



Administration

Creating Users in v4

Creating New Users

In the v4 Client and v4 Online, user access to different functions is controlled by the groups to which they belong. It is also dependant on their person record. New users must be assigned to at least one group, and should have their User ID mapped to their person record.

To create a new user in the v4 Client:

1. Select **Tools | Administration | User Management | User Accounts** to display the **User Accounts Enquiry** page.
2. Click the **New** button to display the **User Account Details [New User]** page.
3. In the **User Account Details** panel, enter the **User Name** and the **User Description**.
4. Enter a **Password** for the user.
5. As required, complete the other fields. For more information about each of these fields, refer to the *User Account Details: Optional Fields* section on the next page.
6. Click the **Save** button to create the user account.

Mapping Users

Users should be mapped to their person record within the One database. This enables them to access involvement records, activities, risks and the CSS team workload. It also enables the use of workflow messages, which are linked to the person record, not the User ID. ICS users must be mapped to a person record.

To map a user to their person record in the v4 Client:

1. Select **Tools | Administration | User Management | User Accounts** to display the **User Account Enquiry** page.
2. Search for and open the required user account to display the **User Account Details** screen.
3. Click the magnifying glass icon next to the **Mapped Person** field to display the **Person Enquiry** dialog.
4. Enter your search criteria and click the **Search** button to display a list of matches.
5. Double-click the required person in the list to close the dialog and add the name to the **Mapped Person** field.
6. Click the **Save** button to complete the mapping.



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Adding Users to Groups

User permissions are assigned through groups. To grant users certain sets of permissions, they must be added to an appropriate group. This enables different types of users to access the functions relevant to their role.

To add users to groups:

1. Select **Tools | Administration | User Management | User Accounts** to display the **User Account Enquiry** page.
2. Search for and open the required user account to display the **User Account Details** screen.
3. In the **Member of Groups** panel, click the **Add** button to display the **Select Group(s)** dialog.
4. Either search for the required groups by completing the **User Groups Enquiry** panel and clicking the **Search** button, or locate the groups in the list.
5. Select the check boxes for the groups to which you want to add the user.
6. Click the **Select** button to add the user to the groups.

User Group Name	User Group Description

User Group Name	User Group Description	Select
CSS GROUP	CSS General Access	<input type="checkbox"/>
Adpt & Fost 1	Adtp & Fost - Read Access	<input type="checkbox"/>
Adpt & Fost 2	Adtp & Fost - Write Access	<input type="checkbox"/>
Adpt & Fost 3	Adtp & Fost - Super User Access	<input type="checkbox"/>
ICS Assmt Team 1	Assessment Team - Read Access	<input type="checkbox"/>
ICS Admin	ICS Contact Entry Only	<input type="checkbox"/>
eCAF Admin	eCAF Administrator	<input type="checkbox"/>

User Account Details: Optional Fields

Active - A tick in this check box means the account is active and the user can log into One. A cross means the account is not currently active.

System Admin - A tick in this check box indicates that the user is a system administrator, and a cross indicates that they are a regular user.

Email Address - This is the current email address of the user.

Domain User ID - If you want to associate a Windows Active Directory with this user account, enter the appropriate User Principal Name here, using the format <username>@<domain name>.

Telephone - This is the current telephone number of the user.

Mapped Person - For information on mapping a person to the account, please refer to the *Mapping Users* section on the previous page.

Mapped Base - This enables you to associate the user to a base recorded in the One database. The process for doing so is similar to the **Mapped Person** field. To map a base to the account, apply steps 3 to 6 of the *Mapping Users* section on the previous page to the **Mapped Base** field.

Signature - This button enables you to upload a signature for the user. This must be an image file (.bmp, .gif, .jpeg, .jpg, or .png).



Related Reference Guides:

- **RG_Permissions_User Group Permissions**