

Assign Security Roles and Approver Permissions

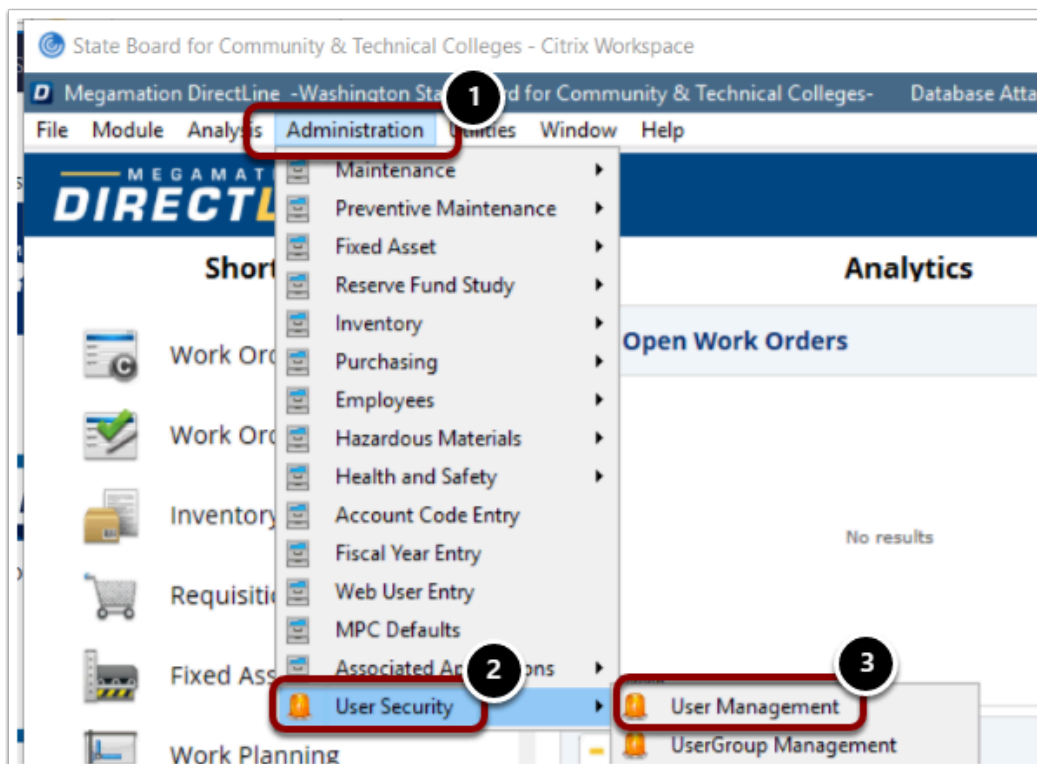
Purpose: Use this document to assign security roles to current DirectLine users and set up approver credentials for staff that approve surplus/disposal lists.

Audience: DirectLine administrators with permission to maintain user security roles.

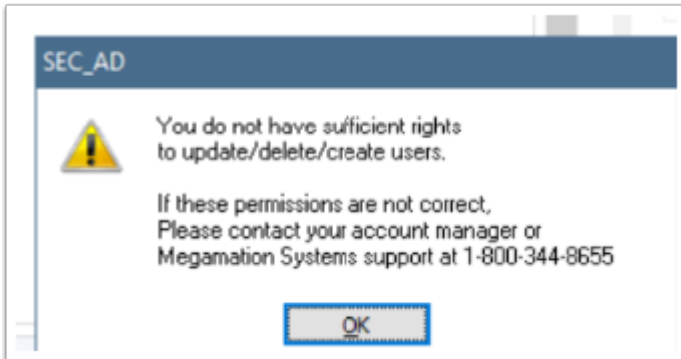
💡 Megamation support staff create new DirectLine users at the college's request. Use this email address to submit a request: support@megamation.com

Navigation: Administration / User Security / User Management

1. On the DirectLine Menu screen, select the **Administration** drop down menu.
2. From there, select **User Security**.
3. Then select **User Management**.

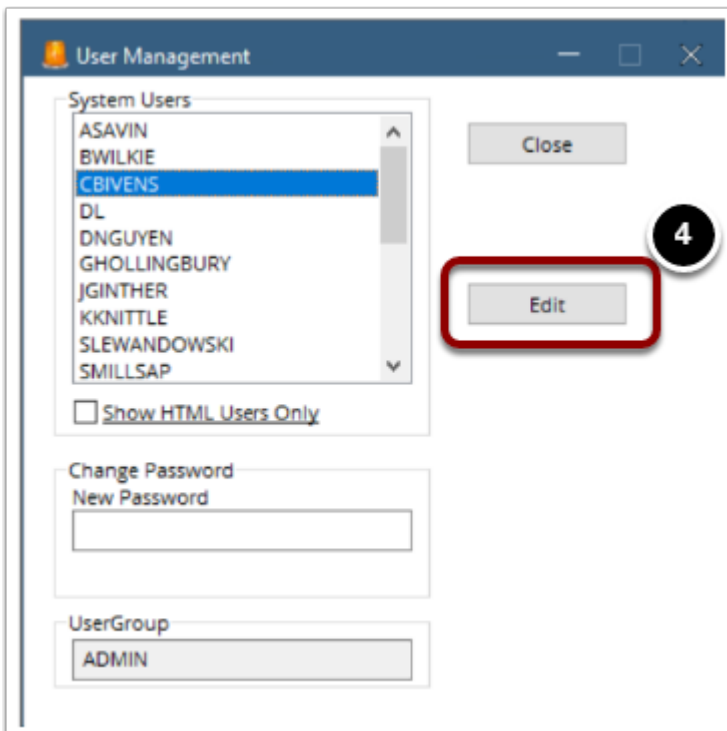


- i** If you don't have the appropriate administrative rights, the following message will display:



- i** If you do have sufficient administrative rights, a list of users will display:

4. Highlight the user you want to change and select the **EDIT** button.



There are four screens available for review and input.

5. The first screen is the **General** tab. It contains the User Group, System Language, email addresses, etc.

💡 Note: the checkbox, **User has active profile** is not needed for business office fixed asset users. However, anyone using work order features must have this box checked.

The screenshot shows the 'User Entry' dialog box with the 'General' tab selected. A red circle with the number '5' is next to the 'User has active profile' checkbox, which is highlighted with a red rectangle. The dialog contains the following fields and options:

- User Name:** CBIVENS
- *User Group:** ADMIN (dropdown)
- Description:** DirectLine
- Window's Username:** SBCTC-CBIVENS
- System Language:** Washington College (dropdown menu with options: French, Hungarian, Italian, Spanish, UK English, Washington College)
- System Database:** DATASBCTC (dropdown)
- On-line Help:** User may update (checkbox)
- System Verticals:** (dropdown menu with a search icon and a checkbox for 'DL Vertical only')
- Permissions:**
 - ☒ Allow user to create and modify Window's Users
 - ☒ Allow user to access Security Module
 - ☐ Do not allow user to modify personal shortcuts
- Personal Information:**
 - Surname:** Bivens
 - First Name:** Cheryl
 - Password:** (empty field)
 - E-Mail Address:** (empty field)
 - E-Mail Replies:** (empty field)
 - Employee#:** (empty field)
 - Associated Assign To:** (empty field)

Buttons at the bottom: OK, Cancel.

6. The second screen available is **W/O Defaults**.

User Entry (6)

General | **W/O Defaults** | User Options | HTML/Mobile

Work Order Entry Default Values

Type: Submitted By:

Status:

Priority:

Job Type:

Assign To: Project:

Issue To: Description:

Work Order Console Options

☐ Enable Maintenance Planner displays and functions ☐ Allow access to Console Summary, Dashboard tabs

☐ Run Work Order Console on login/start-up ☒ Run FAE Console on login/start-up

☐ Disable Work Order Priority entry

☐ Disable Work Order creation date (fill with current date)

☐ Disable entry of date work due/required

OK Cancel

7. The third screen available is **User Options**. This sets up user preferences for work order activity.

User Entry (7)

General | W/O Defaults | **User Options** | HTML/Mobile

User Options

Report 'Work Order List'

☐ 'Work Order List' report is date independent

☒ Planned for today

☐ Planned for next two (2) days

☐ Planned for next seven (7) days

☐ Planned for last seven (7) days

☐ Custom date range

Date Planned (From):

Date Planned (To):

Login/Start-up Options

☐ Open Work Request Entry window

☐ Open Work Planning window

☒ None

☐ Launch Tool-Die Information Center

☐ Run report 'Work Order List'

☐ Run report on login/start-up

OK Cancel

8. The final screen **HTML/Mobile** is used for those colleges that have added mobile device features.

User Entry

8

General

W/O Defaults

User Options

HTML/Mobile

HTML/Mobile Configuration

☐ Mobile user
Note that this type of user must be assigned an Employee#. In addition, if the user wishes to enter time against Work Orders, the Employee should be associated with a Trade.

Mobile User Group:

☐ HTML user Default HTML application is Work Request

HTML Applications

☐ Final Approval Right
Note that if user has this right, they will have access to approve RC work order to RCC

OK

Cancel

Set up FAE Approver

This feature is used for supervisors that approve surplus and disposal lists. From the **General** tab:

9. Select **FAE-APPROVER** from the User Group drop-down list.

State Board for Community & Technical Colleges - Citrix Workspace

Megamation DirectLine - Washington State Board for Community & Technical Colleges - Database Attached : DATASBCTC

File Module Analysis Administration User Entry

General W/O Defaults User Options HTML/Mobile

User Name: CBIVENS

*User Group: ADMIN

Description: DirectLine

Window's Username: SBCTC-CBIVENS

☒ Allow user to create and modify Window's User

☒ Allow user to access Security Module

☐ Do not allow user to modify personal shortcuts

Surname: Bivens

First Name: Cheryl

Password:

E-Mail Address:

E-Mail Replies:

Employee#:

Associated Assign To:

Available UserGroups

UserGroup	Description
1 ADMIN	DirectLine
2 CCC-FM	Cascadia CC Facilities Manager
3 DL	DL System Default Group
4 DL-FLEET	DirectLine
5 FAE-ADMIN	Full access to the FAE related modules and screens, including
6 FAE-APPROVER	View only access to all screens, plus access to transfer and c
7 FAE-EQAPPROVER	FAE EQP Approver User Menu
8 FAE-READONLY	Read only access to all FAE related screens.
9 FAE-USER	Full access to all FAE related modules and screens, but no a
10 FRONT-OFFICE	FRONT-OFFICE
11 LEADS	LEADS
12 LEADS-HS	LEADS + Health/Safety
13 LOCK	LockSmith ONLY
14 MAINT	Maintenance
15 MAINTLSASSIGN	Maintenance and LockSmith Assign Only
16 READONLY	Read Only
17 SCHD	SCHD System Default Group
18 WOONLY	Work Order Module Only
19 WOVIEWONLY	Work Order Planning View Only


OK Cancel Print

10. Select **OK** to save your changes.

User Group Definitions

User Group Type	User Group Name	Description
Administration	ADMIN	Full access to all screens and all pages on those screens
Facilities	(BLANK)	This is the default user group type if this field has been left blank. Facilities users have view only permissions for the financial screens in the Building and Equipment records
Finance	FAE Admin	Full access to fixed asset related modules and screens, including administration. View only permissions for the facilities screens in the Building records
Finance	FAE User	Full access to all fixed asset related modules and screens, but not access to administration and no access to approvals
Finance	FAE Approver	View only access to all screens, plus access to transfer and disposal approvals. User must be set up as an approver as well. (Instructions provided in this user

User Group Type	User Group Name	Description
		guide).
	FAE Read Only	Read only access to all FAE related screens

 Users in the Finance group have read-only permissions for the Facilities and AMS tabs in the Building/Site entry screens. Users in the Facilities group have read-only permissions on the Finance tab in the Building/Site entry screens.

Procedure complete.