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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

Restricting user access to Transactions

Adding the authorisation columns

Turning off filters

Installing scripts

From:
<https://www.docs.sussol.net/> - Sussol Docs

Permanent link:
https://www.docs.sussol.net/doku.php/moneyworks:po_authorisation:adding_a_new_moneyworks_user?rev=1344365187

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