

Managing Users

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

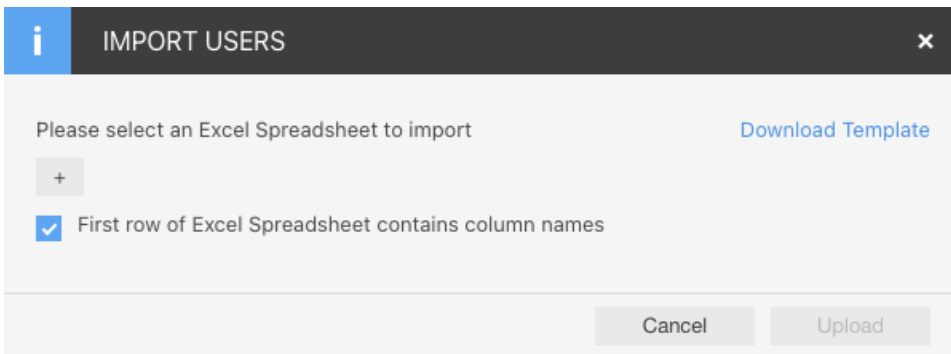
A User can be a **Staff User**, an employee of the Access host company, or a **Customer User** who accesses the services of the host company.

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.

	A	B	C	D	E	F	G	H	I
1	Username	First Name	Last Name	Email Address	Plant	Email Language	Comments	Role	User Type
2	John Wick	John	Wick	john@wick.com	Seattle	English	John's account	Administrator	Staff
3									
4									
5									

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** if 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 ⓘ