

Adding Users

Questions? From your BS&A program, go to **Help>Contact Customer Support** and select **Request Support Phone Call** or **Email Support**. Or, you may call us at (855) 272-7638 and ask for the appropriate support department. Questions for our I.T. department may be submitted by phone (same number), or by emailing tech@bsasoftware.com.

Users can be added directly into a BS&A .NET application, or you can import users from your Windows Active Directory. If multiple users will have identical custom rights, you can set up User Groups (page 3 of this document).

Instructions on this help doc are excerpted from the software manual, which contains more information. Your software manual is located in **Help>View Documentation>Manual**.

Add a User

1. Go to **Program Setup>Administration>Users**.

2. Click .

3. Enter the **User Name**.

4. (Optional) Enter the full **Name**, the user's **E-mail**, and any fields[‡] in the **Other Information** pane.

[‡]With the exception of Enterprise Administrator; please contact Tech Support for assistance.

5. Click **Change Password**.

6. Type the password (may be subject to some type of security; see Set Up Password Security, above) in **New Password** and **Confirm New Password**.

7. Click **Save Password**.

8. Click **Security Settings**[‡] and set security for the current user.

- o If *Custom Access*, go to each Category to receive its security options and check the appropriate boxes to the right.

- o [‡]Going into Security Settings is not necessary if...

 - ...the user is an Enterprise user...

 - ...and/or you will be setting up User Groups, where you can set rights for multiple users at once.

9. Click **Close** to return to the Users screen.

10. If applicable, click **Set Active [application name] Database**.

Import Users from Windows Active Directory

1. Go to **Program Setup>Administration>Users**.

2. Click  **>Import Users from Active Directory**.

3. Double-click a user name to move it from the *Active directory users* column to the *Users to create and add to database* column.

4. **Default Password** is not recommended for Active Directory users.

5. Click **Create New Users**, then **Ok**.

6. Locate one of the users you just imported.

7. (Optional) Enter or verify the user's **E-mail**, and fill out any fields[‡] in the **Other Information** pane.

[‡]With the exception of Enterprise Administrator; please contact Tech Support for assistance.

8. Click **Security Settings**[‡] and set security for the current user.

o If *Custom Access*, click each Category to receive its security options and check the appropriate boxes to the right.

o [‡]Going into Security Settings is not necessary if...


...the user is an Enterprise user...

...and/or you will be setting up User Groups, where you can set rights for multiple users at once.

9. Click **Close** to return to the Users screen.

10. If applicable, click **Set Active [application name] Database**.

Add a User Group

1. Go to **Program Setup>Administration**.
2. Add or import users but do not go into the Security Settings screen.
3. Click **Close** to exit the Users screen; you will be on the Administration tab of Program Setup.
4. Click **User Groups**.
5. Click  and enter the **Group Name**.
6. Enter the **Primary Contact** and his/her **E-mail**.
The Primary Contact is typically the one responsible for determining access rights.
7. Click **Security Settings**.
8. Set security for the current group.
 - o If *Custom Access*, go to each Category to receive its security options and check the appropriate boxes to the right.
9. Click **Close** to return to the Groups screen.
10. Double-click a user name to move it from the *Users not in group* column to the *Users in group* column.
11. If one or more of this user group should have elevated rights, return to the Users screen to set those rights.