



User Permissions by Department

v 1.0

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User Permissions by Department

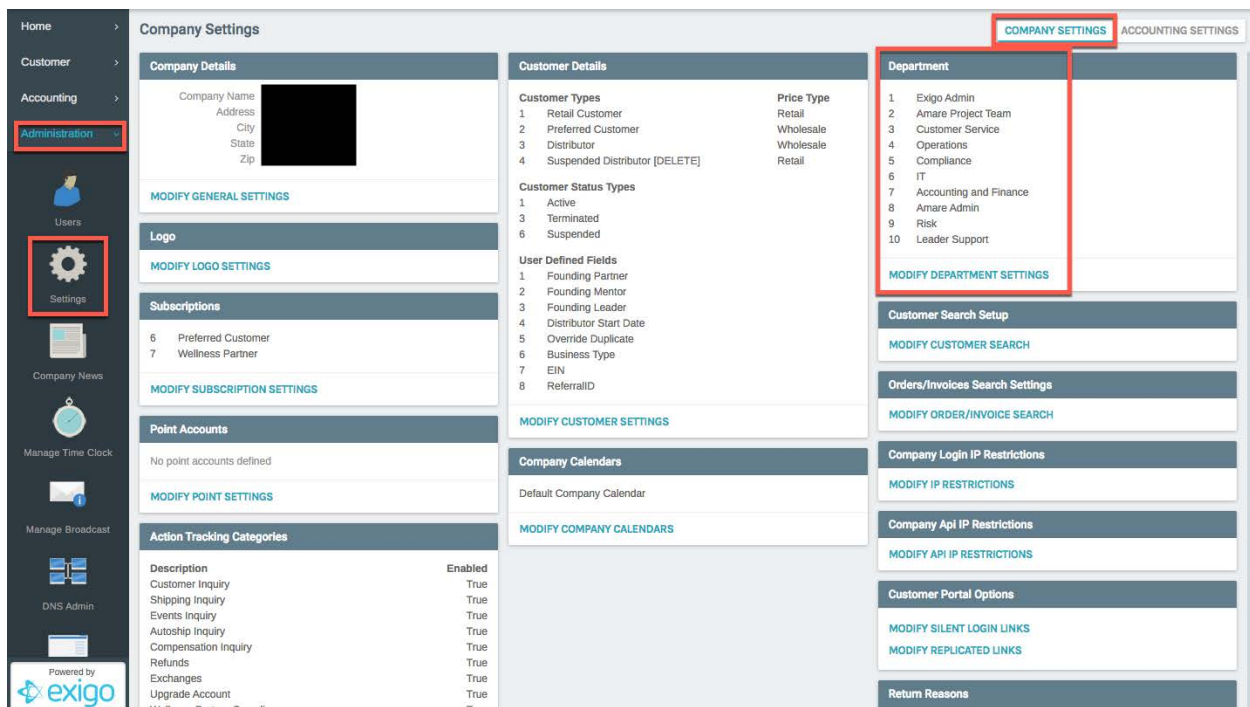
Exigo allows the ability to apply User Permissions on a larger scale using Departments and Security Templates. This functionality saves time as User Permissions are not set on each individual User.

This document will review the following:

1. Setting up Departments
2. Assigning Users to Departments
3. Setting up Security Templates
4. Propagating Security Templates to Departments

SETTING UP DEPARTMENTS

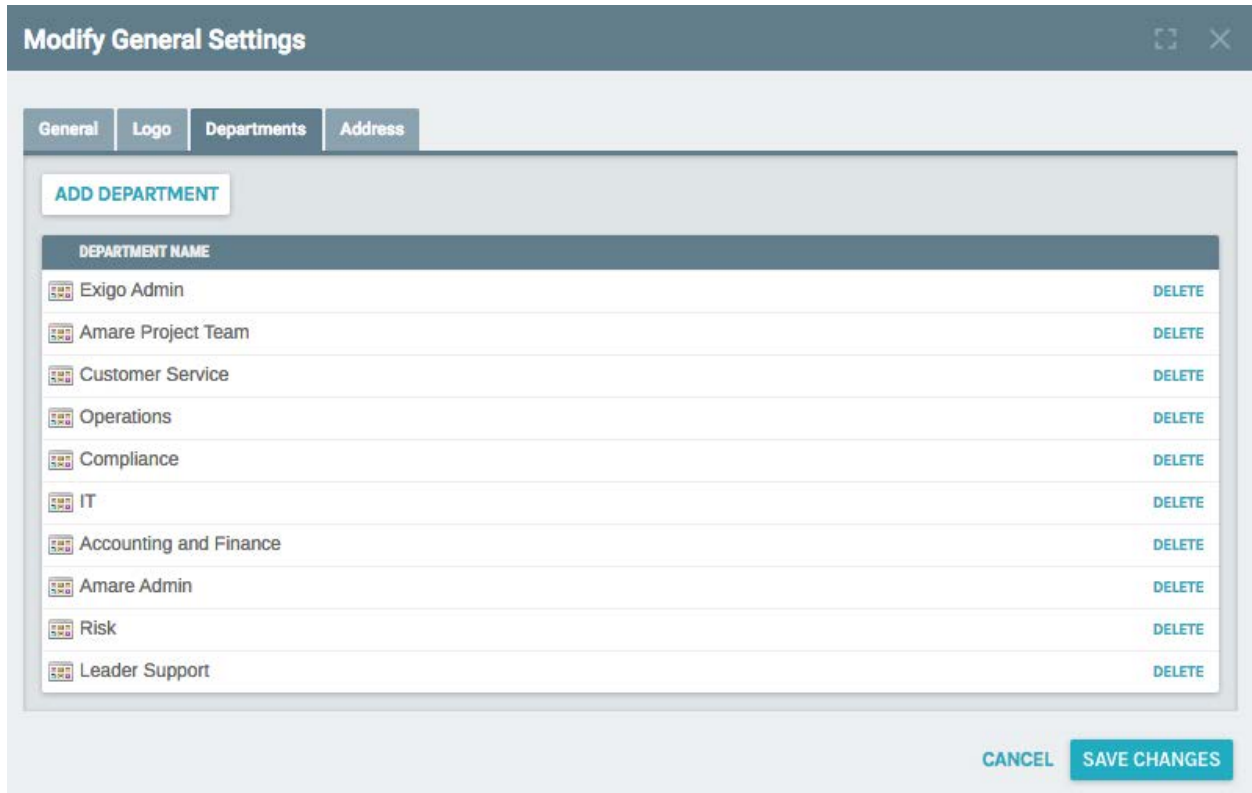
To set up a Department, go to Administration > Settings > Company Settings > Department



The screenshot shows the 'Company Settings' page in the Exigo administration interface. The left sidebar contains navigation options: Home, Customer, Accounting, Administration (highlighted), Users, Settings (highlighted), Company News, Manage Time Clock, Manage Broadcast, DNS Admin, and Powered by exigo. The main content area is titled 'Company Settings' and is divided into several sections: Company Details, Logo, Subscriptions, Point Accounts, Action Tracking Categories, Customer Details, Customer Status Types, User Defined Fields, Company Calendars, and Department. The 'Department' section is highlighted with a red box and contains a list of departments: 1. Exigo Admin, 2. Amare Project Team, 3. Customer Service, 4. Operations, 5. Compliance, 6. IT, 7. Accounting and Finance, 8. Amare Admin, 9. Risk, 10. Leader Support. Below the list is a 'MODIFY DEPARTMENT SETTINGS' link. Other sections like 'Customer Details' and 'Subscriptions' also have 'MODIFY' links.

To Add a Department, click on “Modify Department Settings” in the Department Section.

Clicking on "Modify Department Settings" will display the following window:



Modify General Settings

General | Logo | **Departments** | Address

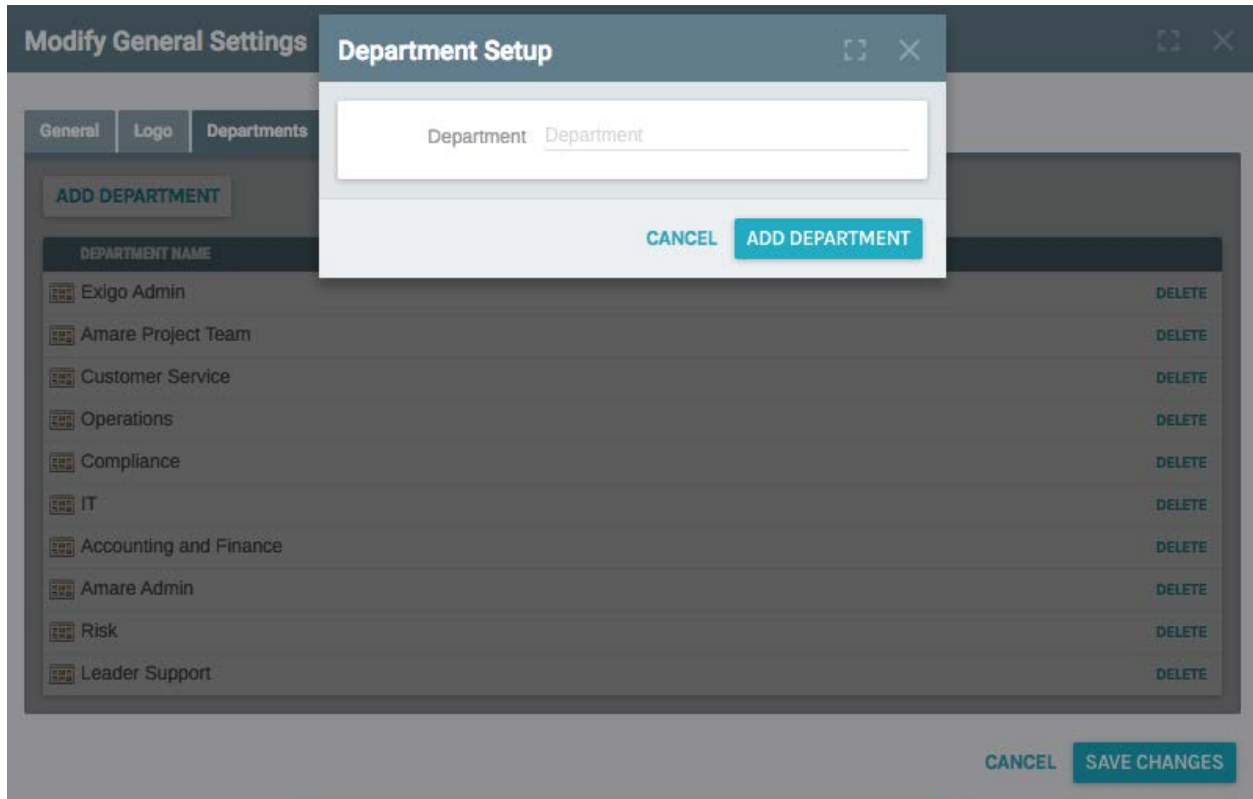
ADD DEPARTMENT

DEPARTMENT NAME	
Exigo Admin	DELETE
Amare Project Team	DELETE
Customer Service	DELETE
Operations	DELETE
Compliance	DELETE
IT	DELETE
Accounting and Finance	DELETE
Amare Admin	DELETE
Risk	DELETE
Leader Support	DELETE

CANCEL SAVE CHANGES

From this window, you have the ability to Delete a Department or Add a Department. NOTE: If Users are assigned to a Department, the Department cannot be Deleted.

Clicking on Add Department will display the following window:

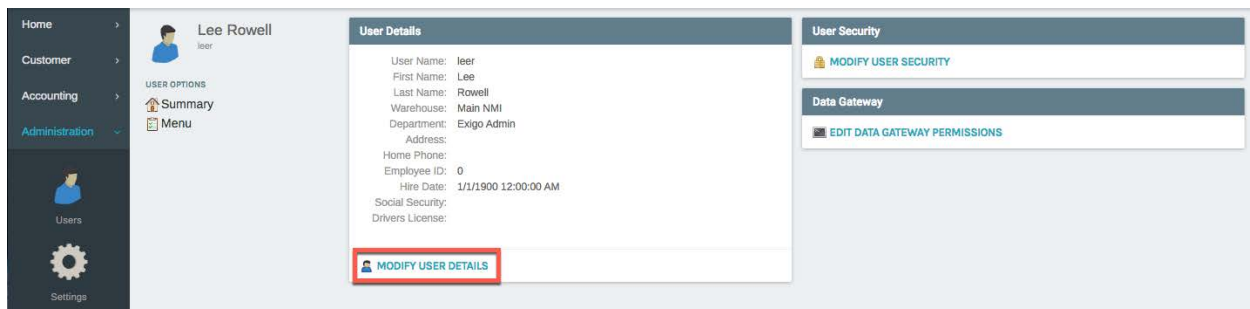


To Add a Department, simply type in the Department Name and click “Add Department”. Clicking on “Save Changes” will finalize the addition of the Department.

ASSIGNING USERS TO DEPARTMENTS

In Exigo, Users are assigned to a Department. To Assign a User to a Department, go to Administration > Users

Click on the User you wish to assign to a Department (or change Department). The following window will be displayed:

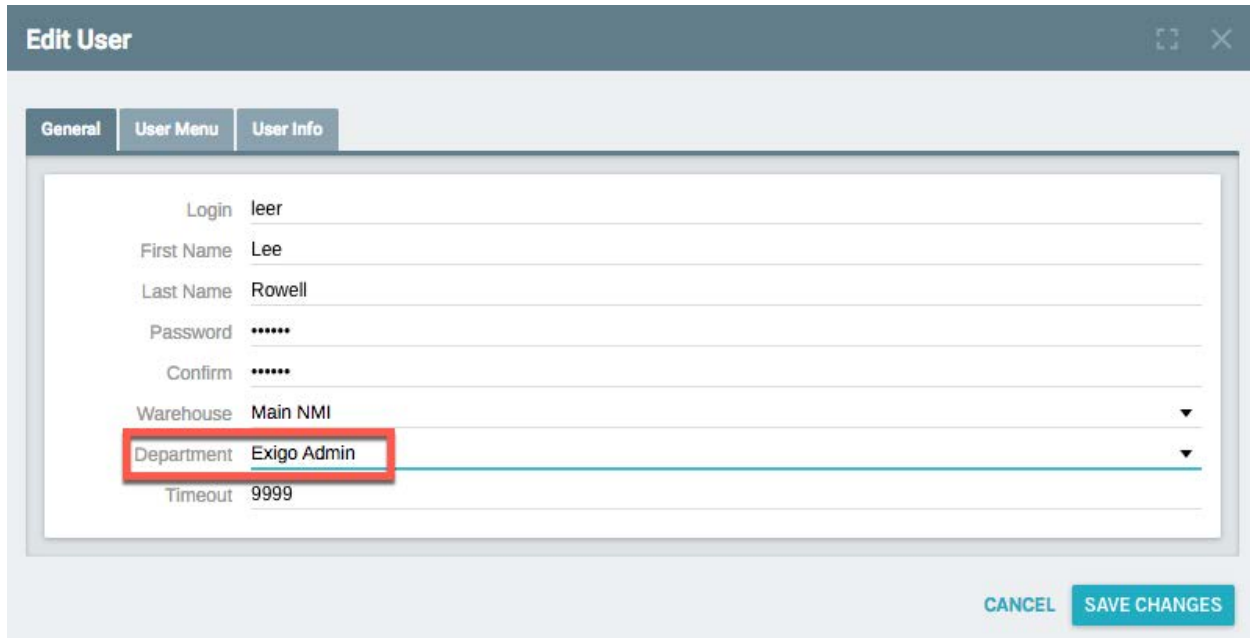


The screenshot shows the 'User Details' window for user 'Lee Rowell'. The user's information is displayed in a table-like format:

User Name:	leer
First Name:	Lee
Last Name:	Rowell
Warehouse:	Main NMI
Department:	Exigo Admin
Address:	
Home Phone:	
Employee ID:	0
Hire Date:	1/1/1900 12:00:00 AM
Social Security:	
Drivers License:	

At the bottom of the 'User Details' section, there is a button labeled 'MODIFY USER DETAILS' which is highlighted with a red box.

Click on "Modify User Details", the following window will be displayed:



The screenshot shows the 'Edit User' window with the 'General' tab selected. The user information is displayed in a form:

Login	leer
First Name	Lee
Last Name	Rowell
Password	*****
Confirm	*****
Warehouse	Main NMI
Department	Exigo Admin
Timeout	9999

The 'Department' field is highlighted with a red box. At the bottom right of the window, there are two buttons: 'CANCEL' and 'SAVE CHANGES'.

Choose the appropriate Department from the drop down list.

Click on "Save Changes"

SETTING UP SECURITY TEMPLATES

Templates in Exigo are essentially the same as Users. To begin setting up a Template, navigate to Administration > Users. The following window will be displayed:

USERNAME	FIRST NAME	LAST NAME	DEPARTMENT	STATUS	EMAIL
AdaP	Ada	Perez		Enabled	VIEW
AideH	Aide	Estafania Herreda		Enabled	VIEW
AlejandroB	Alejandro	Cortes Brenia		Enabled	VIEW
AlejandroG	Alejandro	Grandos		Enabled	VIEW
AlejandroP	Alejandro	Pacheco		Enabled	VIEW
AnamariaG	Ana Maria	Pacheco-Gamboa		Enabled	VIEW
AndreaG	Andrea	Perez Granados		Enabled	VIEW
AngelM	Angel	Emmanuel Sanchez Meza		Enabled	VIEW
AntoniettaW	Antonietta	Walker		Enabled	VIEW
AntoioO	Antonio	Zaragoza Orozco		Enabled	VIEW
API_immunotec	API	USER		Enabled	VIEW
AriadnaD	Ariadna	Metzil Ramirez Delgado		Enabled	VIEW
ArturoS	Arturo	Sandoval		Enabled	VIEW
BettyG	Betty	Grintuch		Enabled	VIEW
BrigitteM	Brigitte	Mayen		Enabled	VIEW
CandelariaC	Candelaria	Cabanillas		Enabled	VIEW
CarolinaS	Carolina	Santiago		Enabled	VIEW
CarlosM	Carlos	Maldonado		Enabled	VIEW
CharlieO	Charlie	Orr		Enabled	VIEW
CinthiaL	Cynthia	LeGresley		Enabled	VIEW
ClaraR	Clara	Alicia Cu Rodriguez		Enabled	VIEW
ClaudioC	Claudio	Casillas		Enabled	VIEW
ClaudioP	Claudio	Penaloza		Enabled	VIEW

To create a new Template, click on "Add User". The following window will be displayed:

Add User

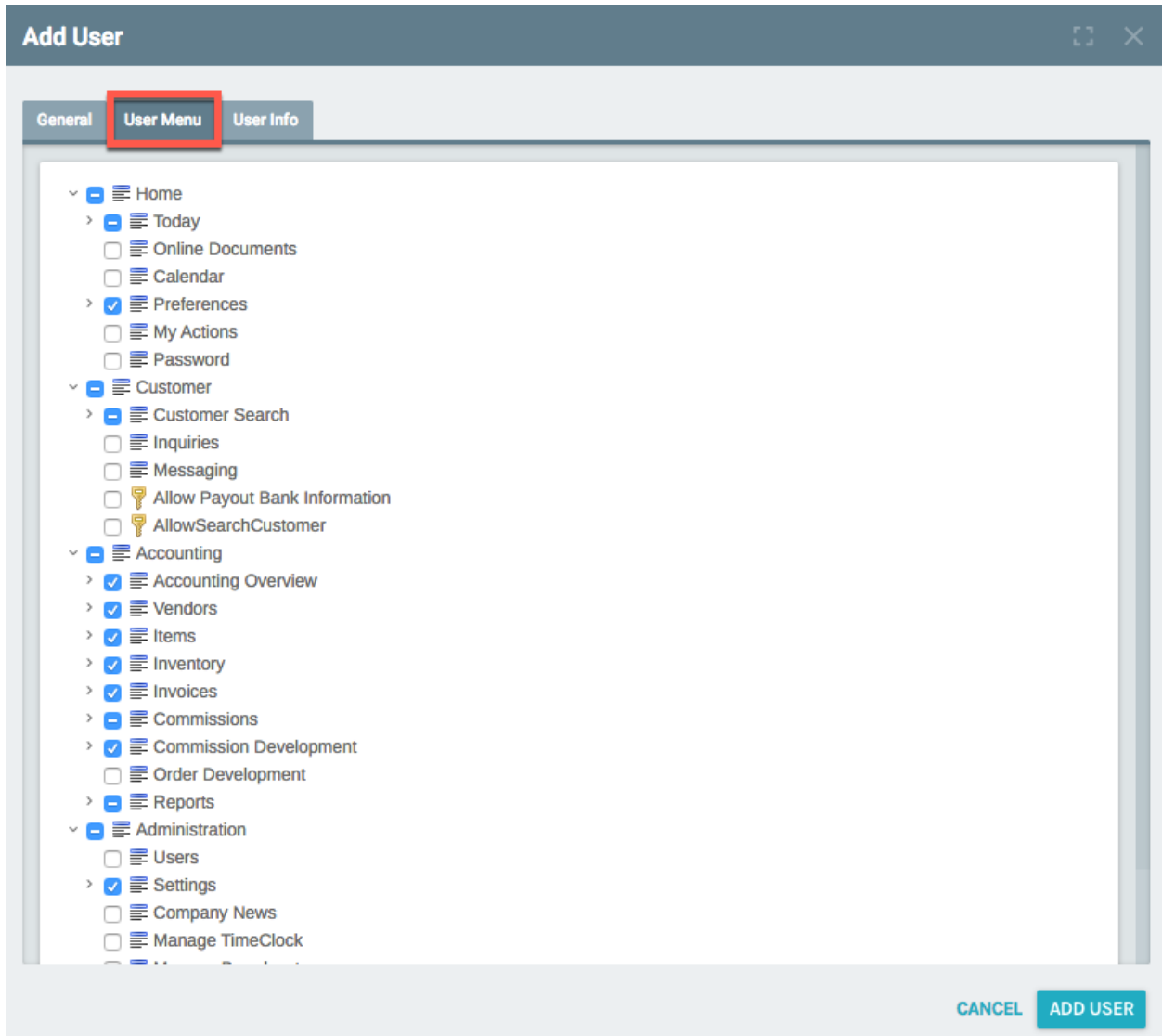
General User Menu User Info

Login	TemplateTest 2
First Name	Template
Last Name	Test
Password	*****
Confirm	*****
Warehouse	California ▼
Department	Test ▼
Timeout	30

CANCEL ADD USER

On the General Tab as shown above, Enter a Login Name for the Template. Consider some of the following names for Templates: CSR Level 1, CSR Level 2, CSR Supervisor, etc.

Proceed to the User Menu Tab.



The User Menu Tab is where you will designate the User Permissions to be applied to the Template you are creating. For example, a CSR may not need all Edit capability, or something as broad as the Administration Menu. User permissions applied to the Template are solely at the discretion of the client.

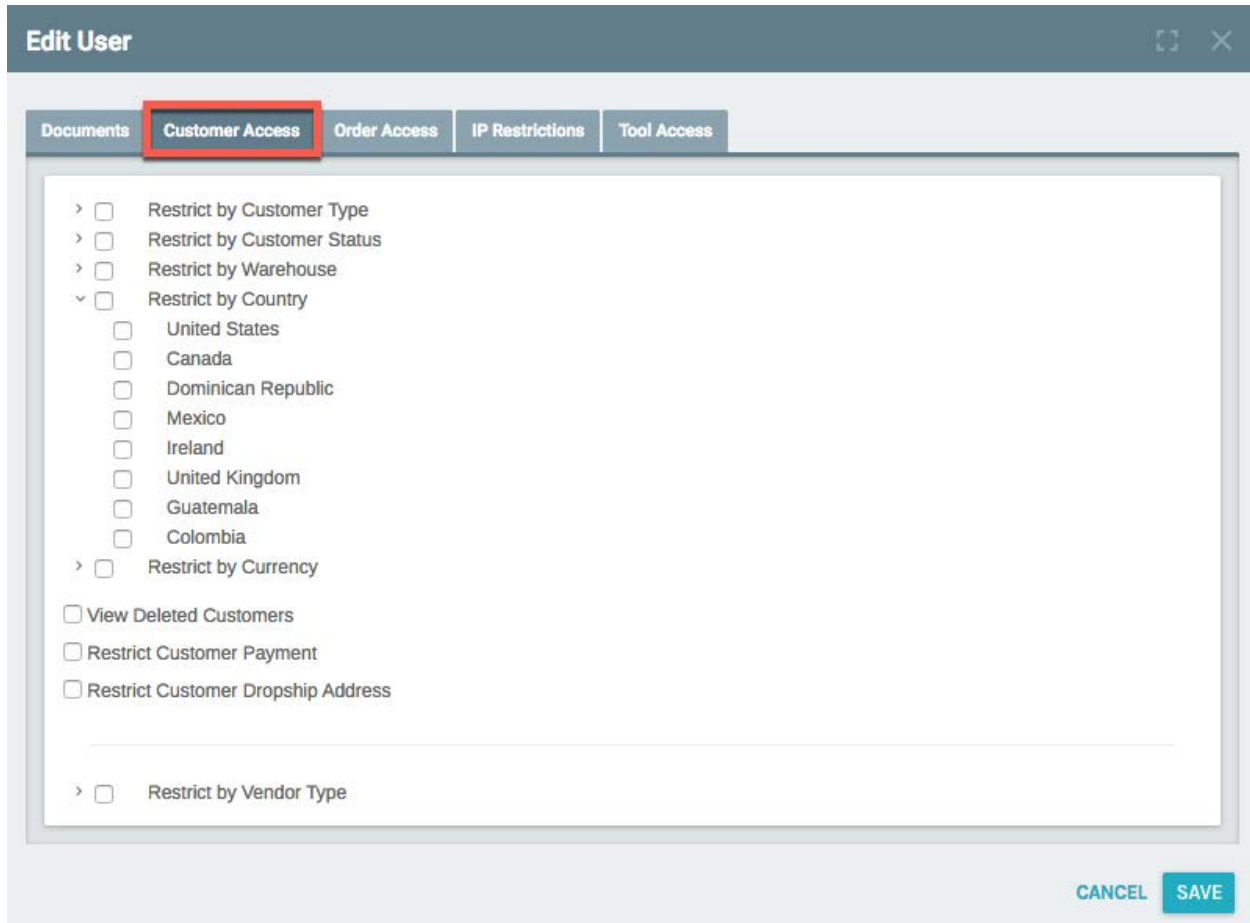
Once you have completed selecting the appropriate User Permissions, click "Add User".

One additional step is required if you wish to segregate User Permissions by Country, Warehouse, etc. To set these up, find and click on the Template just created.

The following window will be displayed:



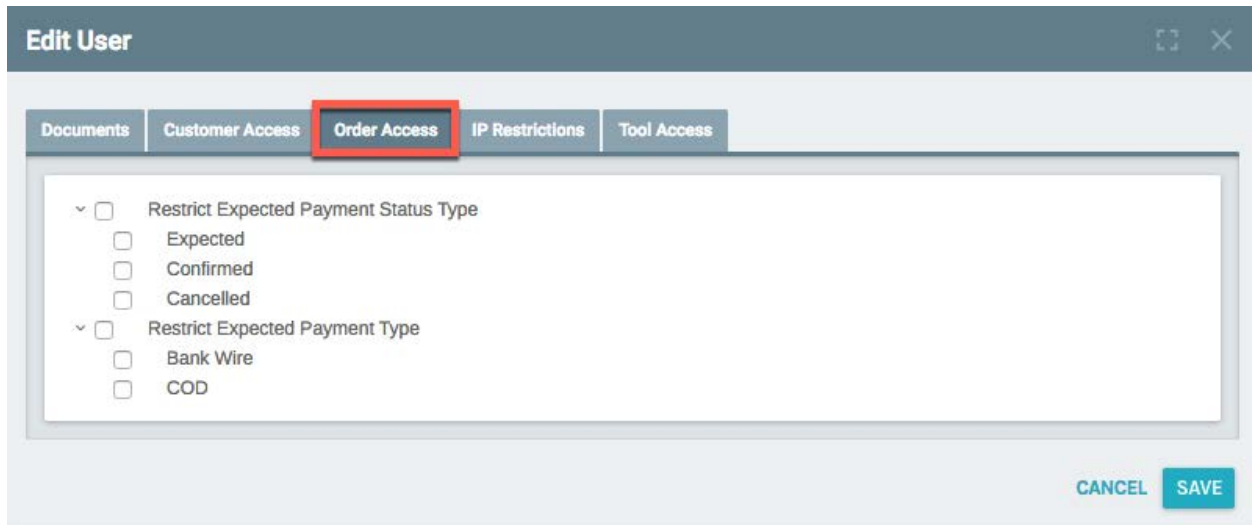
Click on "Modify User Security". The following window will be displayed:



Two types of restrictions can be controlled on this window: Customer Access and Order Access. From the Customer Access Tab (shown above), you can click on any checkbox to activate a

restriction for the Template. For example, if you are Restricting by Country and only United States is checked, the User will only have access to those Customers with a US Address.

Order Access restrictions are also available:



Edit User

Documents Customer Access **Order Access** IP Restrictions Tool Access

- ▼ Restrict Expected Payment Status Type
 - Expected
 - Confirmed
 - Cancelled
- ▼ Restrict Expected Payment Type
 - Bank Wire
 - COD

CANCEL SAVE

This Tab deals with Expected Payments. Many clients do not use Expected Payments, so you may not find this tab relevant.

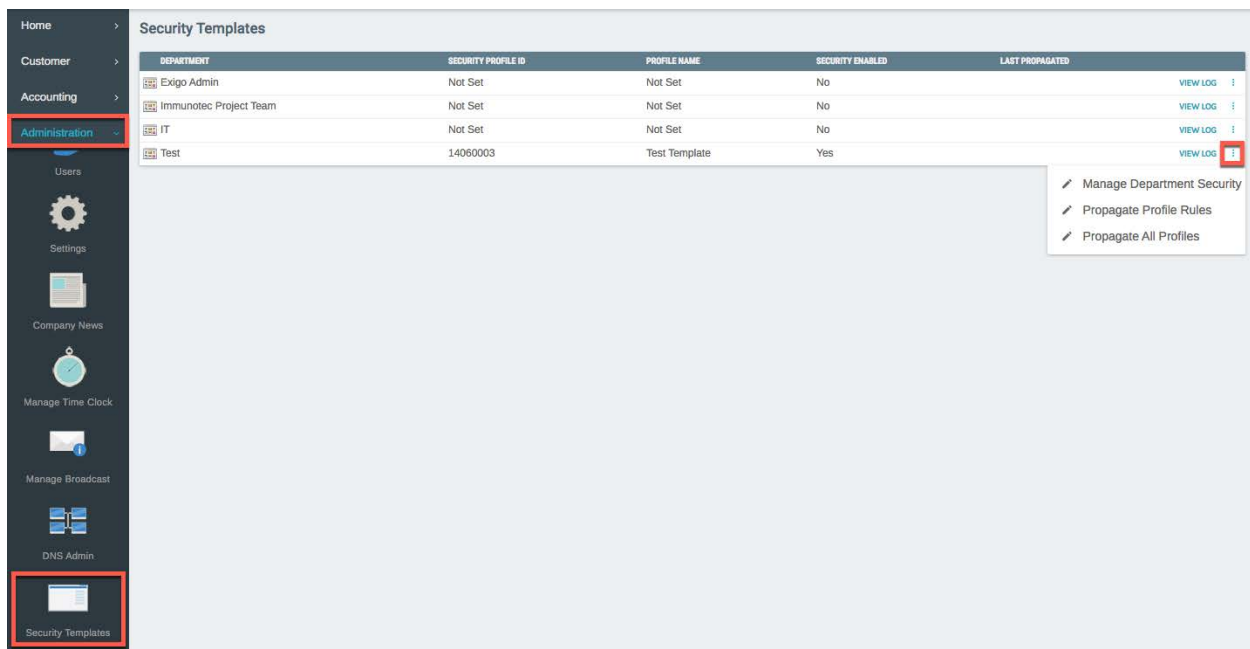
When all changes have been made, Click "Save".

PROPAGATING SECURITY TEMPLATES

Exigo refers to the assignment of User Permissions to all Users within a Department to Propagation.

Ensure all appropriate Users have been tied to the correct Department prior to proceeding with Propagation.

The Propagation Process may be found via Administration > Security Templates.

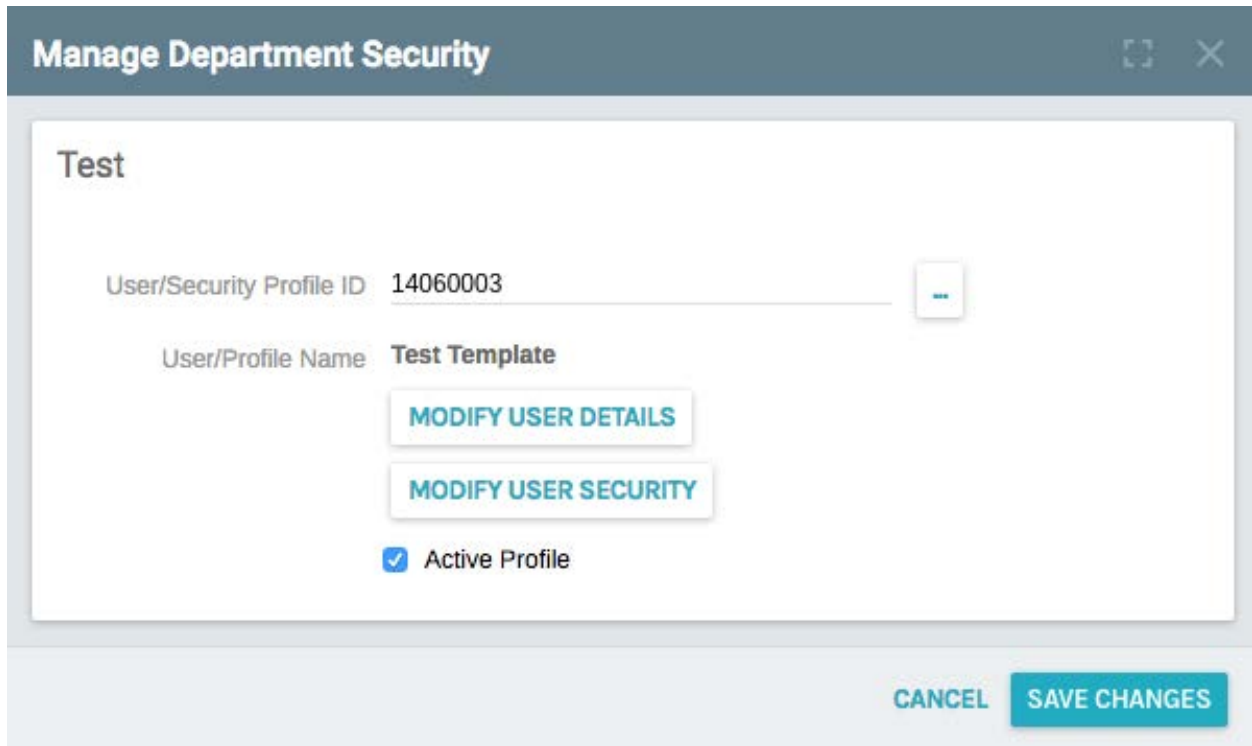


DEPARTMENT	SECURITY PROFILE ID	PROFILE NAME	SECURITY ENABLED	LAST PROPAGATED	
Exigo Admin	Not Set	Not Set	No		VIEW LOG ⋮
Immunotec Project Team	Not Set	Not Set	No		VIEW LOG ⋮
IT	Not Set	Not Set	No		VIEW LOG ⋮
Test	14060003	Test Template	Yes		VIEW LOG ⋮

- ✎ Manage Department Security
- ✎ Propagate Profile Rules
- ✎ Propagate All Profiles

To begin the Propagation Process, click on the Ellipses at the end of the row for the Department.

Choose 'Manage Department Security' to tie a Template to a Department. Clicking on "Management Department Security" will display the following window:



Manage Department Security

Test

User/Security Profile ID 14060003

User/Profile Name **Test Template**

MODIFY USER DETAILS

MODIFY USER SECURITY

Active Profile

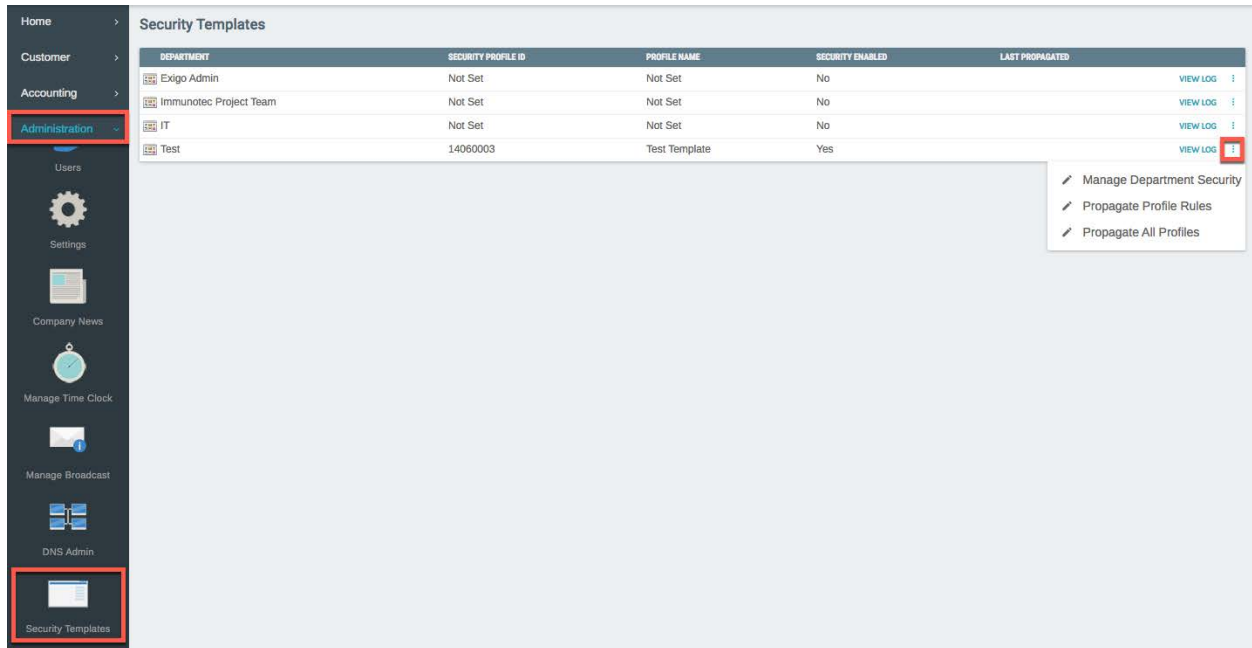
CANCEL **SAVE CHANGES**

To choose the Template that was just set up, click on the Ellipses to search for the User Template to be utilized.

Once the Template has been chosen, the User/Profile Name will show. Ensure the checkbox next to "Active Profile" is checked.

Click on "Save Changes".

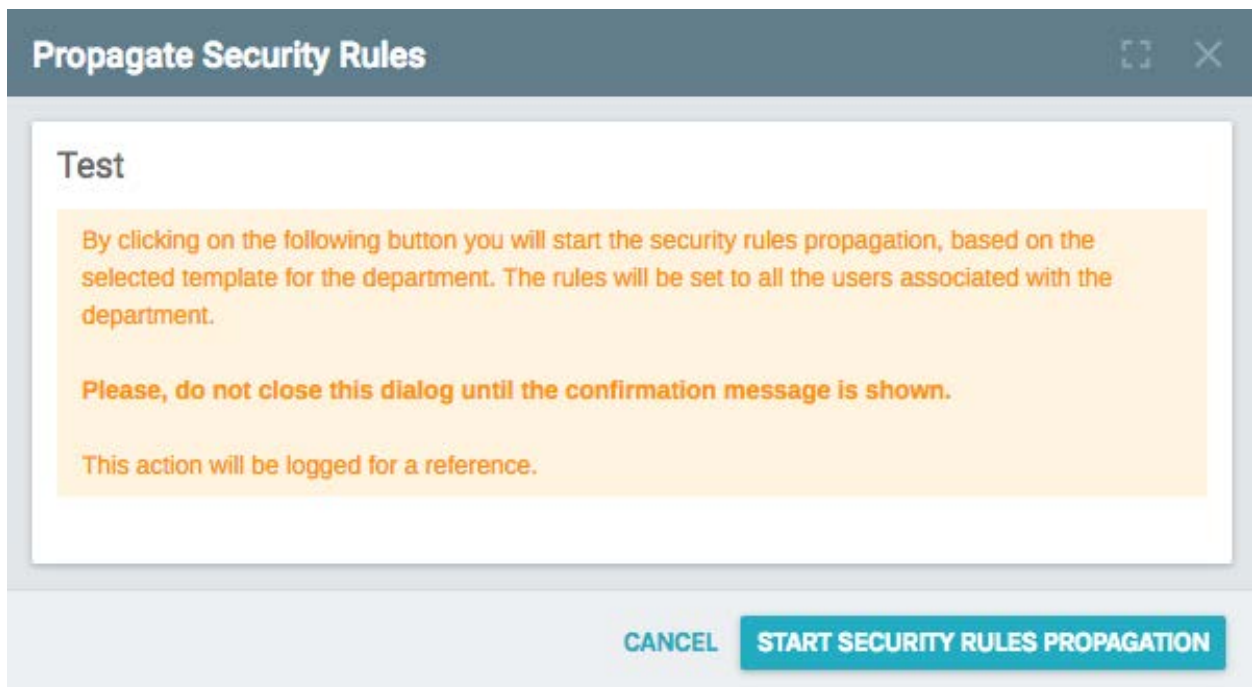
Return to the Security Template window shown below for the final step of the Propagation Process:



DEPARTMENT	SECURITY PROFILE ID	PROFILE NAME	SECURITY ENABLED	LAST PROPAGATED
Exigo Admin	Not Set	Not Set	No	VIEW LOG
Immunotec Project Team	Not Set	Not Set	No	VIEW LOG
IT	Not Set	Not Set	No	VIEW LOG
Test	14060003	Test Template	Yes	VIEW LOG

- Manage Department Security
- Propagate Profile Rules
- Propagate All Profiles

Click on "Propagate Profile Rules". The following window will be displayed:



Propagate Security Rules

Test

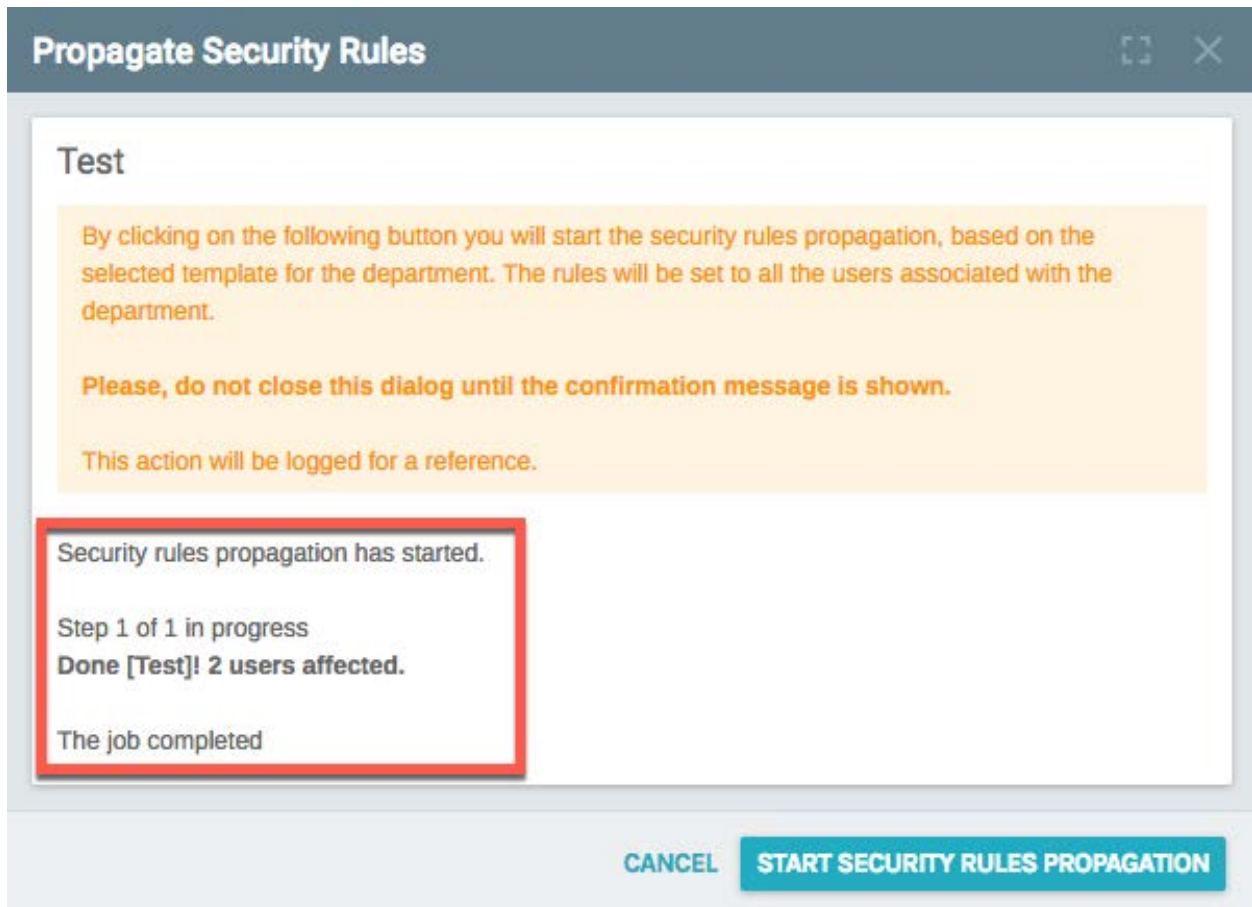
By clicking on the following button you will start the security rules propagation, based on the selected template for the department. The rules will be set to all the users associated with the department.

Please, do not close this dialog until the confirmation message is shown.

This action will be logged for a reference.

CANCEL **START SECURITY RULES PROPAGATION**

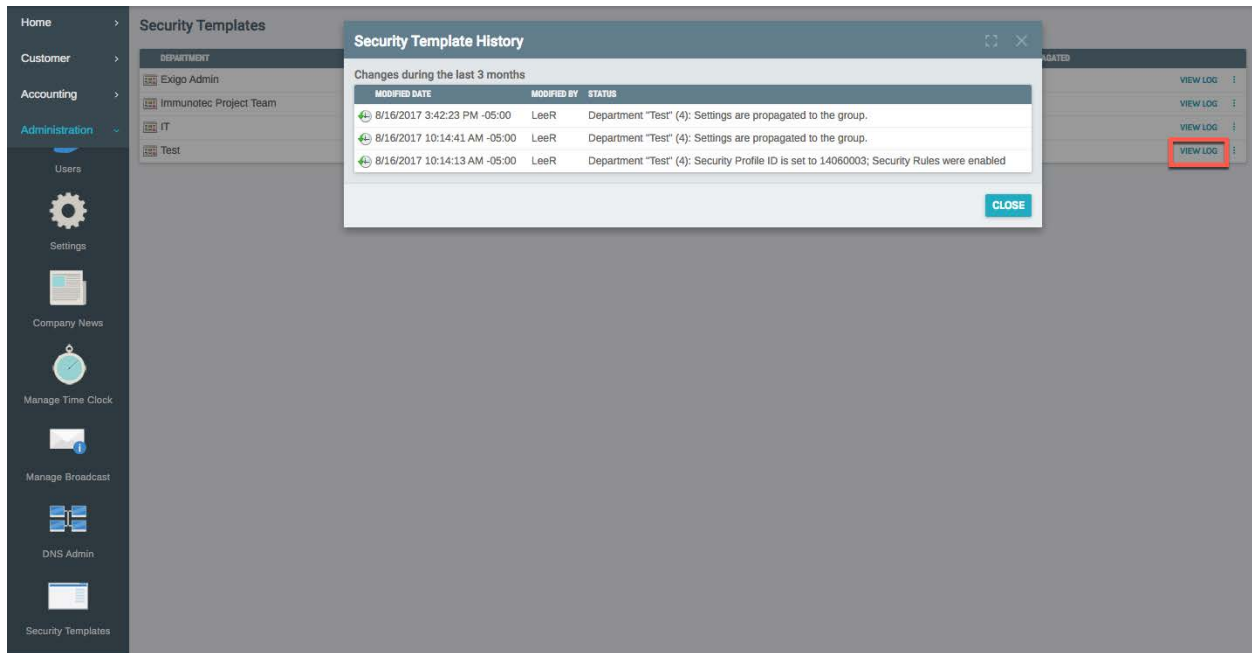
Click on “Start Security Rules Propagation”. The following window will be displayed:



The process has been completed. Click the “X” or “Cancel” to complete.

NOTE: Use extreme caution with the “Propagate All Profiles” option. This option applies the User Permissions from the Template to ALL Users.

To Review the Log of Changes for the Security Template, click on "View Log". The Log shows all changes to Department Ties and Propagation.



This concludes User Permissions by Department Setup.