

# User Permissions - User Guide

This help file describes the User Permissions facility.

## 1. Introduction

The User Permissions facility lets you easily control access to products for large numbers of users.

## 2. General Description

1. Create a series of named product groups corresponding to the products you want to assign to different groups of users.

To do this, click the **product groups** button on the User Permissions tab, then click the **new product group** button. Enter a unique group name then click **create**. The new group appears in the list of product groups.

Click the name of the new group. A list of available products is displayed. Highlight the products you want to add to the group then click the >>>> button to move them into the group.

You can remove a product from a group using the reverse procedure, ie select the product within the group, then click the <<<< button.

Observe that when you add a product to the destination box it is removed from the source box.

*TIP: You can highlight several products simultaneously using SHIFT CLICK for consecutive products or CTRL CLICK for discrete products, then move them into the group with a single click of the >>>> button.*

*TIP: You can create extra groups to organise your products by type of product, then copy these groups into the groups you assign to users using the **Copy products from group** dropdown.*

*TIP: You can rename or remove product groups as required using the buttons provided. If you remove a product group that has been assigned to one or more users it is removed from those users and the permissions are adjusted.*

*TIP: To help you find products easily you can list products in Product Code order or Category order using the option buttons below the **Available products** box.*

2. Assign a 'default' product group to each user group. This tells the system which group of products to permission a new user for when he or she is added to the system.

Click the **default group association** button. The system displays a list of user groups. Click each user group and choose a product group from the dropdown list to associate with it.

3. When you create a new user (using the User Manager tab) assign a user group from

the dropdown list **before** clicking the **save** button. When you click the save button, the user is permissioned for all products in the product group associated with that user group.

### 3. Additional information

1. When you change the composition of a product group by adding or removing products, those changes are automatically propagated to all users permissioned for that group.
2. You can 'tweak' or 'fine tune' permissions for an individual user.

Click the **tweak users** button. You can display a list of all users, search for users without permissions, display users matching a full or partial name or users in a particular user group. Choose one of the option buttons, enter a search term or select a group if required, then click the **go** button.

Click the user whose permissions you want to adjust.

The current groups and products for which that user is permissioned (if any) are displayed, along with a list of available groups and products that can be added to this user. Select groups or products and move them to or from that user as required, by clicking the chevron buttons.

### 4. Reports & Help

Click the **groups report** button or **users report** button to display a report.

Click the **help** button to display this document.

### 5. Points to note

1. Product permissioning affects ordinary Users only, not Super Users. Super Users can view all products.
2. In the Sprint stock system there are two different ways of controlling product permissions: (a) the facilities on the User Permissioning tab (described here) and (b) the 'classic' product permissioning screens accessible from the User Manager and Product Manager tabs. To avoid confusion we advise you to use either one method or the other, and not to switch between them.

You can re-apply the User Permissions you have defined by clicking the **refresh all user permissions** button on the **product groups** page. You may want to do this to resynchronise the system if you have used 'classic' product permissioning screens. After you do this, users will have only the permissions you have explicitly defined. Users who were added to the system before you started to use User Permissioning may lose their permissions if you have not explicitly granted them permission.

3. If you modify user details on the User Manager tab, when you come to save the changes the system checks if the current permissioning for the user matches the default permissioning for that selected user group. If it differs (since you may have modified it since the user was created) you are prompted either to overwrite the current permissioning with the default permissioning, or leave permission unchanged.

[end]