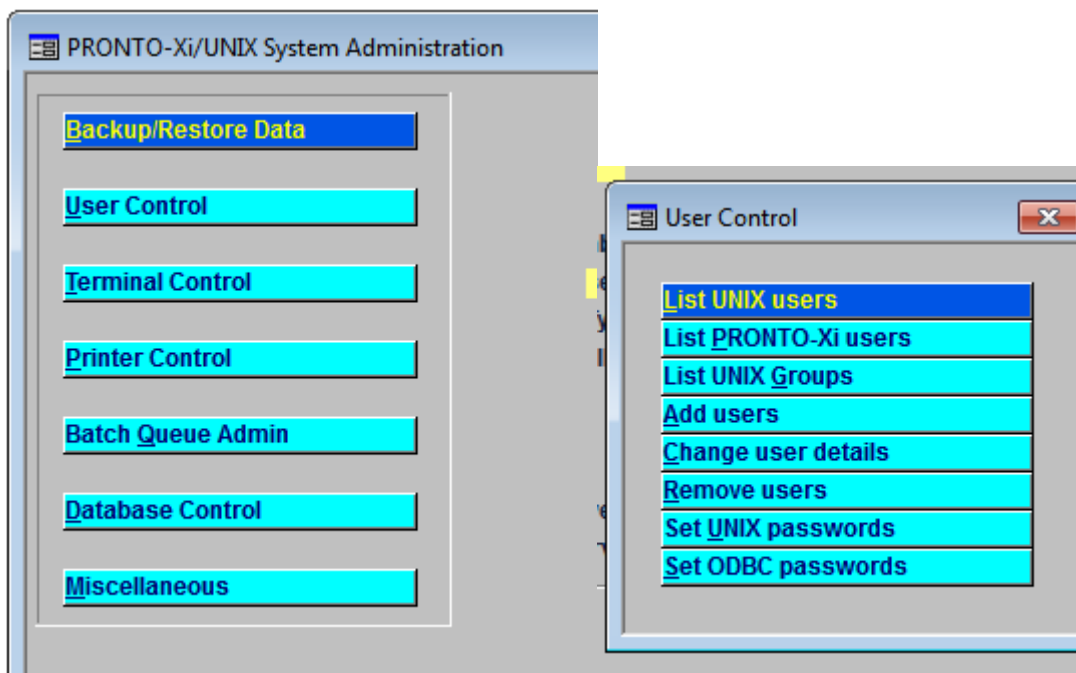
Step 2 on the Pronto linux Server login as the Pronto User (it has administrator (root) rights and use the proadmin tool via Users Menu. Add New User.

The preferred mode is to login as yourself the access the shell or Su facility from

<F3>Shortcuts

Eg

```
-sh-4.1$ su - pronto  
Password: █
```



User name: testuser	
User ID:	
Group ID: 502	pronto
Login Shell: /bin/sh	
Home Directory: /home/testuser	
Comment: Test users full name	
PRONTO-Xi Registered: Y	
Security level: 5	
Group code: Z	
Help mode: N	
Shell access allowed: N	DBA Privileges: N
SQL development: N	Sort/Filter Columns: Y
4GL development: N	Export Columns: Y
Default task: bmsmenu	
Maximum sessions: 0	

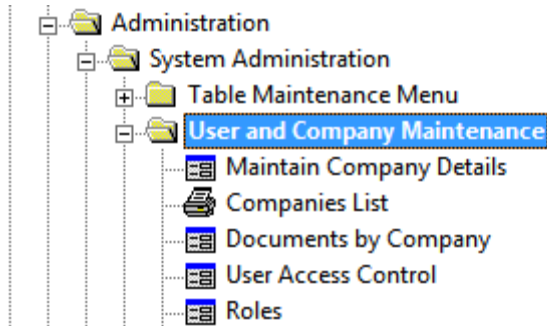
Its preferable to let the system assign the next sequential user id and the default pronto group and all defaults except Security level

- 1=Very Restricted user usually not part of the company
- 2=A Very Low user enquiry only
- 3= not normally used
- 4= a reporting enquiry level maybe new employee
- 5=Normal operator user such as warehouse or sales rep
- 6=Normal Office Staff not manager
- 7=Manager level Staff, whse supervisor ,senior office staff.
- 8=The Manager Chief Operating Officer CEO Owners, Operations Mgr etc
- 9=System Admin Programmers and Non Financial Technicians.

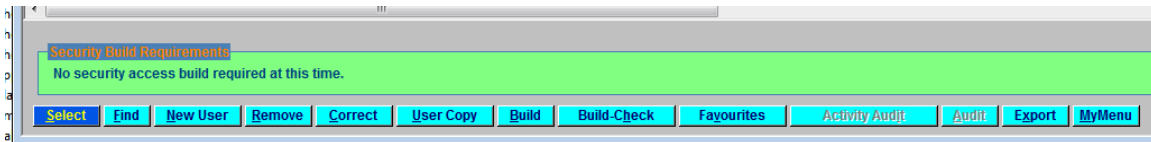
This security level reflects to MAXIMUM security level a user can access AND is COMPLETELY overridden by the Roles and Access Allow/Deny options.

The other options vary by client needs and usually if staff are trained to use the Hotkey options correctly the default 2 simultaneous sessions is usually adequate, becasue allowing more usually causes lockout and deadly embrace failures.

Step 3 Grant access for this user to a dataset and logical company and setup defaults eg warehouse, territory. Exit the proadmin task and login as a level 8 user.
Select Administration, System Administration, User and User and Companies Maintenance
Then User Access Control

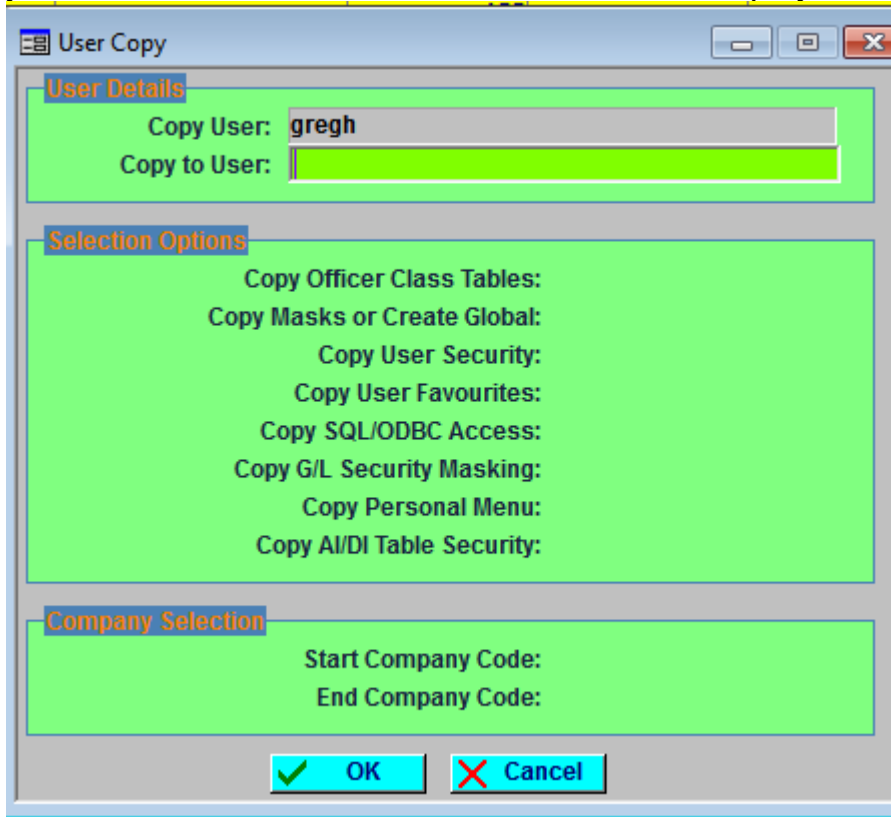


Then use the option New User FIRST to add any new users to the list



Then either select the New user to add Datasets and Roles Manually.
OR

Find a current user that has the necessary roles and permissions already and choose UserCopy and enter the new users name and select the dataset/company

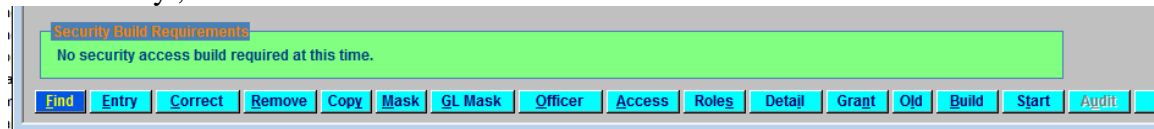


The 'User Copy' dialog box is shown with three main sections: 'User Details', 'Selection Options', and 'Company Selection'. The 'User Details' section has 'Copy User' set to 'gregh' and 'Copy to User' is empty. The 'Selection Options' section lists several checkboxes: 'Copy Officer Class Tables', 'Copy Masks or Create Global', 'Copy User Security', 'Copy User Favourites', 'Copy SQL/ODBC Access', 'Copy G/L Security Masking', 'Copy Personal Menu', and 'Copy AI/DI Table Security'. The 'Company Selection' section has 'Start Company Code' and 'End Company Code' fields. At the bottom are 'OK' and 'Cancel' buttons.

required.

Step 4

Add/Modify , Datasets and Roles to the new user



The 'Security Build Requirements' dialog box shows a message: 'No security access build required at this time.' Below the message is a row of buttons: Find, Entry, Correct, Remove, Copy, Mask, GL Mask, Officer, Access, Roles, Detail, Grant, Old, Build, Start, and Audit.

Note the Officers Tables is essential for purchase and inventory

And Masking if used to restrict territories, reps etc.

Normally Access is used for override options, or individual tasks

Roles is the easiest option . but several Roles are not obvious from the long list available.

Eg EIS , SHOWCOSTS,

Several sample users setups follow.

.. 435pm pause