



TRAVERSE NEW USER SETUP



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www.compusource.com

<http://www.servicecontractorsoftware.com/>

Traverse – New User Setup

Overview

Your company is responsible for creating user logins and maintaining the Traverse system security. If a user accesses something they should not, it is because you have not implemented the security settings correctly.

This video will explain the process of adding new Traverse users. Traverse 11 has made it possible to add and maintain Traverse users from inside of Traverse.

Compusource support can answer questions regarding this process, but it is your responsibility to add and maintain your Traverse users and their security rights and permissions. Training can be purchased for this.

It is no longer a requirement to run the external Traverse - Server Manager program to do this.

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Traverse – New User Setup

Assumptions

System security is being discussed here and because of that, companies should only allow trusted administrative personnel the system privileges required to do what is demonstrated in this presentation.

Menu access to the [Traverse / System Manager / Administration](#) programs is required to maintain users and their system security privileges in Traverse.

Traverse – New User Setup

Processing Summary

For every new Traverse user, you need to determine the following:

1. Login *beths*
2. Password *123abc*
3. Same as an existing user Y/N
 - If so, what existing users login? *maryp*
 - If not, what modules and programs does the new user need access to?

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Same as Existing User

1. What user are you copying security settings from? *maryp*
2. What groups do they belong to?

Accounts Receivable, All Users

- Run the Traverse / System Manager / Administration / Users program and view the user being copied? *maryp*

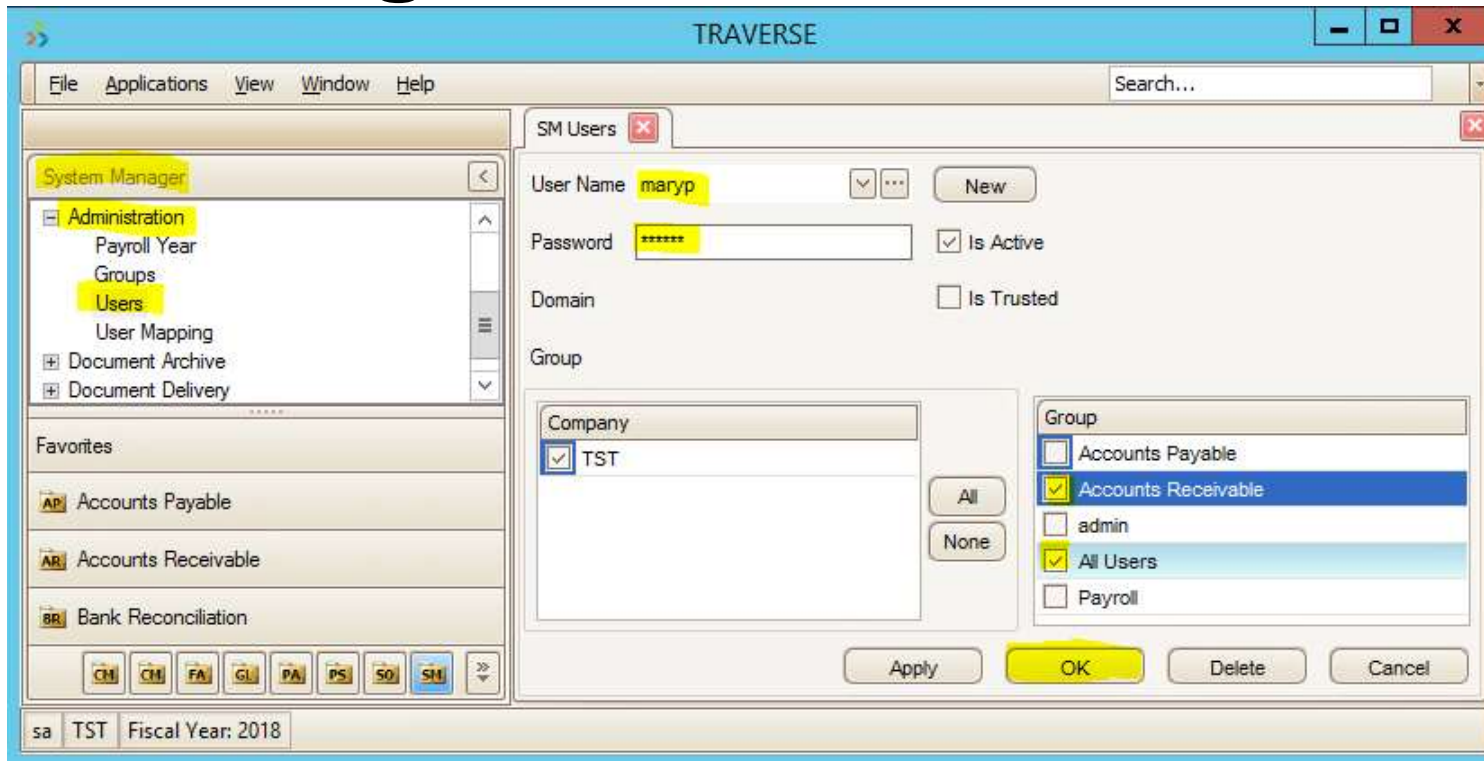
1. Add the New User

- Run the Traverse / System Manager / Administration / Users program and click the [New] button and add the new user.
 - Write down the login and password assigned and save these. *beths / 123abc*
 - Check the same groups as the user being copied had and click [Apply] and [OK].

The new user should now be created and you can now have that user login and run Traverse.

Traverse – New User Setup

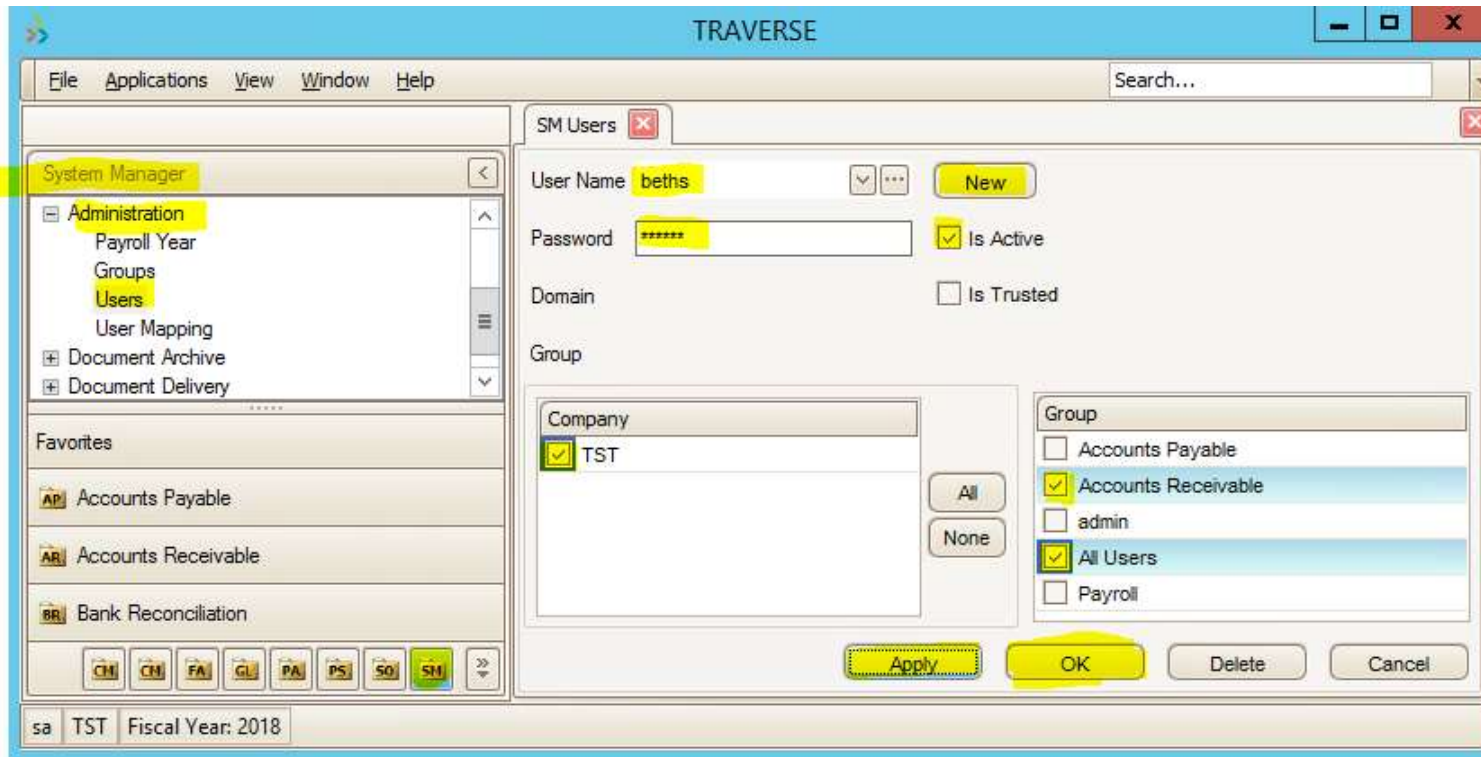
Existing User



Traverse / System Manager / Administration / Users

Traverse – New User Setup

New Copied User



Traverse / System Manager / Administration / Users

Traverse – New User Setup

Not the Same as Existing User

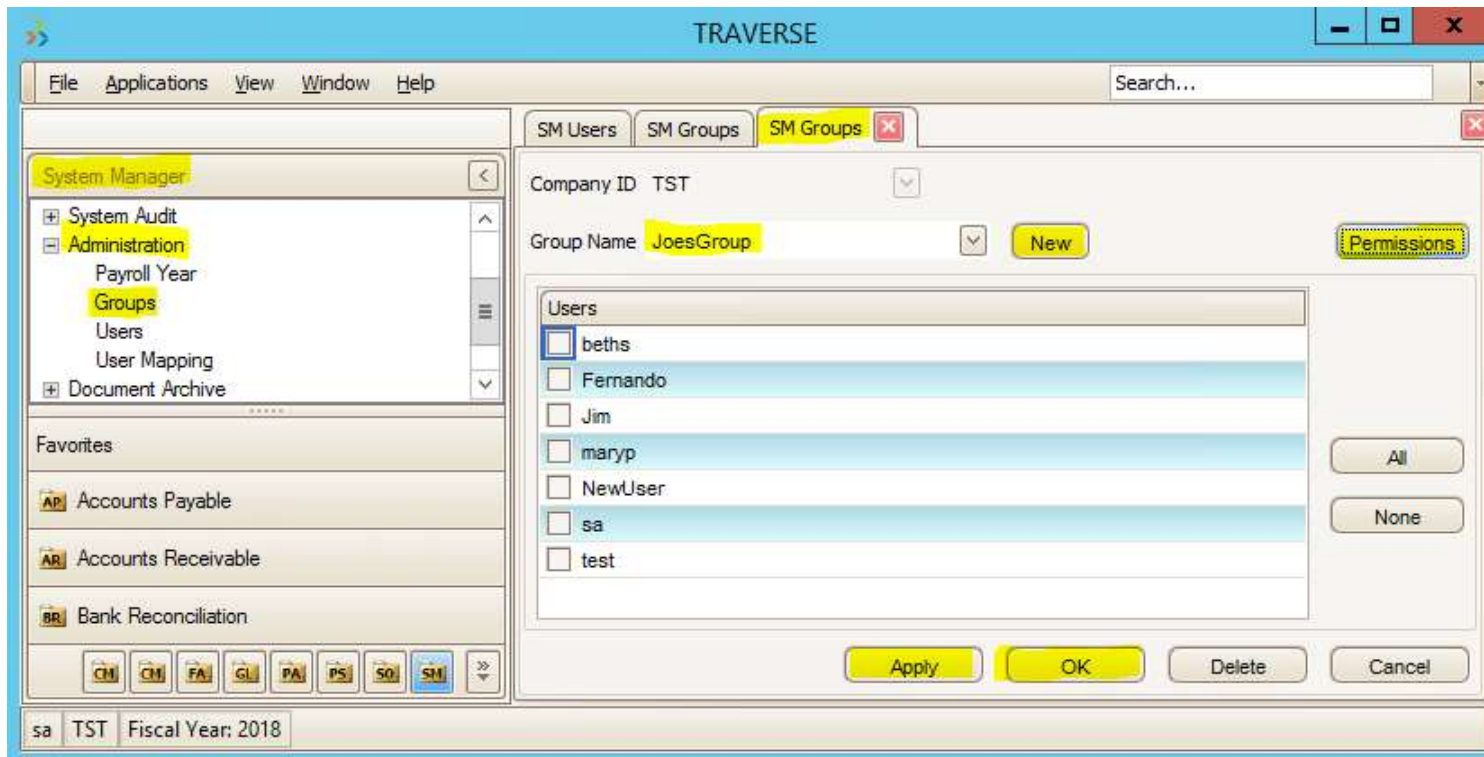
1. Determine that login and password for the new user: *joes/123abc*
2. Add the Group for the New User *JoesModule*
 - Run the *Traverse / System Manager / Administration / Groups* program and click the [New] button and add the new group for this new user with all of the menu access rights the new user will need.
3. Add the New User
 - Run the *Traverse / System Manager / Administration / Users* program and click the [New] button and add the new user.
 - Write down the login and password assigned and save these. *joes / 123abc*
4. Assign Groups to the New User
 - Check the same group(s) added above in step #1 and click [Apply] and [OK]. *JoesModule*
 - Check any other group(s) for the new user that will determine the new users menu access rights.

The new user should now be created and you can now login as that user login and run Traverse.

Traverse – New User Setup

New Created Group

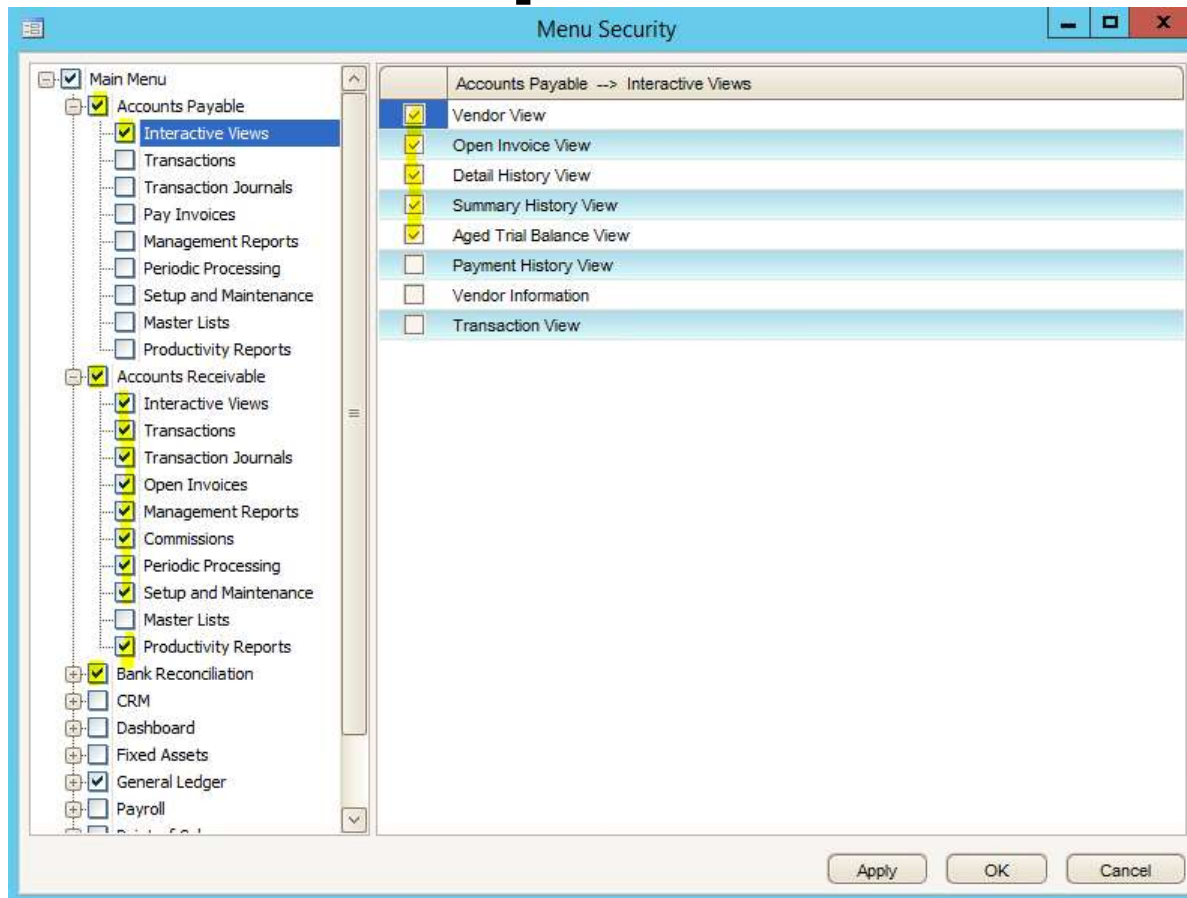
New Group for user joes is created called JoesGroup



Traverse / System Manager / Administration / Groups

Traverse – New User Setup

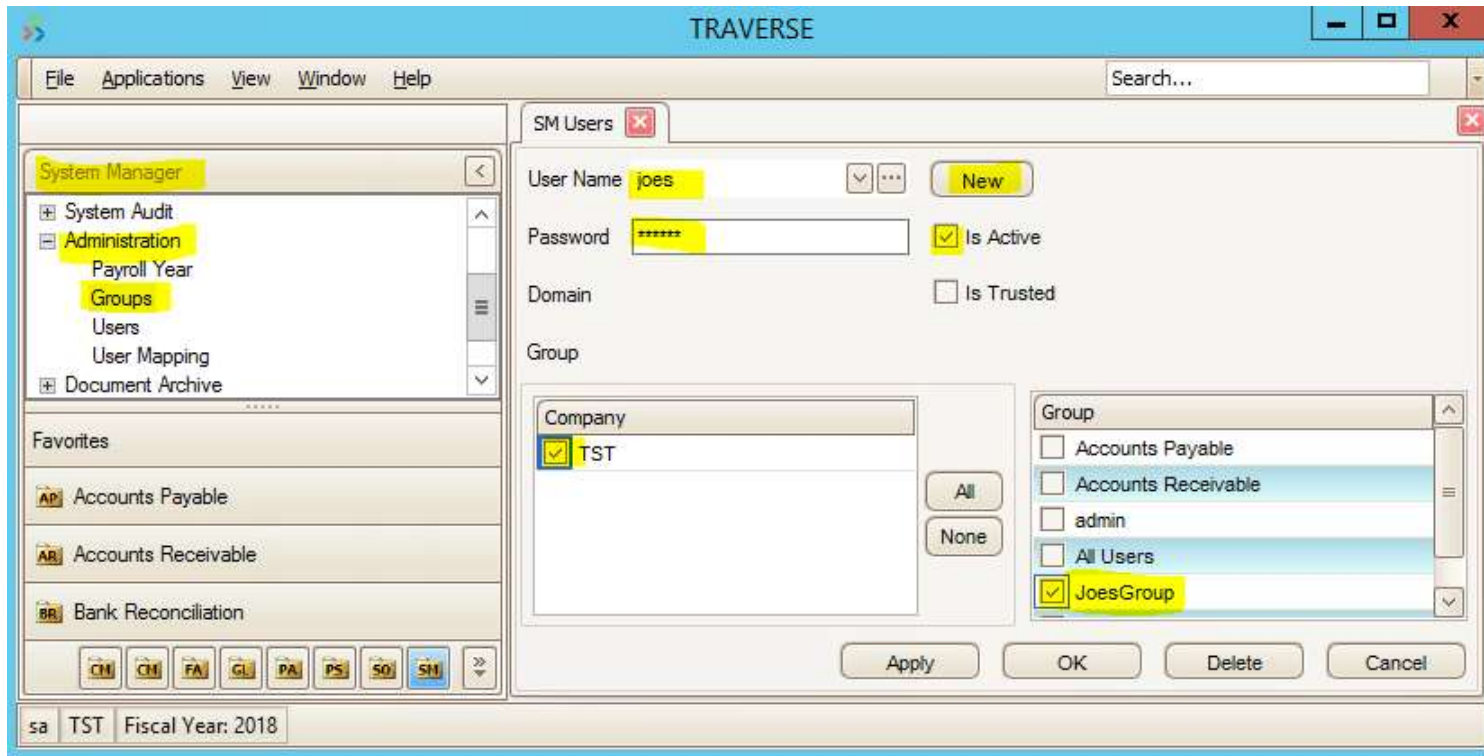
New Groups Permissions



Traverse / System Manager / Administration / Groups [Permissions]

Traverse – New User Setup

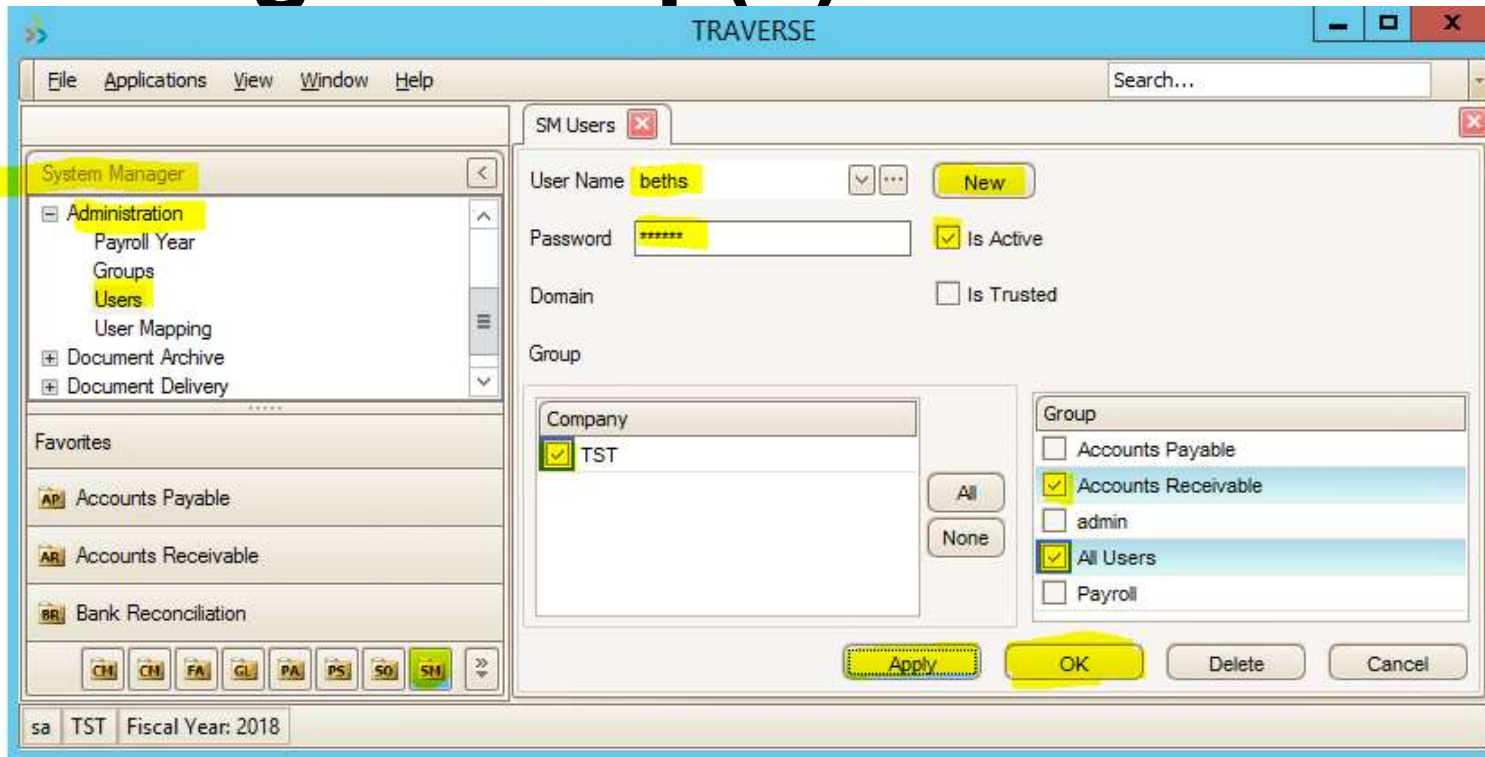
Create New User



Traverse / System Manager / Administration / Users

Traverse – New User Setup

Assign Group(s) to the New User



Traverse / System Manager / Administration / Users

Traverse – New User Setup

Recommendations

1. Always login as the newly created user in order to verify menu access settings for the new user. Edit that users groups and settings as necessary before having the user use the login.
2. Group privileges are cumulative. A user can be a member of multiple groups.
3. Some companies prefer to create a group for each user. This provides more control, but can take a little more time to maintain.
4. Changing one group changes the security got all users that are a member of that group.