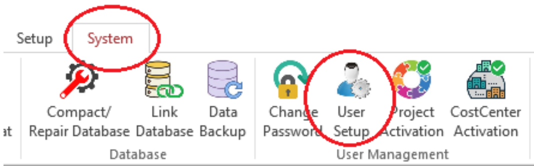
User

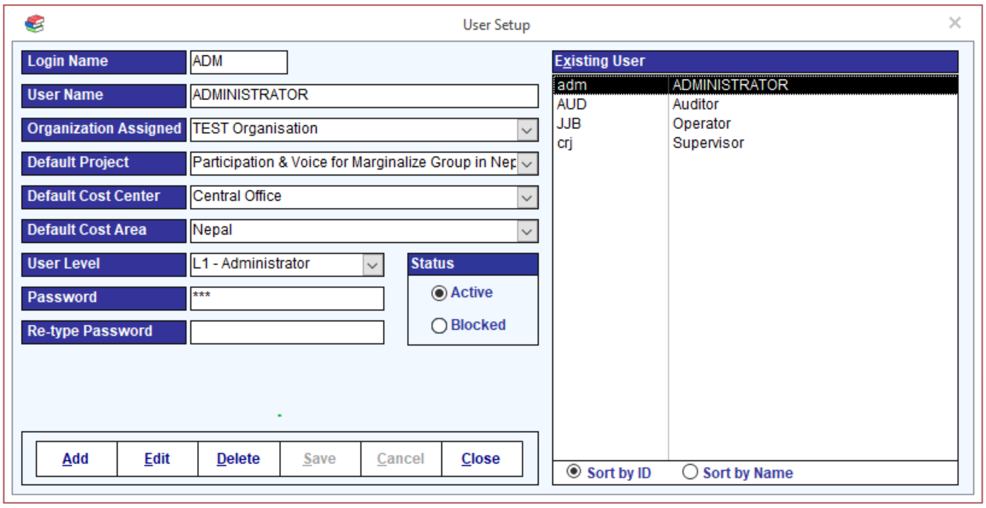
A user is a person who is authorized to access the system. You need to create account of each user in the system. In TrueBook, users are categorized into 5 Levels. Following are the rights of each user level.

- L4 - Viewer – can only view reports and data (for program manager & auditors)
- L3 - Entry – Viewer rights + data entry
- L2 - Supervisor – Entry rights + Budget entry, Exchange Rate entry, Sub-Ledger Add/Edit and voucher posting
- L1 - Administrator – Supervisor rights + master data setup/change
- L0 – Adm Master - All Administrator rights + **Voucher un-posting**

Process for Setup



- Go to *Setup* menu
- Click on *User Setup*
- *User Setup* dialog box will open.
  You will see already defined Users in *Existing User* List.



To Add

- Click *Add* button
- Type User Login Name in *Login Name*
- Type User Name in *User Name*
- Assign Organization for the User by selecting Organization in *Organization Assigned.*
- Set default setting for the user for Project, Cost Center and Cost Area for the User
- Define user level by select user type in *User Level*
- Type password in *Password* and re-type it in *Re-Type Password*. Both password should be same and password is case sensitive.
- Click *Save* Button, added Project will display in *Existing User* List.

  Note:

  1. *Status* – Only active user can login (access) in the system.
  2. Default Setting (Project, Cost Center and Cost Area) are for system auto select while entering transaction and generating reports. You can change it by editing user setting.
  3. *L0* user can only be created by Service provider only.

To Edit

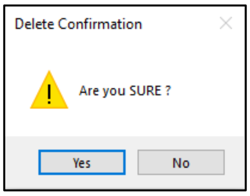
- Click (select) on the user from *Existing User* List of which you want to edit
- Selected record detail will be displayed and *Edit* button will be enabled.
- Click *Edit* Button
- Make necessary changes
- Click *Save* Button, changes will also reflect in *Existing User* List

  Note:

  1. *Login Name* cannot be changed
  2. *Blocked* user cannot login in the system.
  3. *L0* user information/options can be changed by the same user or service provider.

To Delete

- Click (select) on the user from *Existing User* List of which you want to delete
- Selected record detail will display
- Click *Delete* Button
- *Delete Confirmation* Message will pop-up or
  Security Alert will pop-up if user already add/edit/post transactions
- Click *Yes* Button to delete or *No* Button to Cancel



  Note:

  1. *L0* user can only delete by Service provider.