



Ascente

CREATING NEW ASCENTE USERS

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www.compusource.com

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

Creating New Ascente Users

Overview

In Ascente version 4.1.19 a new feature was added so that users can be created without having to run the SQL program to edit the new users SQL permissions and configuration.

This means that all that the only processing required to create a new user is done in Ascente using the *Ascente / System / Maintenance / User* program.

The Ascente user doing this needs to have access to this program and Ascente admin rights.

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Security Considerations

It is your companies responsibility for creating new Ascente users logins and passwords and also for setting and maintaining their Ascente security rights for menus and forms.

This is all done in Ascente using the *Ascente / System / Maintenance / User* program.

Every company should have a person that is responsible for doing this. Compusource support can answer questions regarding this process.

Creating New Ascente Users

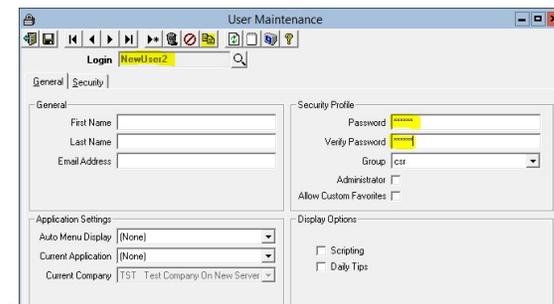
Create a New User by Copying a User

There are many Ascente menu and forms security settings in Ascente. Setting all of these can take a lot of time. It is always recommended that every new user that is created is copied from an existing user that should have the same or similar menu and forms security settings. This way the time required to adjust the new user's security settings is reduced because the variances are very minor. If the new user's security settings are the same, then no additional work is required for the new user.

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Process

1. Run the *Ascente / System / Maintenance / User* program
 2. Enter the new users 'Login'
 3. Enter the new users 'Password'
 4. 'Verify Password'
 5. Click on the 'Copy From Existing' button 
 6. Select the User to copy security settings from
 7. Just click the [OK] button with out unchecking any of the security boxes above.
 8. Correct the names and e-mail address.
- You are done!

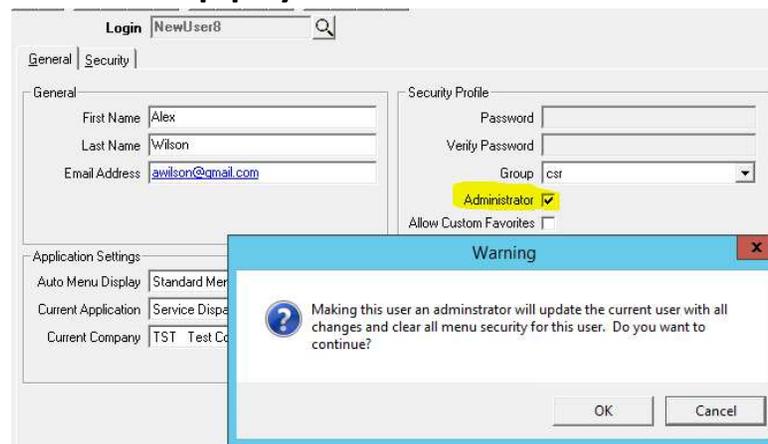


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User Security Settings

Administrator Rights

If a user has the 'Administrator' box checked. The user has complete access to everything in Ascente. The Options, Toolbar and Forms layers of security settings do not apply to users with administrator rights.



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User Security Settings

Assuming the user does not have 'Administrator Rights', there are three layers of Ascente user security setup

1. Options – Menu Level Access Rights
2. Toolbar – Button Level Access
3. Forms - Determines the ability to Allow Change, View or Hide Specific Fields on Forms or Reports.

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User Security Settings

1. Options – Menu Level Access Rights

- Checked – They can run the program
- Unchecked – They will not see that menu option and therefore can't run that program.

The screenshot shows the 'User Maintenance' window with the following details:

- Title Bar:** User Maintenance
- Login:** NewUser8
- Company:** TST Test Company On New Server
- Options Tab:** Form
- Application List:** Service Dispatch, Job Cost, Payroll, Quotes, Inventory, Purchase Order, Physical Inventory, Paging, Flat Rate, GPS, Mobile
- Service Dispatch List:** Transactions, Journals, Periodic, Maintenance, Inquiries, Reports
- Maintenance List:** Price Break (checked), Priority (checked), Refrigerant (checked), Service Order Status (unchecked), Service Order Type (unchecked), Supervisor (unchecked), Task (checked), Technician (checked), Trouble (unchecked), Union (checked)
- Toolbar Security:** Technician (checked)

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User Security Settings (*Continued*)

2. **Toolbar Security** – Enable or Disable Buttons on the Form

- Active – They can see that button/function
- Grey – Can't use that button/function



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Form Security Settings (*Continued*)

3. Forms Security - Determines the ability to Allow Change, View or Hide Specific Fields

- Use the [F1] Help to see all of the details specific to each of these Form settings.

The screenshot shows the 'User Maintenance' window for user 'NewUser8'. The 'Security' tab is selected under the 'Options' section. The 'Form' sub-tab is also active. A table lists various form fields and their security settings:

Field	Security
Commissions	Allow Change
Create SO from Quote	Allow Change
Pay Rates	Hide
Tech Log	View Only
Work Order Costs	Allow Change
Work Order GL Accounts	Allow Change