Adding Users

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 2 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.

Option 1: Manually Add a User

1. Go to Program Setup>Administration>Users.
2. Click the green Add button and enter the User Name.
3. Optional. Enter the full Name, the user's Email, and any fields[1] in the Other Information pane.
4. If applicable, click Set Active [program] Database.
5. Once you have all of your users entered, you may (optionally) set passwords and set up either individual security or group security.

Option 2: Import Users From Active Directory

1. Go to Program Setup>Administration>Users.
2. Click the Tools button and select Import Users From Active Directory.
3. Optional. Set a Default Password.
4. Optional. Set a Username, Name, and/or Email filter to reduce the amount of names to select from.
5. Move the items from the left column to the right column.[2]
6. Click Create New Users, then click Ok.
7. Locate one of the users you just imported.
8. Optional. Enter or verify the user's Email and fill out any fields in the Other Information pane.
9. If applicable, click Set Active [program] Database.
10. Once you have all of your users entered, you may (optionally) set passwords and set up either individual security or group security.

---

[1]With the exception of Enterprise Administrator. Please contact I.T. Support for assistance.

[2]Use the standard Shift+click or Ctrl+click method to select multiple items, then use the arrow button to move them over.

1. Go to Program Setup>Administration.

2. Add or import users, but DO NOT go into the Security Settings screen. Instead, click Close to exit the Users screen. You will be on the Administration tab of Program Setup.

3. Click User Groups.

4. Click the green Add button and enter the Group Name.

5. Enter the Primary Contact and his/her E-mail.

   The Primary Contact is typically the one responsible for determining access rights.

6. Click Security Settings.

7. Set security for the current group.

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

8. Click Close to return to the Groups screen.

9. Move the appropriate users from the left column to the right column.

10. If one or more of this user group should have elevated rights, return to the Users screen to set those rights.