

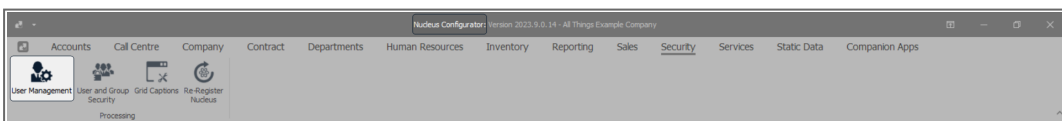
We are currently updating our site; thank you for your patience.

SECURITY

USER MANAGEMENT – CREATE A NEW USER

- Before creating a **new user** in **Nucleus Configurator**, remember the difference between a **user** and an **employee**.
- Each **employee** within the company is loaded onto the system as an **employee**, with their details - refer to [add new employee](#).
- **Employee** details relate to what the company needs to know about its employees and can include personal details, e.g. phone number and email address, banking details, training details, loan details, [Crafts](#) details (skill or job title), etc.
- **Users** on the other hand, are employees (or management), who require **access to the system** and therefore require a **user login** and **password**.

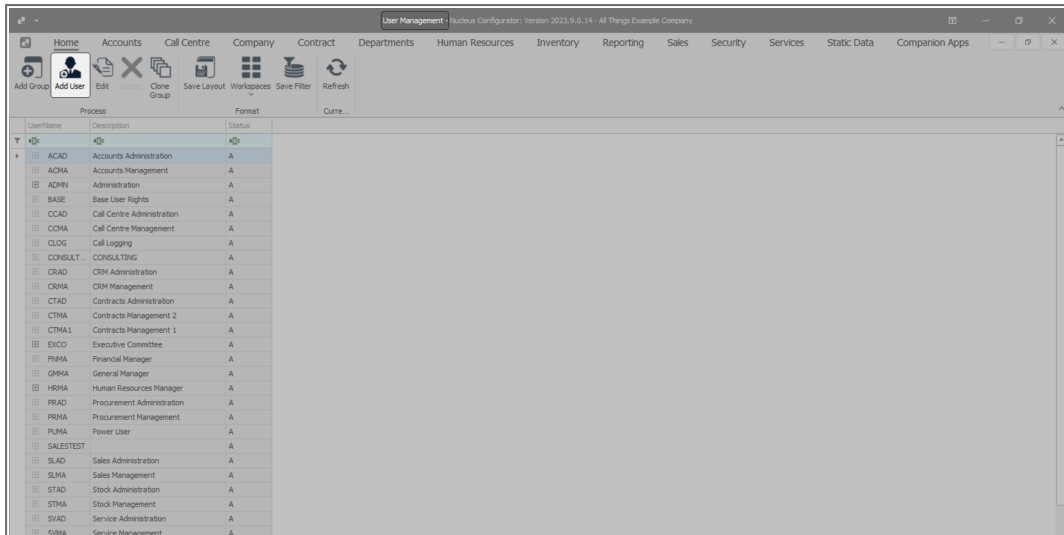
Ribbon Access: Nucleus Configurator > Security > User Management



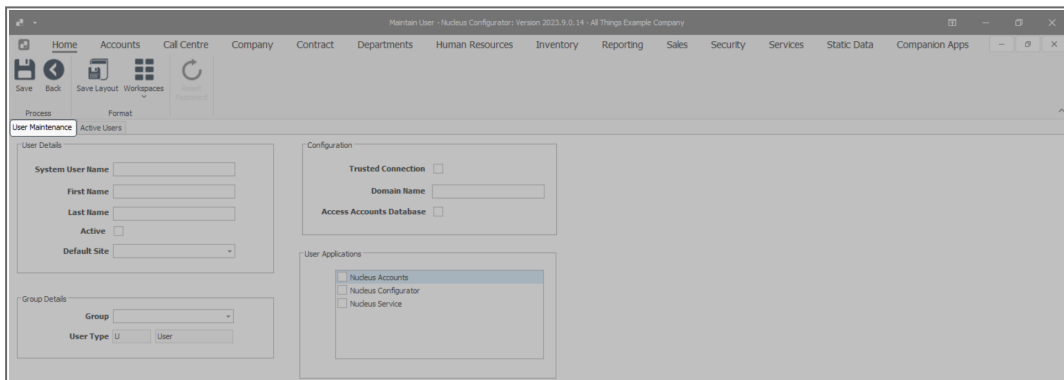
- The **User Management** screen will be displayed.

ADD USER

- Click on **Add User**.



- Ensure that the **User Maintenance** tab is selected to commence filling in the required details.



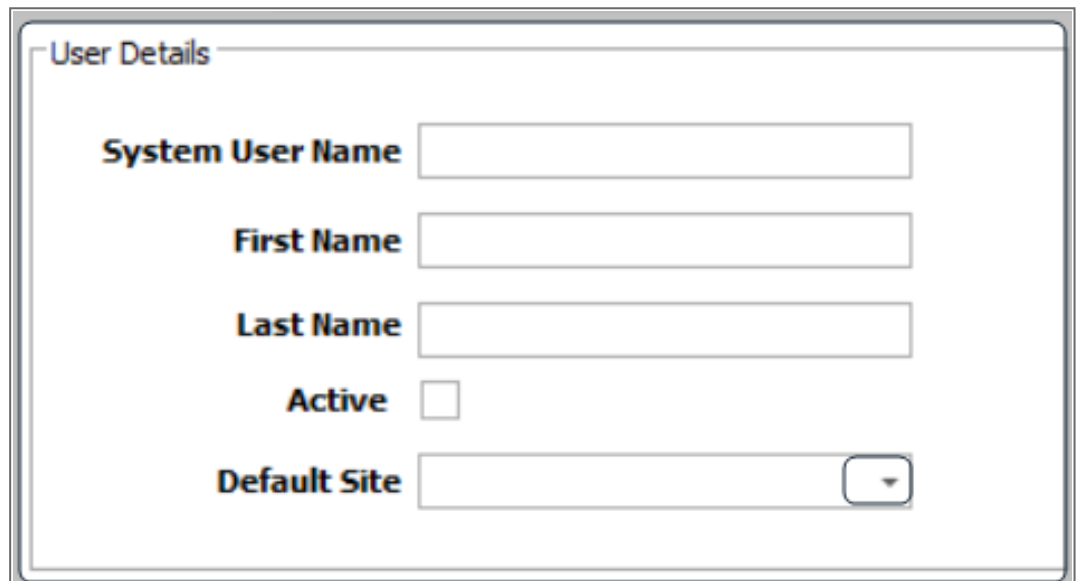
USER DETAILS

- **System User Name:** Type in the name the user will use to log in to Nucleus Service. The standard convention is to use the user's first name with the first letter of their surname appended without a space, e.g. TomS (for Tom Seger).

Note: Nucleus Service will pull through the user's Windows login name to the Nucleus Service user name

first during login, so use this for the user name if you wish to simplify login. The user name is not case sensitive.

- **First Name:**Type in the user's first name.
- **Last Name:**Type in the user's last name.
- **Active:** Set this user as 'Active' by clicking on this check box.
- **Default Site:** You can click on the drop-down arrow, and from the drop-down list, select the default site for this user.

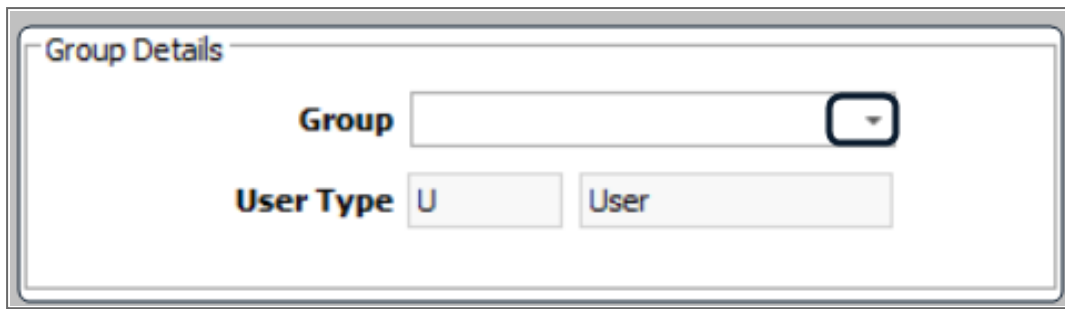


The screenshot shows a form titled "User Details" with the following fields:

- System User Name**: A text input field.
- First Name**: A text input field.
- Last Name**: A text input field.
- Active**: A checkbox.
- Default Site**: A dropdown menu with a downward arrow.

GROUP DETAILS

- **Group:** You can click on the drop-down arrow and from the drop-down list, select the group that this user belongs to.
 - To create a new Group refer to this [link](#).
- **User Type:** This will auto populate with **U - User** and is un-editable.



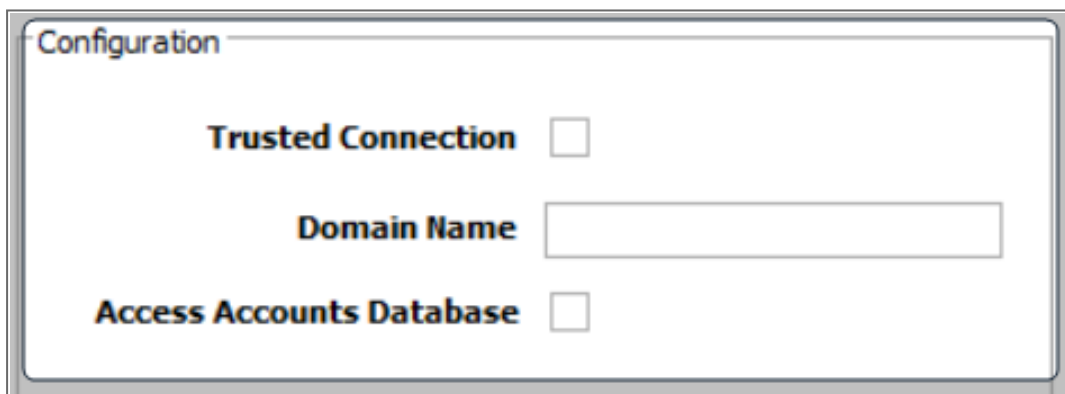
Group Details

Group

User Type

CONFIGURATION

- **Trusted Connection:** You can enable this check box if you are going to include a Domain Name.
- **Domain Name:** Creating the logins via Nucleus Configurator will create the SQL Login too. You must type in the full Domain Name and use the employee's Windows login name in the System User Name field.
- **Access Accounts Database:** You can tick this check box for the user to have access to the Accounts Database.



Configuration

Trusted Connection

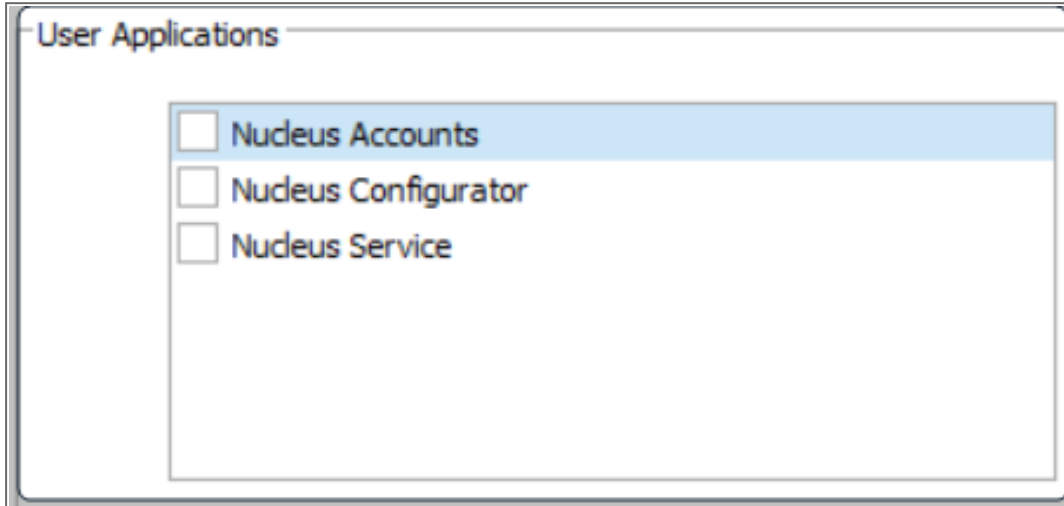
Domain Name

Access Accounts Database

USER APPLICATIONS

- **Nucleus Accounts:** You can tick this check box if the user will be allowed access to Nucleus Accounts.

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

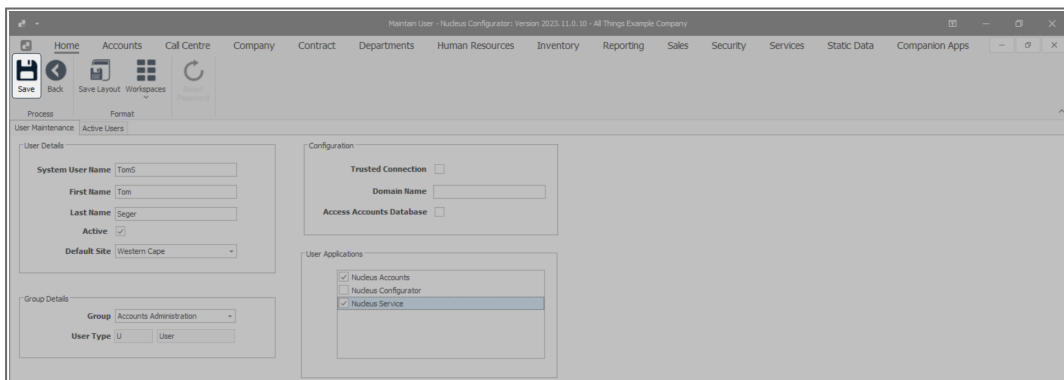


The image shows a dialog box titled "User Applications". It contains three items, each with an unchecked checkbox:

- Nucleus Accounts
- Nucleus Configurator
- Nucleus Service

SAVE

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



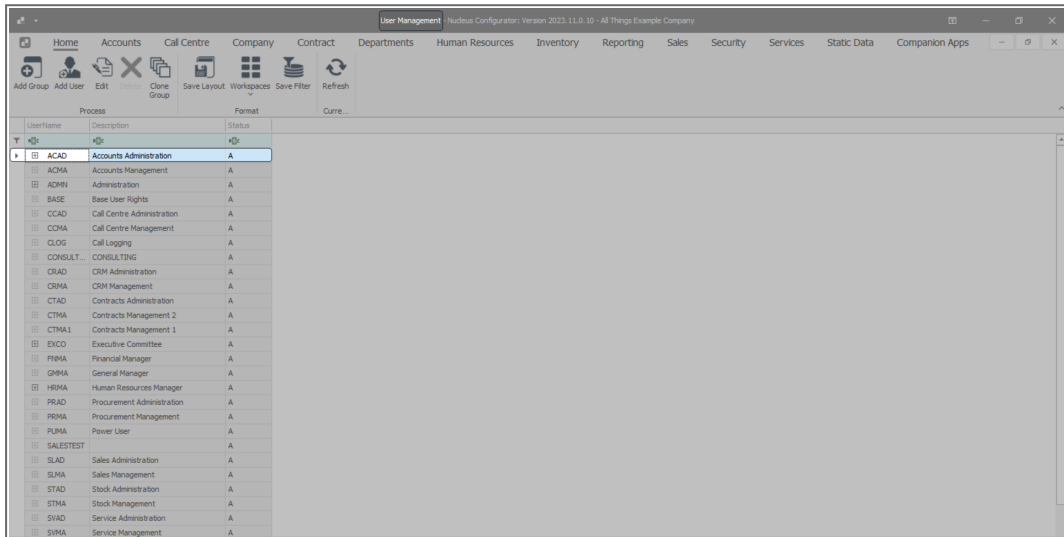
The image shows the "User Management" screen in the Nucleus Configurator software. The screen is divided into several sections:

- User Details:** Fields for System User Name (TomS), First Name (Tom), Last Name (Sege), Active (checked), and Default Site (Western Cape).
- Group Details:** Group (Accounts Administration) and User Type (U - User).
- Configuration:** Trusted Connection (unchecked), Domain Name, and Access Accounts Database (unchecked).
- User Applications:** A list of applications with checkboxes: Nucleus Accounts (checked), Nucleus Configurator (unchecked), and Nucleus Service (checked).

- You will return to the **User Management** screen.

VIEW USER

- Click on the **expand** button in front of the **group** that you linked the new user to.
 - In this example, the new user was linked to the **Accounts Administration** group.



- The **users** frame will be expanded for that group.
 - Here you can see that the new **user** has been added to the **Accounts Administration** group.



- **Note:**
 - When you click on **Save**, a **default password** will be assigned to the user: **P@ssword123**.

This should be changed by the user as soon as possible by following the [Reset Password](#) process.

- If you add a **user** that already exists in the system, the **user** record will be **updated**, not duplicated, in the system.

MNU.085.005

