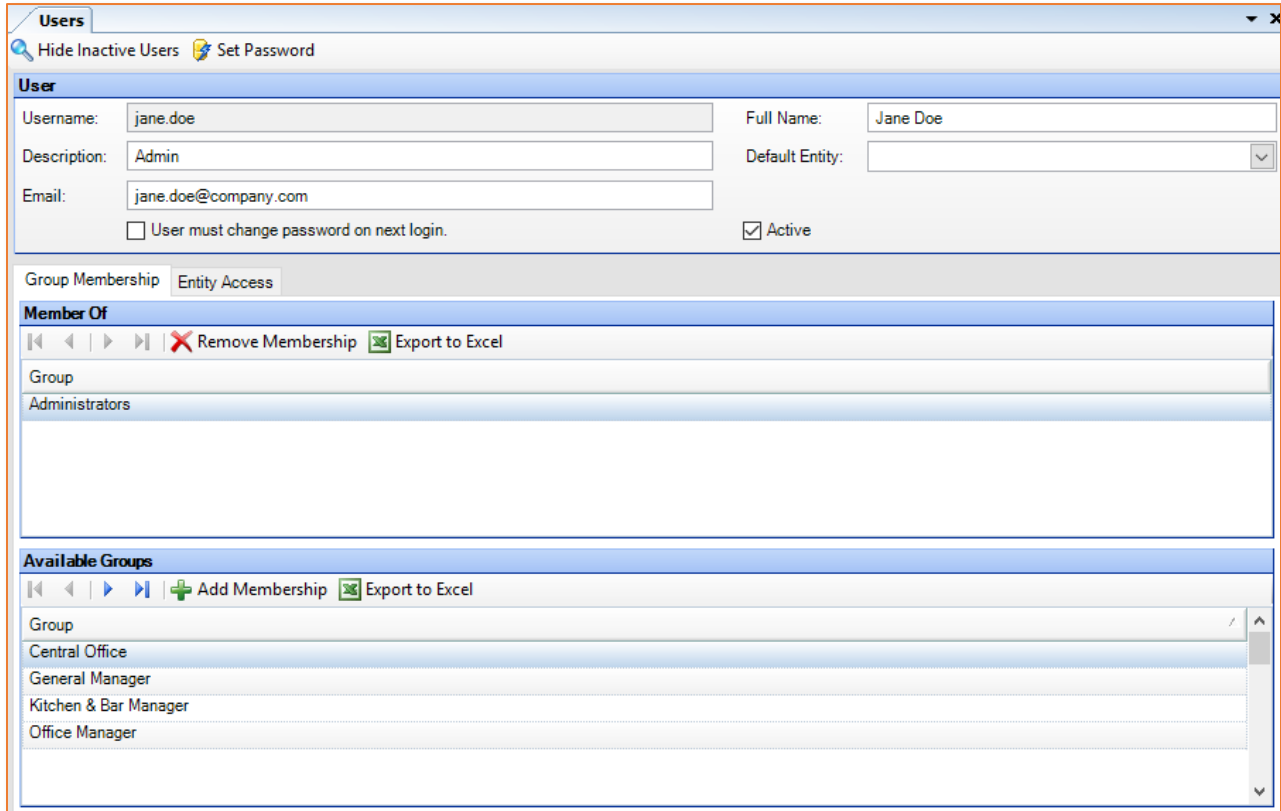


Create New Users in Compeat Advantage

Users allows you to define and manage users in Advantage. This includes specifying which entities a user can access, and to which security group a user belongs.

To create a new Advantage user, navigate to **Setup > Security > Users**. Compeat requires you enter a security password before you can continue.



Compeat considers creating users an administrator-level function as it requires access to the Compeat security menu. Careful consideration should be given when assigning this ability to users within your organization.

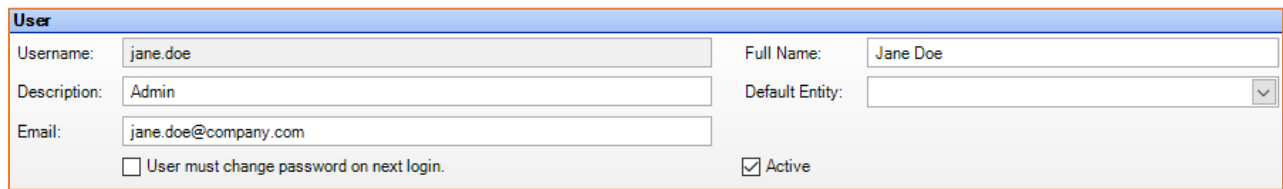
Jump to...	
1	Create New User
1.1	User Details
1.2	Set Password
1.3	Group Membership
1.4	Entity Access

Create New User

From the *User* pop-up listing, select *New Record* in the lower-right corner to create a new user record.

User Details

The *User* section of the record allows you to enter basic user information, such as the username and default entity. You can also manage a user's active status.



Username:	<input type="text" value="jane.doe"/>	Full Name:	<input type="text" value="Jane Doe"/>
Description:	<input type="text" value="Admin"/>	Default Entity:	<input type="text" value=""/>
Email:	<input type="text" value="jane.doe@company.com"/>		
<input type="checkbox"/> User must change password on next login.		<input checked="" type="checkbox"/> Active	

- » **Username:** Enter a unique username.

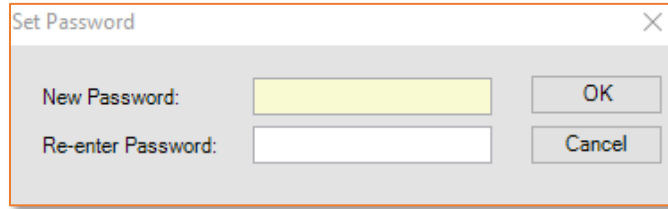
Note – Best Practices

Compeat recommends using naming conventions that incorporate users' first and last name, such as *First Initial + Last Name* (i.e., jdoe) or *First Name.Last Name* (i.e., jane.doe). Usernames are not case-sensitive.


- » **Full Name:** Enter the user's full name.
- » **Description:** Enter job title or alternative description for the user.
- » **Default Entity:** Once [entity access](#) is assigned, you can select a default entity for the user. This is the entity a user is initially logged into; however, they are given the option to change entities if they have access to more than one entity.
- » **User must change password on next login:** Select this checkbox if you wish for the user to reset their password upon next login.
- » **Active:** If selected, the user is considered active and can log into Compeat. If a user has left your organization, deselect this box to prohibit future access.

Set Password

Compeat requires you provide a temporary password for each user. To do so, select *Set Password* at the top of the user record. A pop-up window prompts you to enter and confirm the password. Once done, select **OK**.

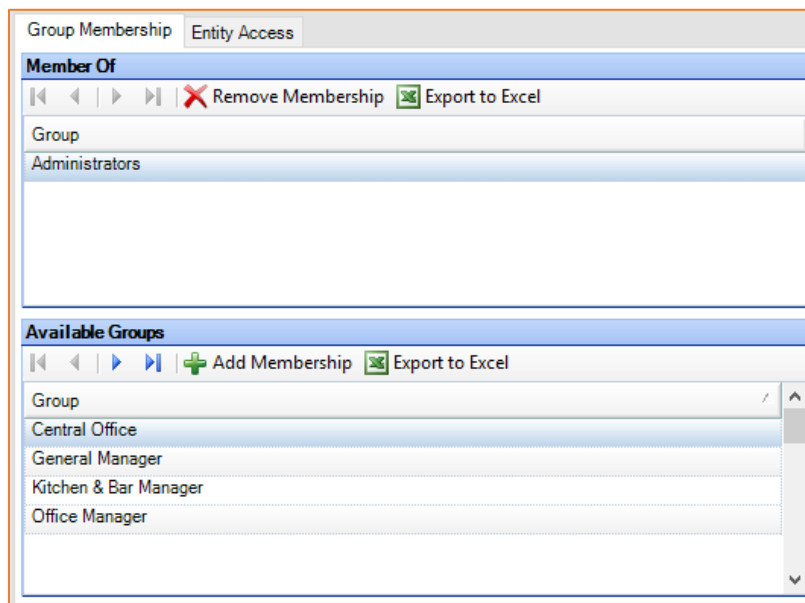


Passwords are case-sensitive and must contain a number or symbol and be 6 or more characters in length.

Once done, select the save  icon in the toolbar. You can now proceed with security group assignment and entity access.

Group Membership

The *Group Membership* tab allows you to assign a security group to the user. While a user record denotes which entity a user has access to, it is the security group assignment that defines which features a user can access.



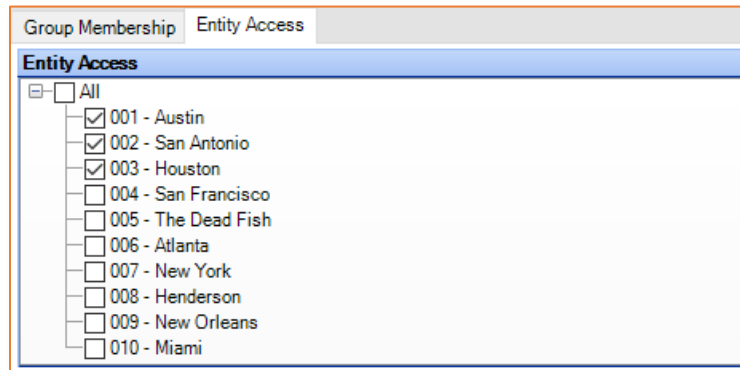
To assign a security group, highlight the desired group from the *Available Groups* listing, then select **+ Add Membership** above the listing. Your selected group then displays in the *Member Of* box.



Note – Multiple Security Groups

Users should only be assigned to one security group. If a user requires the unique feature access of one or more groups, create a custom security group with all necessary access and assign that group to the user.

Entity Access

The *Entity Access* tab allows you to select which entities a user can access. Select the checkbox beside each entity, or select *All* at the top of the list to allow access to all entities. Entities that are not selected do not appear for the user in drop-downs or search dialogs throughout the system.



Once done, select the save  icon in the toolbar. Your new user has been successfully created. To continue with another new user, select the plus  sign icon in the toolbar at the top of the screen.