

# Setting Up User Management

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This section explains how to work with PCS Axis user accounts in *User Management*. The information is intended for users with *SysAdmin* security permissions. Topics in this section include those in the following list:

- *Understanding User Management*
- *Using Computer Name User Authentication* (page 188)
- *Adding and Editing Users* (page 188)

## Understanding User Management

*User Management* controls system security using a role based method. Each PCS Axis user is defined in *User Management* and assigned a PCS Axis installed user role. A user role is a collection of security permissions that tells PCS Axis which system features a user has access to and if the user is allowed to add and edit data.

The following list identifies the three types of PCS Axis installed user roles. Each type gives users a different level of security permissions. Users are assigned only one user role. The *SysAdmin* user role has full control of all PCS Axis features and functions. For a list of user role permissions assigned to the *User* and *Read Only* user roles, see *Appendix C. System Security* (page 855).

- SysAdmin
- User
- Read Only

When PCS Axis first installs, it creates the first system account using *Computer Name* user authentication. This account is automatically assigned the *SysAdmin* user role, which has the highest set of privileges. See *Using Computer Name User Authentication* (page 188) for more information.

### Related Topics

- *Using Computer Name User Authentication*
- *Adding and Editing Users*

## Using Computer Name User Authentication

PCS Axis uses *Computer Name* user authentication when logging users in to the PCS Axis database. If more than one user will share a single computer installed with PCS Axis, contact your IT department for information about setting up the required Windows user accounts on the computer. Login credentials must be unique for each PCS Axis user. If needed, refer to Windows Help and Support (*Start > Help and Support*), or visit the Microsoft website at the following address to learn more about Windows user accounts: <http://windows.microsoft.com/en-US/windows7/User-accounts-recommended-links>.

### Related Topics

- Adding and Editing Users
- Understanding User Management

## Adding and Editing Users

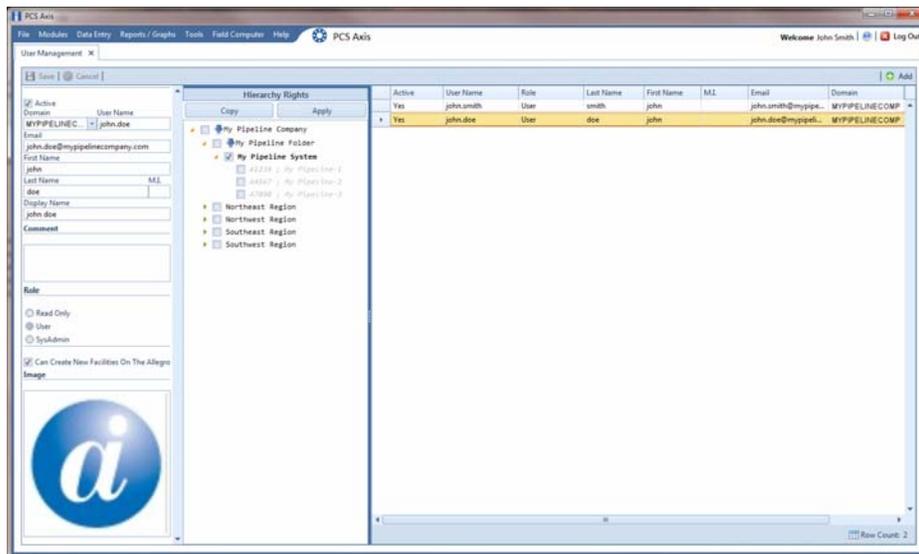
Information in this section explains how to work with user accounts in User Management. The information is intended for the PCS Axis SysAdmin. Topics include those in the following list:

- *Adding a New User* (page 189)
- *Editing an Existing User Account* (page 190)
- *Changing User Account Status from Active to Inactive* (page 191)

## Adding a New User

To add a new user in PCS Axis, follow these steps:

- 1 Click **Tools** > **User Management** > **+ Add** (Figure 5-1).



**Figure 5-1. Adding a New User**

- 2 Type a user name in the **User Name** field and the user's email address in the **Email** field.
- 3 Complete the following steps as needed:
  - a Edit information in the fields **First Name**, **Last Name** and **Display Name**.
  - b Type information in the **Comment** field.
- 4 Select a PCS Axis user role by clicking the **Read Only**, **User**, or **SysAdmin** button. If needed, see *System Security* (page 855) for information about user role security permissions.
- 5 If you want to allow the user to create new facilities on the Allegro Field PC, click the check box **Can Create New Facilities On the Allegro**.

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**NOTE:** Clicking the *Hierarchy Rights* bar collapses the *Hierarchy Rights* panel allowing you to view more of the grid. Clicking the bar again expands the panel.

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- 6 If you want to include an image in the user account, complete the following steps. Maximum image size is 150 x 150 (measured in pixels). Valid image formats are BMP, JPG, GIF, and PNG.
  - a Hover the mouse over the **Image** field to display a toolbar .
  - b Click the open icon  in the image toolbar to open Windows Explorer. Locate and select an image, then click **Open** to close the window.
- 7 If PCS Axis is set up with *Hierarchical Security* in *Options*, set permissions in **Hierarchy Rights** to identify which parts of the hierarchy the user will have access. This step applies only to users assigned with the *User* or *Read Only* user role. SysAdmin has full access to all items in the hierarchy.

To grant access, click the check box for an item in the hierarchy to place a check mark inside the check box. To remove access, click the check box again to remove the check mark. When you finish, click **Apply**. For information about *Hierarchical Security* in *Options*, see *Setting Security Options* (page 52).

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**NOTE:** Items in the hierarchy with a check mark indicate the user has access. If a check mark is not present, the user does not have access.

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- 8 Click  **Save** to save changes.

### Related Topics

- Editing an Existing User Account
- Changing User Account Status from Active to Inactive
- Understanding User Management

## Editing an Existing User Account

Complete the following steps to edit an existing user account in *User Management*:

- 1 Click **Tools** > **User Management** (Figure 5-1, page 189).
- 2 Select a user record in the grid.
- 3 Change user information and *Hierarchy Rights* as needed. User information includes all fields, such as *Domain*, *User Name*, *Email*, *Display Name*, and so on.
- 4 Click  **Save** to save changes

## Related Topics

- Changing User Account Status from Active to Inactive
- Adding a New User
- Understanding User Management

## Changing User Account Status from Active to Inactive

If a user no longer requires access to PCS Axis, change the status of the user account in the following manner:

- 1 Click **Tools** > **User Management** (Figure 5-2).
- 2 Select a user record in the grid. PCS Axis indicates a selection by highlighting the record and displaying an arrow next to the Active property field.
- 3 Click the **Active** check box to remove the check mark and change the user account status from active to inactive.
- 4 Click **Save** to save changes.

The *Active* property setting changes from *Yes* to *No* indicating the user account is now inactive (Figure 5-2).

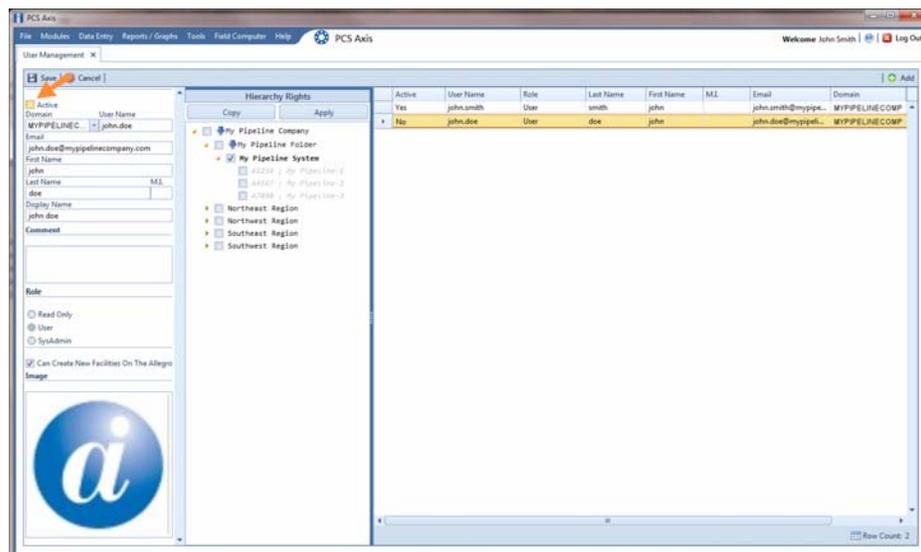


Figure 5-2. User Account Status

## Related Topics

- Adding a New User

- Editing an Existing User Account
- Understanding User Management