User

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Purpose

User Maintenance allows you to define which users can access your Ascente data, and when in Ascente which features they can use. In addition, you can control which functions a user can use within each screen.

Users can be assigned to Groups which you can define in Group Maintenance. You can then configure the security settings for one user in the group and then use a Copy to Group function to set all other users in the group to have the same security level.

NOTE: Groups should be defined before creating users.

This option also lets you control other various settings for a user such as:

- Daily Tips
- Scripting
- Menu Style
- Default Application
- Allow View Only, Change or Hide of certain features.

Screens

General Screen
Enter general information about a user and define default settings.

Security Options Screen
Define menu and toolbar security access for the current user.

Security Form Screen
Define specific form security access for the current user.

Adding a User

To add an Ascente user, follow these steps:

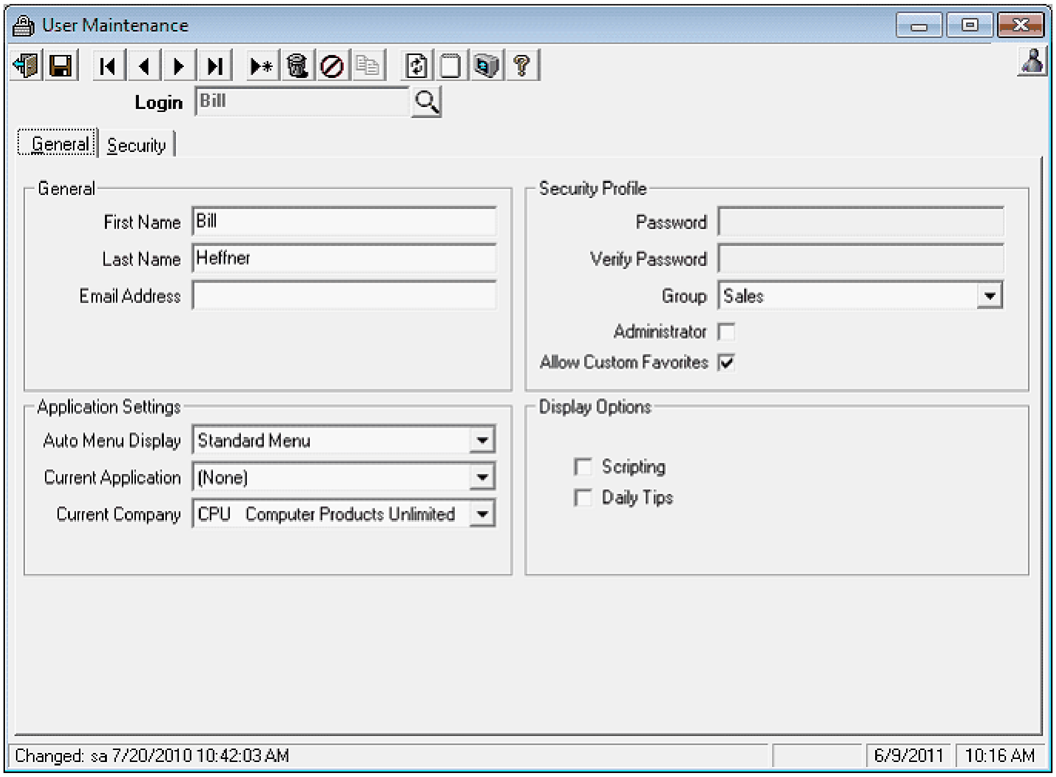
1. Press the **New Record** button , and enter the new user login and settings.
2. Press **Save Changes** button, to save the new record.

Editing a User

To edit a user, follow these steps:

1. Select a User using the Lookup button , to view existing users. Select the user to edit.
2. Edit the user record.
3. Press **Save Changes** button , to save changes.

User Maintenance General Screen



Field Descriptions

Login: Enter the login to be used, up to 16 characters. Do not use any special characters, such as periods.

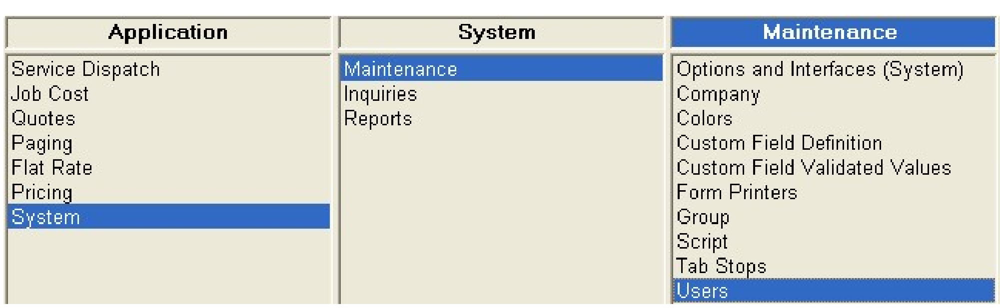
General Panel

First Name: Enter the user's first name, up to 30 characters. Not required, but recommended.
Last Name: Enter the user's last name, up to 30 characters. This field may not be left blank.
Email Address: Enter the user's e-mail address (Optional). If this user sends out pages via the Paging module, this e-mail address will be used as the senders address. If this field is blank, the system will use the Email From value from the Email Account setup for Paging.

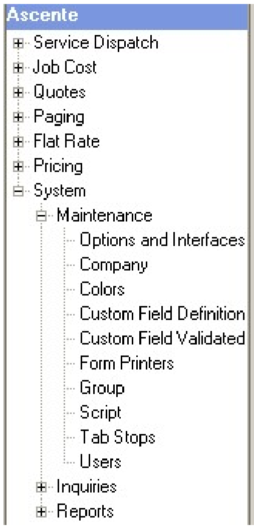
Application Settings Panel

Auto Menu Display: Select the default menu style for this user. The options are:

- (None) in which case no menu will be displayed. The user will see a gray blank screen, but will be able to select options from the tool bar at the top of the window.
- Traverse Style (recommended), which will display the Ascente menu in a format similar to the Traverse menu style:



- Explorer Style, which will display the Ascente menu in a Windows Explorer style:



Current Application: Defines the default application that the system will select on the menu when the user first logs into Ascente. The selections shown will only be those modules which have been registered. The full module list is: Service Dispatch, Job Cost, Quotes, Paging, Flat Rate, Pricing and System. Select the application that the user will be using the most.

Current Company: This will list the various Traverse companies that have been defined on your system. Typically there will be one main company along with one called CPU, which is a test company. You should always select the main company.

Security Profile Panel

Password: This field is disabled and not used by the system at this time. The Change Password function on the tool bar can be used by the user to change their own password.

Verify Password: This field is disabled and not used by the system at this time. The Change Password function on the tool bar can be used by the user to change their own password.

Group: Assign the user to a Group that has been defined in the system. It is recommended that all users be configured and assigned to groups; however, you do not have to set up the Security tab for the users. Once all users have been defined, select one user in the group and configure their Security Tab. Then use the Copy to Group button to have the system copy the security settings for the current user to all other users in the same group.

Administrator: Check this box if the current user will be an Administrator. By checking this box the user will have full access to all feature in Ascente. Therefore, the Security Tab will be disabled for this user.

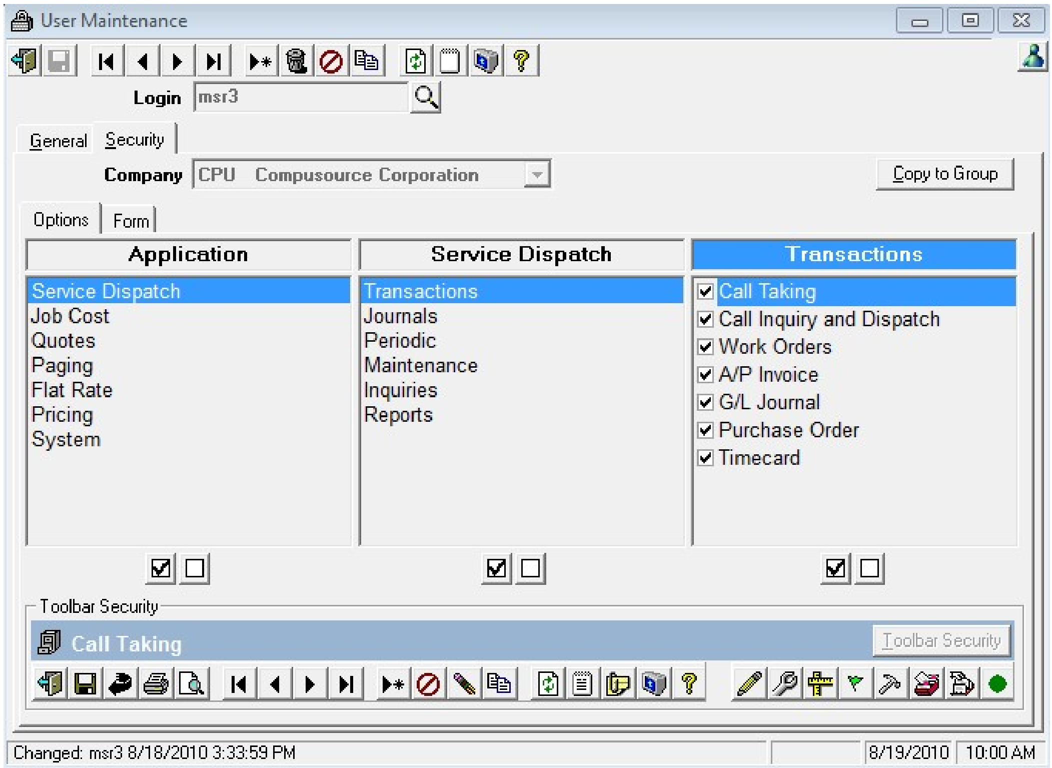
Allow Custom Favorites: Check this box if the current user will be allowed to add custom items on the Favorites Menu. If the Administrator box is checked, this box will be checked by default and cannot be changed.

Display Options Panel

Scripting: Check this box to enable the Scripting feature within Ascente. Scripting can be used through the system to prompt the user on what to ask a customer, or give helpful information about what to enter in a field. Scripts are defined in the System, Maintenance, Script option.

Daily Tips: Check this box to enable the display of Daily Tips when a user first logs into the system.

User Maintenance Security Options Screen



Company: Be sure to select the proper company that you want to adjust security for.

Application: Select the Application that you want to adjust security for. Use the ☑ button to give the user full access to all options within all applications. Use the ☐ button to remove access to all options within all application for the user.

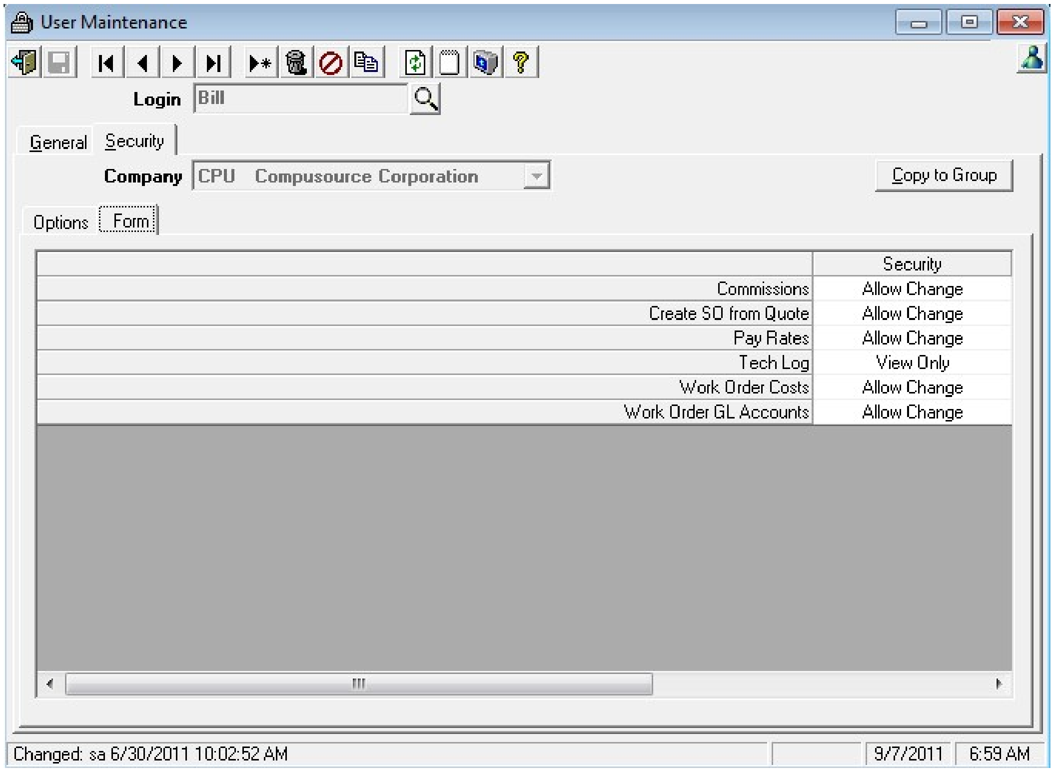
Submenu: (Under the heading Service Dispatch in the above example) Select the submenu item that you want to adjust security for. Use the ☑ button to give the user full access to all options within the selected application. Use the ☐ button to remove access to all options within the selected application for the user.

Menu item: (Under the heading of Transactions in the above example) Manually check or uncheck those items that you do not want the user to have access to. Unchecked items will not be displayed on the menu. Use the ☑ button to give the user full access to all items within the selected submenu. Use the ☐ button to remove access to all options within the selected submenu for the user.

Toolbar Security Panel

Toolbar Security Use the Toolbar Security button to display the toolbar buttons for the selected menu item. Once the toolbar buttons are listed you can then click on a button to enable or disable that item. Note that some items when disabled/enabled will also disable/enable other items on the toolbar (for example the save button will also disable/enable the Change ID's button). By disabling the save button the user will be able to view information, but will not be able to save any changes they make. The Exit and Help buttons are required and cannot be disabled.

User Maintenance Security Form Screen



Company: Be sure to select the proper company that you want to adjust security for.

Commissions: This option controls if the user can see or change commission information in Work Orders, Work Order History Inquiry, and Technician maintenance.

Select ***Allow Change*** (Default) for the user to be able to see commission rates and allow them to change them on a Work Order, Work Order History Inquiry (view only) or Technician maintenance.

Select ***View Only*** to allow the user to see the commission rates, but not be able to make any changes.

Select ***Hide*** to disable the commissions button in the Work Order screen and hide the commission rates in the grid. This will also hide the commission information in Work Order History Inquiry and Technician maintenance.

Create SO from Quote: This option controls if the user can create a Service Order from a Quote in Quotes.

Select ***Allow Change*** (Default) or ***View Only*** for the user to be able to create a Service Order from a Quote.

Select ***View Only*** for the user to be able to see the Create SO button in the Quotes screen, but the button will be disabled.

Select ***Hide*** to remove the Create SO button in the Quotes screen.

Pay Rates: This option controls if the user can see or change pay rates in the following areas:

- Timecard Entry
- Timecard Register
- Work Orders
- Prebill Register
- Job Actuals Inquiry
- Job Actuals Detail
- Contracts in Progress
- Estimate/Actual Worksheet
- Job Backlog
- Job Cost Detail
- Job Cost Report with Close Outs
- Job Status
- Job Costs by Cost Code
- Job Costs by Group
- Job Costs by Job

The user will NOT be able to run the following reports if Pay Rates is set to ***Hide:***

- Certified Payroll Report

[Job Cost Detail with Burden]
[Payroll Reports]
[Payroll Trend Reports]
[Relieve Work in Progress Register]
[Union Report]

Select ***Allow Change*** (Default) for the user to be able to see pay rates and allow them to change them throughout the system.

Select ***View Only*** to allow the user to see the pay rates, but not be able to make any changes.

Select ***Hide*** to not show pay rates in all of the items listed above.

Tech Log: This option controls if the user can see or change Technician Log records in Call Taking, Technician Maintenance, and in the Service Order History Inquiry.

Select ***Allow Change*** for the user to be able to change the date, time or comments on any existing Technician Log record, delete a record, or add a new record from Technician Maintenance or Service Order History Inquiry (but not from Call Taking, as this can be done from Call Inquiry).

Select ***View Only*** (Default) to allow the user to see the Technician Log records in Call Taking, Technician Maintenance, and in Service Order History Inquiry, but not make any changes.

Select ***Hide*** to remove the Tech Log tab from the Call Taking, Technician Maintenance, and Service Order History Inquiry screens.

Work Order Costs: This option controls if the user can see or change cost information in Work Orders and on the Prebill Register.

Select ***Allow Change*** (Default) for the user to be able to see costs and allow them to change them on a Work Order.

Select ***View Only*** to allow the user to see the costs, but not be able to make any changes.

Select ***Hide*** to not show costs in the Work Order screen or on the Prebill Registers.

Work Order GL Accounts: This option controls if the user can see or change GL Account information in Work Orders and Work Order History Inquiry.

Select ***Allow Change*** (Default) for the user to be able to see the GL Accounts and allow them to change them on a Work Order and Work Order History Inquiry (view only).

Select ***View Only*** to allow the user to see the GL Accounts, but not be able to make any changes.

Select ***Hide*** to disable the GL Accounts button in the Work Order screen and hide the GL Accounts in the grid. This will also hide the GL Account information in Work Order History Inquiry.

Command Buttons - General

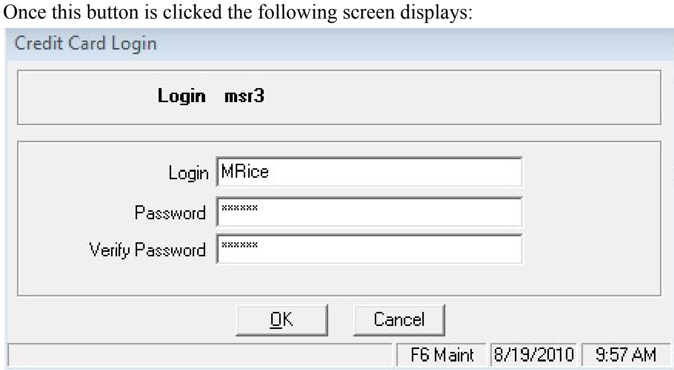
The Command Buttons & Hotkeys section reviews all of the Buttons and Hotkeys that are available on most screens.

Command Buttons - Specific

Credit Card Login: This button is only displayed if the X-Charge Credit Card software is installed. This is used to set up the Login/Password for the X-Charge interface for a User that is processing Credit Card transactions within Ascente.

NOTE: A Login/Password MUST be defined for users that will be running the Create Maintenance Service Orders option where contracts are set up to automatically charge a Credit Card.

Once this button is clicked the following screen displays:



Field Descriptions

Login: Enter the X-Charge Credit Card Login to be used for Credit Card processing within Ascente.

Password: Enter the X-Charge Credit Card Password to be used for Credit Card processing within Ascente.

Verify Password: Re-enter the X-Charge Credit Card Password to be used for Credit Card processing within Ascente.

NOTE: The User will be prompted for a Login and Password when processing Credit Card transactions within Ascente if these fields are not set up.