

## Users

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### Managing User Profiles

On first obtaining **iProjects**, you would have received UserGuide **6.1 Initial installation & configuration** (if you purchased a subscription) or **6.6 iProjects Demo Setup** (if you received a free trial copy).

Those documents introduce you to the User functions, and guide you through a preliminary test setup.

There are two ways to create a new User record. The first is to use the [New](#) button.

Clicking this produces a new blank line for the new User, as shown below (in green). It also opens blank fields for Full Name and Login Name (which appears on the Login screen), Password and Initials. Initials are required for Checklist management.

| Firm Details   |            | Office Settings          |  | Users                  |  |
|----------------|------------|--------------------------|--|------------------------|--|
| Full Name      | Login Name | Dup                      |  | <a href="#">New</a>    |  |
| Charles Nelson | Charles    | <input type="checkbox"/> |  | <a href="#">Manage</a> |  |
| James Moore    | James      | <input type="checkbox"/> |  | <a href="#">Manage</a> |  |
| Justine        | Justine    | <input type="checkbox"/> |  | <a href="#">Manage</a> |  |
|                |            | <input type="checkbox"/> |  | <a href="#">Manage</a> |  |

| Email        | Contacts     | Projects |
|--------------|--------------|----------|
| Office Admin | System Admin |          |

  

| Firm Details  | Office Settings | Users                    | Custom DDNA         | System DDNA            | Project Guides |
|---------------|-----------------|--------------------------|---------------------|------------------------|----------------|
| Full Name     | Login Name      | Dup                      | <a href="#">New</a> |                        |                |
| Geoff Daniels |                 | <input type="checkbox"/> |                     | <a href="#">Manage</a> |                |
| User Tester   | User            | <input type="checkbox"/> |                     | <a href="#">Manage</a> |                |
|               |                 |                          |                     |                        |                |
|               |                 |                          |                     |                        |                |

  

|                 |  |                                   |
|-----------------|--|-----------------------------------|
| Full Name       | <input type="text" value="Geoff Daniels"/> | <a href="#">Assign To Contact</a> |
| Login Name      | <input type="text"/>                       |                                   |
| Password        | <input type="text"/>                       |                                   |
| Initials        | <input type="text"/>                       |                                   |
| Office Location | <input type="text"/>                       |                                   |

When you enter a name in the Full Name field, a button [Assign To Contact](#) appears to the right of the field. Click this button; it will open a window called **Picker**, and will locate the staff member in your Contact database. In the event that there is more than one person with that name (eg 3 Fred Smiths), select the right one and follow instructions to link the staff person to the database.

| Picker |
|--------|
|        |

**Instructions:**

Enter the full or part name of the Contact you wish to assign to your User. Matching contacts will be listed below. Click the 'View' button to see more details on the corresponding Contact (and click the 'Back' button to return to this Picker screen). User.

Name

| Assign | View | Type   | Name          | Address                    |
|--------|------|--------|---------------|----------------------------|
|        |      | Person | Geoff Daniels | PO Box 758 MACKAY QLD 4740 |
|        |      |        |               |                            |

Office location will display all of the office locations entered in **Firm Details > Office Locations**. Select the applicable location, unless the firm has only one office.

To edit the account details of a user, click **Manage**, then simply type to edit information (e.g. change login name from “BC” to “Belinda”). All changes are automatically saved.

Once you’ve done that, click the [Update](#) button above the **Privileges** schedule; that will list all of the privileges as “turned on” – eg available to the new User (see the **Privileges** graphic next page). The Full Name and Login Name will be auto-entered in the Users schedule.

That’s cool – but it means that you have to modify the **Privileges** list separately for each User – a nuisance if you have a lot of Users. Here’s a shortcut (the second method): Let’s say you’ve got 15 Associates who will all have the same set of privileges. Do the first one, select their privileges profile, then copy this profile by using the light blue [Dupe](#) button on the staff list.

You can, of course, still turn individual privileges items for any one of this group to further customize their access.

You can delete any trials or errors using the trashcan.

Now let’s look at the **Privileges** schedule (above). Clicking on the [Manage](#) button next to a User’s name displays their privileges set.

### Assign Privileges

Assign privileges by checking/unchecking the Access Boxes.

All new users are given access to all privileges under the default setting. To edit the privileges of a user, uncheck boxes of each privilege. Check/Uncheck boxes of System, Contacts and Projects to select/deselect all items under these categories.

Notify when a new version is available  Sample?

#### Privileges

| Access?                             | Title                              |     | <a href="#">Update</a> |
|-------------------------------------|------------------------------------|-----|------------------------|
| <input checked="" type="checkbox"/> | <b>System</b>                      | 11  | ▲                      |
| <input checked="" type="checkbox"/> | Access Office Admin                | 7   |                        |
| <input checked="" type="checkbox"/> | Access System Admin                | 122 |                        |
| <input checked="" type="checkbox"/> | <b>Contacts</b>                    | 8   |                        |
| <input checked="" type="checkbox"/> | Access/Find Contacts               | 14  |                        |
| <input checked="" type="checkbox"/> | New Contact                        | 15  |                        |
| <input checked="" type="checkbox"/> | Delete Contact                     | 16  |                        |
| <input checked="" type="checkbox"/> | Delete Sample Contacts             | 9   |                        |
| <input checked="" type="checkbox"/> | Approved For                       | 21  |                        |
| <input checked="" type="checkbox"/> | <b>Projects</b>                    | 1   |                        |
| <input checked="" type="checkbox"/> | Access/Find Projects               | 10  |                        |
| <input checked="" type="checkbox"/> | New Project                        | 12  |                        |
| <input checked="" type="checkbox"/> | Delete Project                     | 13  |                        |
| <input checked="" type="checkbox"/> | Create Tasks when empty            | 2   |                        |
| <input checked="" type="checkbox"/> | Manage Checklist                   | 4   |                        |
| <input checked="" type="checkbox"/> | Rename Tasks                       | 5   |                        |
| <input checked="" type="checkbox"/> | Rename Actions                     | 6   |                        |
| <input checked="" type="checkbox"/> | New ProjectTeam                    | 17  |                        |
| <input checked="" type="checkbox"/> | Delete ProjectTeam                 | 18  |                        |
| <input checked="" type="checkbox"/> | Add DDNA Actions, Inputs & Outputs | 19  |                        |
| <input checked="" type="checkbox"/> | Edit Sample DDNA?                  | 22  |                        |
| <input checked="" type="checkbox"/> | View Finance Plan                  | 3   |                        |
|                                     |                                    |     |                        |
|                                     |                                    |     |                        |

### Guidelines for assigning Privileges:

1. There are three bold headings: **System**, **Projects**, and **Contacts**. Leave these checked for every staff member.
2. All Project Managers, Team Leaders, and higher should have Access Office Admin checked.
3. Access System Admin should be restricted to a limited group of people: At least two, but generally not more than 4 or 5. People with this permission control the whole system, and it is critically important that such control is managed consistently.
4. With respect to the rest of the permissions, the following guidelines may be used (or varied as appropriate). An "X" means the group should have the permission. Note that within any group, some people might have certain permissions different from others, depending on their responsibilities.
5. The function of some privileges may not be readily apparent for users new to **iProjects**. These are explained following the table below.

| Privilege               | Principals<br>Practice<br>Manager | Project Directors<br>Executive Staff | Project Managers<br>Team Leaders | Other Staff |
|-------------------------|-----------------------------------|--------------------------------------|----------------------------------|-------------|
| Access Office Admin     | X                                 | X                                    | X                                |             |
| Access System Admin     | X                                 |                                      |                                  |             |
| Access/Find Contacts    | X                                 | X                                    | X                                | X           |
| New Contact             | X                                 | X                                    | X                                | X           |
| Delete Contact          | X                                 | X                                    | X                                |             |
| Delete Sample Contacts  | X                                 |                                      |                                  |             |
| Approved For            | X                                 |                                      |                                  |             |
| Access/Find Projects    | X                                 | X                                    | X                                | X           |
| New Project             | X                                 | X                                    | X                                |             |
| Delete Project          | X                                 | X                                    |                                  |             |
| Create Tasks when empty | X                                 | X                                    | X                                |             |
| Create Form when empty  | X                                 | X                                    |                                  |             |
| Manage Checklist        | X                                 | X                                    | X                                |             |
| Rename Tasks            | X                                 | X                                    |                                  |             |
| Rename Actions          | X                                 | X                                    |                                  |             |
| New Project Team        | X                                 | X                                    | X                                |             |
| Delete Project Team     | X                                 | X                                    |                                  |             |
| New DDNA                | X                                 |                                      |                                  |             |
| Edit Sample DDNA?       | X                                 |                                      |                                  |             |

### Explanation of some Privileges

**Delete Sample Contacts:** **iProjects** contains a number of sample contacts to illustrate use of the system. Once the firm loads its own contacts, these should be deleted. To delete them, do a Find on Sample? (lower left corner of the main **Contacts** screen, and delete the found set.

**Approved for:** This permission controls who can define approvals in the Approved for table on the Contacts: Person screen. This table is used typically by engineers, for example, who can approve structural calculations, sign off on various documents, etc.

**Create Tasks when empty, Rename Tasks, and Rename Actions:** These permissions are used to modify a DDNA matrix; for example, when creating a new Discipline or a new Project Type DDNA.

**Create Form when empty:** (Description to follow)

**Edit Sample DDNA:** The default DDNA supplied with the system is for Architecture. This “sample” can be modified to suit the practice, if the user has this permission checked.

### Other Users tab functions

Other functions on the *Users* tab are shown left.

Notify when a new version is available

Sample?

The first should be checked only for the person responsible for managing system updates – **iProjects** will contact that person when there is a new system update.

The second, Sample?, is used only for identifying a sample contact (in this case, “User Tester”). Once you have the system set up, you can delete any samples, and you’ll not need this button further.