



User Permissions by Department

v 1.1

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USER PERMISSIONS BY DEPARTMENT

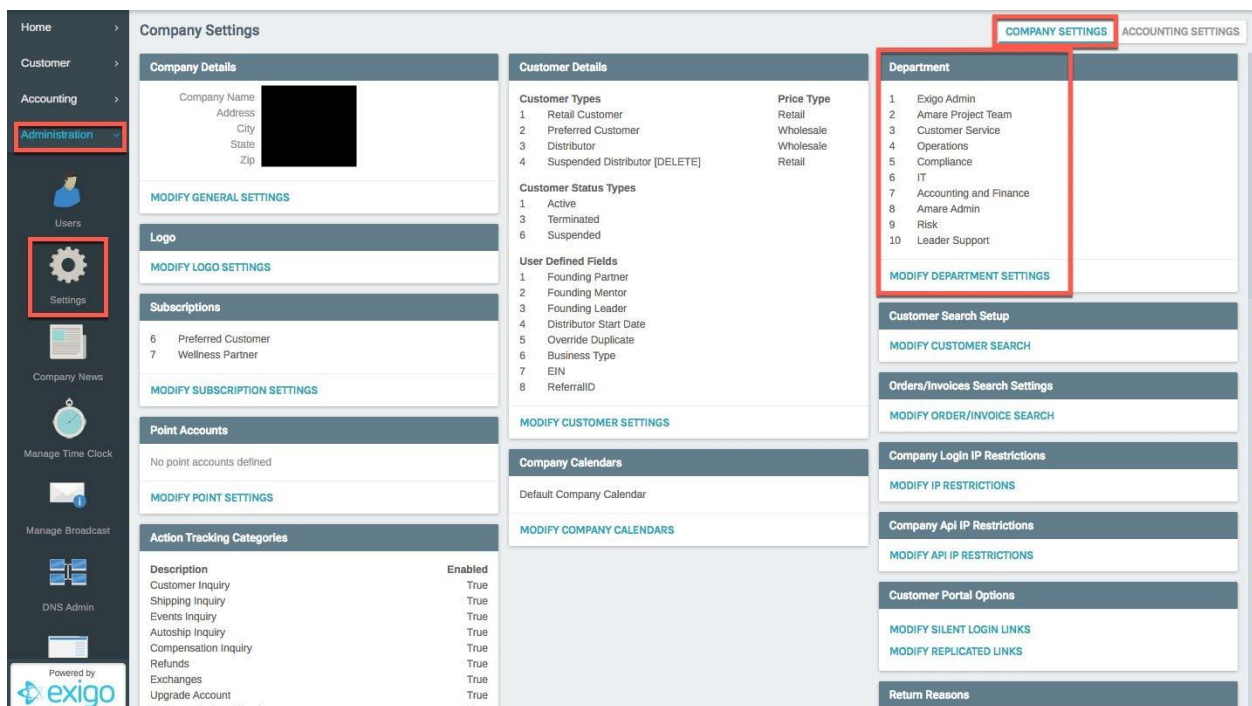
Exigo allows the ability to apply User Permissions on a larger scale using Departments and Security Templates. This functionality saves time as it allows you to update multiple User's Permissions at once.

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



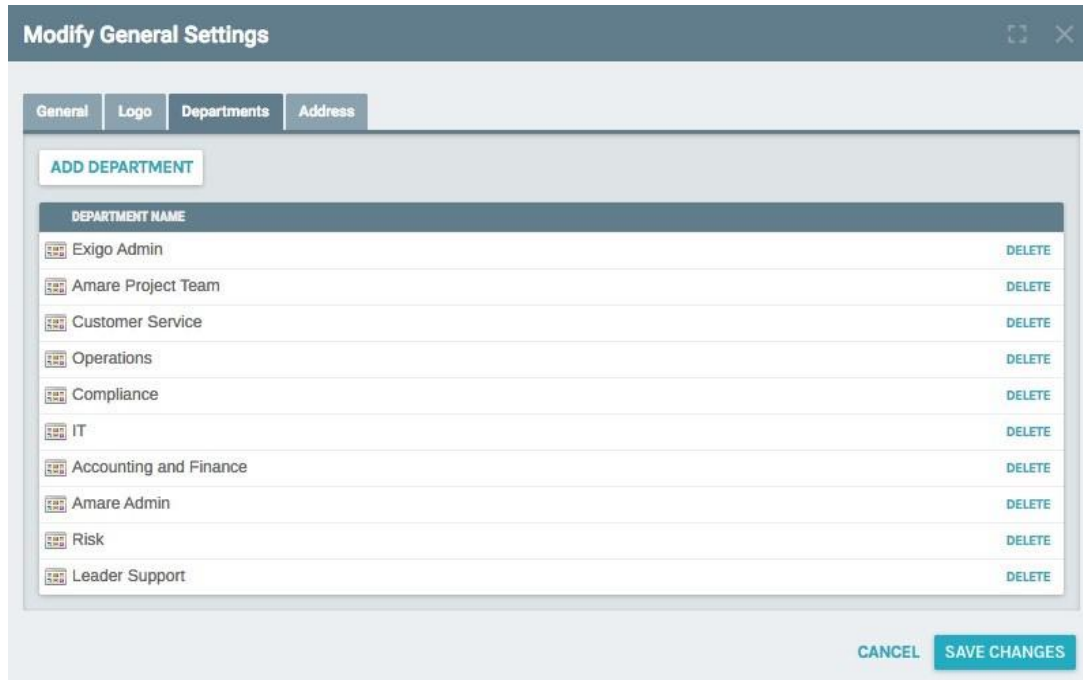
The screenshot shows the Exigo Administration interface. The left sidebar has 'Administration' selected. The main content area is 'Company Settings' with a sub-tab for 'COMPANY SETTINGS'. The 'Department' section contains a table with the following data:

Department	Role
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 table is a 'MODIFY DEPARTMENT SETTINGS' link. Other sections visible include 'Company Details', 'Customer Details', 'Subscriptions', 'Point Accounts', 'Action Tracking Categories', and 'Company Calendars'.

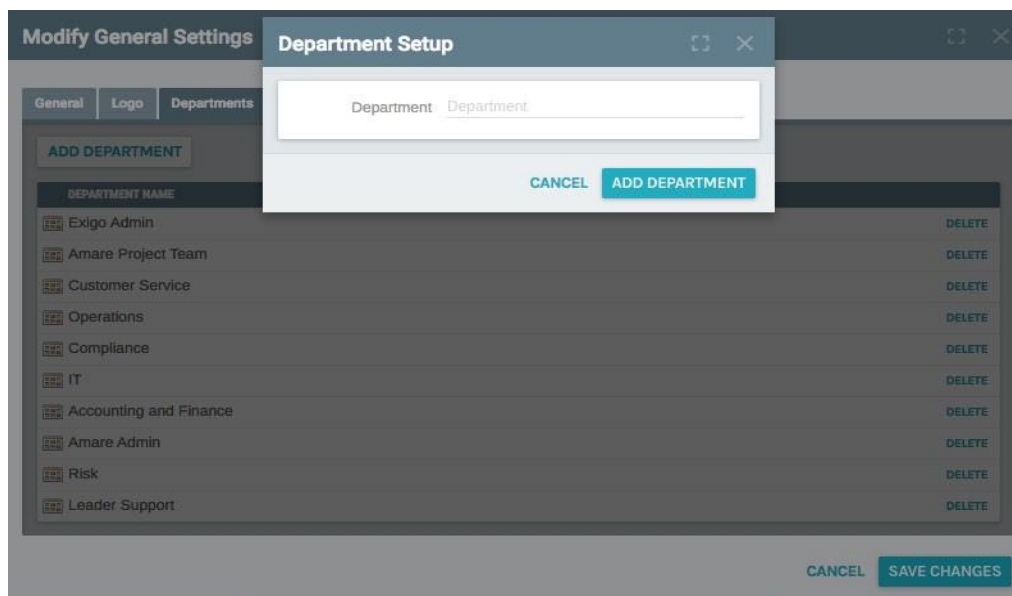
To Add a new Department, click on **“Modify Department Settings”** in the Department Section.

The following window will be displayed:



From this window, you can Add or Delete a Department. If any 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

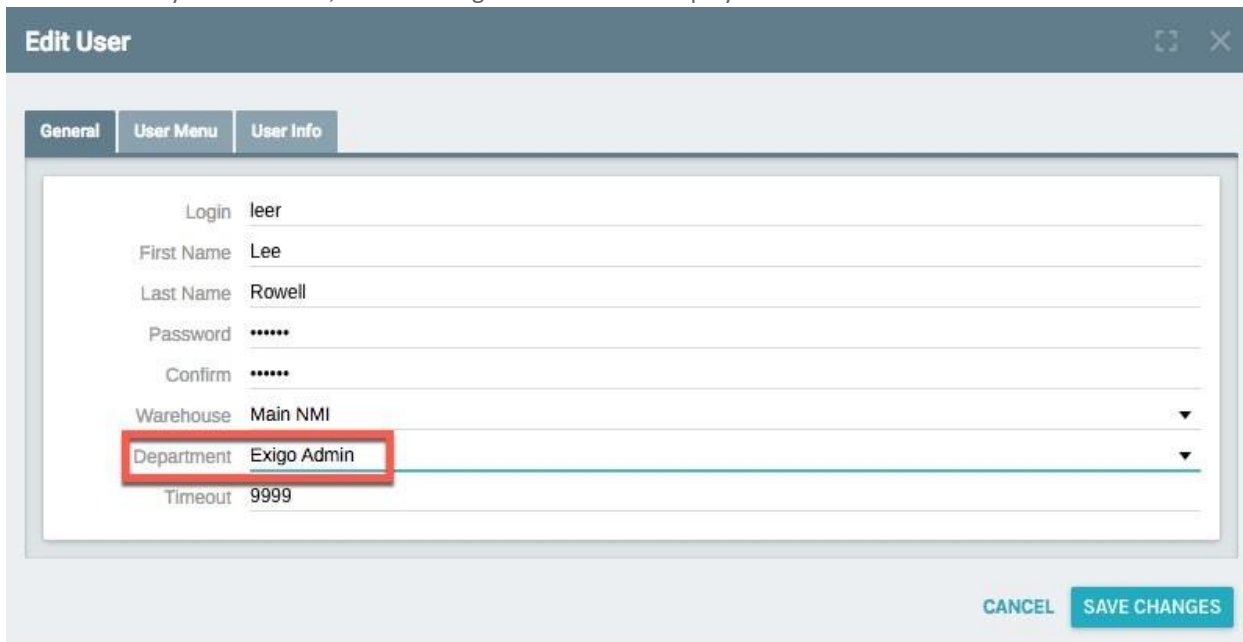
In Exigo, Users are assigned to a Department. To Assign a User to a Department, go to:

Administration > Users

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



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



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 Brena		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
AntonietaW	Antonieta	Walker		Enabled	VIEW
AntolioO	Antonio	Zaragoza Orozco		Enabled	VIEW
API_immunotec	API	USER		Enabled	VIEW
AriadnaD	Ariadna	Metzll Ramirez Delgado		Enabled	VIEW
ArturoS	Arturo	Sandoval		Enabled	VIEW
BettyG	Betty	Grintuch		Enabled	VIEW
BrigetteM	Brigette	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	Penalzoa		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:

First Name:

Last Name:

Password:

Confirm:

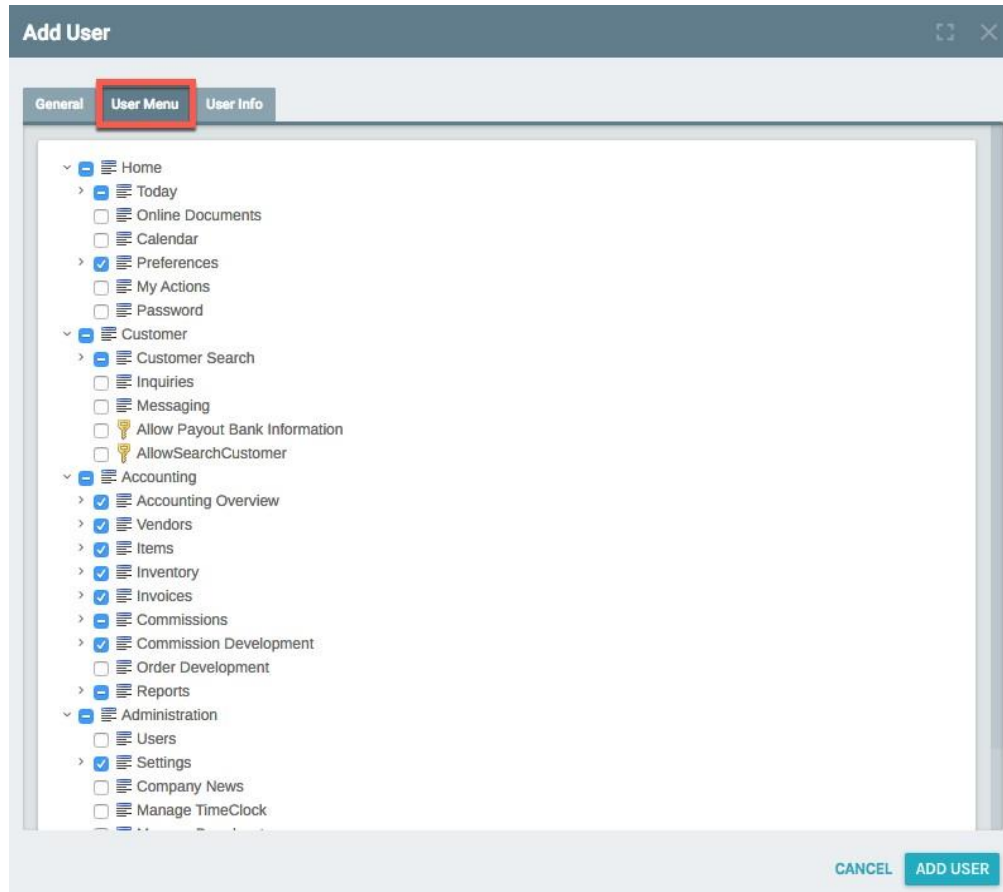
Warehouse:

Department:

Timeout:

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. User permissions applied to the Template are solely at the discretion of the client.

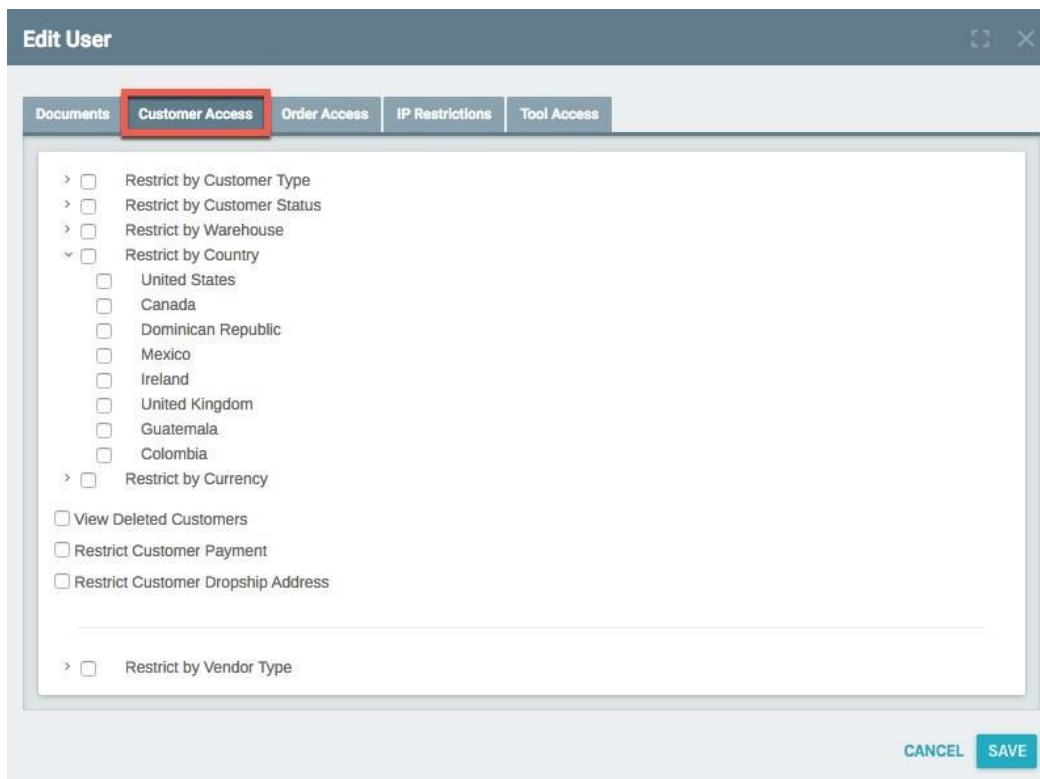
Once you have completed selecting the appropriate User Permissions, click "Add User".

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

The following window will be displayed:

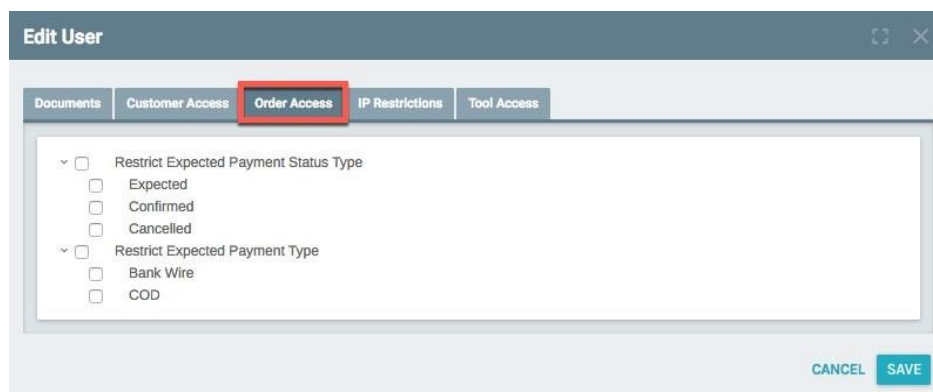


Click on “Modify User Security”. The following window will be displayed:



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:



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

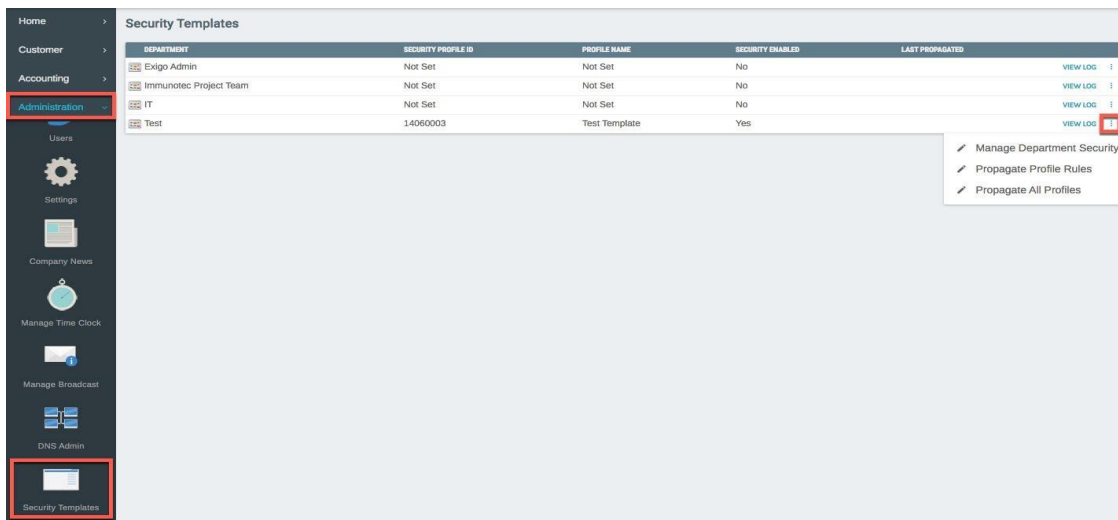
Exigo defines the assignment of User Permissions to all Users within a Department as Propagation.

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.

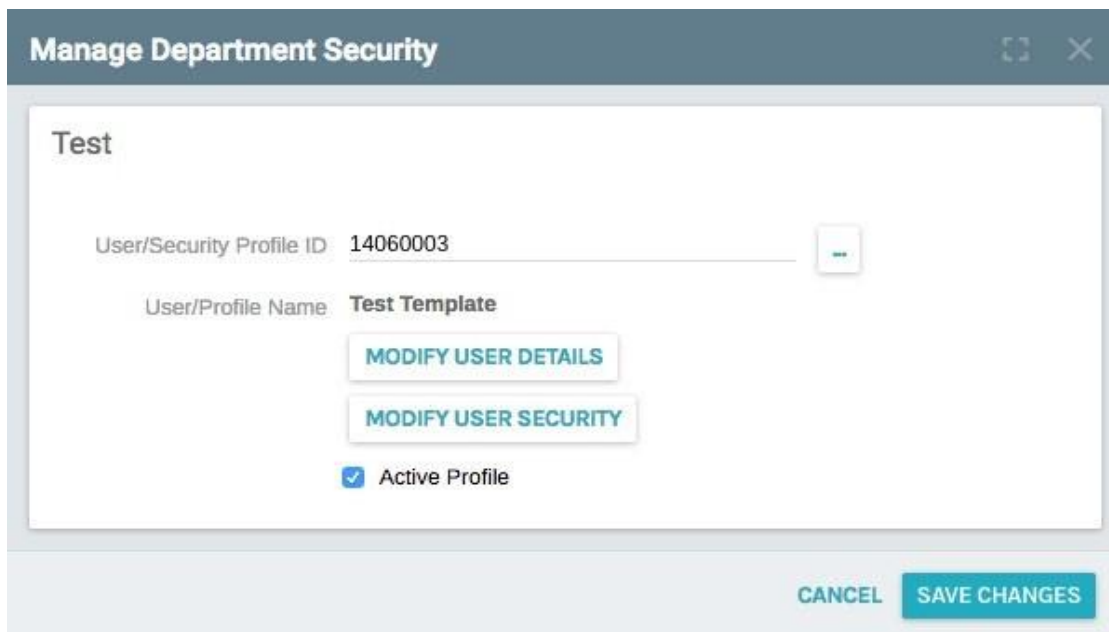
Security Templates will display all departments created previously.

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



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

Choose ‘Manage Department Security’ to tie a Template to a Department. Clicking on “Management Department Security” will display the following window:

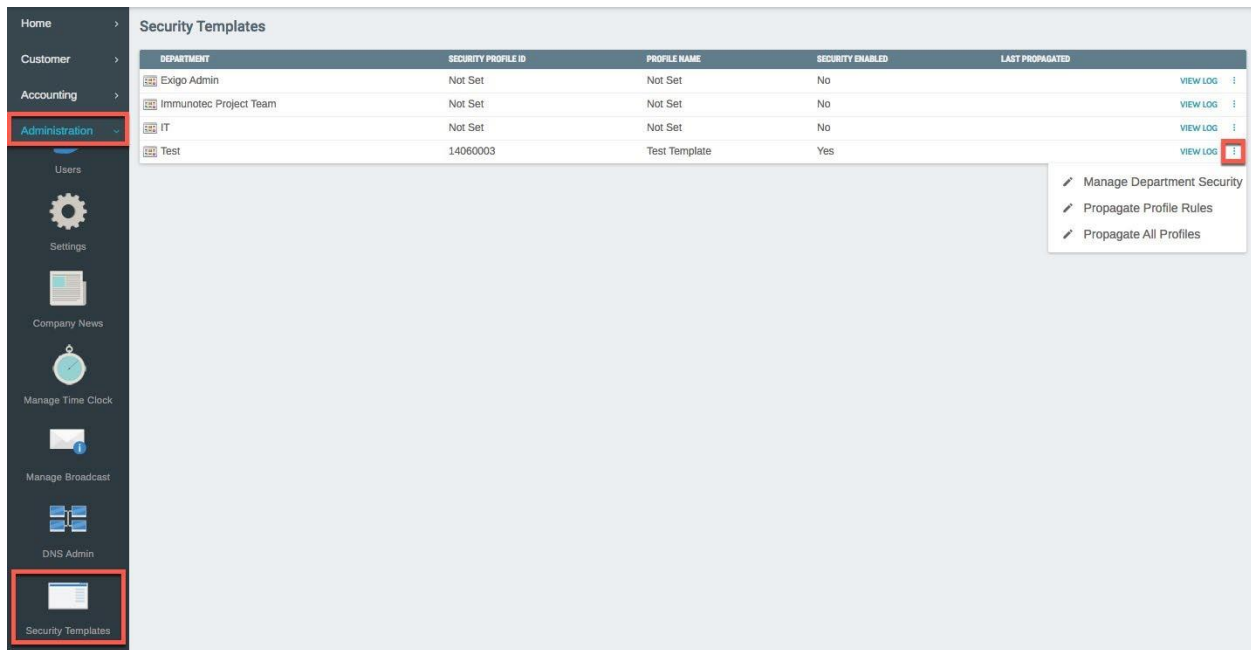


To choose the Template (user) that was set up in the previous section, click on the to the right of **User/Security Profile ID**.

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

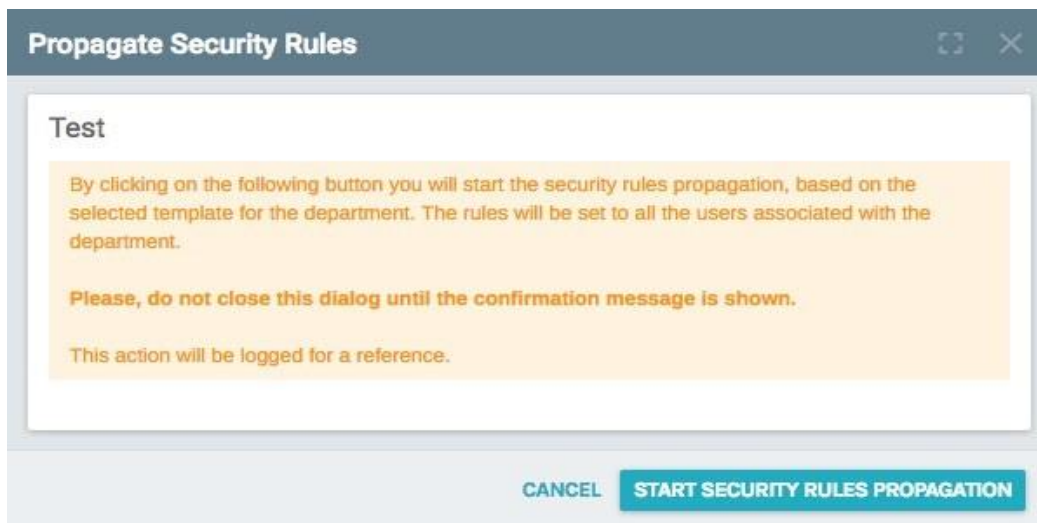
Click on “Save Changes”.

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

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



Propagate Security Rules

Test

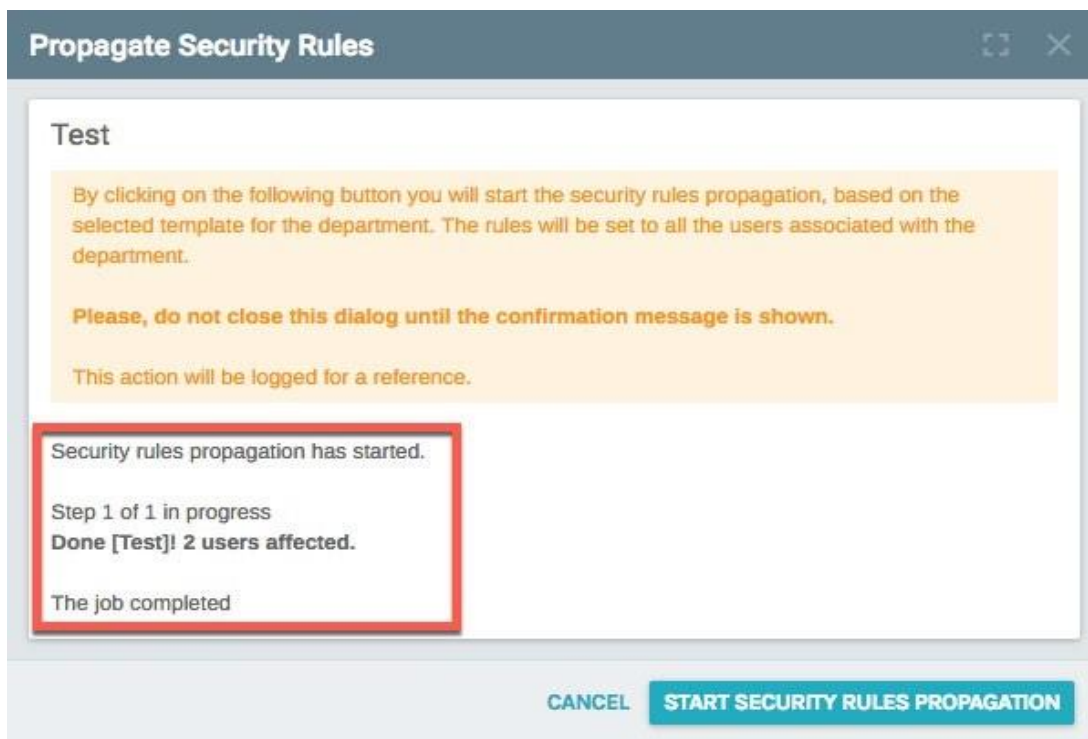
By clicking on the following button you will start the security rules propagation, based on the selected template for the department. The rules will be set to all the users associated with the department.

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”.

