

# System User User Guide

## System User Actions

### Add System User

To start this action, click the **Add System User** button above the System User listing.

Creates a new System User.

When this action starts a form is displayed to enter the details of the System User.

Each field customises or controls some aspect of the System User display or behaviour.

Some fields are required and must be entered before the System User can be added, the required fields are .

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

### View

To start this action, select the System User you need to work on, and click the  **View** button in the  More Menu on that row.

Display the selected System User.

This action displays the System User similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

### Edit

To start this action, select the System User you need to work on, and click the  button on that row.

Edits an existing System User.

When this action starts a form is displayed with the existing System User and any previous information entered.

Each field customises or controls some aspect of the System User display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

### Delete

To start this action, either select the System User to work on and click the  button on that row. Or CTRL+click to select multiple System Users and click the  button above the System User listing.

Deletes an existing System User.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this System User.

### Search

To start this action, click the  button above the System User listing.

Allows a Search of System Users.

This allows a simple text search across all System Users.

To search a specific field select the field from the drop down list

### Adv. Search

To start this action, click the  **Adv. Search** button above the System User listing in the  More Menu.

Allows an Advanced Search of System Users.

The Advanced Search opens a new section at the bottom of the System Users and allows several distinct features:

- Multiple Search Lines : allows System User matches to be identified where more than one search criteria is required
- Nested Searches : allows a combination of AND and OR logic to find results
- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

## Refresh

To start this action, click the  Refresh button above the System User listing in the  More Menu.

Refresh the list of System Users.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

## Export to List

To start this action, click the  Export to List button above the System User listing in the  More Menu.

Export the System User results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the System Users shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for System Users will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

## Export All

To start this action, click the  Export All button above the System User listing in the  More Menu.

Export all the System Users to a List.

Exactly as for "Export to List" except rather than just Exporting the System User results shown, all System Users will be expored.

## Export Item

To start this action, select the System User you need to work on, and click the  Export Item button in the  More Menu on that row.

Export only the selected System User to a List.

Exactly as for "Export to List" except rather than just Exporting the System User results shown, only the selected System User is exported.

## Choose Columns

To start this action, click the  Choose Columns button above the System User listing in the  More Menu.

Changes the Columns shown in the System User Listing.

The Choose Columns screen shows the Selected Columns on the left, and the System User Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the System User Listing.

## Manage Filters

To start this action, click the  Manage Filters button above the System User listing in the  More Menu.

Creates custom Filters for System Users.

A Filter is a saved Advanced Search. Multiple Filters can be created for System Users.

These Filters appear at the top of the System User listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for System Users where these can be managed.

## System User Field Reference

### Additional Permissions

Only required for user with an admin level of less than 'Full'. Select additional admin permissions that apply to this user over and above those assigned to the user's User Group

