4.17 Employee/Users

**Understanding the Basics:**

Users are the people that have access and permissions to work inside your adilas system. You must have one active permission to be considered a user, but there are over 100 permissions that allow you to dictate what users can access, view, edit, and how they work in the system. Users are one of the 12 Main Players of adilas and can technically be bigger than a corporation, since a user can have access to multiple corporations.

System history is tracked with every single piece of adilas telling you the “who” of the story, or what user was associated with every action done in the system. Users (employees) and vendors are similar in the system because they both tie to the end goal of getting paid through expense/receipts. The difference is that a user has permissions and access to use the system, where a vendor is an outside payee of your adilas system.

**Getting Started:**

Adding new payees with their associated permissions is a high administrative function. With the admin permission to “add/edit payees & (their) permissions”, it is a straightforward search and add process from the Payee Permission Homepage. When adding or editing user information or permissions, the personal information is at the top of the page and all of the permission options are below. The add or edit payee button at the bottom of the page must be submitted for your changes to be active.

If users are setup with a basic permission of password and profile, they can go back in themselves and change their username, password and personal information but not their permissions. Permissions can only be changed by a user that has the “add/edit payees & permissions” permission, which should only be given to the highest administrators. Get to the Payee Permission Home from the Classic Homepage under System Management – Add/Edit Payees & Permissions; My Favorites Homepage under Other Homepages – Payees & Permissions; or the Interactive Map – users button.

**Suggested Permission & Settings:**

**Permissions:**

**Basic Use:**

 System Basics: “Password & Profile” – this allows users to change their own password and profile and edit their personal information.

**Admin Use:**

 System Management: “Add/Edit Payees & Permissions” – this is an ultra admin permission. These are the keys to add and change any user’s permissions, it is strongly recommended you take some time to understand permissions and only assign the permissions the user needs to do their job.

\*\*\*With over 100 permissions that can potentially be assigned to a user, this is really where an administrator decides what they want a user to be able to do in the system and then assigns permissions accordingly. It is strongly recommended if you are an administrator setting up new users in the system to take some time to understand permissions. You do not want all of your users having access and permissions to every part of your adilas application.

**Related Pages & Help File Links:**

Payee Permission Home: This is where you search and add new users in the system. This is also where you go to edit user permissions or information for users already in the system by clicking on the user’s name.

<https://www.adilas.biz/top_secret/secure/payee_permission_home.cfm?sec=51>

Search Payee/User: Basic search before you add a new user in the system, this is required so as not to duplicate user in the system. The link is at the top left of the links section and is called, ”[search/add a payee in the database]”.

<https://www.adilas.biz/top_secret/help.cfm?id=11&pwd=search_user>

Add/Edit Employee/User Permissions: Adding or editing employee information or permissions. Each permission has an associated description to help you in assigning the appropriate permissions per user.

<https://www.adilas.biz/top_secret/help.cfm?id=106&pwd=permissions>

**Additional Content:**

 -We might want some screen shots here of the permissions page. Or maybe we would even want to give a couple sample packages, if you will, of basic user permissions. Like a basic set of retail permissions, or basic inventory permissions, etc. Not necessary since each different company will have people that operate so differently but it was just a little thought I had while typing so I thought I’d record it here. It could be helpful?

-Link here to the hour permissions class we recorded for one of our adilas university classes.