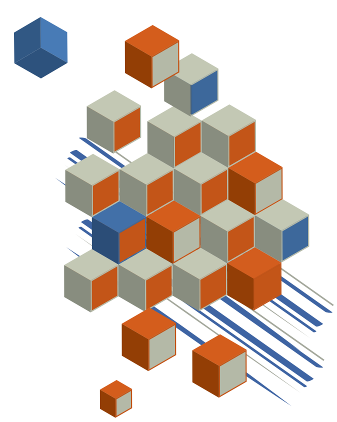
Managing User Profiles

SIMMS Inventory Management Software 7.3

July 26, 2010



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Managing User Profiles

The SIMMS system administrator manages user's profiles.
A user's profile:

- Details a user's basic login information.
- Defines a user's job role.
- Sets a user's access rights within SIMMS.

Add a User Profile

1. On the **SIMMS Start Page**, click the **Administration** menu, and then click **User Manager**.

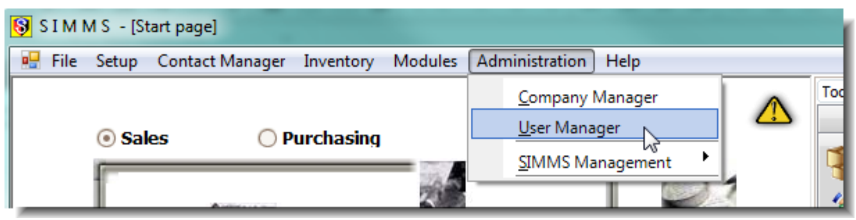

Figure 1: Administration menu

   The User Manager dialogue box opens.

2. Click **New User**.

   The SIMMS User Configuration dialogue box opens.

3. On the **User name Information** tab, type the appropriate information in the text boxes. The following information is mandatory:

   - User Name
   - Password
   - Re-enter Password
   - Last Name
   - First Name

   In addition, you need to enter an e-mail address if you want to send e-mail alerts to a user.

Define a User's Job Role

You define a user's job role on the Details tab in the User Configuration dialogue box. Depending on the user's job role, with the information entered, SIMMS:

- Calculates labor costs and commissions.
- Assigns rights to the user (what they may and may not do within SIMMS).
- Includes the user in employee lists. These lists are available throughout SIMMS. You select employees from these lists to assign them to tasks.

1. In the **SIMMS User Configuration** dialogue box, click the **Details** tab.

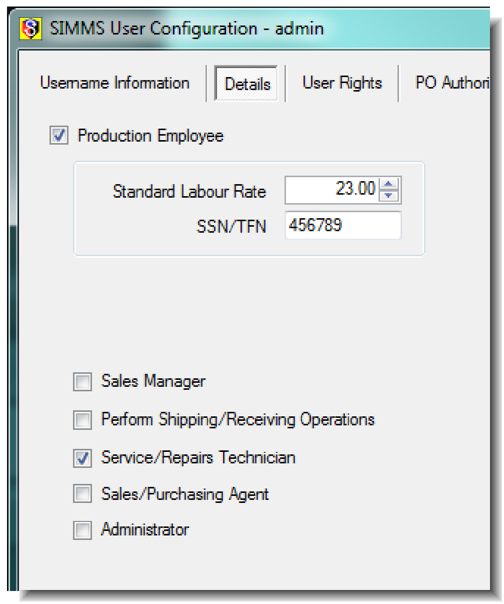

Figure 2: User job roles

2. Select and type the appropriate information for the user.

   Review *Table 1: Job Roles* for guidance.

Table 1: Job Roles

Label	Action
Production Employee	Click to include a production employee in the Employee list, and then in the **Standard Labor Rate** box, type the employee's rate of pay. The Employee list is available when you book time for kit builds, projects, and automotive repairs. SIMMS uses the rate of pay you enter for a production employee to calculate the labor cost for kit builds, projects, and automotive repairs.

Table 1: Job Roles

Label	Action
Sales Manager	Click to include a sales manager in the Manager list. The Manager list is available in the SIMMS User Configuration dialogue box, on the Details tab. You can assign a sales agent to a sales manager, and enter the percentage of the sales agent's commission which the sales manager receives. A sales manager can generate a Gross Margin by Sales Agent report for the sales agents he supervises. A sales manager can also override a customer's credit limit.
Shipping Duties	Click to include the user in the Shipped by list. The Shipped by list is available in the Shipping Details window.
Service /Repairs Technician	Click to include a technician in the Technicians list. The Technicians list is available in the Fix and Destroy window and in the RMA - Testing and Comments window.
Sales/Purchasing Agent	Click to include sales and purchasing agents in the Sales/Purchasing Agent list. The Sales/Purchasing Agent list is available in the Transaction Manager.
Sales Administrator	Click to allow a sales administrator to generate a Gross Margin by Sales Agent report for all sales agents.

Define a Sales Agent's Profile

1. In the **Commission** list, select the commission template for the sales agent.

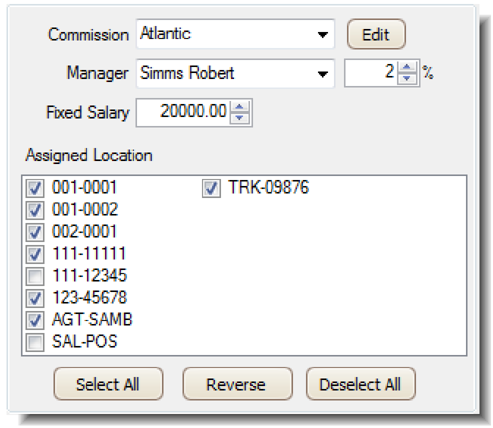

Figure 3: Sales agent profile

2. In the **Manager** list, select the sales agent's manager.
3. If the sales manager receives a percentage of the sales agent's commission, type the percentage value in the box.
4. In the **Fixed Salary** box, type the sales agent's fixed salary.
5. In the **Assigned Location** pane, click the inventory locations to which a sales agent is assigned.

Note*: When adding a new user, you need to save the user's profile, and close the SIMMS User Configuration dialogue box before you can continue to assign user rights, purchase order authorization duties, or extra rights for the user. Do the following:*

1. In the **SIMMS User Configuration** dialogue box, click **Save**, and then click **Close**.

   The SIMMS User Configuration dialogue box closes.

2. In the **User Manager** dialogue box, select the user name of the new user, and then click **Edit Existing User**.

   SIMMS User Configuration dialogue box opens. Continue to assign user rights, purchase order authorization duties, or extra rights to the user.

Assign User Rights

For each user, you can assign different levels of access to SIMMS.

1. In the **SIMMS User Configuration** dialogue box, click the **User Rights** tab.

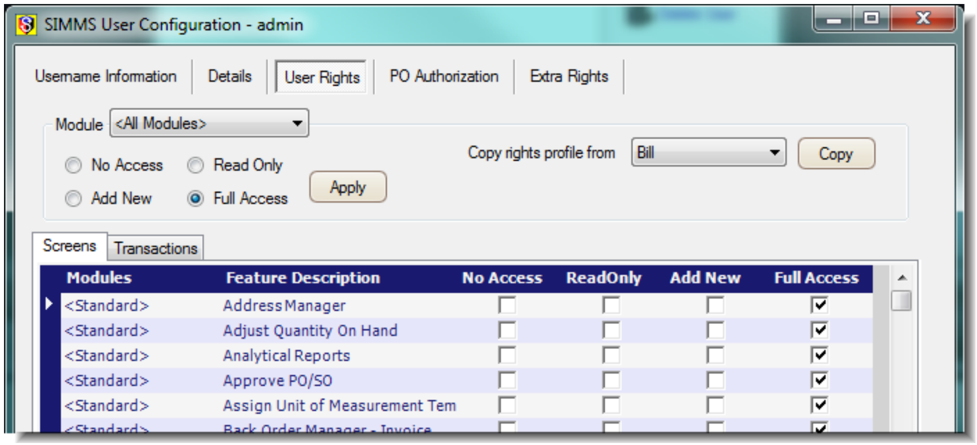

Figure 4: User rights

2. On the **Screens** tab, for each **Feature Description**, select one of the following:
   - **No Access**
     The user has no access to the window.
   - **Read Only**
     The user can view the window, but the user cannot add or edit the content.
   - **Add New**
     The user can add new entries to the window, but cannot view pre-existing entries.
   - **Full Access**
     The user has full rights to entries in the window (view, add, edit, delete).
3. Click the **Transactions** tab, and then click the appropriate transactions rights for the user.

Assign Purchase Order Authorization

You can implement a three tier purchase order authorization process.

To enable purchase order authorization, go to **Setup>Settings>Global Settings>Purchasing** tab, and then click **Use Budgets - Purchase Order Authorization**.

1. In the **SIMMS User Configuration** window, click the **PO Authorization** tab.

2. Choose one of the following:
    - **Submitter**
      A Submitter creates a purchase order, but cannot approve or authorize the purchase order.
    - **Approver**
      An Approver approves the purchase order from the Submitter, but does not give final authorization for a purchase order.
    - **Authorizer**
      An Authorizer authorizes the purchase order from the Approver for release.

Assign Budget Categories to a User

In addition to the purchase order authorization process, you can assign budget categories to a user.

***Note**: You cannot use budget categories without using the three tier purchase order authorization process.*

To enable budget categories, go to **Setup>Settings>Global Settings> Purchasing** tab, and then click **Enforce budget limits in PO and receipts**.

1. In the **SIMMS User Configurator** dialogue box, click the **PO Authorization** tab.
2. Under **Budget Categories**, select the budget categories you wish to assign to the user.

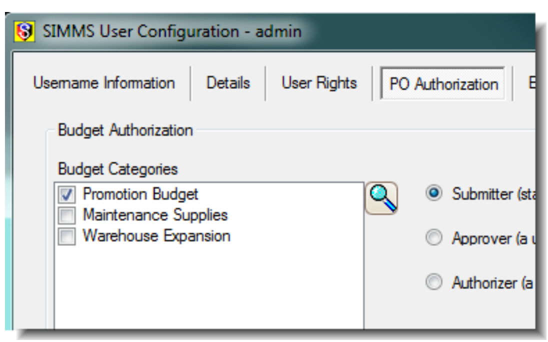

Figure 5: Budget categories

Budget Categories

Each budget category has a budget account assigned to it. This budget account defines the dollar limit that a user can spend for the budget category.

For example, you could create a budget category with the name Maintenance Supplies, and create a budget account of $500 dollars for your budget category.

You then assign the budget category to Robert Smith. This is the only budget category assigned to him.

Robert Smith can only create purchase orders for the budget category Maintenance Supplies, and he can only spend up to $500 dollars (the category account limit).

If there are insufficient funds in a budget category for a purchase, the purchase order cannot be approved.

You create your budget categories at Setup> PO Budget Setup.

Only View Purchase Order within a User's Budget Category

- If you want to limit the purchase orders a user can view, click **User can only see POs created within his category**.

Assign a Purchase Order Authorization Group to a User

You can limit the purchase orders a user can authorize by assigning them to a purchase order authorization group.

The purchase order authorization group has a minimum and maximum dollar amount assigned to it. A user cannot authorize a purchase order outside the dollar range defined in the purchase order authorization group.

1. In the **SIMMS User Configuration** dialogue box, click the **PO Authorization** tab.
2. In the **PO Authorization Group** list, select a purchase order authorization group for the user.

Create a Purchase Order Authorization Group

1. In the **SIMMS User Configuration** dialogue box. Click the **PO Authorization** tab, and then click the magnify icon (at the bottom of the window).

   The PO Authorization Group Setup dialogue box opens.

2. In the **Enter Data** text box, type the name of the purchase order authorization group.

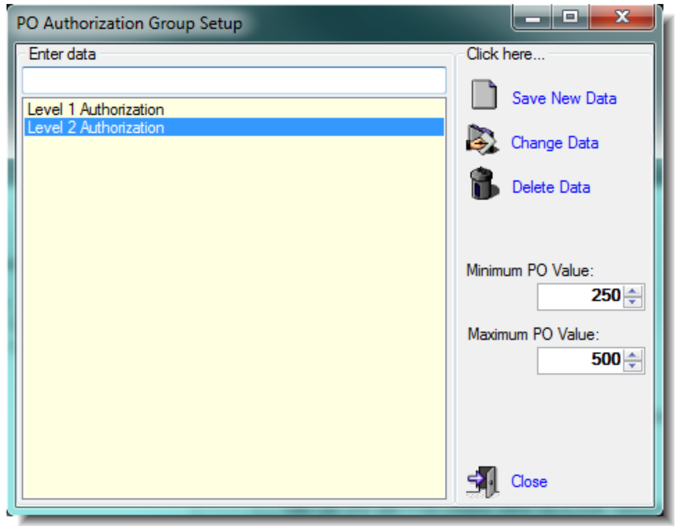

Figure 6: Purchase order authorization group setup

3. In the **Minimum PO Value** box, type the minimum value of the purchase order.
4. In the **Maximum PO Value** box, type the maximum value of the purchase order.
5. Click **Save New Data**, and then click **Close**.

Assign Extra User Rights

1. In the **SIMMS User Configuration** dialogue box, click the **Extra Rights** tab.
2. Click the appropriate rights for the user.

   Review *Table 2: Extra Rights* for guidance.

Table 2: Extra Rights

Label	Action
Allow edit transactions	Click to allow the user to edit transactions, and then choose one of the following: • **No restrictions** • **Only delete items on sales orders and purchase orders** • **Edit only sales orders and purchase orders**

Table 2: Extra Rights

Label	Action
Allow return transactions	Click to allow the processing of returned items with the Transaction Manager (receipts and invoices).
Allow manual AR discount/interest	Click to allow the editing of discounts and interest in the Accounts Receivable window.
Allow modification of transaction currency	Click to allow the editing of the transaction currency for a saved transaction.
Allow to edit matched receipts	Click to prevent the editing of a receipt of goods that is matched to an invoice. You match a receipt of goods to an invoice at Modules> Accounts Payable>Invoice Matching
Void transaction	1. In the **Void transaction** list, select a transaction type. 2. Choose one of the following: • **Allow** • **Deny** If a user is denied permission to void a transaction type, the Void command in the Transaction Manager is unavailable for that transaction type.
Allow to overwrite the freight for sales orders and invoices	If in Global Settings>Automation tab you have selected Automatic calculate freight, click to allow the editing of the freight cost for sales orders and invoices.
Hide cost information in SO, invoices, and quotes	Click to hide cost information in sales orders, invoices, and quotes, and in the Item Manager.
Disable SKU Re-assign SKU option from Item Manager	Click to prevent the changing of stock keeping units (SKU) with the Re-assign SKU command. The Re-assign SKU command changes all SKUs to the SKU format defined in the SKU Configurator.

Table 2: Extra Rights

Label	Action
Access to Book Time	Click to allow the booking of time for kit builds, projects and automotive repairs. The user cannot view labor rates or totals.
Access to Book Time Rate/Total	Click to allow users who can book time for kit builds, projects, and automotive repairs, to view labor rates or totals. This option is not available if Access to Book Time is not selected.

Edit a User's Profile

1. On the **Administration** menu, click **User Manager**.
2. In the **User Information** pane, click the name of the user whose profile you want to edit.
3. Click **Edit Existing User**.

   The SIMMS User Configuration dialogue box opens.
4. Edit the user's profile. Click **Save**, and then click **Close**.

Delete a User's Profile

1. On the **Administration** menu, click **User Manager**.
2. In the **User Information** pane, click the name of the user whose profile you want to delete.
3. Click **Delete User**.

***Note**: You cannot delete a user from SIMMS if the user has been included in a transaction. SIMMS maintains a historical record of all transactions, and therefore requires the user's information.*