User Rights and Permissions

PURPOSE

This document explains the procedures on how to set user rights and permissions in the system.

WHY IS IT IMPORTANT?

Setting user rights and permissions allows the controlling of user access to various areas in the system. This ensures that users have permission to only access the relevant features in the system – various modules and user administration.
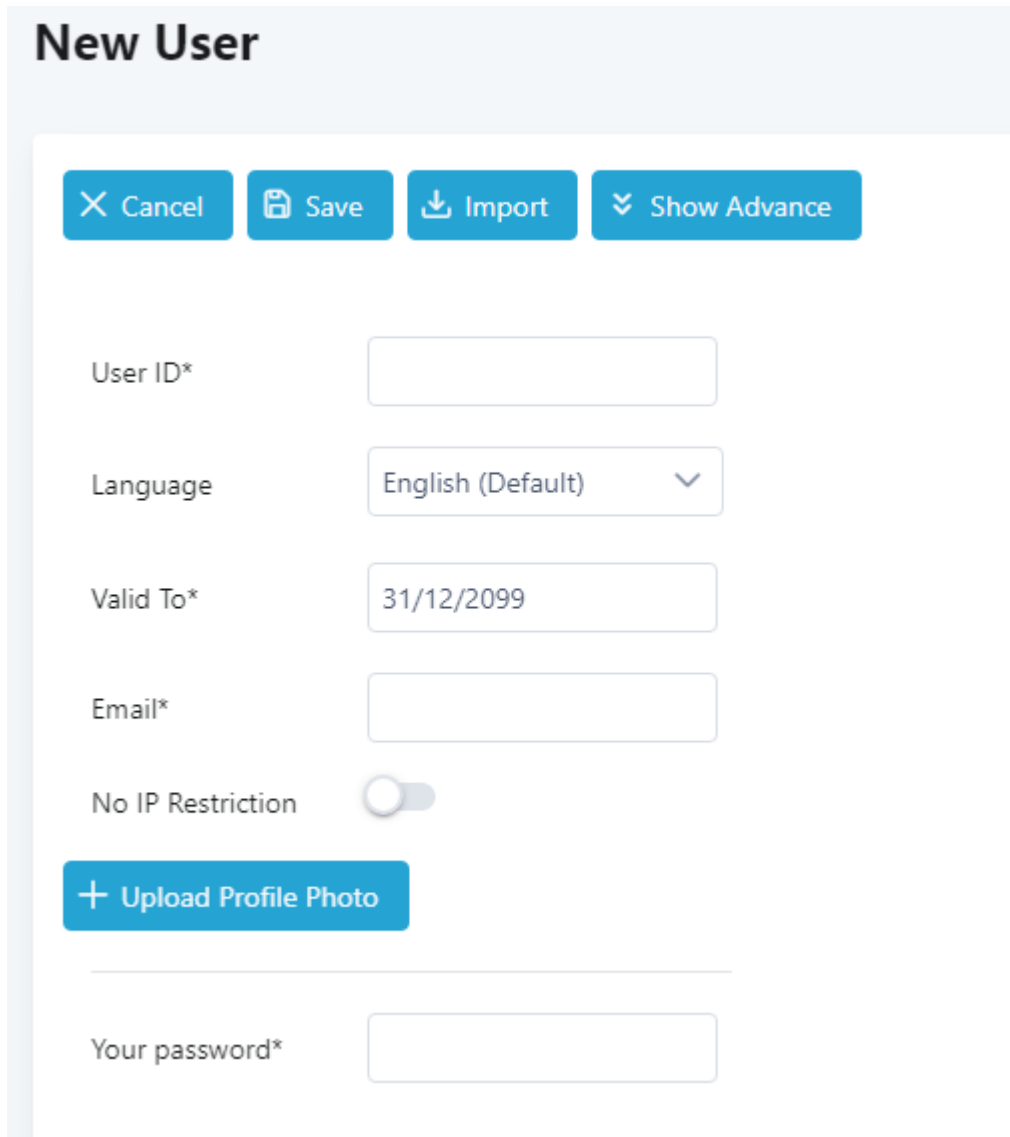
PROCEDURE

1. Click on Set Up > Global > User and Rights.
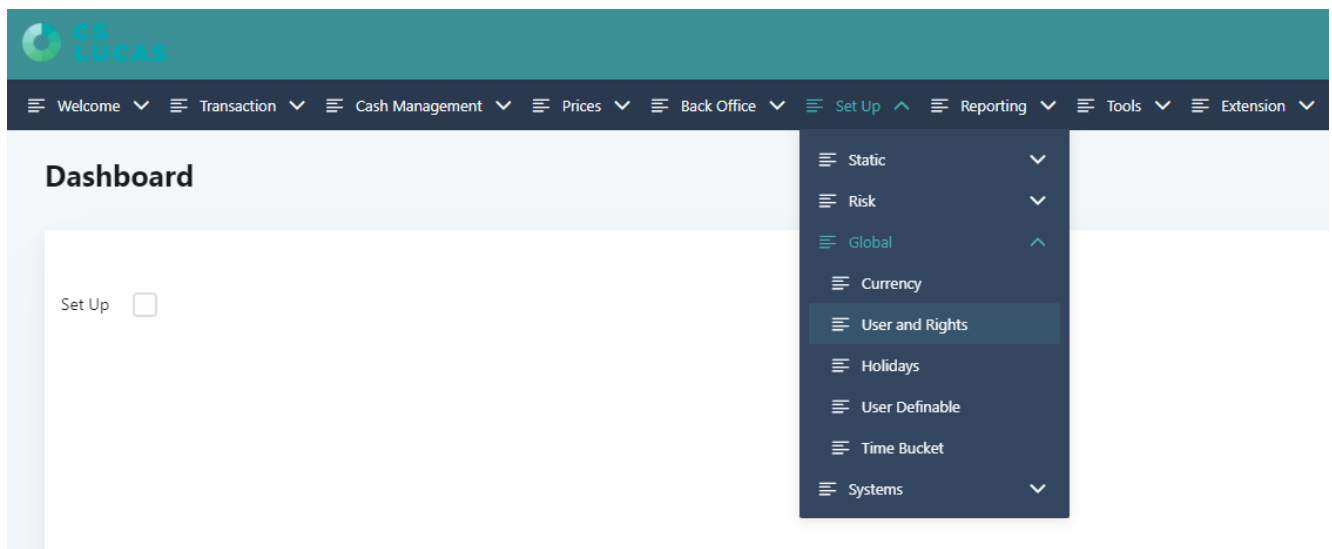
2. In the User screen, click on Action > New and it will show the screen below.

New User

X Cancel   🖫 Save   ⭳ Import   ⭳ Show Advance

User ID*

Language   English (Default)

Valid To*   31/12/2099

Email*

No IP Restriction

+ Upload Profile Photo

Your password*

3. Enter the preferred username in the User ID field. The User ID may contain only letters (a-z, A-Z), numbers (0-9), basic punctuation (. ! ? @ _), and hyphens (-).

4. Language is in English by default. Valid To date is defaulted to 31 Dec 2099, but it can be changed.

5. Enter a valid email address. Required for system to send email instruction for resetting password or verification code if the setting for device activation is enabled. Any Email alert or report scheduling can also be sent to this Email.

6. Tick on the No IP Restriction checkbox if you do not wish the system to limit your access from a restricted IP range only. Default is disabled. See security recommendations for CS Lucas.

7. Click on "+ Upload Profile Photo" to upload your profile picture. Supported file formats are PNG, GIF, JPG, or JPEG. The file size must not exceed 100 KB.

The uploaded profile picture will appear at the top-right corner of the screen.

After uploading a profile picture, please log out and log back into the system to see the updated image.

Mouse over the profile picture will show the user name.

8. Enter your current password. For security reason, system required you to enter your current password before creating a new user to avoid any unauthorised creation and approval.

Note: If you wish to skip entering password, you need to have additional access rights 10359 Skip Password Check (Category: User Permission) assigned to yourself. System will skip the check that password is required when creating/ saving user. Please request for your administrator to assign you this access rights.

New User

✕ Cancel	💾 Save	⬇ Import	⇲ Show Advance

User ID*	jose
Language	English (Default) ⌄
Valid To*	31/12/2099
Email*	jose@lss.com
No IP Restriction	⬤
➕ Upload Profile Photo	profile1.png 5.9 KB
Your password*	················

9. At this point, you can click Save to create new user as all mandatory fields are filled out.

10. Alternatively, click on Show Advance to expand the New User screen and add more information about the user being set up. This is an optional step.

New User

[X Cancel] [💾 Save] [⬇ Import] [⌄ Show Advance]

User ID* | jose

Language | English (Default) ⌄

Valid To* | 31/12/2099

Full name |

Email* | jose@lss.com

Department | - ⌄

No IP Restriction   ⚪

[+ Upload Profile Photo]

Your password* |

11. On the Advance screen, you may fill out the full name.

12. In the Department field, you may choose from the dropdown. If you want to set a new one, it can be added in the User Definable screen. See User Definable for more details.

13. You would need to enter your current password on the Advance screen again for security reason as explained above.

Note: If you wish to skip entering password, you need to have additional access rights 10359 Skip Password Check (Category: User Permission) assigned to

yourself. System will skip the check that password is required when creating/ saving user. Please request for your administrator to assign you this access rights.

14. After filling the fields, click on Save. The screen will show this message if user creation is successful: "The user has been successfully created. The user's password has been set to be the same as the user id. User is strongly recommended to change this immediately."

15. Click on Continue.

16. The new user will need approval. To obtain this, click on the checkbox next to the User ID you just created, then click on Action > Approve. On the popup, click Yes to confirm. Once approved, the user can start logging into the system.

17. To assign permissions to the user, click on the edit button of the User ID that was created. The Amend User screen will display.

18. Click on Assign Group. In the Assign Group Membership screen, click on the checkbox beside the user group you want the user to have access to, then click Add.

19. Enter your current password.

Note: If you wish to skip entering password, you need to have additional access rights 10359 Skip Password Check (Category: User Permission) assigned to yourself. System will skip the check that password is required when saving group membership. Please request for your administrator to assign you this access rights.

20. Click on Save. Then, click Yes to confirm.

21. Click Cancel to return to User screen.

22. For the change to take effect, an approval is needed. Click on the checkbox next to the user ID that was amended and click Action > Approve. On the popup, click Yes to confirm. The user now has rights to access the user group set.

FREQUENTLY ASKED QUESTIONS

FAQ01. I do not see my desired User group. What can I do?

To learn how to set up a User Group, click [here](#).

FAQ02. Can a user be disabled automatically after inactivity for a certain number of days?

Yes, this is possible to set up. By default, it is not set.

Please contact CS Lucas to set this up. System can disable a user after certain number of days for e.g. 90 days. If the user has not logged in to the system for more than 90 days, the user account will be disabled. The threshold needs to be set up by CSL.

RELATED INFORMATION

[User Groups and Assigning Permissions](#)

[Import User and User Group Assignment](#)

[Assigning User Group to Users](#)

CHANGE HISTORY

Date	By	Changes
15-Feb-2008	-	Created.
28-Jul-2015	CS	Included section for FAQ.
11-Nov-2015	Clarissa	Changed format. Rewritten.
12-Jun-2016	Douglas	Proofread.
21-Aug-2018	Silpa	Updated Related Information.
25-Aug-2018	Silpa	Updated step 1.
20-Nov-2019	Lyra	Updated screenshots.
7-Dec-2020	TS	New enhancement for additional security approval by entering the user's current password. Updated instructions and screenshots.
3-Jun-2021	Lyra	Updated instructions for step 6, 11, 17 for skip password check.
16-Jul-2021	Lyra	Added FAQ02.
8-Dec-2022	TS	Updated to W6 instructions and screenshots.