

Visual Streamline FAQ

How to Create New Users in 2018.x (.net) version as is changed from V10 version.

Overview

To create a new user for Streamline, you must open the Users program which is maintained in a security file and is not a program on the main menu.

How to Access

To access the Users program from the main menu:

- From the Options menu in the menu bar, select Users; or,
- Right click on the status bar section at the bottom of the main menu screen (below Warehouse, Terminal and Logged-In details) and then select Users.

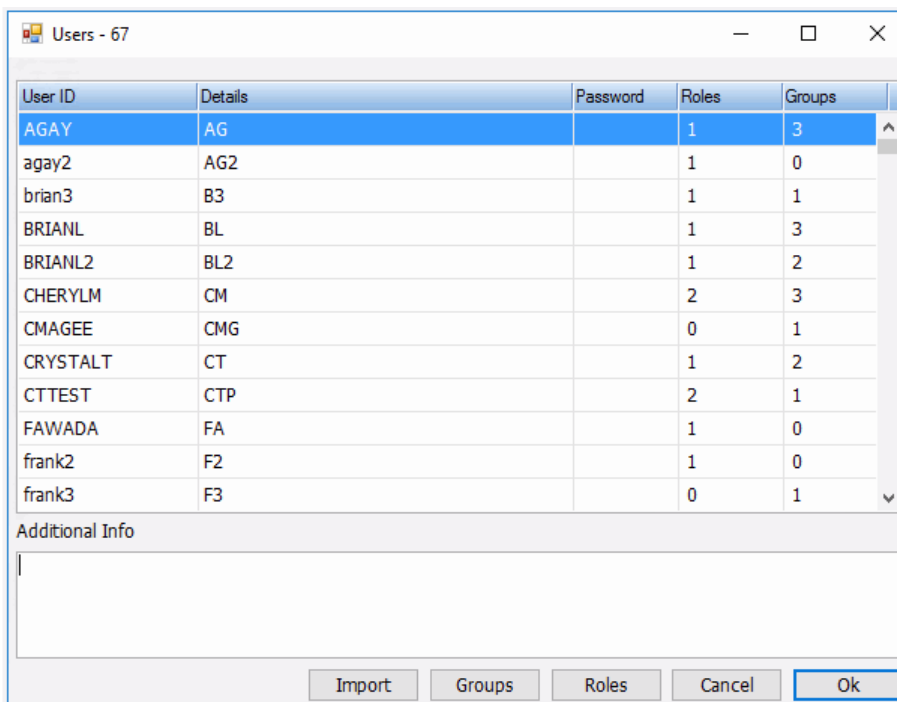
Access to this security file is controlled through the following user right:

- UserManager - User Manager

There are no Business Rules that affect this program.

How it Works

Upon selecting the Users option, you see the following screen:



User ID	Details	Password	Roles	Groups
AGAY	AG		1	3
agay2	AG2		1	0
brian3	B3		1	1
BRIANL	BL		1	3
BRIANL2	BL2		1	2
CHERYLM	CM		2	3
CMAGEE	CMG		0	1
CRYSTALT	CT		1	2
CTTEST	CTP		2	1
FAWADA	FA		1	0
frank2	F2		1	0
frank3	F3		0	1

Additional Info

Import Groups Roles Cancel Ok

To add a new user:

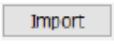
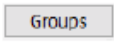
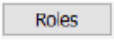
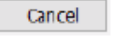
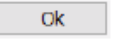
1. Click **Ctrl-M** to put the program in modify mode and then press **F4** to add a new line.

2. Add the new User ID and Details (user name).
3. To add individual user rights to the new user, click **Roles** or place the cursor in the Roles column for the new user and press **F5**. If you are adding groups of rights to a user, use the **Groups** button (for details, see the Groups button definition in the table below).
4. The Role Name window opens.
 - Click **Ctrl-M** to put the program in modify mode and then press **F4** to add a new line.
 - Enter the user right directly or, you can click on the drop down arrow or press **F5** to launch the Role Name Browse window and navigate to the user right you want to add and then click **Choose**.
5. When all of the rights are added to the user, click **OK** to close the Role Name window.
6. To add a password to the new user, place the cursor in the Password column for the new user and then click on the down arrow or press **F5**.
7. The Change Password window opens. Enter the new password and confirm the new password. Click **OK** when complete.
8. In order to activate the new user, you must log in as the new user to activate the rights assigned to the user id. Once this is complete, exit Streamline and then log back with a supervisor ID.
9. The new user ID is now available in User Maintenance. The user is assigned the first company in the Company table by default.
 - To add or remove companies from the user ID, click on **User Comps** in User Maintenance for the new user.

To delete an existing user:

1. On the user record you want to delete, click **Ctrl-M** to put the program in modify mode.
2. Press **F3**.
3. The following message displays: "Do you want to delete? Yes/No". Click **Yes**.
4. The user ID will still be visible in User Maintenance until the user ID is flagged as deleted in the User Maintenance program.

The following table outlines the functionality of each button on the **Users** screen:

Button Label	Icon	Functionality
Import		This option is designed for Streamline Professional Service representative use only.
Groups		Opens the User Groups screen for the current user allowing you to add or delete groups. Groups contain multiple rights. When a group is added to a user, the user is granted all of those rights. In order to add a user to a group, click on Groups in modify mode (Ctrl-M) to open the User Groups screen for the current user. - Press F4 to add a new line and then press F5 or click on the drop arrow to select a group from the list. - When all of the groups are added, click OK to close the window. In order to remove a user from a group, click on Groups in modify mode (Ctrl-M) to open the User Groups screen for the current user. - Press F3 to delete the current line. - When all of the required groups are deleted, click OK to close the window.
Roles		Note: The term roles is the same as 'rights' in the Users program. Opens the Role Name screen which allows you to assign or remove user rights to/from the user. In order to add a right to the user, click on Roles in modify mode (Ctrl-M) to open the Role Name screen for the current user. - Press F4 to add a new line and then press F5 or click on the drop arrow to select a right from the list. - When all of the rights are added, click OK to close the window. In order to remove a right from the user, click on Roles in modify mode (Ctrl-M) to open the Role Name screen for the current user. - Press F3 to delete the current line. - When all of the required groups are deleted, click OK to close the window.
Cancel		Cancels changes and exits you from the program.
OK		Saves all changes and closes the program.