

## TECHNOTE [14/2015]

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 PRODUCT/AREA: Users

# How to create users and groups in cardPresso

To manage users and groups please go to **Users** tab in cardPresso welcome page.



A new type of view will appear in cardPresso. In the example below the red highlight is referred to users and the green highlight to groups. In an initial phase there will be only the ADMIN user and the ADMIN group.

Users	Groups
Login	Group
Name	Name
ADMIN Administrator	ADMIN Administrator ADMIN

Date	Computer	Location	Operation	User	Document	Description	Event Result
2015-03-02 18:00:39	CPSUPPORT2-PC	CP	Exit	ASOLUSA			
2015-03-03 17:58:58	CPSUPPORT2-PC	CP	Refresh Views	ASOLUSA			
2015-03-03 17:59:37	CPSUPPORT2-PC	CP	Refresh Views	ASOLUSA			
2015-03-03 17:59:55	CPSUPPORT2-PC	CP	Remove Group	ASOLUSA			
2015-03-03 17:59:52	CPSUPPORT2-PC	CP	Remove Group	ASOLUSA			
2015-03-03 17:59:51	CPSUPPORT2-PC	CP	Remove Group	ASOLUSA			
2015-03-03 17:59:51	CPSUPPORT2-PC	CP	Remove Group	ASOLUSA			
2015-03-03 17:59:51	CPSUPPORT2-PC	CP	Remove Group	ASOLUSA			
2015-03-03 17:59:51	CPSUPPORT2-PC	CP	Remove Group	ASOLUSA			
2015-03-03 17:59:48	CPSUPPORT2-PC	CP	Remove Group	ASOLUSA			
2015-03-03 17:59:45	CPSUPPORT2-PC	CP	Remove Group	ASOLUSA			
2015-03-03 17:59:39	CPSUPPORT2-PC	CP	Remove Group	ASOLUSA			
2015-03-03 17:59:21	CPSUPPORT2-PC	CP	Remove Group	ASOLUSA			
2015-03-03 17:59:18	CPSUPPORT2-PC	CP	Refresh Views	ASOLUSA			
2015-03-03 17:59:05	CPSUPPORT2-PC	CP	Add User	ASOLUSA			
2015-03-03 17:59:00	CPSUPPORT2-PC	CP	Remove User	ASOLUSA			
2015-03-03 17:51:92	CPSUPPORT2-PC	CP	Users View	ASOLUSA			
2015-03-03 17:50:27	CPSUPPORT2-PC	CP	Welcome view	ASOLUSA			
2015-03-03 17:50:18	CPSUPPORT2-PC	CP	Exit	ASOLUSA			
2015-03-03 17:50:13	CPSUPPORT2-PC	CP	Users View	ASOLUSA			
2015-03-03 17:50:12	CPSUPPORT2-PC	CP	Welcome view	ASOLUSA			
2015-03-03 17:43:02	CPSUPPORT2-PC	CP	Exit	ASOLUSA			
2015-03-03 17:44:27	CPSUPPORT2-PC	CP	Users View	ASOLUSA			
2015-03-03 17:44:09	CPSUPPORT2-PC	CP	Welcome view	ASOLUSA			
2015-03-03 17:43:10	CPSUPPORT2-PC	CP	Exit	ASOLUSA			
2015-03-03 17:39:01	CPSUPPORT2-PC	CP	Users View	ASOLUSA			
2015-03-03 17:40:22	CPSUPPORT2-PC	CP	Welcome view	ASOLUSA			
2015-03-03 17:39:14	CPSUPPORT2-PC	CP	Exit	ASOLUSA			
2015-03-03 17:28:43	CPSUPPORT2-PC	CP	Users View	ASOLUSA			
2015-03-03 17:24:41	CPSUPPORT2-PC	CP	Welcome view	ASOLUSA			
2015-03-03 17:23:22	CPSUPPORT2-PC	CP	Exit	ASOLUSA			

To create a user please go to the button boxed in green.



After the click, **in right side of the program**, there will be some features that allow the creation of the user. In **Login** is chosen the name desired to use for the log in pop-up box, The **Name** is the user name and the **Password** is the security word to protect the user account, with it respective confirmation (**Confirm Password**).

ADD USER

User Properties

Login

Name

Password

Confirm Password

Disable user (cannot login)

Enable auditing

Save

There is also two more features, where **Disable user (cannot login)** makes the user only visible in the group but with blocked access to the program. **Enable auditing** is a feature that allows the user to see every action performed by any user in **cardPresso**.

After fill all the information please click on save to create the **User**.

EDIT USER

User Properties

Login

Name

Password

Confirm Password

Disable user (cannot login)

Enable auditing

Save

Now that the **user** is created he will be displayed in the **user section**.

Users	
Login	Name
ADMIN	Administrator
JDOE	Jon Doe

To create a **group** please go to the button boxed in green.



After clicking, **in the right side of the program**, there will be some features that allows the creation of the **group**. In **Group** is chosen the desired name to be displayed in **cardPresso** Groups tab. In **Name** insert the group name and in **Location** is where the group is inserted (the company name).

ADD GROUP

Group Properties

**Users**

- ADMIN Administrator
- JDOE Jon Doe

**Permissions**

- ▾ Design
  - File
  - Edit
  - View
  - Tool
  - Help
- ▾ Database
  - Database
- ▾ User Logins
  - Users
- ▾ DockBars
  - Document
  - Users
- ▾ cardPresso
  - CP

After fill all the information and chose the desired users to add to the group please click on save in the **bottom right corner**.

ADD GROUP

Group Properties

Group: WORK

Name: Worker

Location: CardPresso

Users

ADMIN Administrator

JDOE Jon Doe

Permissions

- ▾ Design
  - File
  - Edit
  - View
  - Tool
  - Help
- ▾ Database
  - Database
- ▾ User Logins
  - Users
- ▾ DockBars
  - Document
  - Users
- ▾ cardPresso
  - CP

Save

Note that is possible to **add** or **remove** permissions to the groups. In **Permissions** tab all the features are allowed by default. However is possible to change by click in the box that is before the names.

Permissions

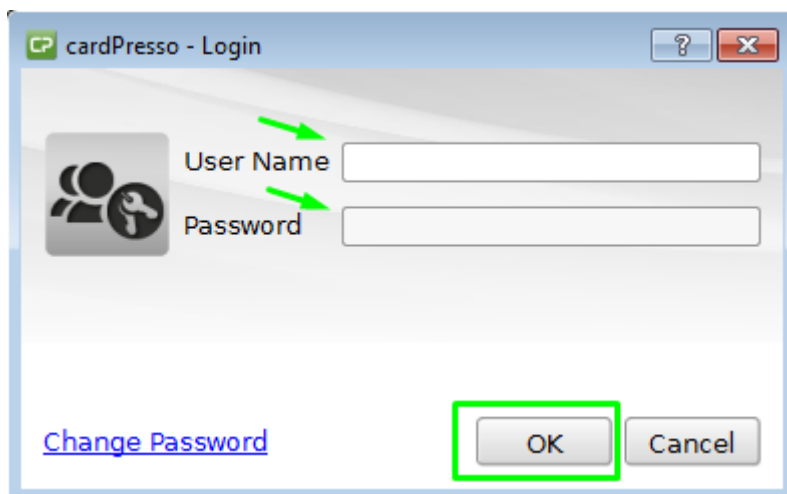
- ▾ Design
  - File
  - Edit
  - View
  - Tool
  - Help
- ▾ Database
  - Database
- ▾ User Logins
  - Users
- ▾ DockBars
  - Document
  - Users
- ▾ cardPresso
  - CP

Now that the **Group** is also are created please click on the box in the **bottom left corner**.

The screenshot displays the cardPresso management interface. At the top, there are two tables: 'Users' and 'Groups'. The 'Users' table lists 'ADMIN Administrator' and 'JDOE Jon Doe'. The 'Groups' table lists 'ADMIN Administrators ADMIN' and 'WORK Worker JDOE', with a green arrow pointing to the 'JDOE' entry in the 'WORK' group. Below these is an 'Auditing' log table with columns for Date, Computer, Location, Operation, User, Document, Description, and Event Result. At the bottom left, a checkbox labeled 'Enable user logins' is checked and highlighted with a green box.

A restart of **cardPresso** is required so that the changes work perfectly, so please do.

After the restart of **cardPresso** a pop-up window will appear, asking for **login name** and **password**. Please fill the boxes with the information of the user and then press **OK**.



Note that every users **must be assigned to a Group**.