

We are currently updating our site; thank you for your patience.

## SECURITY

### USER AND GROUP SECURITY – CREATE A NEW GROUP

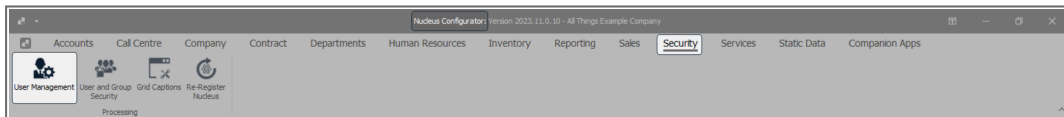
If you are setting up a **new** group from scratch, it is a good idea to set the '**Company Modules: Site' Access Type** first, otherwise you cannot assign a user to this group you have created, and the user will not be able to log into Nucleus Service.

Set the **Site** (Branch) security dependant on which Sites the user may have access to.

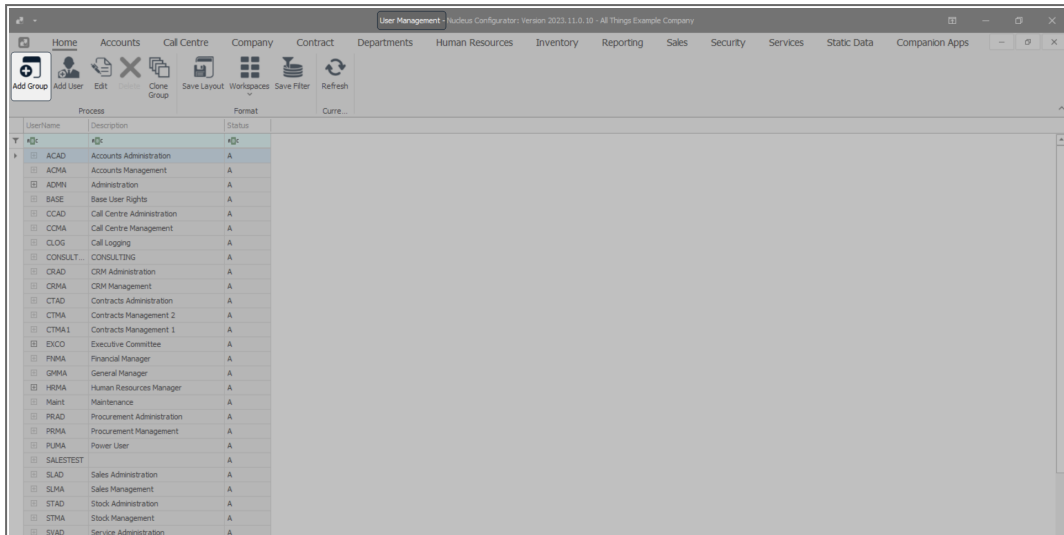
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#### Ribbon Access: Configurator > Security > User Management

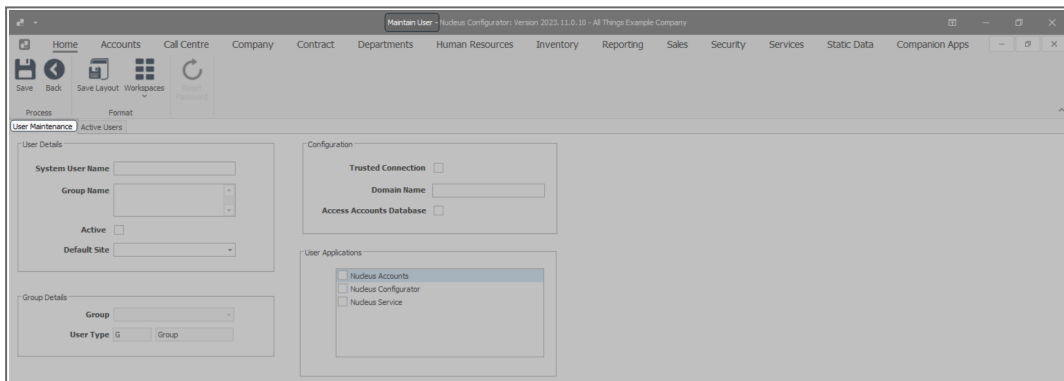
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- The **User Management** screen will be displayed.
- Click on **Add Group**.

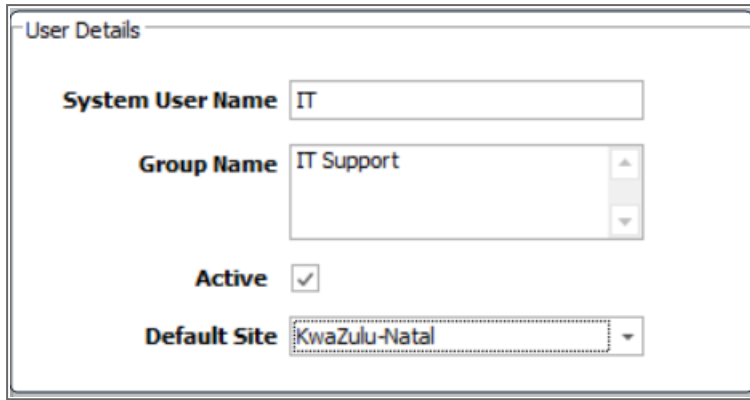


- The **Maintain User** screen will be displayed.
- Ensure that the **User Maintenance** tab is selected to commence filling in the required details.



## USER DETAILS:

- **System User Name:** Type in the name of the Group, abbreviated if required.
- **Group Name:** Type in the full Group Name.
- **Active:** Set this Group as '**Active**' by clicking on this check box.
- **Default Site:** Click on the drop-down arrow and select from the menu displayed, which **Site** you wish to link this new Group to.



User Details

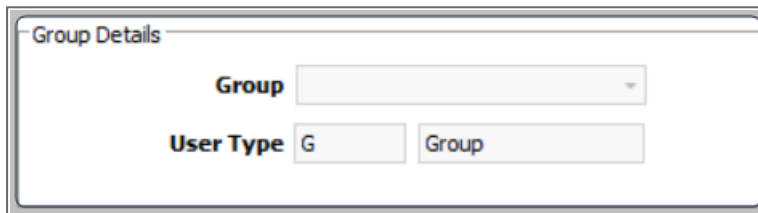
System User Name

Group Name

Active

Default Site

- **Note:** The Group Details frame is **un-editable**.



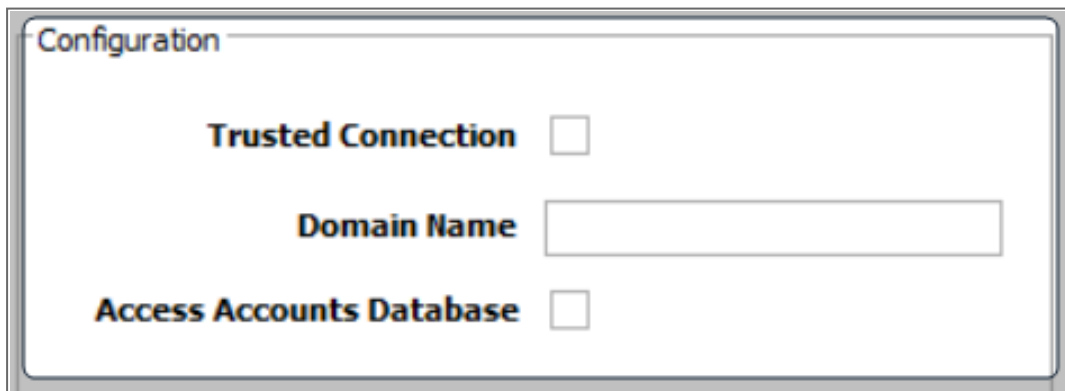
Group Details

Group

User Type

## CONFIGURATION:

- **Trusted Connection:** You can enable this check box if you are going to include a Domain Name.
- **Domain Name:** You must type in the full Domain Name.
- **Access Accounts Database:** You can tick this check box for the User Group to have access to the Accounts Database.



Configuration

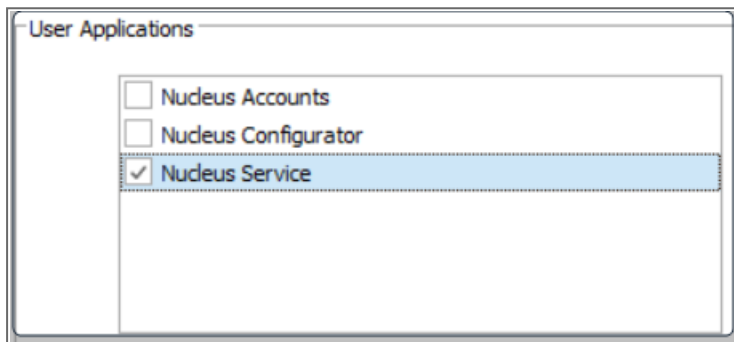
Trusted Connection

Domain Name

Access Accounts Database

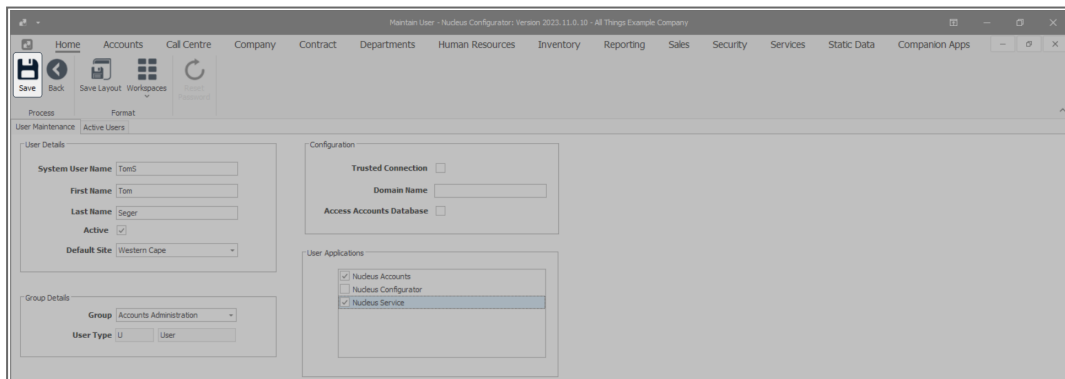
## USER APPLICATIONS:

- **Nucleus Accounts:** You can tick this check box if the User Group will be allowed access to Nucleus Accounts.
- **Nucleus Configurator:** You can tick this check box if the User Group will be allowed access to Nucleus Configurator.
- **Nucleus Service:** You can tick this check box if the User Group will be allowed access to Nucleus Service.



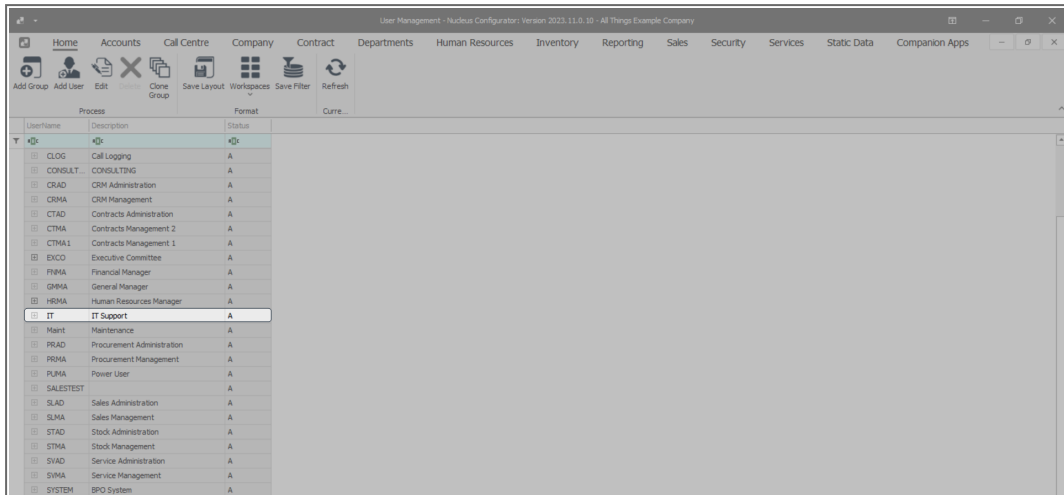
## SAVE

- When you have finished adding the new **Group** details -
- Click on **Save**.



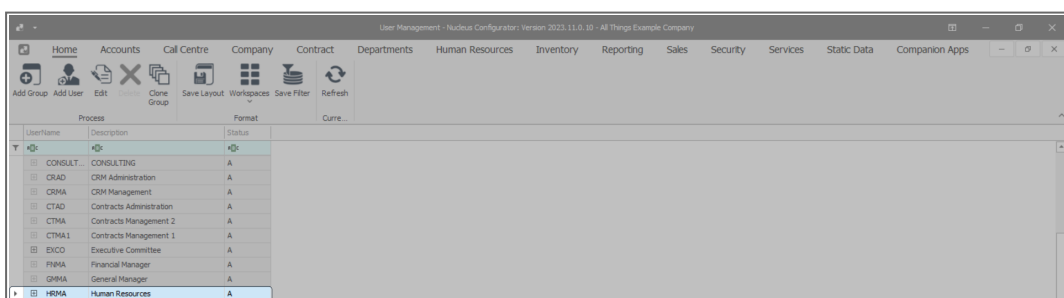
- You will return to the **User Management** screen where you can **view** the new Group and a user can be added to this Group.

- To create a new **user** refer to this [link](#).

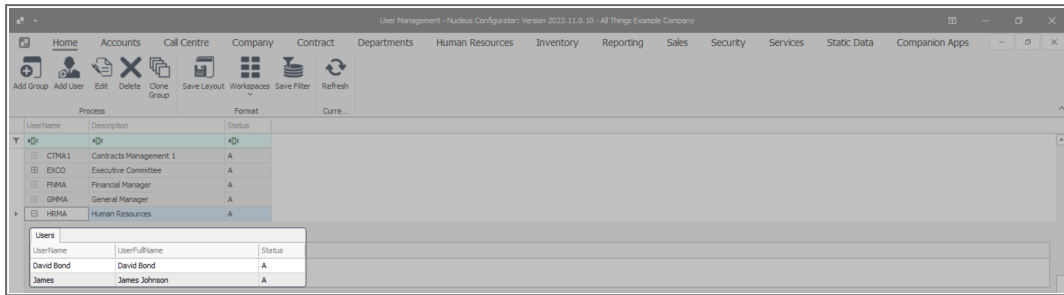


## VIEW GROUP

- When you have **created a new user** and added the **user** to a new **Group**, you will be able to view the active users assigned to a group.
- Click on the **expand button** in the **row** of a selected group. (If the expand button is feint, it means that there are no active users assigned to this group.)
  - In this example, **Human Resources** group has been selected.

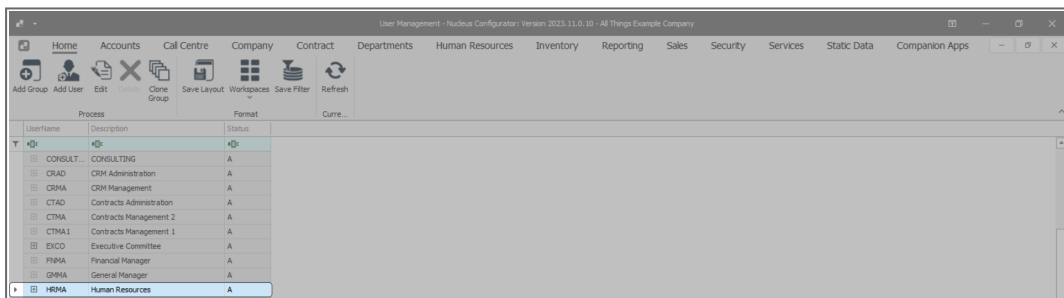


- The **Users** frame will be expanded for that group and the list of active users will be displayed.

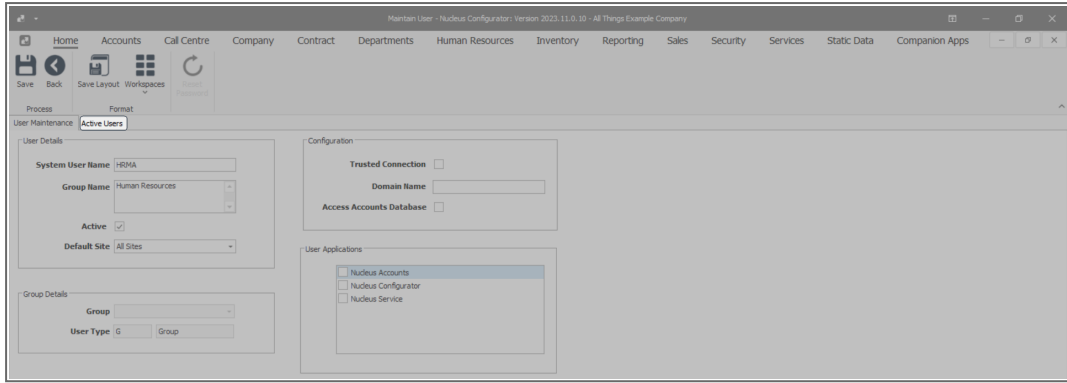


## ACTIVE USERS TAB

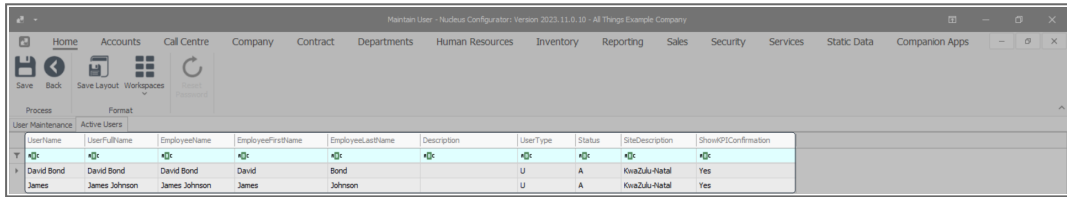
- Click on the **expand** button in the **row** of a selected **group** and click on **Edit**. (If the expand button is feint, it means that there are no active users assigned to this group.)
  - In this example, the **Human Resources** group has been selected.



- The **User Maintenance** frame will open.
- Click on the **Active Users** tab.



- The list of **Active Users** will be displayed.



- Click on the Back button or close the screen to return to the **User Maintenance** screen.



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