

Adding Users and Roles

Quick Guide

Publication date April 9, 2024
Copyright © One Network Enterprises

No part of this document may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without prior written permission of One Network Enterprises, Inc.

1. Adding Roles

Only a user with administrative privileges can add a user role. Prior to adding users, user roles first need to be created.

Complete the following steps to add new roles:

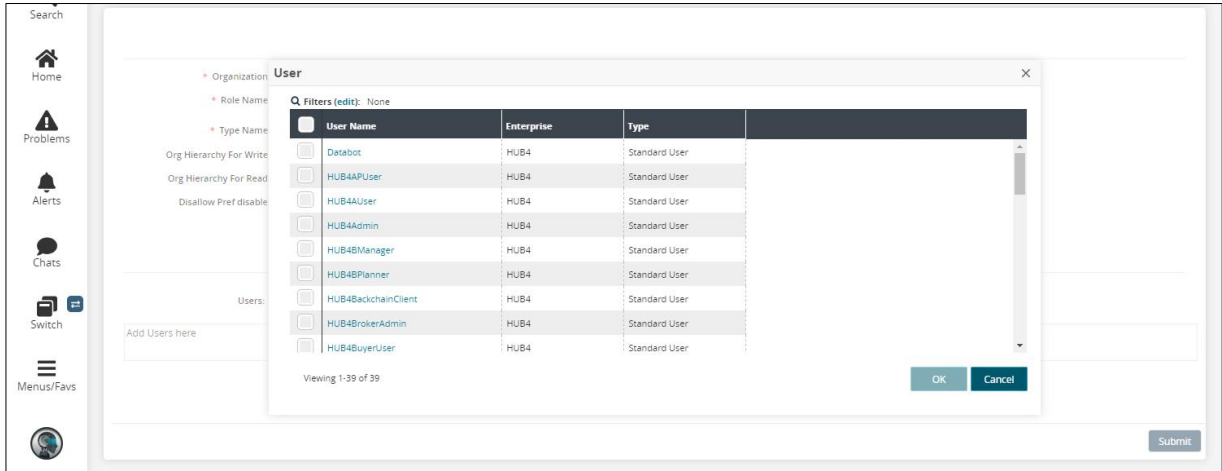
1. Click **Menus/Favs > Administration > Role > Add Role**.
In NEO UI, users can click the Menus/Favs icon on the left sidebar and type in the name of the screen in the menu search bar. For more information, see "Using the Menu Search Bar."

The Add Role screen opens.

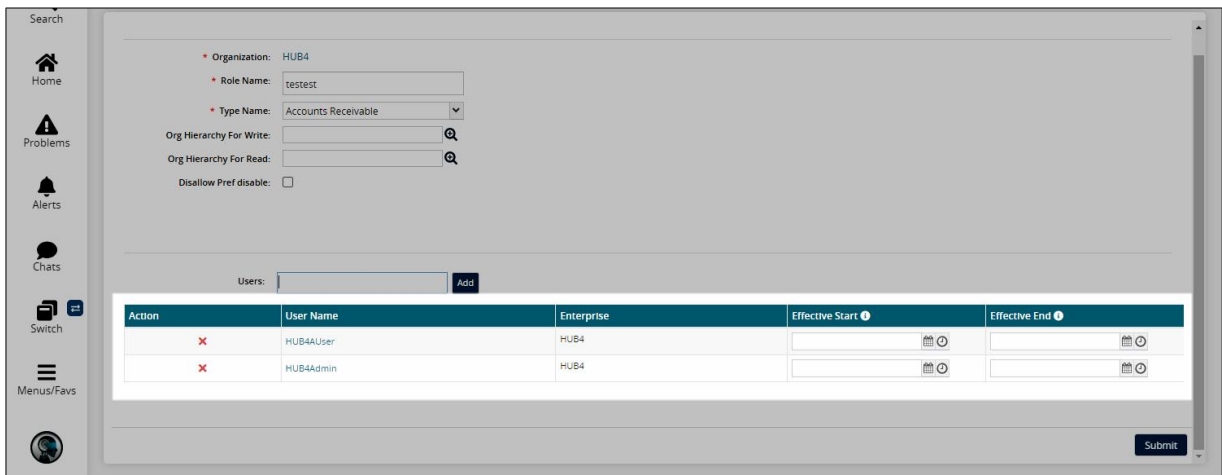
2. Enter values for the fields described in the table below. Fields with an asterisk (*) are required.

Field	Description
Organization	This field auto-populates.
Role Name*	Enter a name for this role.
Type Name*	Select a role type from the dropdown menu. The permissions of the selected role type are applied to the new role.
Org Hierarchy For Write	Select an organization hierarchy for writing operations using the picker tool.
Org Hierarchy For Read	Select an organization hierarchy for reading operations using the picker tool.
Disallow Pref Disable	Select this checkbox to prevent preferences from being disabled.

3. Click the **Add** button to add users to this role.
The User pop-up opens.



4. Select one or more users, and click the **OK** button. Each selected user displays in the table.



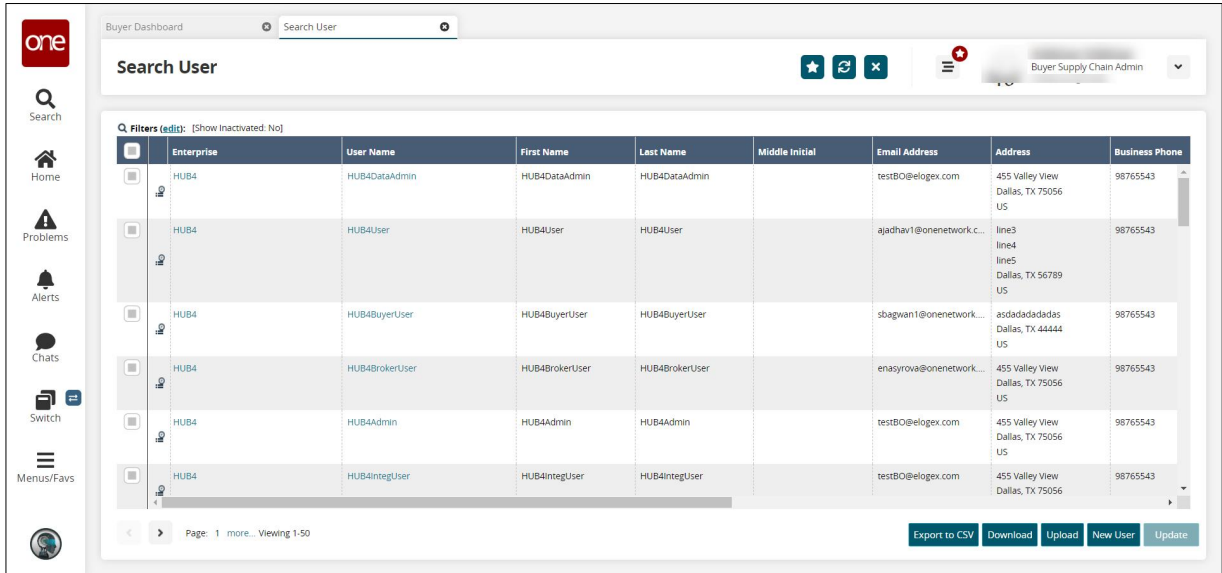
5. Click the calendar and clock icons to set the day and time for the **Effective Start** field.
6. Click the calendar and clock icons to set the day and time for the **Effective End** field.
7. Click the **Submit** button. A success message displays.

2. Adding Users

Only a user with administrative privileges can add a user. Prior to adding a user, a user role first needs to be created.

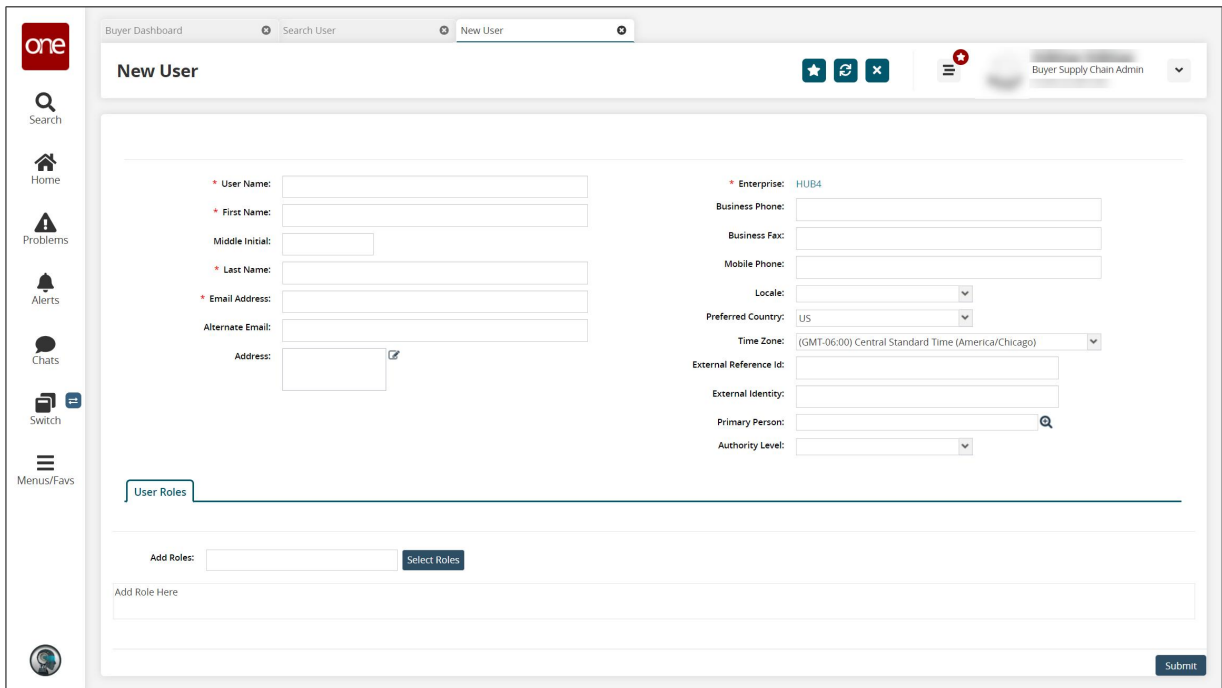
Complete the following steps to add a user:

1. Click **Menus/Favs > Administration > User > Search User**. The Search User screen displays.



- Click the **New User** button.
Not all users and roles have access to this feature.

The New User screen displays.



- Enter values for the fields described in the table below. Fields with an asterisk (*) are required.

Field	Description
*User Name	Enter a unique user name.
*First Name	Enter the user's first name.
Middle Initial	Enter the user's middle initial.
*Last Name	Enter the user's last name.
*Email Address	Enter the user's email address.
Alternate Email	Enter an alternate email if one exists.
*Enterprise	The system auto-populates enterprise information based on the administrator role.
Business Phone	Enter the user's business phone number.
Business Fax	Enter the user's fax number.
Mobile Phone	Enter the user's mobile phone number.
Locale	Select the user's language from the dropdown menu.
Preferred Country	Select the user's preferred country from the dropdown list.
Time Zone	Select the user's time zone from the dropdown list.
Address	1. Click the Edit icon. A dialog box displays. 2. Enter the user's address information.
Primary Person	User the picker tool to select the user's primary person.
External Reference ID	Enter the user's external reference identification information.
External Identity	Enter the user's external identity.

- Type in the role in the **Add Roles** field.
The system will use predictive text to display roles matching the characters typed.
- Select the role.
The role is added to the User Roles table.

Action	Role Name	Role Type	Enterprise	Organization	Site	Effective Start	Effective End	Default Dashboard
✖	Buyer Financials Manager1	SCC.Buyer Financials Manager	HUB4	HUB4				

- Click the **Select Roles** button to select multiple roles at once.
The Role pop-up displays.
- Click the checkboxes for the roles, and click **OK**.
The User Role table updates with the roles and associated information.



NOTE

A user can be assigned more than one role.

8. Click the calendar icons in the **User Role** table for a role to select the **Effective Start** and **Effective End** dates.
9. Click the picker tool icon in the **Default Dashboard** column to select a default dashboard for that role.
10. Click the **Submit** button.
A success message displays.