User Access Overview

There is a separate User guide to explain the process of how to set up new users, new roles and assigning a role to a user called 'Managing User Access'

There are two types of users within Indicater, a Head Office user and an Outlet User. The Head Office user manages the system and the required elements of Indicater, to enable the Outlet users to use the system for their required tasks. Permissions are used to enable the users to have access, to only what they need to have. Roles can be created with selected permissions and assigned to multiple users. The user can have a role assigned and the permissions can be overridden by taking away or adding further permissions for that user.

A head office user will need a Head office role and an Outlet Role Assigned.

When a user is created, an email address is needed and used for the login, this email address needs to be unique within Indicater, so cannot be used more than once.

There are default roles for a Head Office user and an Outlet User, so when a user is created a default role is automatically assigned. If bespoke roles are created, it's any easy task just to switch from the default role to the bespoke role to assign the correct permissions for each user.

Head Office User

There is a further option only available for a Head Office user. Where there are multiple companies a Head office User can be given access to the different companies, this needs to be set up by Indicater. Please provide Indicater with any users that this will be required for.
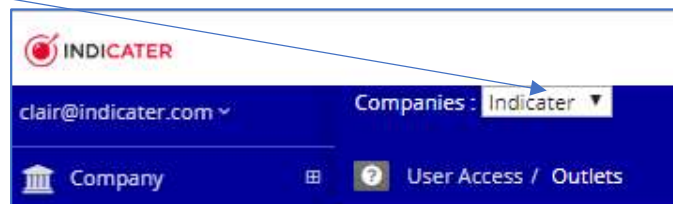
Requisition Levels

If requisitions levels set and user needs to be set up as an approver the requisition level needs to be selected within the users record.
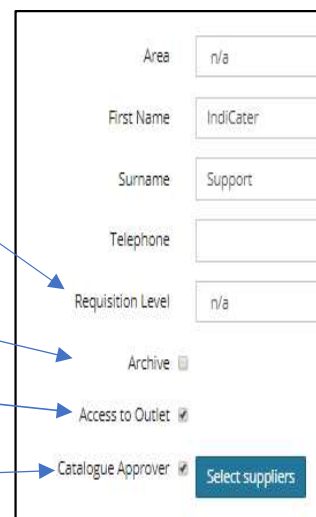
Archive

Select to Archive a user

Access to Outlets

If a head office user needs access to outlets this option will need to be selected in the users record

Catalogue Approval

If a head office user needs to approve catalogues, this option will need to be selected within the users record, there is also the option to select which catalogues a user can approve by supplier.

Outlet User

If an outlet user needs access to multiple outlets, this can be set up per user, selecting Multioutlet in User Access>Outlets>Multioutlet and selecting the outlets needed. The user role assigned to the user will show permissions for all of the outlets. The outlet user will always have a default outlet which is selected when creating the outlet user. When the user logins in to the outlet, this can then be changed by selecting an alternative outlet in the toggle.

Mangement of users

Changing email address or password

If a user email address or password needs to be changed this can be done, by entering the users record, selecting the button to update email address or password and select save. The user can also select forgotten password on the login page and follow the instructions, to change their password.

Changing User from Outlet User to Head office user

If a user needs to be changed from an outlet user to a Head office user, the Outlet users email address needs amending, and then archived. This is so the email address recreated as a Head office user is still unique within Indicater.

Email allerts for users

There are a number of alerts that can be emailed to a user. These are selected by ticking the required alert within the users record There is a separate document, with explanation of each alert – Called 'Email alerts' Please refer to this for an explanation of the alerts.

User Roles

There are many different permissions for Head Office Roles and Outlet Roles. Please refer to the documents 'Permissions for Head Office' and 'Permissions for Outlet' with explanations of each permissions and suggested set of permissions for certain job roles.