

Creation of Users and Groups

Describes in details how to create the needed users and groups of users, and how to assign the required permissions to them

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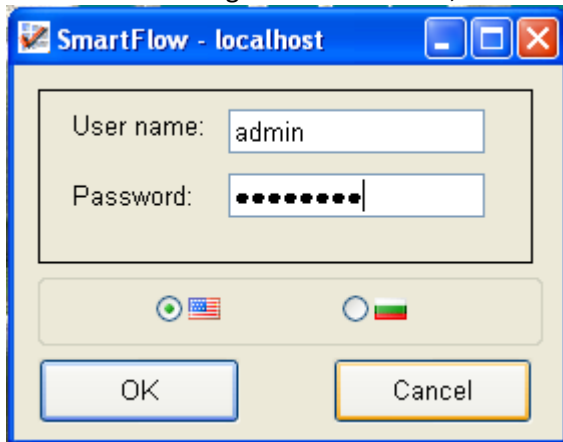
Introduction

After the initial database creation, there is only one *Smart Flow* user - *admin* with password *issvarna*. The *Smart Flow* administrator can use this username and password to log-on and create the needed users and groups of users.

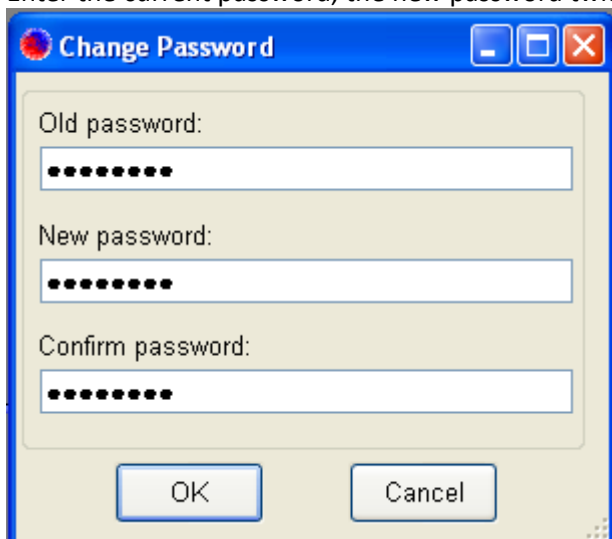
If you're using the free version of *Smart Flow*, you're limited to one user only (the user *admin*). In this case you can skip the rest of this manual.

Initial Log-on to Smart Flow

If this is the first log-on to *Smart Flow*, use the username '*admin*' and password '*issvarna*'.

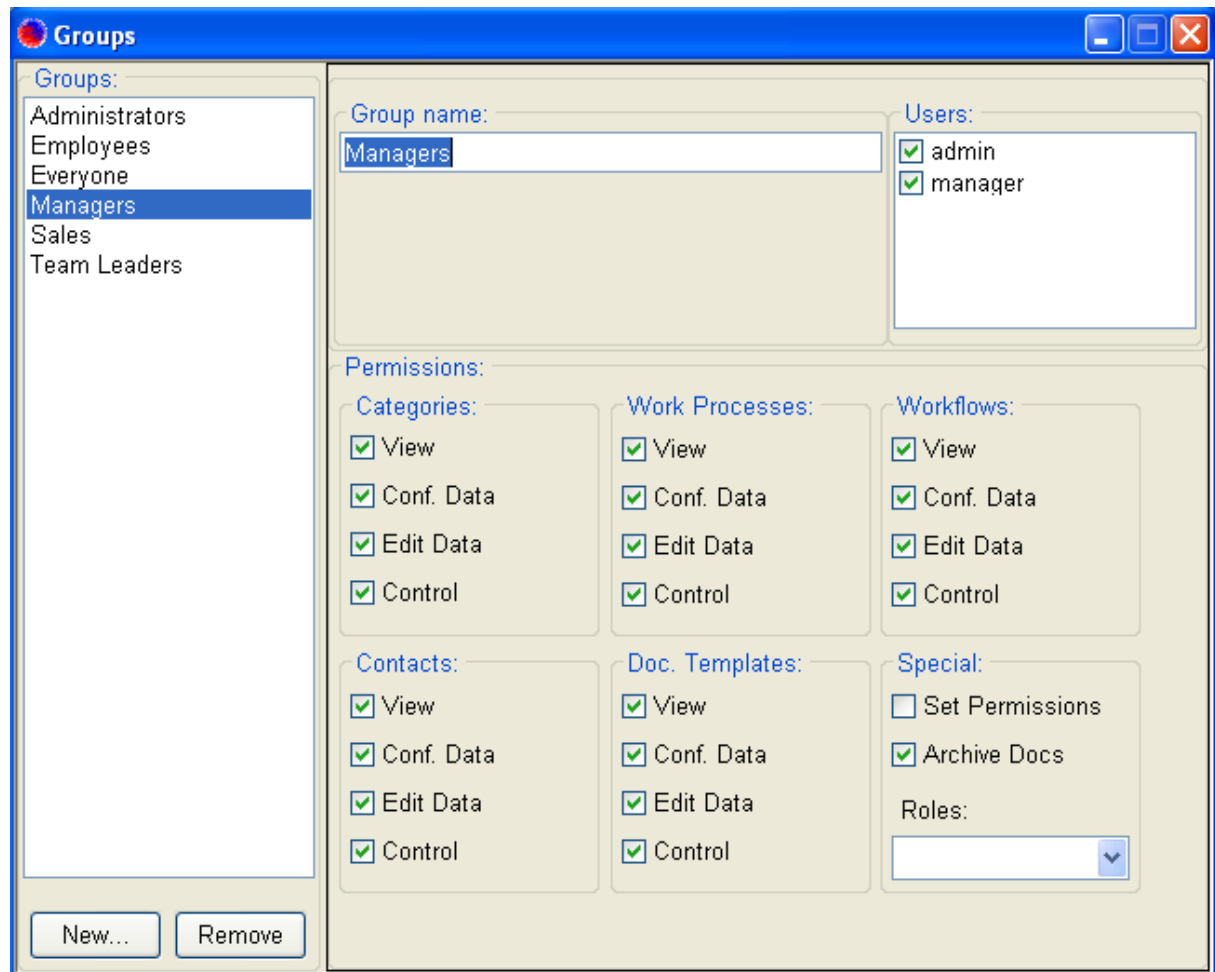


Do not forget to change the password of the user *admin* after the initial log-on. To change the password, select the menu *Manage / Change Password*. The dialog *Change Password* shows up. Enter the current password, the new password twice, and finally press the button *OK*.



Managing the Groups of Users

Usually the groups match the departments or work groups within your organization. To inspect or manage the groups of users, on the *Smart Flow* main screen select the menu *Admin / Groups*. The dialog *Groups* shows up.



The Groups Dialog

On the left side of the dialog is displayed the list of existing groups. On the upper right side of the dialog is displayed the name of the currently selected group, and the list of available users.

The users, which are members of the currently selected group, are checked. To make a user member of the currently selected group, check its name in the list. To remove a user from the currently selected group uncheck its name in the list.

The Permissions

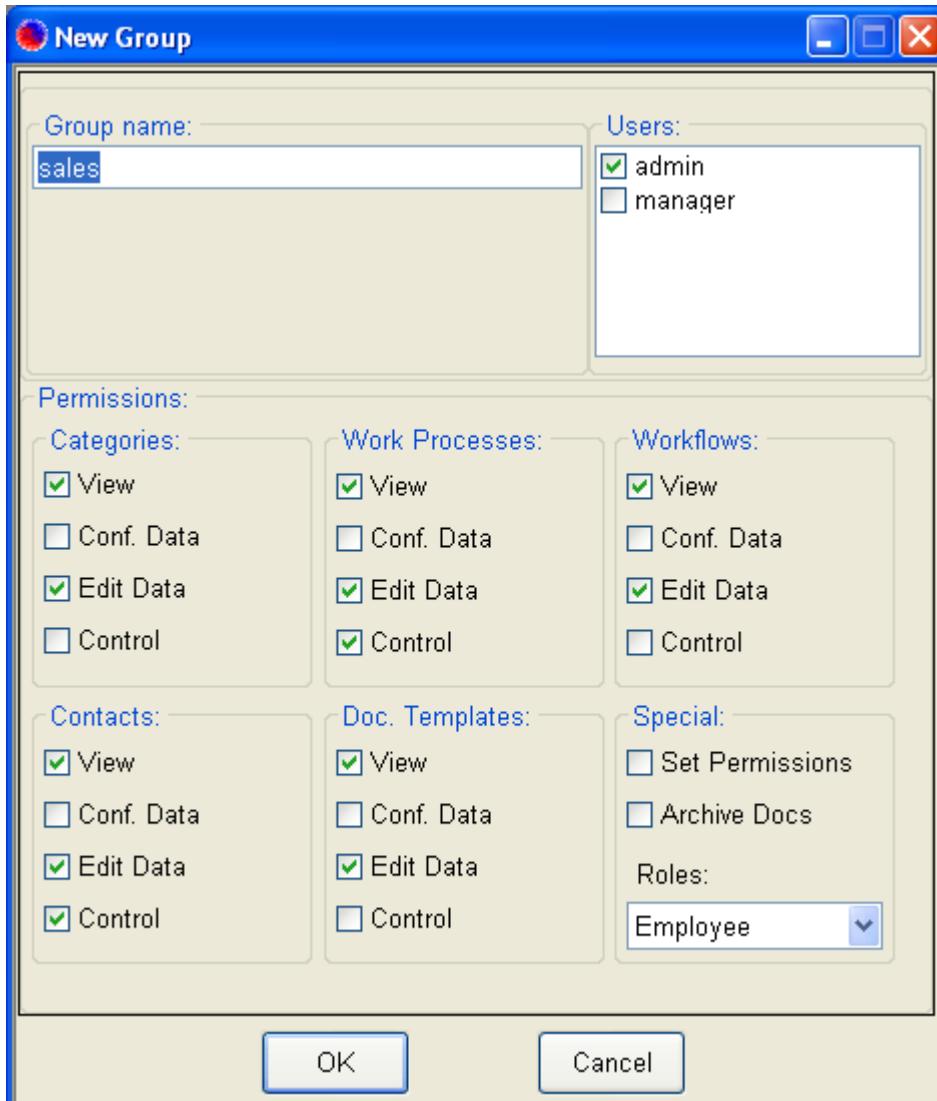
Each group has its own set of permissions (rights) for the actions, which the users-members of this group could perform on the categories, work processes, workflow templates, contacts/appointments and document templates. The individual permissions (rights) are as following:

- *View* – grants the right to view/inspect the data of the corresponding object
- *Conf. Data* – grants the right to view/inspect the data of the corresponding object, if it is marked as confidential
- *Edit Data* – grants the right to modify the data of the corresponding object and the custom data, documents or notes related to the object
- *Control* – grants the right to add or delete the corresponding objects
- *Set Permissions* – grants the special right to add or delete users or groups, and to grant permissions to the existing users and groups
- *Archive Docs* – grants the special right to backup or restore documents

There is also a set of pre-defined roles – look at the combo box on the lower right part of the dialog. You can select a predefined role from the list in order to grant to the selected group all needed permissions with one click.

Creation or Deletion of a Group

To create a new group of users, press the button *New* located below the list of existing groups. The *New Group* dialog will show up. Enter a name for the new group and set the needed permissions that will apply to all users in the group (or select a predefined role). Mark the users in the list that should be members of this group and finally press the button *OK*. The new group will be created and you will be brought back to the *Groups* dialog.



To delete a group of users, on the *Groups* dialog select the needed group and press the button *Remove* located below the list of existing groups. Confirm the deletion, and then the selected group will be deleted.

Managing the Users

The users are the people, which are allowed to log-in and work with the product. To inspect or manage the list of users, on the *Smart Flow* main screen select the menu *Admin / Users*. The dialog *Users* shows up.

The Users Dialog

On the left side of the dialog is displayed the list of existing users. On the upper right side of the dialog are displayed the details of the currently selected user, and the list of available groups.

The groups which have the currently selected user as a member are checked. To make the currently selected user member of a group, check the group's name in the list. To remove the currently selected user from a group uncheck the group's name in the list.

Below the user's details are displayed the permissions (rights) specific to the currently selected user. **Avoid assigning permissions directly to the user. It would be easier to maintain the overall security, if you assign or revoke the permissions to the groups to which the user belongs.**

To set or change the password of the currently selected user, press the *Set Password* button. The *Set Password* dialog will show up. Enter the needed password twice and press the button *OK*. To clear the password of the currently selected user, press the *Clear Password* button.

Each user can have a related contact, which could be assigned later as a worker to the work processes or as a participant to the meetings and appointments. To relate a contact to the currently selected user, press the button with the magnifying glass located above the field *Rel. Contact*. The *Choose Contact* dialog will show up. Select a contact and press the button *OK*. The selected contact will be set as a contact related to the currently selected user. To remove the relation between the user and its contact, press the button with the red *X* located above the field *Rel. Contact*.

Creation or Deletion of a User

To create a new user, press the button *New* located below the list of existing users. The *New User* dialog will show up.

The screenshot shows the 'New User' dialog box with the following details:

- User Info:**
 - User name: sales1
 - Password: [Set Password] [Clear Password]
 - First name: []
 - Last name: []
 - Rel. Contact: []
- Address, Phone, E-mail:**
 - Address: [] []
 - City: [] State: [] ZIP: []
 - Phone: [] Mobile: [] E-mail: []
- Permissions:**
 - Categories:** View, Conf. Data, Edit Data, Control
 - Work Processes:** View, Conf. Data, Edit Data, Control
 - Workflows:** View, Conf. Data, Edit Data, Control
 - Contacts:** View, Conf. Data, Edit Data, Control
 - Doc. Templates:** View, Conf. Data, Edit Data, Control
 - Special:** Set Permissions, Archive Docs
 - Roles: []
- Groups:**
 - Administrators
 - Employees
 - Everyone
 - Managers
 - sales (checked)
 - Team Leaders
- Other options:**
 - Allow Alerts
 - Create Contact for User

Enter the username of the new user, set its password if needed and mark the groups in the list, which should have the new user as a member. **Avoid assigning permissions directly to the user. It would be easier to maintain the overall security, if you assign or revoke the permissions to the groups to which the user belongs.**

Pay special attention to the following options:

- *Create Contact for User* – when checked, instructs *Smart Flow* to create a contact with the same name as the new user, and to relate it to the user. This contact could be assigned later as a worker to the work processes or as a participant to the meetings and appointments. This saves the additional step to create such contact manually.

- *Allow Alerts* – when checked, allows *Smart Flow* to send notifications to the user when certain events concerning its related contact take place. For instance when its related contact becomes assigned as a worker to a work process; when the due date of a work process, which has the related contact assigned as a worker, approaches; when a document or a note has been added to a work process, which has the related contact assigned as a worker, etc.

Finally press the button *OK* and the new user will be created. Then you will be brought back to the *Users* dialog.

To delete a user, on the *Users* dialog select the needed user and press the button *Remove* located below the list of existing users. Confirm the deletion, and then the selected user will be deleted.