Add a new user to Moneyworks

This section describes how to add a new usercode to Moneyworks.

1. Select *Sharing & Users* from the File menu.
    - The Password Control window will be displayed.
2. Highlight an existing username with the same access privileges as the new one you want to create
3. Click the Duplicate button
    - The User Privileges window will be displayed for you to enter the new user's details.
4. Enter the User Name, initials and password.
5. Check the privileges for the new user.
    - A staff member with standard privileges should have the following options turned on:
        - This User Can Make Changes
        - Execute External Scripts
        - Exporting
        - Customise List View
        - Enter Orders
        - Expression evaluation
    - These options allow a user to enter purchases orders and also allows Moneyworks to run the add-on script which warns the user if they modify an authorised Purchase Order
6. Copy User Preferences
    - If there is another staff member who has the same filters as you need for the new user, then you can copy those filters into the new user.
    - To do this:
        1. Double click on the usercode you want to copy from.
        2. Hold down the pop-up menu with a '*' on it (right-handside of the User Privileges window) and select 'Copy User Preferences).
        3. Click OK to return to the list of Users.
        4. Double click on your new User.
        5. Use the same '*' pop-up menu button but this time select 'Paste User Preferences'.
7. Turn on the option *Select Filters*.

> If you were able to copy the User Preferences from another existing user then you don't need to follow this step.

- This is the last option in the list of privileges and is required to be turned on while you set up the usercode correctly. You must turn it off once you've finished following all the instructions below.

. **8.** Click the OK button to save the new User's record.

Giving a new user access to Reports

One of the privileges is called *Form & Report Signing* and this should only be given to administration users as this gives them access to all reports. General staff members do not have this privilege and therefore cannot print reports by default. This section describes how to "sign" particular reports so a new user can print them.

1. Log onto a usercode with access to *Sharing & Users*
2. Click the *Signing* button
   - The Signing window is displayed.
3. In the top part of the window, highlight the user to whom you want to give access to a report.
4. In the bottom half of the window, highlight the form or report to which you want to give the user access.
5. Click the *Sign* button
   - This will sign the report so that the selected user will have access to it.
6. Click on the *Upload* button
7. Highlight the Report you've just signed
8. Click *Upload One* to upload the report to the server
   - This makes the new signed version of the report available for all users.
9. Click the *Close* button and then the *Done* button to save your changes and close the User Preferences window.

Restricting user access to Transactions

This section describes how to set the filters for each user so that they can only see Purchase Orders they've enter or have permission to view. If you have copied the User Preferences from an existing user then you shouldn't have to do this step. You should however still log on to the new usercode and check the filters are correct.

1. Log on to the usercode that you want to set
2. Select Show | Transactions
3. Click on *View by Orders*, then on the *Purchase Order* Tab
4. Select the appropriate filter for this user from the filter pop up menu
   - The filter popup menu is found at the top left hand-side of the window. You select the filter for the user according to what access they have to view Purchases. A general staff member would have access to 'General Purchase'
5. Now click on each of the View by Orders tabs in turn and set the filter for each one
   - These tabs are *Bought*, *Sold*, *Sales Order* and *Quote*.
6. Now do the same for each of *View by Type*, *View by Period*, *View by Status*
   - That is, click on each view option and then select each tab in that group and set the filter for each tab.

Adding the authorisation columns

This section describes how to add two columns to the Purchase Order tab so that a user can see whether a Purchase Order has been authorised or not. If you have copied the User Preferences from an existing user to make the new usercode, then you probably will not have to do this step.

1. Make sure you are on the *Purchase Order* tab
   - To get to this tab, click on View by Orders, then click the Purchase Order.
2. Right click anywhere in the list of transactions.
   - A popup menu will be displayed.
3. Select *Customise List View* from the popup menu
4. Add two new columns by adding the *Heading* [your calculation here] to the list of fields to be displayed.

5. Edit each new column in turn so they are named “Auth 1” and “Auth 2” respectively.
6. Edit the *Auth 1* column so it displays the first authorisation field.
    - The column value should be:
        - Upper(Slice(lookup(SequenceNumber,”User.data”),1,”*”))
7. Edit the *Auth 2* column so it displays the first authorisation field.
    - The column value should be:
        - Upper(Slice(lookup(SequenceNumber,”User.data”),2,”*”))
8. Click *OK* to save your changes.

Turning off filters

This section describes how to turn off the privilege called ‘Select Filters’. It is vital that this is turned off for each user once the correct filter has been set. If it is not, then the user will have access to all Purchase Orders.

1. Log on to a usercode with access to *Sharing & Users*
2. Select *Sharing & Users* and double click on the user you are dealing with.
3. Turn off the *Select Filters* for the user you’ve just set up.
    - You must do this otherwise the user will be able to view transactions they don’t have the privilege to view.
4. Click *OK* to save your changes.

Installing scripts

In addition to Moneyworks, each user requires additional scripts installed to prevent them modifying authorised Purchase Orders and to allow them to authorise Creditor Invoices. These scripts are listed below but you will need to refer to the separate documentation for information on how to install them.

Authorisation Script

- This script needs to be installed for users who authorise Purchase Orders — e.g. head of the Finance Department. This is a Windows only script.

Helper Script

- There are two versions of this script — a Windows version and a Mac version. The appropriate one should be installed for each user who will be entering Purchase Orders, generally the teaching staff. It is essential this is installed as it warns the users if they modify an authorised Purchase Order plus it will delete the authorisation if they do.

Emailer

- This script should be installed for staff in the Finance office. It allows the user to email details of creditor invoices to the originator of the Purchase Order so that they can authorise them.

Authorise Invoice

- There are two versions of this script — a Windows version and a Mac version.

It should be installed for each user who has access to enter Purchase Orders. It allows the user to authorise a creditor invoice based on the details of the invoice that has been emailed to them.