

25.15. Managing users

About users and groups

User permissions are per-store, so a user can have different permissions when logged into different stores.

If you have many users that need to have the same permissions (because they carry out the same role, for example), you can create a group and assign the users to the group. Once a group is set up and permissions for the group assigned, any users that are assigned to the group will inherit the group's permissions, rather than having to set permissions for each user individually. When you change a group's permissions, you change the permissions for all users who belong to that group.

If you want to change a user's permissions and find out that all their permissions are greyed out and uneditable then it means they are a member of a group. To edit their permissions separately from the group, they must first be removed from the group:



- Edit the user, change the **Is a member of** drop down list to None, click **OK** (see below for details).
- Open the user again and their permissions will be editable.

Refer to [Using groups](#) below for more details. If the user is to remain part of the group then you must change the group's permissions (see [Editing a group](#) below) but beware, this will change the permissions for all users who belong to the group, not just the user you're interested in.

If you want to disable a user, perhaps because the staff member has left the organisation, then they must be made 'inactive':

- Edit the user, uncheck the **Active** checkbox, click **OK**.



If the **Active** checkbox is greyed out, it is because they are a member of a group. You will need to first remove them from the group before you can make them 'inactive':

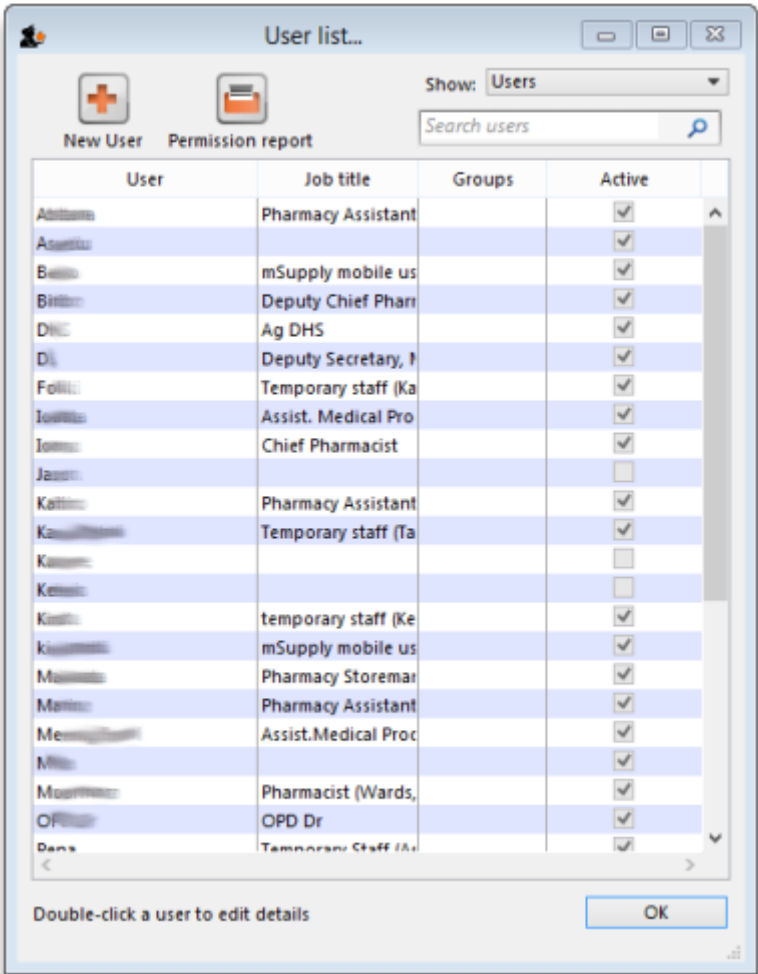
- Edit the user, change the **Is a member of** to None
- Edit the user, uncheck the **Active** checkbox, click **OK**.

Of course, if the whole group of users needs to be made inactive then you can just uncheck the **Active** checkbox for the group.

Adding and editing users and groups

mSupply has a comprehensive system of controlling user access, allowing you to manage in fine detail what each user can do and see in the system. You can manage users individually, in groups or a mixture of both - whichever is most suitable for your situation.

User access is managed by choosing **File > Edit users** from the menus, or by choosing **Admin > Edit users** in the Navigator. When clicking on this option you are presented with a list of current users:



The list shows you the following information:

- **User** The user's name.
- **Job title** The user's job title, as entered on the details tab of the user's details form.
- **Group** The group the user belongs to. Will be blank if the user does not belong to a group.
- **Active** Checked if the user is allowed to login to the system.

To view groups rather than users, choose **Groups** from the **Show** Drop-down list at the top-right of the window. The list changes slightly to look like this:



Now the list shows you slightly different information:

- **Group** The name of the group
- **Active** Checked if the group is active. If the group is active then all users in the group are allowed to login to the system. If the group is inactive (checkbox unchecked), all users in the group are inactive and are not allowed to login to the system.

To get a list of all current user permissions, click the **Permission Report** button. An Excel spreadsheet will be generated (see

sample

); it will have one worksheet for each store showing all the users and groups and what permissions they have in that store.

Double-click a user (or group) to edit their details or delete them. Click the **New User** button to add a new user (or the **New group** button to add a new group). Doing either will open the user details window (described below - for a new user or group all the tabs are empty, for an existing user or group the tabs are filled with their current settings)

User details window

Edit user...

User:

General | Permissions | Permissions (2) | Permissions (3) | Login rights | Details

Is a member of:

Password:

Confirm Password:

Active: ☒

Can be responsible officer: ☐

User Initials:

Language:

LDAP

Login using LDAP: ☐

LDAP login string:

Windows Username:

License category:

User belongs to State/Region:

User can:

- ☒ Login as Desktop user
- ☐ Use the Dashboard
- ☐ Receive email notifications
- ☐ Use web authorisation system

Signature

Add Remove

Tags

Delete Cancel **OK**

This window has several tabs, all described below.

General tab

Is a member of

Used to select the user group the user belongs to (see below). When the window loads, it displays the group the user currently belongs to. It will show “None” if they are not a member of any group.

Password

This text box will always appear empty when the window is loaded. It must be set for a new user. It can be used here to change the password of an existing user.

Confirm password

If something is entered in the *Password* textbox, then the same text must be entered in this textbox. This step makes sure you set the password to what you think you're setting it to!

Active

If this checkbox is checked, then that user has permission to use the system, and their name will appear in the login window. If this checkbox is unchecked the user will not be allowed to login to the system and their name will not appear in the login window.

Can be responsible officer

If this checkbox is checked, the name of that user will appear for selection in the [Responsible Officer](#) selector on the [Transport Details tab](#) of a [Customer invoice](#).

User initials

User initials should be entered in this field.

Language

Allows you to select which language the user wants to use in mSupply. As of August 2020, supported languages are:

- English
- French
- Lao
- Spanish
- Khmer
- Portuguese (partially complete)

LDAP section

This section can be used to check a user's login credentials against an LDAP (Lightweight Directory Access Protocol) server. If you are going to use LDAP you must fill in the server details in the [General Preferences, LDAP tab](#) first.

- **Login using LDAP:** Check this if you want this user's login details to be checked against your LDAP server. Means that you can have some users logging in normally and some being checked against your LDAP server. Helpful if there's a delay in users being given LDAP credentials for any reason.
- **LDAP login string:** Enter any string which has to be used with the LDAP login. Will be provided by the LDAP administrator if required.

Windows username

The username the user logs into window systems with. Used to provide single-sign-on capability when the user is logging in remotely to an mSupply client running on a Windows server.

License category

Used to select which user license category the user belongs to. This will contain a list of all user categories currently set up in the datafile. See [License management](#) for details.

User belongs to State/Region

Used to select the [name category 1](#) that the user belongs to. Only used in some customised versions of mSupply.

Signature

Use to add or remove an image of a user's scanned signature for displaying on invoices for example

Tags

Use to apply 'tags' to a user. These tags can then be used to control access to various features for users according to the tag.

User Can:

Used to give the following controls to users:

- Login as Desktop user
- Use the Dashboard - this is necessary if you want the user to be able to see dashboards
- Receive email notifications - this is necessary to enable reports to be emailed on a schedule to a user or group of users. Multiple reports for a User will appear on different tabs of an excel workbook. This needs to be configured by Sustainable Solutions, so get in touch if you're interested and we'll set this up for you.
- Use system - if checked the user can login to the remote authorisation web app as an authoriser. See the [26.15. Remote authorisation](#) page for details.



When a user is added to a group, the *User can* settings are set to those of the group i.e. they are inherited from the group. However, the *User can* section is still editable for an individual user - the settings are not controlled by the group after the user has been added to it.

Permissions tabs

These are where you can set access to the many features and functions on a store-by-store basis for each user or group. There are three Permissions tabs and each are shown in the screenshots below:

Edit user

User: Store:

General **Permissions** Permissions (2) Permissions (3) Notifications Login rights Details Dashboard

Ordering <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View purchase orders <input checked="" type="checkbox"/> Delete purchase orders <input checked="" type="checkbox"/> Edit purchase orders <input checked="" type="checkbox"/> Edit purchase order pricing <input checked="" type="checkbox"/> Manage tenders <input checked="" type="checkbox"/> Finalise purchase orders <input checked="" type="checkbox"/> Authorise purchase orders 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create purchase orders <input checked="" type="checkbox"/> Confirm purchase orders <input checked="" type="checkbox"/> Create & edit backorders <input checked="" type="checkbox"/> Create new quotes <input checked="" type="checkbox"/> Edit & delete quotes <input checked="" type="checkbox"/> Duplicate purchase orders <input checked="" type="checkbox"/> Print purchase orders 	Admin <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Add / edit users <input checked="" type="checkbox"/> Access server administration <input type="checkbox"/> Edit authorisers <input type="checkbox"/> Clone database <input type="checkbox"/> Edit periods and period schedules <input type="checkbox"/> Add/edit sync sites <input type="checkbox"/> Edit insurance providers
Items <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create new items <input checked="" type="checkbox"/> View items <input checked="" type="checkbox"/> Edit items <input checked="" type="checkbox"/> Delete items <input checked="" type="checkbox"/> Duplicate items <input checked="" type="checkbox"/> Create repacks or split stock <input checked="" type="checkbox"/> Edit repacks <input checked="" type="checkbox"/> View pricing information for items <input checked="" type="checkbox"/> Edit item units list <input checked="" type="checkbox"/> Merge two items... <input checked="" type="checkbox"/> Add / edit departments <input checked="" type="checkbox"/> Add / edit master list <input checked="" type="checkbox"/> Consolidate stock <input checked="" type="checkbox"/> View stock <input checked="" type="checkbox"/> Edit stock 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> View inventory adjustments <input checked="" type="checkbox"/> Enter inventory adjustments <input checked="" type="checkbox"/> Edit inventory adjustments <input checked="" type="checkbox"/> View cost prices of stock <input checked="" type="checkbox"/> Edit item names, codes and units <input checked="" type="checkbox"/> View DDD information for items <input checked="" type="checkbox"/> Manage item access <input checked="" type="checkbox"/> Manage locations <input checked="" type="checkbox"/> Make item inactive <input checked="" type="checkbox"/> Edit item default price <input checked="" type="checkbox"/> Modify sell and cost prices of existing stock <input checked="" type="checkbox"/> Create and edit custom stock field value lists <input checked="" type="checkbox"/> Modify donor on stock and transaction lines <input checked="" type="checkbox"/> Manage drug interaction groups 	Goods receiving <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View goods received <input checked="" type="checkbox"/> Add/edit goods received <input checked="" type="checkbox"/> Authorise goods received <input checked="" type="checkbox"/> Finalise goods received <input type="checkbox"/> Disallow adding an unordered item to a Goods Received note
Supplier invoices with issued stock <ul style="list-style-type: none"> <input type="checkbox"/> Update pack size, cost and sell price 	Tenders... <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create & edit tenders 	Special <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Add / edit currencies <input checked="" type="checkbox"/> Add / edit reminders <input checked="" type="checkbox"/> View and print labels <input checked="" type="checkbox"/> Add / edit misc labels <input checked="" type="checkbox"/> Add / edit abbreviations <input checked="" type="checkbox"/> Add / edit warnings <input checked="" type="checkbox"/> Add / edit prescribers <input checked="" type="checkbox"/> Add / edit transaction categories <input checked="" type="checkbox"/> Add / edit contacts <input checked="" type="checkbox"/> Merge prescribers <input type="checkbox"/> Add and edit options <input type="checkbox"/> Add / edit vaccinators

Edit user

User: Store:

General **Permissions** Permissions (2) Permissions (3) Notifications Login rights Details Dashboard

Names <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create customer, supplier & manufacturer names <input checked="" type="checkbox"/> View customer, supplier & manufacturer names <input checked="" type="checkbox"/> Edit customer, supplier & manufacturer names <input checked="" type="checkbox"/> Delete names <input checked="" type="checkbox"/> Edit name codes <input checked="" type="checkbox"/> Edit name charge code <input checked="" type="checkbox"/> Merge names <input checked="" type="checkbox"/> Edit name categories <input checked="" type="checkbox"/> Create & edit patient events <input checked="" type="checkbox"/> Add patients <input checked="" type="checkbox"/> Edit patient details <input type="checkbox"/> Add and edit insurance policies <input checked="" type="checkbox"/> Add / edit name groups <input checked="" type="checkbox"/> Update master code 	Invoices <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create customer invoices <input checked="" type="checkbox"/> View customer invoices <input checked="" type="checkbox"/> Edit customer invoices <input checked="" type="checkbox"/> Create supplier invoices <input checked="" type="checkbox"/> View supplier invoices <input checked="" type="checkbox"/> Edit supplier invoices <input checked="" type="checkbox"/> Edit comments on finalised invoices <input checked="" type="checkbox"/> Import supplier invoices <input checked="" type="checkbox"/> Duplicate supplier & customer invoices <input checked="" type="checkbox"/> Finalise multiple invoices <input checked="" type="checkbox"/> Finalise customer invoices <input checked="" type="checkbox"/> Finalise supplier invoices <input checked="" type="checkbox"/> Finalise repacks <input checked="" type="checkbox"/> Finalise inventory adjustments <input checked="" type="checkbox"/> Cancel finalised invoices <input checked="" type="checkbox"/> Change transportation dates on finalised invoice <input checked="" type="checkbox"/> Edit user fields on finalised invoices <input checked="" type="checkbox"/> Customer stock takes: show internal analysis columns by default <input checked="" type="checkbox"/> Change invoice category on finalised invoice <input type="checkbox"/> Return stock from customer invoices <input type="checkbox"/> Return stock from supplier invoices <input checked="" type="checkbox"/> Create supplier credits <input type="checkbox"/> Overwrite total amount in prescriptions 	Invoices <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Authorise customer invoices <input checked="" type="checkbox"/> Authorise supplier invoices <input type="checkbox"/> Create cash transactions <input type="checkbox"/> Pack boxes
Web interface <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Edit web passwords <input checked="" type="checkbox"/> Edit and create web messages 		Builds and bill of materials <ul style="list-style-type: none"> <input checked="" type="checkbox"/> View cost prices on builds <input checked="" type="checkbox"/> Finalise builds <input checked="" type="checkbox"/> View bill of materials <input checked="" type="checkbox"/> Edit bill of materials <input checked="" type="checkbox"/> Build items <input checked="" type="checkbox"/> Edit build items
Reports <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Manage reports <input checked="" type="checkbox"/> Revert reports to original <input checked="" type="checkbox"/> View reports 		Cash transactions <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Make cash payments <input checked="" type="checkbox"/> Receive cash <input checked="" type="checkbox"/> Edit payment note field
		Transfers <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Transfer goods between stores <input checked="" type="checkbox"/> Finalise stock transfers
		Printing <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Print duplicate packing slips <input checked="" type="checkbox"/> Print duplicate customer invoices

Edit user

User: Store:

General | Permissions | Permissions (2) | **Permissions (3)** | Notifications | Login rights | Details | Dashboard

Document management

Tenders

- ☒ Upload tender document
- ☒ Download tender document
- ☒ Delete tender document

Quotes

- ☒ Upload quote document
- ☒ Download quote document
- ☒ Delete quote document
- ☒ Modify quotes entered by the supplier (via the website)

Items Lines (Batches of Stock)

- ☒ Upload batch document
- ☒ Download batch document
- ☒ Delete batch document

Stocktakes

- ☒ Create stocktake
- ☒ Delete stocktake
- ☒ Add stocktake lines
- ☒ View stocktake lines
- ☒ Edit stocktake lines
- ☒ Delete stocktake lines
- ☒ Edit stocktake dates

Virtual Stores

- ☒ Create new stores
- ☒ Edit store details
- ☒ Edit visibility in stores
- ☒ Edit store credentials

Reminders

- ☒ Edit and delete reminders assigned to me

Admin

- ☒ Send email
- ☒ Purge old records
- ☒ View log
- ☒ Set start of year stock
- ☒ View/edit preferences
- ☒ Export & import
- ☒ Backup data file

Vaccines

- ☒ View temperature breach configuration
- ☒ View and edit vaccine vial monitor status
- ☒ View sensor details
- ☒ Edit sensor location

Replenishments

- ☒ Can be a worker
- ☒ Can authorise replenishments
- ☒ Can finalise replenishments

Customer budgets

- ☒ Add/import customer budgets
- ☒ Edit/delete customer budgets

Registration

- ☒ Add/edit registrations
- ☒ Change registration status

Requisitions

- ☒ View requisitions
- ☒ Create and edit requisitions
- ☒ Administer finalised report type requisitions
- ☒ Create customer invoices from requisitions

Supplier Hub

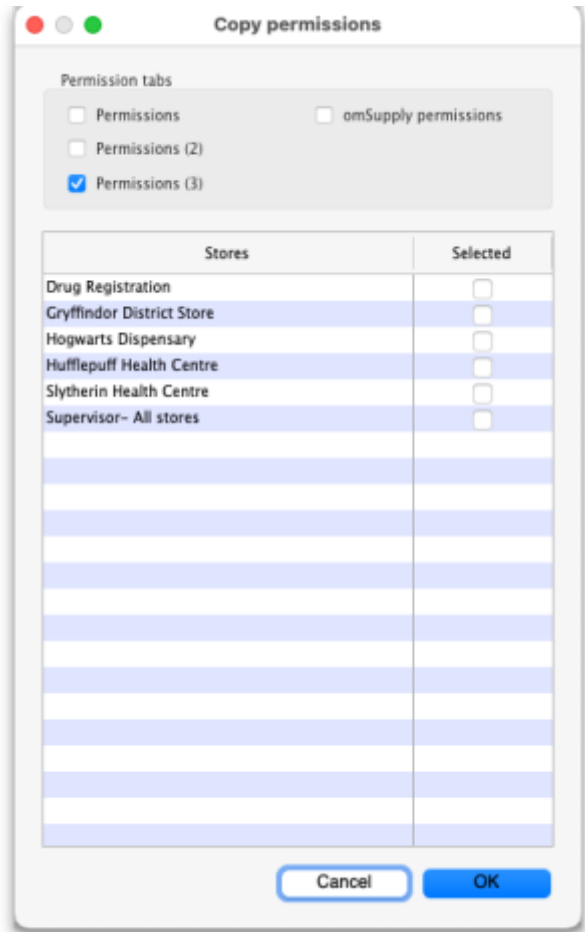
- ☒ View and edit supplier hub details

Assets

- ☒ View assets
- ☒ Add/edit assets
- ☒ Setup assets
- ☒ Change asset status

Buttons on the Permissions tabs

- The **Store** drop down list: Selects the store for which permissions are being displayed and set on the current tab. Select the store you want to see or set permissions for in this drop down list.
- The **All on** button: Checks all the permissions on the current tab i.e. turns them all on. There are exceptions to this for safety reasons; the *Update pack size, cost and sell price*, *Add/edit users* and *Access server administration* permissions on the **Permissions** tab are not turned on with the **All on** button.
- The **Copy** button: Copies the state of all the checkboxes on the tab for this store to an internal clipboard for that tab. From version 5.03 onwards, the button opens this window:



- In the *Permission tabs* section, select which tabs you want to copy the permissions from by checking their checkboxes.
- In the table, select the stores you want to copy the permissions of the current store to by checking them in the *Selected* column.
- Click the **OK** button to copy the selected permissions tabs of the current store to the selected stores. Click the **Cancel** button to close the window without doing anything.
- The **Paste** button: Only exists for versions before 5.03. Pastes the checkbox settings saved to the clipboard for the current tab to the same tab for another store. In this way, the Copy and Paste buttons are a great way of copying permission settings for tabs between stores - really handy when users have similar permissions in different stores.

Most of the permissions are self explanatory. Those that need more explanation are given below:

Permission	Details
Permissions Tab	
View stock	If not checked the user is not able to view the current stock list (see the 4.15. Show items with stock page), view the Stock tab of an item's details window (see the 4.01.05. Items - Stock tab page), not able to view stocktakes (see the 4.17. Stocktakes page) or view any reports in the <i>Stock and items</i> section on the <i>Reports</i> tab of the Navigator (see the 13.02. Stock and items reports page). If this permission is checked then they can do all these things unless they are prevented by not having other permissions e.g. if a user has this permission but they do not have the <i>View stocktakes</i> permission then they will still not be able to access Stocktakes.

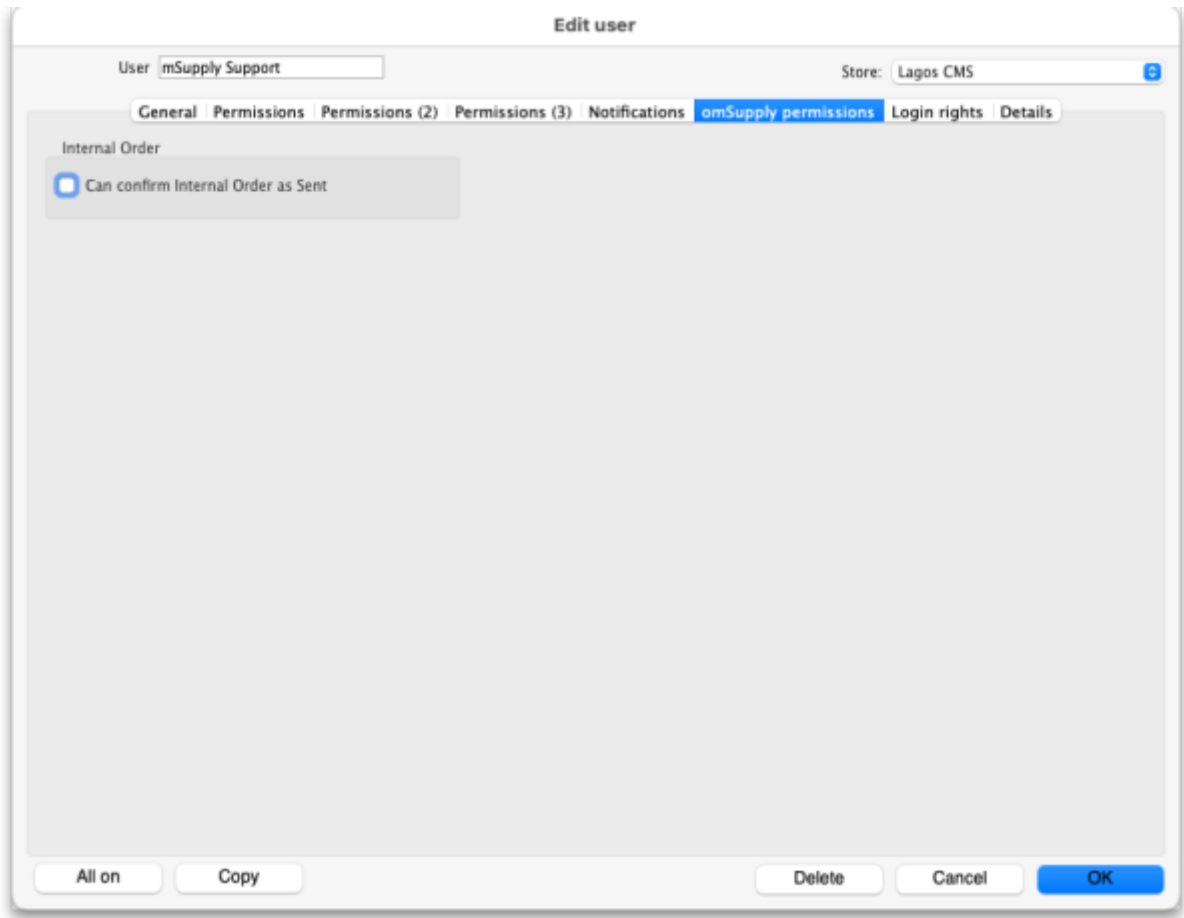
Permission	Details
Update pack size, cost and sell price	If checked the user is able to edit the pack size, cost and sell price of supplier invoice lines that have already had stock issued from them, <i>provided that the SI has not been finalised</i> . See the 7.01. Supplier invoices page for details.
Add/edit users	To prevent you being locked out of your datafile permanently, mSupply will not allow you to turn off this preference for the first 2 users which already exist when you open mSupply for the first time. You should always treat these users as admin users.
Access server administration	If this is checked the user will be able to access the server administration windows, as described on the 25.13. mSupply server administration page. Only assign this permission to users who really know what they are doing!
Add/edit sync sites	If checked the user is able to edit site settings in a synchronisation system (see the 29.02. Synchronisation Sites page for details). This includes being able to use the sync site wizard (29.03. Sync Site Wizard (Superseded)).
Disallow adding an unordered item to a Goods Received note	If checked the user is not able to add items to a goods received note that are not included on a purchase order (see the 7.02. Goods receipts page for details).
Permissions (2) Tab	
Change transportation dates on finalised invoice	If checked, the user can edit the Order written date, Order received date, Expected arrival date, Actual arrival date and Ship date fields on the <i>Transport details</i> tab of finalised customer invoices
Edit user fields on finalised invoices	The user fields are the 4 custom transaction fields that can be enabled in the preferences - see Invoices Preferences for details. If this is enabled the user can edit the contents of these fields on transactions that have already been finalised
Change invoice category on finalised invoice	If checked the user can edit the transaction category of invoices (customer, supplier and inventory adjustments)
Transfer goods between stores	If checked the user can create a customer invoice with a store as the customer (i.e create a stock transfer)
Finalise stock transfers	If checked the user can finalise a customer invoice where the customer is another store (i.e. a stock transfer)
Return stock from supplier invoices	If checked a <i>Return selected lines</i> button will appear for the user on finalised supplier invoices, allowing them to return the goods on the invoice. See the 9.01. Returning goods section for details
Return stock from customer invoices	If checked a <i>Return selected lines</i> button will appear for the user on finalised customer invoices, allowing them to return the goods on the invoice. See the 9.02. Receiving goods back from a customer section for details
Pack boxes	If checked the user is allowed to manage boxes and assign stock to boxes on a customer invoice, even if the user does not have the <i>Edit customer invoices</i> permission. See the 8.06. Box management page for details
Permissions (3) Tab	
Edit stocktake dates	If checked the user can edit the <i>Stock take date</i> field at the top of a stocktake and the confirmed date of inventory adjustments created from the stocktake (see Creating a new stocktake) for details
Edit store details	If checked the user can edit the store details and preferences , including using the bulk store preferences editor .
Edit visibility in stores	If checked the user can edit the visibility of names and items in different stores. If it is unchecked they can't - either in the <i>Store</i> tab of a name or item's details window or the <i>Visibility</i> tab of a store's details window (in fact, the Visibility tab won't even be visible for them)

Permission	Details
Add/import customer budgets	If this is checked the user can import or add budgets for a customer, if unchecked they cannot
View temperature breach configurations	If checked, the user can view temperature breach configurations in the vaccine/cold chain module. See the 20.01. Vaccine Vial Monitoring (VVM) page for details. Temperature breach configurations can only be edited in the Cold chain app or in mSupply mobile .
View and edit vaccine vial monitor status	If checked, the user can view and edit the statuses that vaccine vial monitors have. See the 20.01. Vaccine Vial Monitoring (VVM) page for details.
View sensor details	If checked the user can view temperature sensor details. See the 20.03. Cold Chain App Notifications page for details.
Edit sensor location	If checked the user can edit the warehouse location attached to a sensor. See the 20.03. Cold Chain App Notifications page for details.
Edit/delete customer budgets	If this is checked the user can edit or delete budgets for a customer, if unchecked they cannot
Create customer invoices from requisitions	If this is checked the user can create customer invoice from the <i>Create customer invoice</i> button on requisitions. You can use this in conjunction with the <i>Create customer invoices</i> permission on the Permissions (2) tab to force all distribution to be carried out from requisitions.
View assets	If this is checked, the user is allowed to search the assets in the system and see their details
Add/edit assets	If this is checked, the user can also change the details of assets
Setup assets	If this is checked a user can manage the setup of assets e.g. add or edit asset statuses, conditions, properties etc. (see the assets setup page for details of the various setup options)
Change asset status	If checked, the user can make an asset's proposed status its current status.

Notifications tab

On this tab, you determine what notifications (alerts) a user will see, and when they will see them:

omSupply permissions tab



This tab contains permissions that only affect Open mSupply users. Currently Open mSupply must connect to an existing mSupply server, which takes care of the authentication and synchronisation. Soon, when we've re-written the central synchronisation server in Open mSupply, there will be no need for this tab. Until then, permissions that only apply to users of Open mSupply will appear on this tab.

This tab is included in the permissions copying functionality of the **Copy** button at the bottom of the window (see the [Buttons on the permissions tabs](#) section for details).

Permission	Details
Can confirm internal order as sent	If checked then the user can <i>Finalise</i> an internal order in mSupply terms or <i>Send</i> it in Open mSupply terminology.

Login rights tab

On this tab you set which stores the user can login to:

[illegible]

If there are too many stores in the list, you can restrict the display by typing in the *Search stores* text box: only stores with names starting with what you type will be displayed.

If you need a more complex type of search then click on the **Complex search** button and this filter window will open (you will recognise it as very similar to the customer or supplier search window):

Show stores...

Normal ☐ Fuzzy ☐

Name filter

Name

and is

and

Search...

☒ All names ☐ Manufacturers

☐ Selection ☐ Donors

☐ Customers ☒ Exclude patients

☐ Suppliers ☒ Only stores

☒ Exclude hidden names

Complex Find Cancel Find

Make your filter selections as required, click on the **Find** button and only the stores which match the filters you have set will be displayed in the table.

The **Toggle all in selection** button turns on (checks) all the *Can login* checkboxes for all the stores

shown in the list. Clicking it again will turn them off.

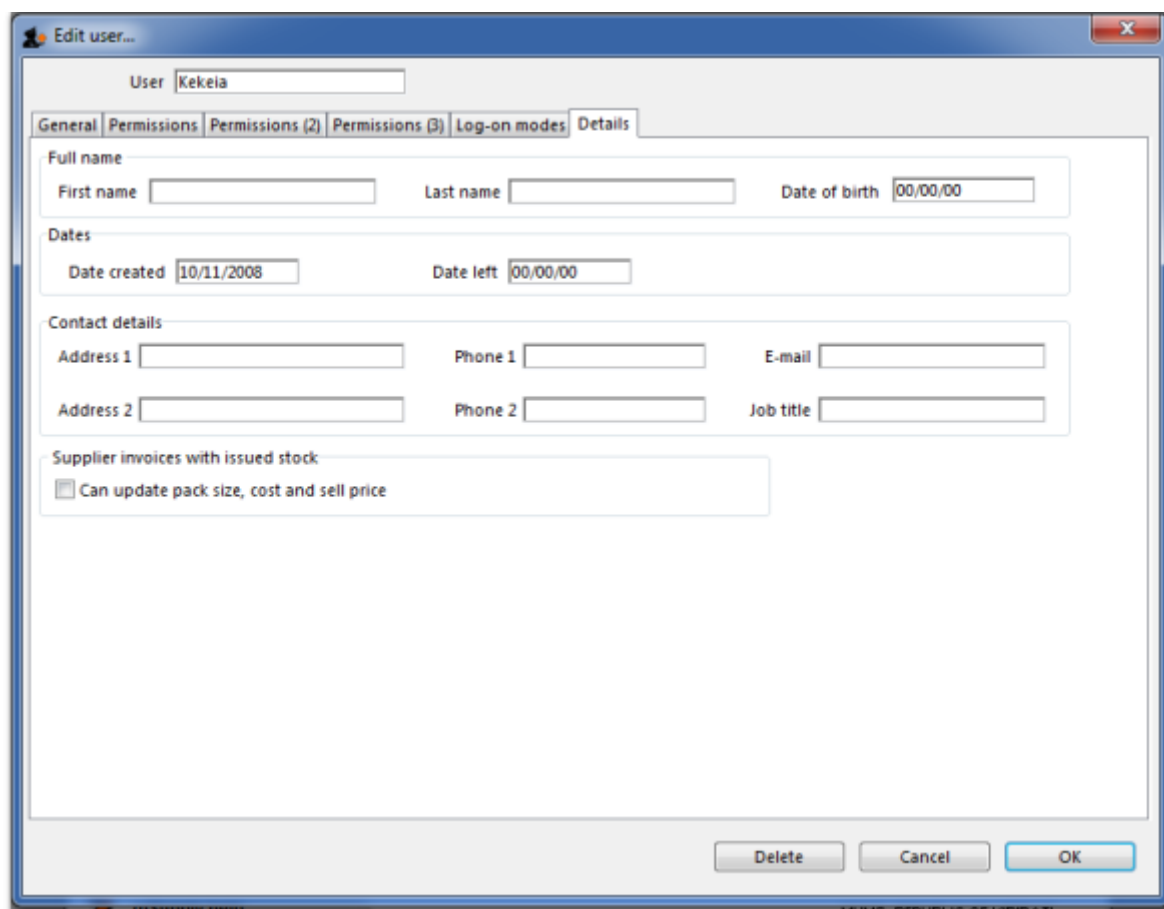
The *Is disabled* column indicates whether a store is disabled or not and can't be edited.

You can check one box in the *Default store* column - this will be the store the user is offered by default every time they login or switch stores.

In the *Can login* column you can check the box for each store the user is allowed to login to. All the stores in your mSupply datafile are displayed here in alphabetical order. Please note:

- The “Drug Registration” store is a special store used for the mSupply medicine registration functionality. See [Registration](#) for more details. Checking this box will allow the user to login to the Registration module.
- The “Hospital Info System” is another special store used for mSupply's built-in Hospital Information system. See [here](#) for more details. Checking this box will allow the user to login to the HIS module.
- “Supervisor - All stores” stores is a special mode to allow users to view information in and run reports over multiple stores. See [here](#) for more information.

Details tab



The screenshot shows the 'Edit user' dialog box with the 'Details' tab selected. The user name 'Kekela' is entered in the 'User' field. The 'Details' tab contains the following sections:

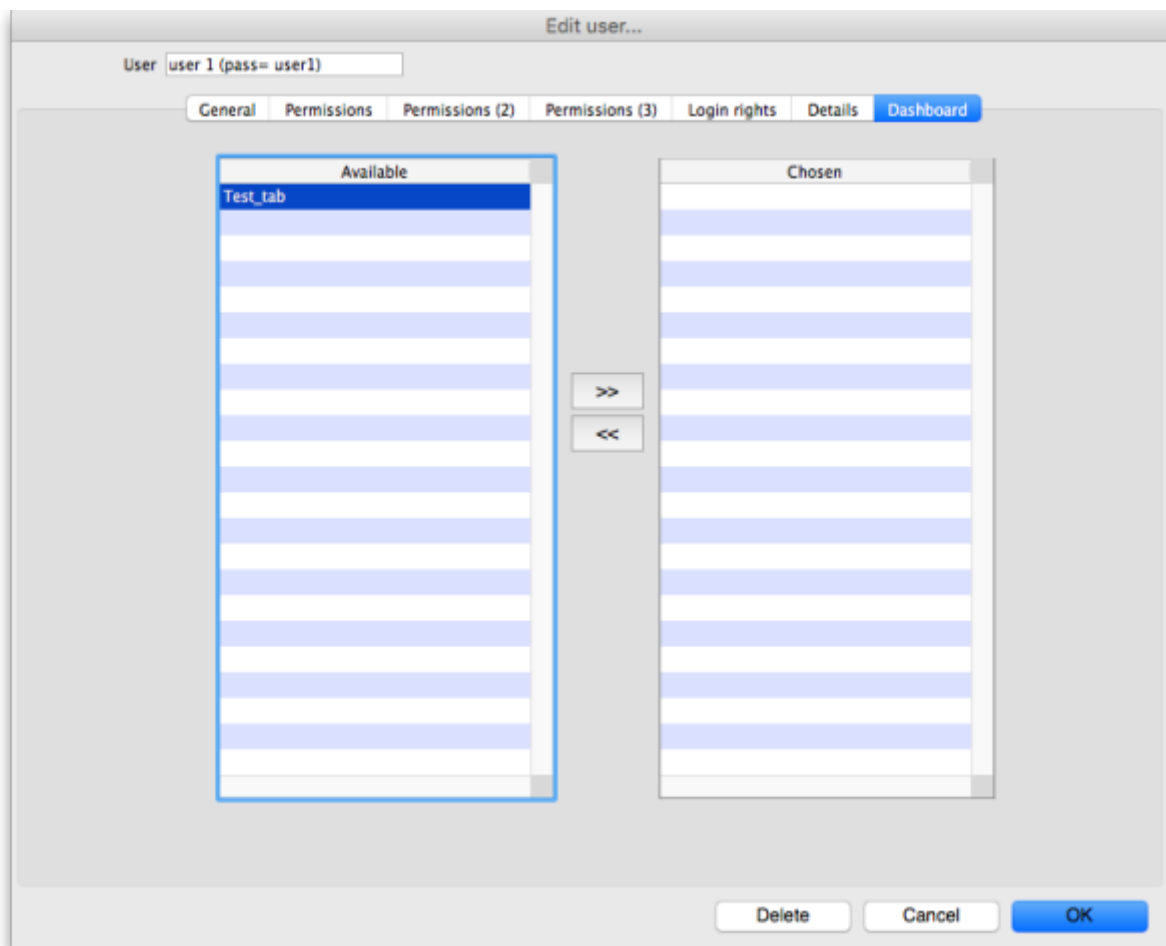
- Full name:** Fields for 'First name', 'Last name', and 'Date of birth' (00/00/00).
- Dates:** Fields for 'Date created' (10/11/2008) and 'Date left' (00/00/00).
- Contact details:** Fields for 'Address 1', 'Address 2', 'Phone 1', 'Phone 2', 'E-mail', and 'Job title'.
- Supplier invoices with issued stock:** A checkbox labeled 'Can update pack size, cost and sell price'.

At the bottom of the dialog are buttons for 'Delete', 'Cancel', and 'OK'.

Here some personal details including job title, address and email address of the user can be recorded. The job title will appear in the *Job title* column in the list of users and the email address is used when using email functionality or other special functions in mSupply.

Other than that, these fields are for reference only, providing a handy place to record information about your system users.

Dashboard tab



On this tab you set which dashboard tabs will appear on the dashboard when the user logs into it. Of course, you have to set up the dashboard tabs before you can assign them to a user's dashboard. See [Dashboard](#) for instructions on doing that.

Once the dashboard tabs have been setup, they will appear in the *Available* column of this tab. You can see the "Test_tab" in the screenshot above. Anything in the *Chosen* column will be displayed on the user's dashboard. So, to make a dashboard tab appear on the user's dashboard, select it in the *Available* column and click on the >> icon to move the tab into the *Chosen* column. And to remove a dashboard tab from the user's dashboard, simply select it in the *Chosen* column and click on the << icon to move it back into the *Available* column.

Create a new user

To create a new user do this:

1. Go to *File > Edit users...* and click on the **New user** button
2. Enter the user name

3. Assign a password
4. Enter the password again in the *Confirm password* text box
5. Go to the permissions tabs and set up permissions (3 tabs) **OR** select which group the user is to belong to using the *Is a member of* drop down list on the General tab (you must do one of these because you'll have noticed that when you create a new user they have absolutely no permissions at all!)
6. Go to the Login rights tab and set the stores the user can login to.
7. Click **OK** when you're done.
8. The user should now be able to log in.
9. After the user logs in, they may want to [change their password](#).

Delete a user or group

To delete a user do this:

1. Go to *File > Edit users...*
2. Double-click the name of the user or group you want to delete in the list
3. Click on the *Delete* button on the bottom of the edit user window that opens

Note that you won't be able to delete a group that has users belonging to it. If you really want to delete the group, remove all users from the group first by editing their *Is a member of* fields.

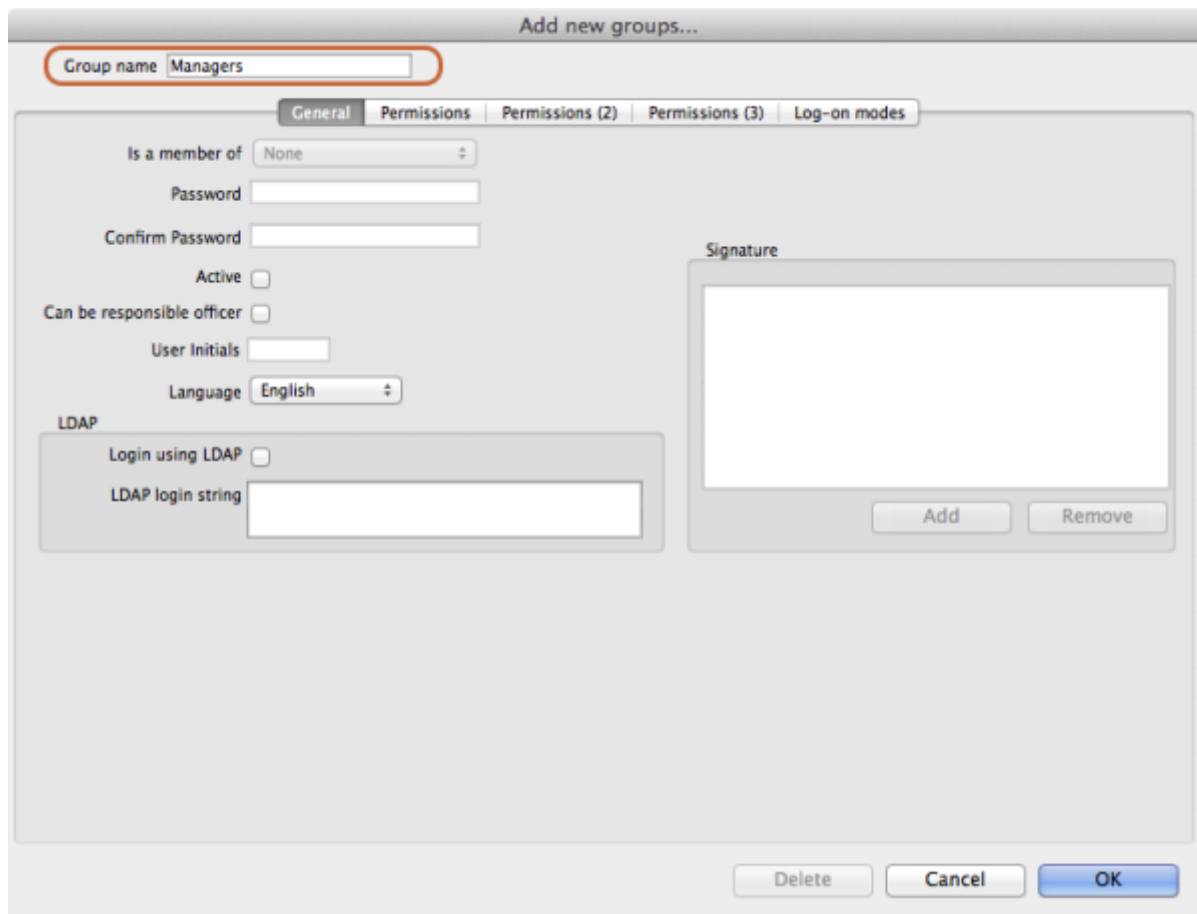
Managing and using groups

mSupply allows for a high granularity of user permission configuration. There are literally hundreds of user permissions possible for each store in an mSupply system. User groups assist with management of these user permissions.

- Users can be configured to:
 - Log in to particular stores
 - Have a range of general user permissions such as access to the dashboard
- Users can also be configured to have permission to view or edit data while logged in to particular stores.
- If users are a member of a group, then permission to view or edit data while logged in to particular stores is governed by the group membership.



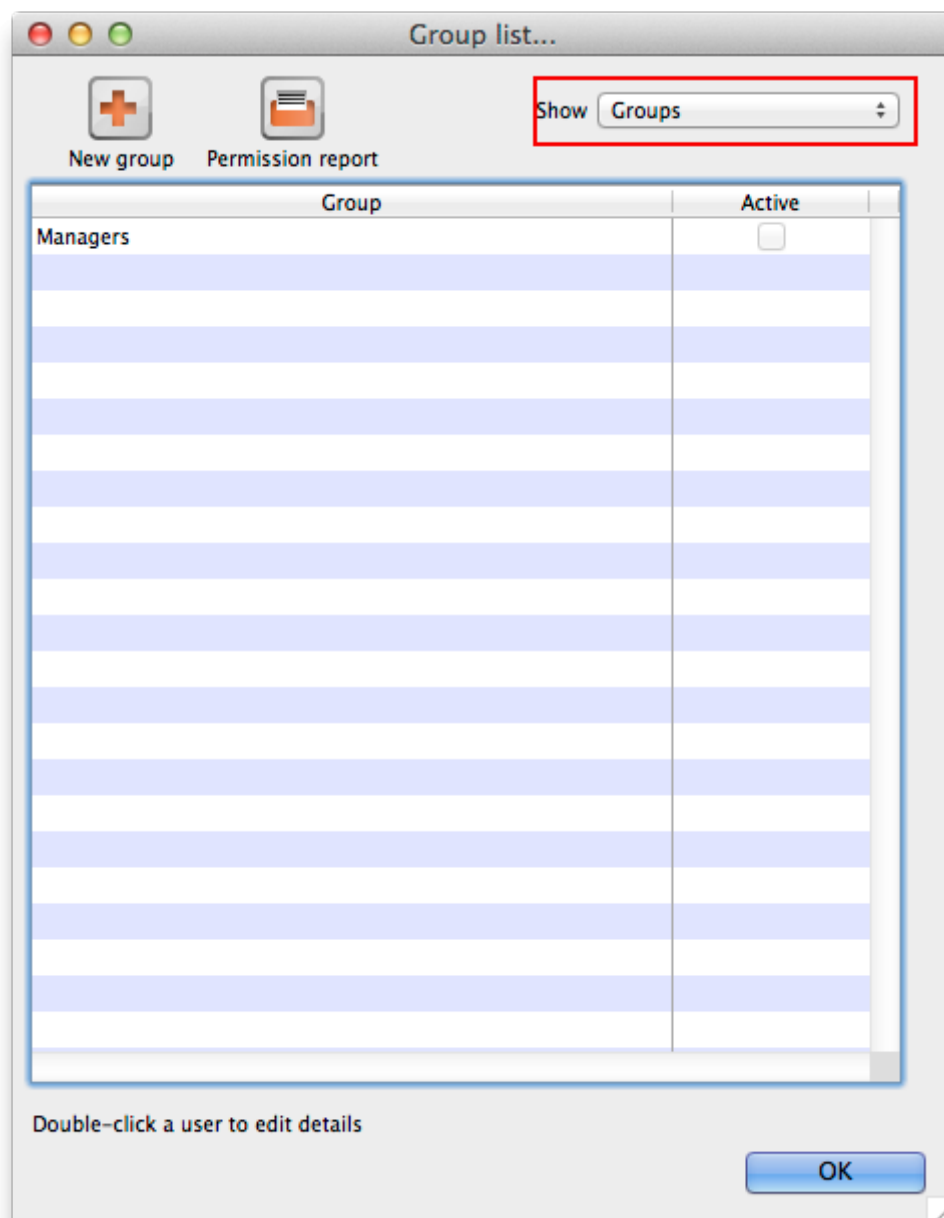
A user can have permission to view or edit data while logged in to a particular store, either directly or through membership of a group. If you want the user to *exercise* these permissions then they will also need to have permission to *log in* to the store 😊.



You will only be able to set checkboxes which can have different settings in different stores. Anything that is not a checkbox and or any checkbox that applies across all stores cannot be set in a group's permissions (another way of saying this is that they cannot be controlled by a group). These items will all be disabled when creating or editing a group and are editable in the individual users' permissions only.

Editing a group

First, show the list of groups by opening the “Edit user” window and then choosing “Groups” from the “Show” Drop-down menu



Then double click on a group in the list. The same window as for adding a group opens but it is populated with the group's current settings. Change these settings as described for a new group above and click on the **OK** button to save them.

Using groups

Groups are a quick way of setting and managing permissions for many people at a time. Users belonging to a group take the permissions of that group: when a user is a member of a group you cannot edit their permissions directly, you must edit the group's permissions. And if you edit the group's permissions, you edit the permissions for every user in the group. To assign a user to a group, do the following:

1. Go to *File > Edit users*
2. Double click on the user you want to edit
3. On the general tab of the window which opens, use the *Is a member of* drop down list to select the group the user is to belong to:

The screenshot shows the 'Edit user...' dialog box with the 'General' tab selected. The 'User' field contains 'user1'. The 'Is a member of' dropdown is set to 'None' and is highlighted with a red box. Other fields include Password, Confirm Password, Active (checked), Can be responsible officer (unchecked), User Initials, Language (English), and LDAP settings. A Signature box is on the right. Buttons at the bottom are Delete, Cancel, and OK.

4. Click on the OK button to save you changes.

User license categories

A menu item on the Special menu of the navigator gives access to a form to view and edit user license categories, including the number of users belonging to them that can be logged in at any one time. A DDL on the user input form allows a user to be assigned to a category and a new permission covers the ability to edit these license categories and membership of them. Finally, a check on the OK button of the login form will check that there are less than the maximum users belonging to the license category the user belongs to already logged in.

Previous: [25.14. mSupply deployment](#) | Next: [25.16. Show connected users](#)

From:

<https://docs.msupply.org.nz/> - mSupply documentation wiki

Permanent link:

https://docs.msupply.org.nz/admin:managing_users

Last update: **2023/07/10 23:47**

