



How To Setup A New User

Summary

Disclaimer: This applies only to Enterprise customers.

When a new employee joins your company, you'll need to setup a new user within the system before he/she can begin using it.

Step-by-Step Guide

1. Go to Administration->Setup->General->Users

The screenshot shows the 'Users - Setup' form. The left sidebar is expanded to 'Administration' > 'Setup' > 'General' > 'Users'. The main form has the following fields and options:

- Superuser
- Mobile User
- Support User
- User Code
- Bind with Microsoft Windows Account
- User Name
- Employee (dropdown menu)
- E-Mail
- Mobile Phone
- Mobile Device ID
- Fax
- Defaults
- Branch: Main (dropdown menu)
- Department: General (dropdown menu)
- Password: **** (password field)
- Location (dropdown menu)
- Password Never Expires
- Change Password at Next Logon
- Locked

Buttons at the bottom: OK, Cancel, Copy Form Settings, Send Mobile Setting.

2. Fill in all the information listed, especially User Code, User Name, E-Mail, and Location*



3. Example:
4. Click the  button next to the Password field to set the user's password
5. Click the Add button on the bottom
6. In the Employee Tab, you can optionally create an Employee Master Data for the user to hold HR information, which you can then associate with the new user.

1. This is located in Human Resources->Employee Master Data (Switch to Add mode with

CTRL + A)



Your new user should now be setup.

Note: Before they can access the software, they will need a license. See this [Quick Note](#) for more details.

*For some customers, you will need to set the Bind with Microsoft Windows Account. You will know that this is a requirement when you login and get a "**Current MS Windows account is not bound to any specified company on specified server.**" error.

If you see that message, you have to enter in the Orchestrated username after one of the two following:

- Orchprod\<
- Orchestrasw\<

For example:

- Orchprod\jeffm
- Orchestrasw\jeffm

Please note that it will be one OR the other, but not both.

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