

SFH v15.5 User Guide - User Management System

INTRODUCTION

Welcome to the SFH v15.5 User Management System. This guide will help you manage users, roles, and access permissions efficiently within your organization.

This new system will allow you to set micro-rights to an on-screen level. These rights allow full access, read only, or if unchecked deny access.

On first launch after the upgrade roles will be created that match your existing scheme so no changes are made until you are ready to make them.

ROLES

User Roles

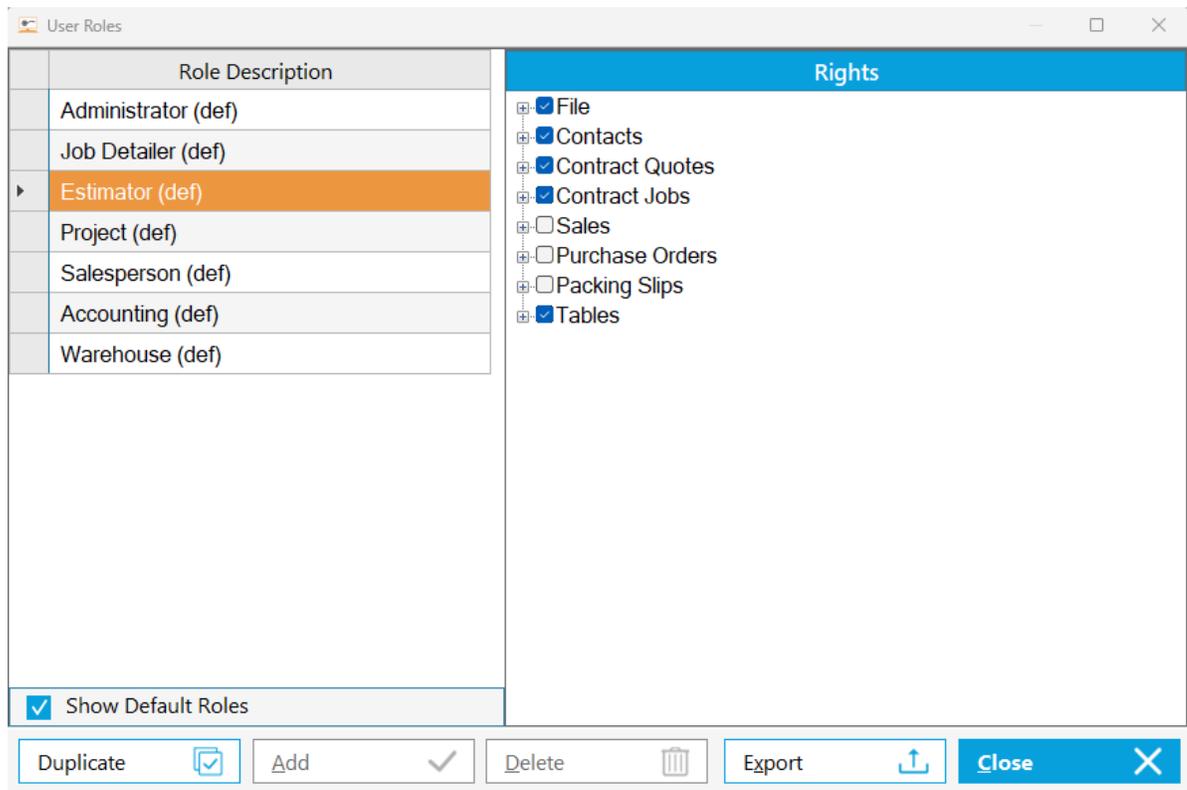
User roles define access permissions within the system. Instead of assigning individual permissions, administrators can assign roles to users to streamline access control.

Default User Roles

SFH provides predefined roles to facilitate an easy transition from older access control method, formerly known as “Administrative Functions”. These include:

- Administrator
- Job Detailer
- Estimator
- Project
- Salesperson
- Accounting
- Warehouse

Click on any *Role Description* to view the preassigned default rights.

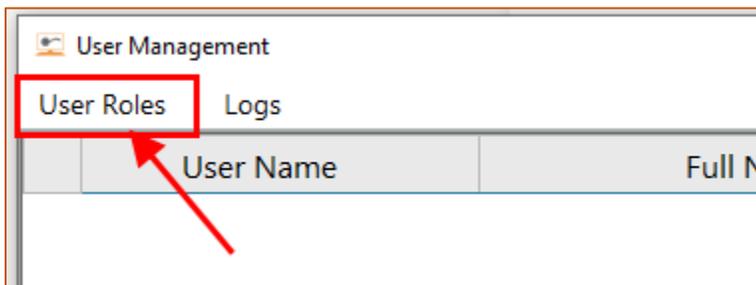


Custom User Roles

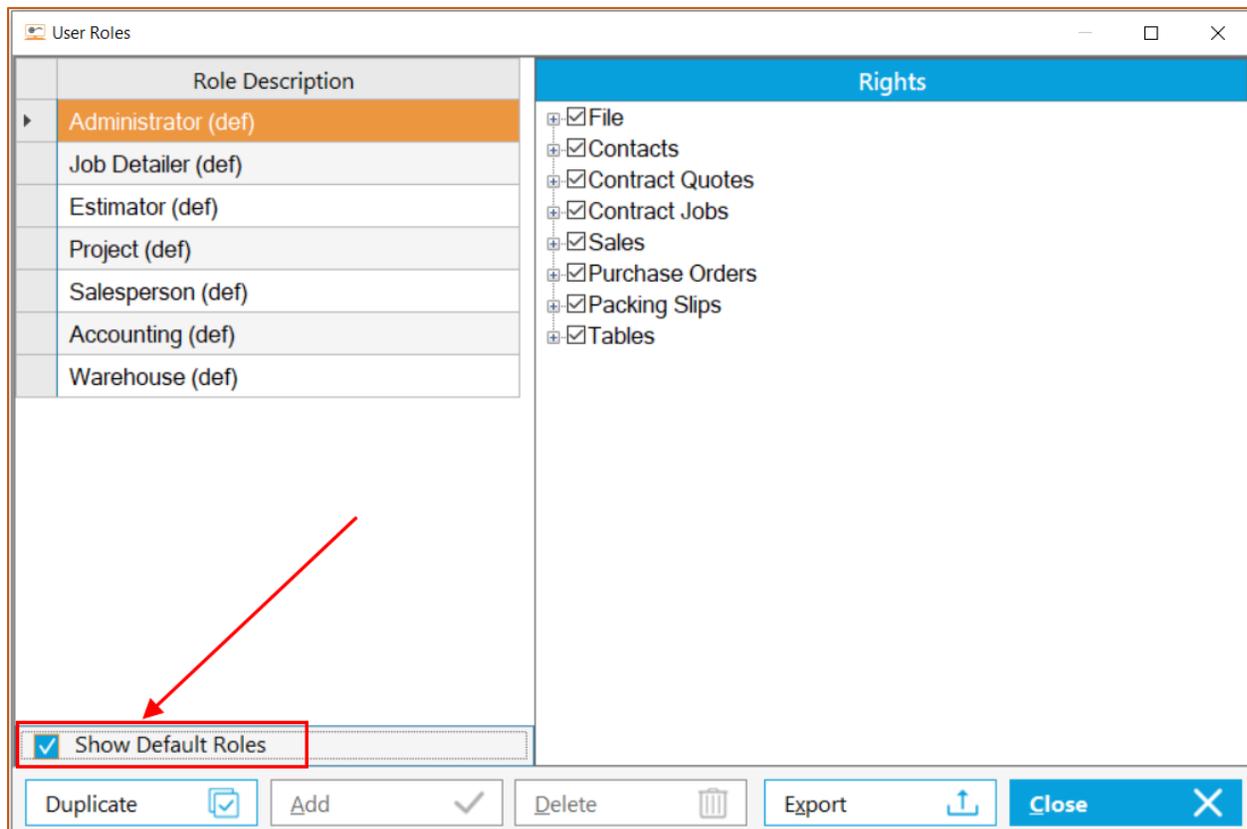
Administrators can create user-defined roles tailored to specific organizational needs.

Viewing User Roles

1. Click File > User Management.
2. Select User Roles from the top menu.

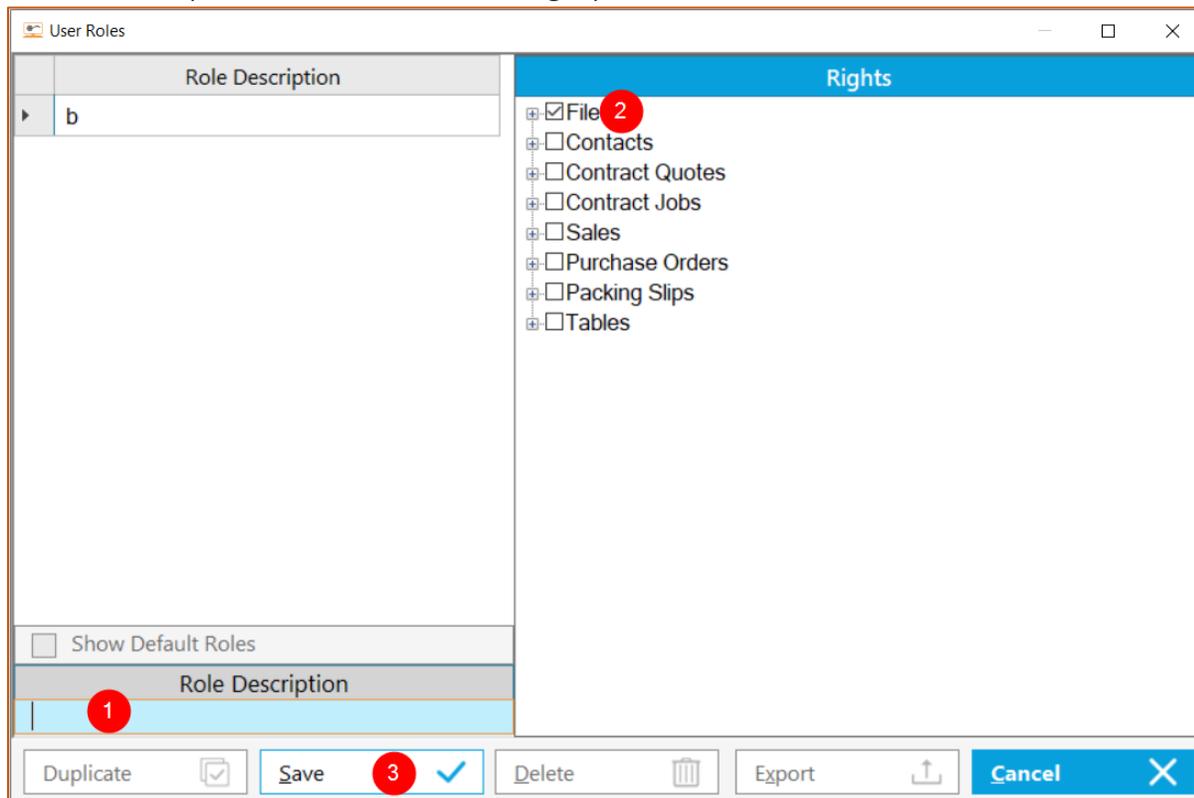


3. Check Show Default Roles to view the system-defined roles.



Adding a New User Role

1. Open the User Roles screen.
2. Click Add.
3. Enter a Role Description.
4. Select the access rights from the Rights section.
5. Expand the plus sign to see more options and screens including the right levels.
6. Click Save (or Cancel to discard changes).



Duplicating an Existing User Role

1. Open the User Roles screen.
2. Select an existing role.
3. Click Duplicate.
4. Enter a name for the new role (it will inherit the selected role's permissions).
5. Click Save.

Deleting a User Role

1. Open the User Roles screen.
2. Select the role to be deleted.
3. Click Delete.
4. Confirm the deletion in the pop-up message.

Exporting User Roles

1. Open the User Roles screen.
2. Click Export and choose a location to save the file.

SYSTEM USERS

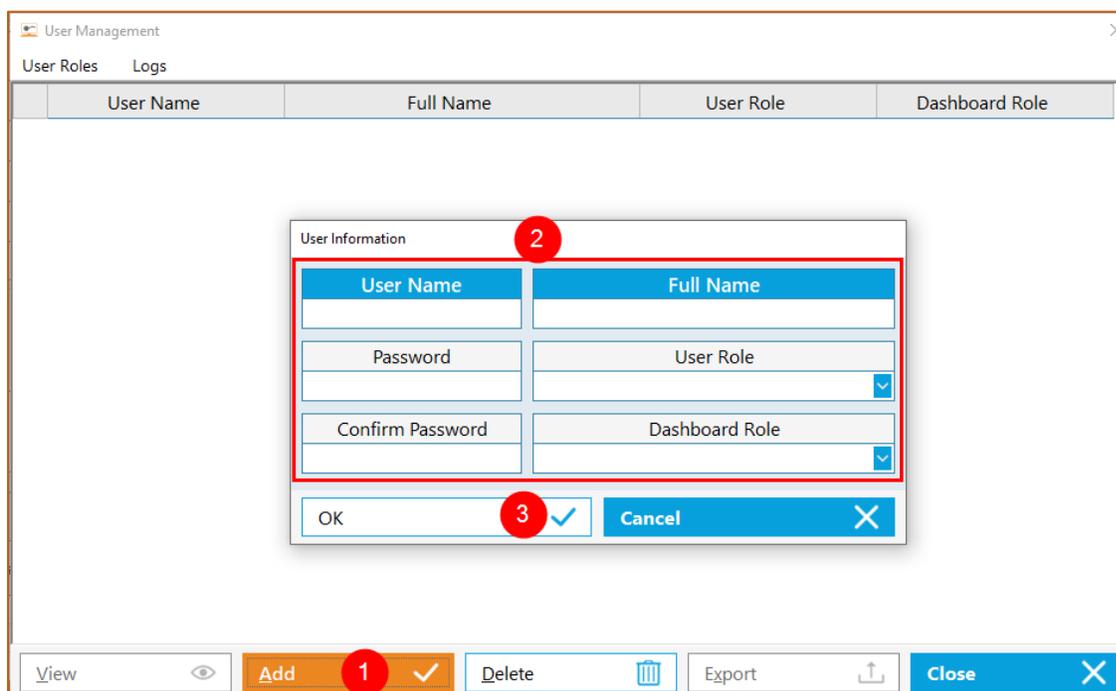
System users manage interactions between users and the system, ensuring secure and controlled access.

Viewing User Information

1. Click File > User Management.
2. Select a user from the grid.
3. Click View to display user details.

Adding a New User

1. Open the User Management screen.
2. Click Add.
3. Enter the username and full name.
4. Set a password and confirm it.
5. Assign a User Role and Dashboard Role.
6. Click Save (or Cancel to discard changes).



Deleting a User

1. Open the User Management screen.
2. Select the user to be deleted.
3. Click Delete.
4. Confirm the deletion in the pop-up message.

Exporting Users

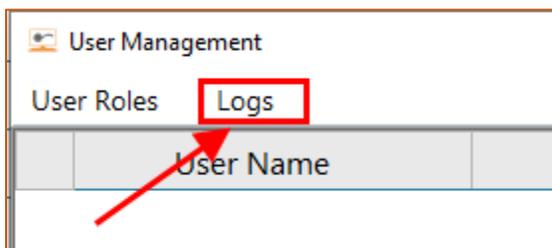
1. Open the User Management screen.
2. Click Export and choose a location to save the file.

USER LOGS

User logs help track login activity, security events, and system interactions.

Accessing User Logs

1. Click File > User Management.
2. Select Logs from the top menu.



Filtering Logs

1. In the Logs screen, select a filter option.
2. Enter search terms.
3. Click Search.
4. Adjust the date range if needed.
5. Click Refresh to reset the data.

The screenshot shows the 'Logs' application window with a table of log entries. The table has columns for 'Date and Time', 'Action', 'Windows User', and 'SFH User'. A search filter is applied at the bottom, with a dropdown menu open over the 'Action' column. Red circles and a dropdown menu highlight the steps for filtering logs.

	Date and Time	Action	Windows User	SFH User
1	09/20/2024 5:07 AM	Loq-In	olyperb	a
2	09/20/2024 5:13 AM	Loq-In	olyperb	a
3	09/20/2024 5:13 AM	Loq-In	olyperb	b
4	09/20/2024 5:17 AM	Loq-In	olyperb	a
5	09/20/2024 5:18 AM	Loq-In	olyperb	a
6	09/20/2024 5:19 AM	Loq-In	olyperb	b
7	09/20/2024 5:19 AM	Loq-Out	olyperb	b
8	09/20/2024 5:21 AM	Loq-In	olyperb	b
9	09/21/2024 4:13 AM	Loq-In	olyperb	a
10	09/21/2024 4:15 AM	Loq-In	olyperb	a
11	09/21/2024 4:16 AM	Loq-In	olyperb	a
12	09/21/2024 4:17 AM	Loq-In	olyperb	a
13	09/21/2024 4:19 AM	Loq-In	olyperb	a
14	09/21/2024 4:20 AM	Loq-In	olyperb	a
15	09/21/2024 4:30 AM	Loq-In	olyperb	a
16	09/21/2024 4:32 AM	Loq-In	olyperb	a
17	09/21/2024 4:33 AM	Loq-In	olyperb	a
18	09/21/2024 4:34 AM	Loq-In	olyperb	a
19	09/21/2024 4:36 AM	Loq-In	olyperb	a
20	09/21/2024 4:36 AM	Loq-In	olyperb	a
21	09/21/2024 4:49 AM	Loq-In	olyperb	a
22	09/21/2024 4:51 AM	Loq-In	olyperb	a
23	09/21/2024 4:52 AM	Loq-In	olyperb	a
24	09/21/2024 4:53 AM	Loq-In	olyperb	a
25	09/21/2024 4:54 AM	Loq-In	olyperb	a
26	09/21/2024 4:54 AM	Loq-In	olyperb	a

Search Filter: Find Action S 09/10/2024 To 10/10/2024 Refresh Close