# **Managing Users**

You manage access to the system by creating **Users** and assigning them **Roles** which grants permissions for specific actions.

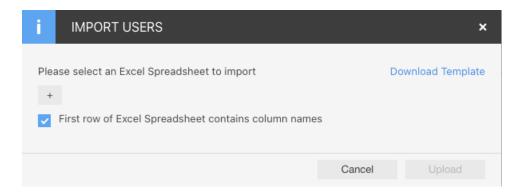
A User can be a **Staff User,** an employee of the Access host company, or a **Customer User** who accesses the services of the host company.

## Configuring Users for PRINERGY Access

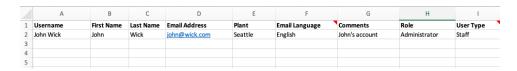
You can manually add Users one at a time, or you can use the **Import** function to import a list of names from an Excel Spreadsheet.

### **Importing Users**

- 1. Go to the **Administration** tab in PRINERGY Portals
- 2. Select **Users**
- 3. Click **Import** to get the following dialog:



- 4. You can press the + button to open a **User Import Template** that has been populated with User Names and relevant information.
- 5. You can click the **Download Template** button to get a sample pre-formatted spreadsheet, to use as a guide for entering User information.



- 6. Make sure to check First row of Excel Spreadsheet contains column names
- 7. Users will be imported
- 8. Imported Users can be selected and edited.

#### **Manual Entry of Users**

- 1. Go to the **Administration** tab in PRINERGY Portals
- 2. Select **Users**
- 3. Click **Add** to create a new User, or click on an existing **User Name** to edit the User.
- 4. The **User Info** tab will be selected by default

**5.** Select **Staff User** or **Customer User** from the **User Type** drop-down menu. The choices you then have depend on the User Type selected.

#### Staff User

#### **User Info** tab

- 1. Select Staff User as the User Type
- 2. Enter a **Username**.
- 3. Enter First Name and Last Name.
- 4. The **Company** will be hard coded to the Tenant Host name and cannot be changed.
- **5.** *Ink Manufacturer* is used only for PRINERGY Portals Ink Analytics, and is not relevant to PRINERGY Access.
- **6.** Select **Is Contractor** if a user is only going to be temporary, and set **from** and **to** dates to limit their access.
- 7. Plant is used only for PRINERGY Portals Analytics, and is not relevant to PRINERGY Access.
- 8. Enter the user Email address
- 9. Select the **Email Language** from the drop-down menu
- **10.** Enter any relevant **Comments** in the entry box
- 11. Proceed to the **Email Subscriptions** tab

#### Email Subscriptions tab

- 1. Check **Enable Event Notifications i**f the User is going to be an Administrator and wants to be alerted to User edit events
- 2. Optionally select
  - a. User Created
  - b. User Info Modified
  - c. User Deleted

#### **POD Role** tab (PRINERGY Portals Roles)

- 1. Select a Role for the User by clicking the radio button beside the Role name.
  - As you select each Role, the rights for each Role will display in the **Rights of customer** user panel on the right•
  - You can only select one Role for each user.
  - There is only one mandatory Right that must be selected in a Role for a PRINERGY Access User and that is **PRINERGY Access View**
  - Roles cannot be created or modified in this tab. POD Roles are created and edited under **Roles** in the **Administration** tab.

#### **PA Role** tab (PRINERGY Access Roles)

- 1. For **Staff Users**, you can set **PA Roles** for all customers, or you can set different Access Roles for different Companies.
- 2. The default setting assigns a PA Role for All customers.
- **3.** Click on **Customer Access...** if you wish to configure different User Roles for different Customers
- **4. Select a Role for All customers/Individual Customers** by clicking on the drop-down menu under the Role column.
- 5. To see the Rights of each PA Role, click on the **Info** icon beside each Role

#### **Customer User**

#### User Info tab

- 1. Select Customer User as the User Type
- 2. Enter a **Username**.
- 3. Enter First Name and Last Name.
- 4. Enter the user **Email** address
- 5. Select the **Email Language** from the drop-down menu
- **6.** Enter any relevant **Comments** in the entry box

## PA Role tab (PRINERGY Access Roles)

- 1. Click on Customer Access... to select the Company of the User
- 2. **Select a Role** by clicking on the drop-down menu under the Role column beside the Customer
- **3.** To see the Rights of the assigned PA Role, click on the **Info** icon ①