

User Setup and Security Manual

sZen Corp

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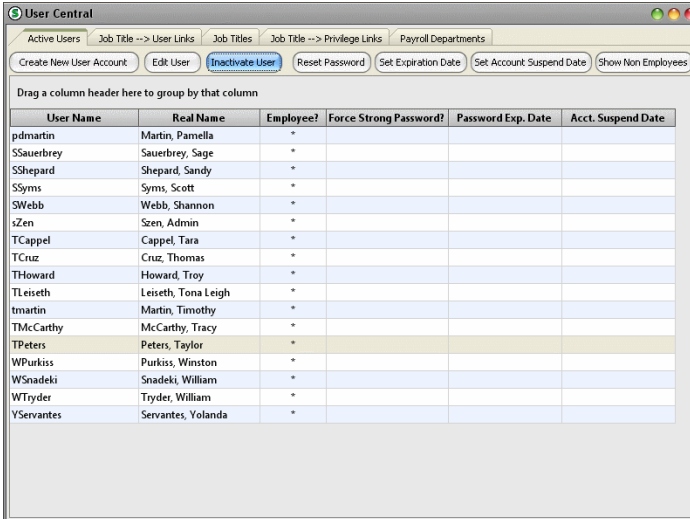
1 User Setup and Security

Users are people in the database that have rights to use the sZen system. They will have a user name and a password, and will have a job title tied to their user account that defines what they can and cannot do in the program.

User Central

Users are created and managed from User Central. To get to User Central:

- SELECT** File from the menu bar then choose Administrator from the drop down
- This opens the Administrator Screen
- SELECT** Admin from the menu bar then choose User Central from the drop down
- This opens User Central



The screenshot shows the 'User Central' application window. At the top, there are tabs for 'Active Users', 'Job Title --> User Links', 'Job Titles', 'Job Title --> Privilege Links', and 'Payroll Departments'. Below the tabs are several buttons: 'Create New User Account', 'Edit User', 'Inactivate User', 'Reset Password', 'Set Expiration Date', 'Set Account Suspend Date', and 'Show Non Employees'. The main area contains a table with the following columns: 'User Name', 'Real Name', 'Employee?', 'Force Strong Password?', 'Password Exp. Date', and 'Acct. Suspend Date'. The table lists 17 users with their respective details.

User Name	Real Name	Employee?	Force Strong Password?	Password Exp. Date	Acct. Suspend Date
pdmartin	Martin, Pamela	*			
SSauerbrey	Sauerbrey, Sage	*			
SShepard	Shepard, Sandy	*			
SSyms	Syms, Scott	*			
SWebb	Webb, Shannon	*			
sZen	Szen, Admin	*			
TCappel	Cappel, Tara	*			
TCruz	Cruz, Thomas	*			
THoward	Howard, Troy	*			
TLeiseth	Leiseth, Tona Leigh	*			
tmartin	Martin, Timothy	*			
TMcCarthy	McCarthy, Tracy	*			
TPeters	Peters, Taylor	*			
WPurkiss	Purkiss, Winston	*			
WSnadeki	Snadeki, William	*			
WTryder	Tryder, William	*			
YServantes	Servantes, Yolanda	*			

1.1 User Accounts

Important! Make sure that a Member Account has been created for the person for whom a User Account is being created. This **must** be done before the User Account can be created, as it is required to link a Member Account to a User Account.

[Creating a New User Account](#)

[Editing a User Account](#)

[Resetting the Password for a User Account](#)

[Linking User Accounts to Job Titles](#)

[Inactivating a User Account](#)

Creating a New User Account

To create a new User Account:

- Get to User Central
- Make sure the Active Users tab is selected
- It will look like this

The screenshot shows the 'Active Users' tab selected in the 'User Central' interface. The toolbar includes buttons for 'Create New User Account', 'Edit User', 'Inactivate User', 'Reset Password', 'Set Expiration Date', 'Set Account Suspend Date', and 'Show Non Employees'. Below the toolbar is a table with the following data:

User Name	Real Name	Employee?	Force Strong Password?	Password Exp. Date	Acct. Suspend Date
pidmartin	Martin, Pamela	*			
SSauerbrey	Sauerbrey, Sage	*			
SShepard	Shepard, Sandy	*			
SSyms	Syms, Scott	*			
SWebb	Webb, Shannon	*			
sZen	Szen, Admin	*			
TCappel	Cappel, Tara	*			
TCruz	Cruz, Thomas	*			
THoward	Howard, Troy	*			
TLeiseth	Leiseth, Tona Leigh	*			
tmartin	Martin, Timothy	*			
TMcCarthy	McCarthy, Tracy	*			
TPeters	Peters, Taylor	*			
WPurkiss	Purkiss, Winston	*			
WSnadeki	Snadeki, William	*			
WTryder	Tryder, William	*			
YServantes	Servantes, Yolanda	*			
zacs	Smith, Zachary	*			

- SELECT** the 'Create New User Account' button



- This opens the Create New User Account Screen

Create User Account

Post New User **Cancel**

Step #1
Select an Individual from your Customer Module. Enter at least one letter of the last name, and optionally part of the first name, then click search:

Last Name: First Name:

Individual	Pers. Code

Step #2
Specify the User Name and Password. User Names must be unique, and passwords are case-sensitive.

User Name:

Password:

Step #3
Is this user an employee? There are times when you will want to give a non-employee limited access to the system. Some functions work differently, dependent on whether or not the user is an employee.

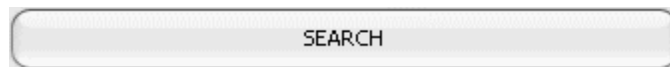
User is an employee?

Step #4
If you wish to force this user to always have a strong password, then check this box. Be aware that if the global system setting entitled "REQUIRE STRONG PASSWORDS FOR ALL USERS" is enabled, that setting will override any value that you provide here:

Require User to Have a Strong Password?

-**ENTER** the first few letters of the last name of the Member Account to be tied to the User Account

-**SELECT** the 'Search' button



-The Member Accounts with last names that match the search will populate the grid

-**HIGHLIGHT** the desired Member Account

-Create a User Name and a Password. The User Name must be unique. The password does not

-If the new User is an employee, make sure the 'User is an Employee' box is checked

-Define whether the new User is required to have a strong password or not

Once everything is done and seems correct:

-**SELECT** the 'Post New User' button

The new User Account will be created and, once Job Titles are tied to it, the User may log in and begin using the sZen system.

Editing a User Account

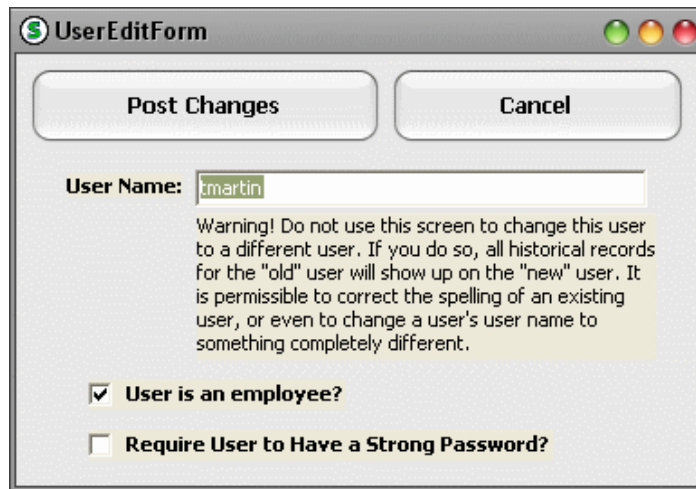
To edit an existing User Account:

-**HIGHLIGHT** the desired User Account

-**SELECT** the 'Edit User' button



-This opens the Edit User Form



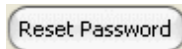
- Make the desired changes
- SELECT** the 'Post Changes' button

The changes will be made to the highlighted user account.

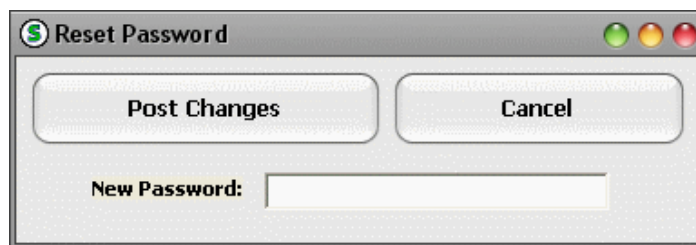
Resetting the Password for a User Account

User Passwords cannot be looked up. If Users forget their password, they will have to choose a new password, and have someone with sufficient rights reset it for them. To reset a Users password:

- HIGHLIGHT** the desired User Account
- SELECT** the 'Reset Password' button



- This opens the Reset Password Screen



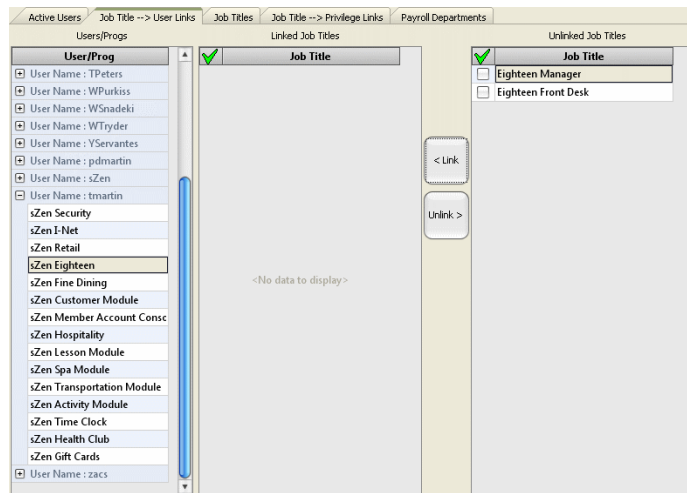
- ENTER** the new password
- SELECT** the 'Post Changes' button

The new password will be active for the highlighted User Account, and the old one will be deleted.

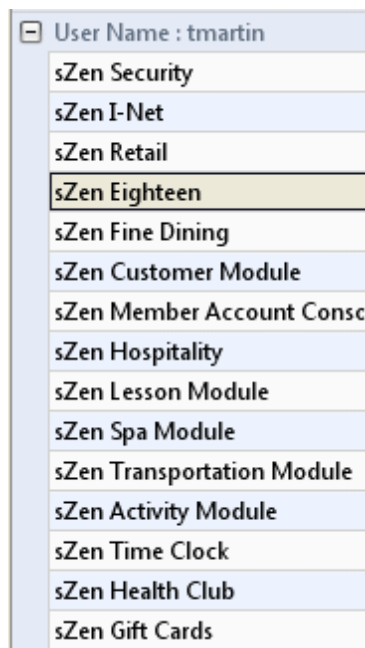
Linking User Accounts to Job Titles

User Accounts must be linked to at least one Job Title in before they can be used to access the program effectively. To link User Accounts to Job Titles:

- Get to User Central
- SELECT** Job Titles --> User Links tab



- SELECT** the '+' sign next to the desired User Name
- A list of sZen program modules will appear



- HIGHLIGHT** the desired module
- Job Titles for the highlighted module will appear in the grids. Unlinked Job Titles will be in the Unlinked Job Titles grid



-Place check mark in the box next to as many job titles as it is desired to link to the User Account.

-**SELECT** the '<Link' button



The selected Job Title(s) will move from the Unlinked Job Titles grid to the Linked Job Titles grid. The User Account will now have all the privileges tied to the Job Title(s) linked to it.

Inactivating a User Account

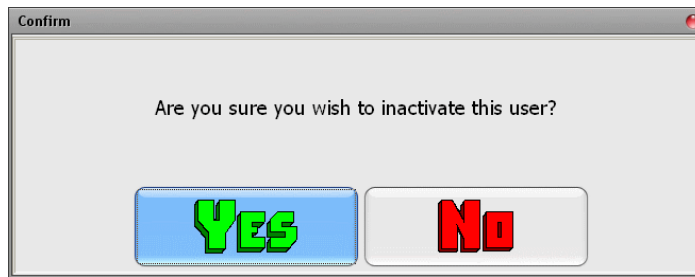
To inactivate a User Account that is no longer in use:

-**HIGHLIGHT** the desired User Account

-**SELECT** the 'Inactivate User' button



-A confirmation box will appear



-SELECT the 'Yes' button

The highlighted User Account will be inactivated and will no longer be able to access the system.

1.2 Job Titles

Job Titles are what give Users privileges to use sZen. Different Job Titles give Users different privileges. For Example, the Eighteen Manager Job Title will have privileges to do everything in the Tee Sheet, whereas the Eighteen Personnel would only have certain privileges. Many of these Job Titles come standard with a sZen installation, but custom Job Titles can be created as well to tailor the system to the needs of each facility.

[Creating a New Job Title](#)

[Editing a Job Title](#)

[Inactivating a Job Title](#)

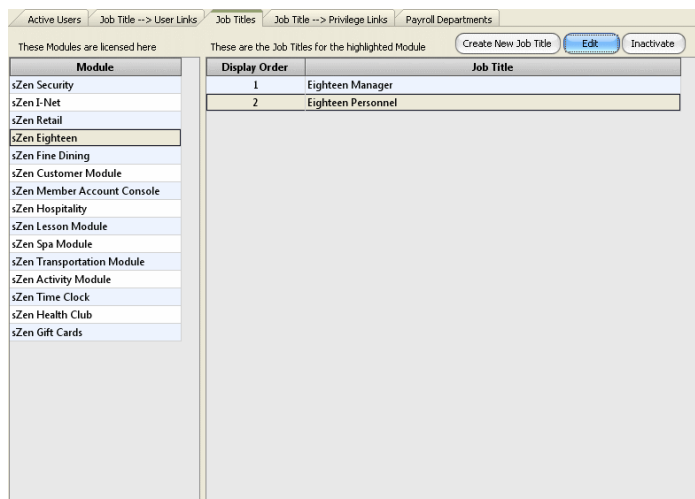
[Linking Privileges to Job Titles](#)

Creating a New Job Title

To create a new Job Title:

-Get to User Central

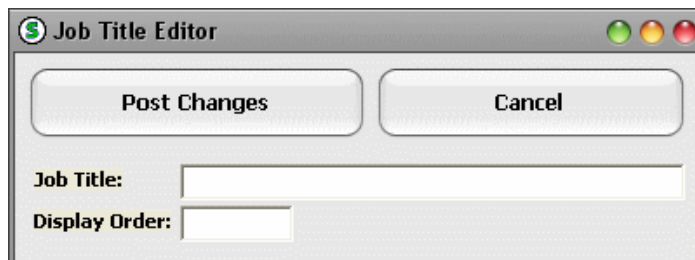
-**SELECT** the Job Titles tab



-**SELECT** the 'Create New Job Title' button

Create New Job Title

-This opens the Job Title Editor Screen



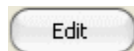
- ENTER** the appropriate information
- SELECT** the 'Post Changes' button

The new Job Title will be created, and is ready to have privileges tied to it.

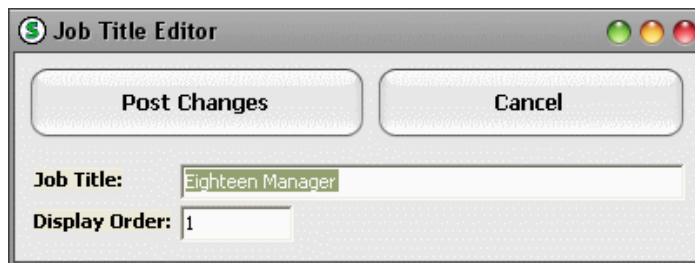
Editing a Job Title

To edit an existing Job Title:

- HIGHLIGHT** the desired Job Title
- SELECT** the 'Edit' button



-This opens the Job Title Editor Screen with the highlighted Job Title's information entered into it



- Make the desired changes
- SELECT** the 'Post Changes' button

The changes will be applied to the highlighted Job Title.

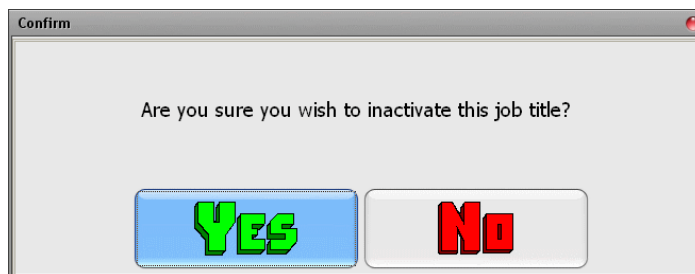
Inactivating a Job Title

To inactivate a Job Title that is no longer in use:

- HIGHLIGHT** the desired Job Title
- SELECT** the 'Inactivate' button



-A confirmation box will appear



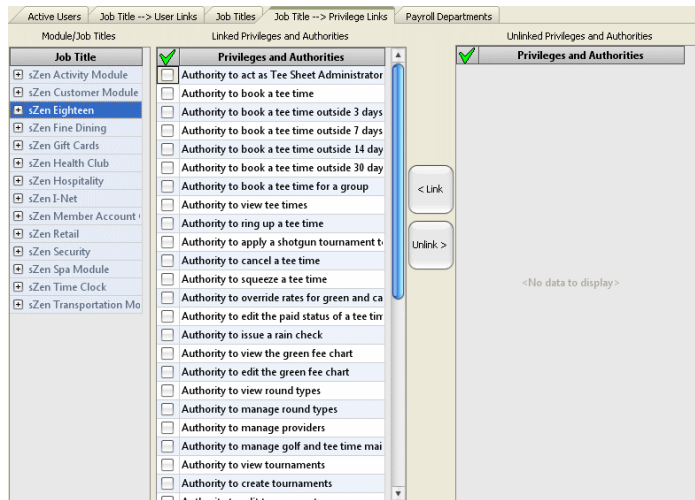
- SELECT** the 'Yes' button

The highlighted Job Title will be inactivated and will no longer be visible in the grid or be able to be

Linking Privileges to Job Titles

In order for Job Titles to give privileges to Users, those privileges must be linked to the Job Titles. To link privileges to Job Titles:

- Get to User Central
- SELECT** the Job Title --> Privilege Links tab



- SELECT** the '+' sign next to the desired module



-**HIGHLIGHT** the desired Job Title

-A list of privileges will appear in the grids. Unlinked privileges will appear in the Unlinked Privileged grid

-Place a check mark in the box next to as many privileges as it is desire to link to the highlighted Job Title

-**SELECT** the '<Link' button



The selected privileges will move from the Unlinked Privileges grid to the Linked Privileges grid and will be linked to the highlighted Job Title.

1.3 Payroll Departments

Payroll Departments are a way to track where employee hours are going. Users can be linked to one or more payroll departments, and can choose what payroll department their hours should be applied to when they clock out. A default Payroll Department can and should be set for each User, and a Pay Rate can be defined for each User for each of the Payroll Departments they are linked to.

[Creating a New Payroll Department](#)

[Editing a Payroll Department](#)

[Inactivating a Payroll Department](#)

[Linking Users to Payroll Departments](#)

[Setting the Default Payroll Department for a User](#)

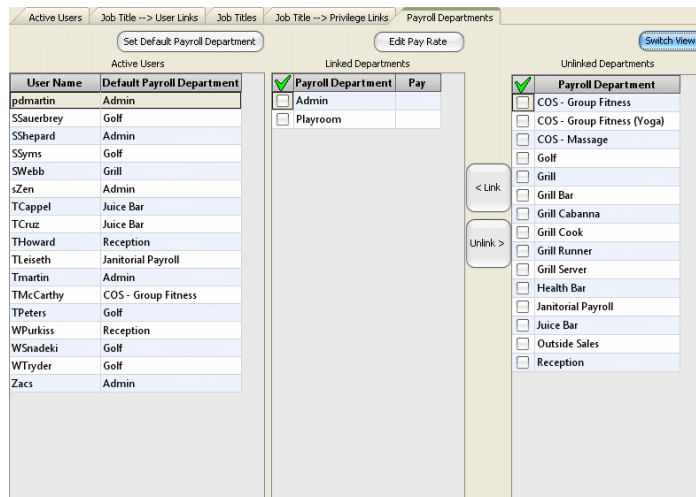
[Setting the Pay Rate for Payroll Departments for a User](#)

Creating a New Payroll Department

To create a new Payroll Department:

-Get to User Central

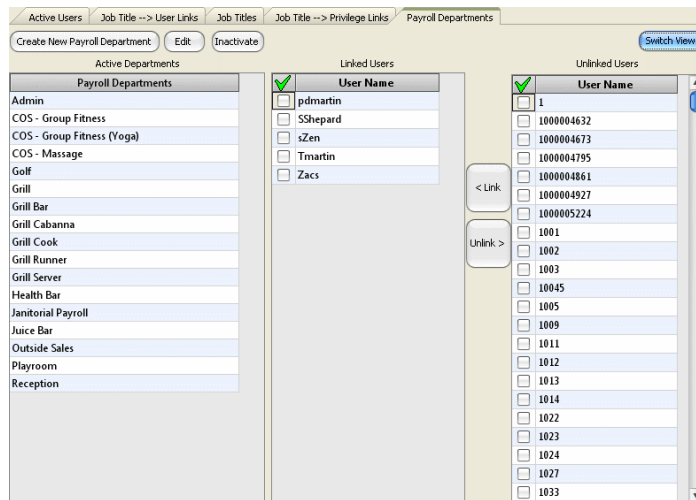
-**SELECT** the Payroll Departments tab



-**SELECT** the 'Switch View' button



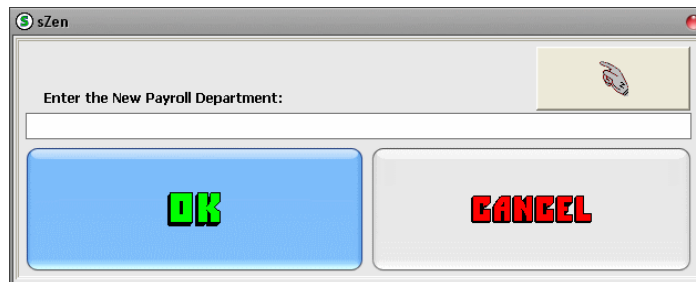
-The screen will change to look like this:



-**SELECT** the 'Create New Payroll Department' button

Create New Payroll Department

-This opens a data entry screen



-**ENTER** the appropriate information
 -**SELECT** the 'Ok' button

The new Payroll Department will be created, and Users may now be tied to it.

Editing a Payroll Department

To edit an existing Payroll Department:

-Get to the Payroll Departments tab in User Central
 -**SELECT** the 'Switch View' button
 -**HIGHLIGHT** the desired Payroll Department
 -**SELECT** the 'Edit' button

Edit

-This opens a data entry screen with the highlighted Payroll Departments info in it



- Make the desired changes
- SELECT** the 'Ok' button

The changes will be applied to the highlighted Payroll Department.

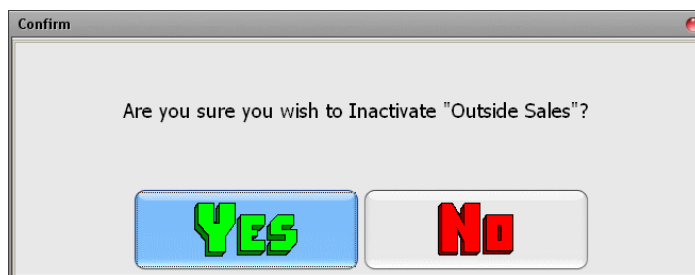
Inactivating a Payroll Department

To inactivate a Payroll Department that is no longer in use:

- Get to the Payroll Departments tab in User Central
- SELECT** the 'Switch View' button
- HIGHLIGHT** the desired Payroll Department
- SELECT** the 'Inactivate' button



- A confirmation box will appear



- SELECT** the 'Yes' button

The highlighted Payroll Department will be inactivated and will no longer appear as an option to link Users to.

Linking Users to Payroll Departments

To link a User to one or more Payroll Departments:

- Get to the Payroll Departments tab in User Central
- HIGHLIGHT** the desired User in the Active Users grid

Active Users	
User Name	Default Payroll Department
pdmartin	Admin
SSauerbrey	Golf
SShepard	Admin
SSyms	Golf
SWebb	Grill
sZen	Admin
TCappel	Juice Bar
TCruz	Juice Bar
THoward	Reception
TLeiseth	Janitorial Payroll
Tmartin	Admin
TMcCarthy	COS - Group Fitness
TPeters	Golf
WPurkiss	Reception
WSnadeki	Golf
WTryder	Golf
Zacs	Admin

-Place a check mark in the box next to all the desired Payroll Departments in the Unlinked Payroll Departments grid

Unlinked Departments	
<input checked="" type="checkbox"/>	Payroll Department
<input type="checkbox"/>	COS - Group Fitness
<input type="checkbox"/>	COS - Group Fitness (Yoga)
<input type="checkbox"/>	COS - Massage
<input type="checkbox"/>	Golf
<input type="checkbox"/>	Grill
<input type="checkbox"/>	Grill Bar
<input type="checkbox"/>	Grill Cabanna
<input type="checkbox"/>	Grill Cook
<input type="checkbox"/>	Grill Runner
<input type="checkbox"/>	Grill Server
<input type="checkbox"/>	Health Bar
<input type="checkbox"/>	Janitorial Payroll
<input type="checkbox"/>	Juice Bar
<input type="checkbox"/>	Outside Sales
<input type="checkbox"/>	Reception

-SELECT the '<Link' button

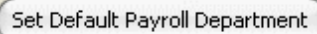


The selected Payroll Department(s) will move from the Unlinked Departments grid to the Linked Departments grid and are now tied to the highlighted User.

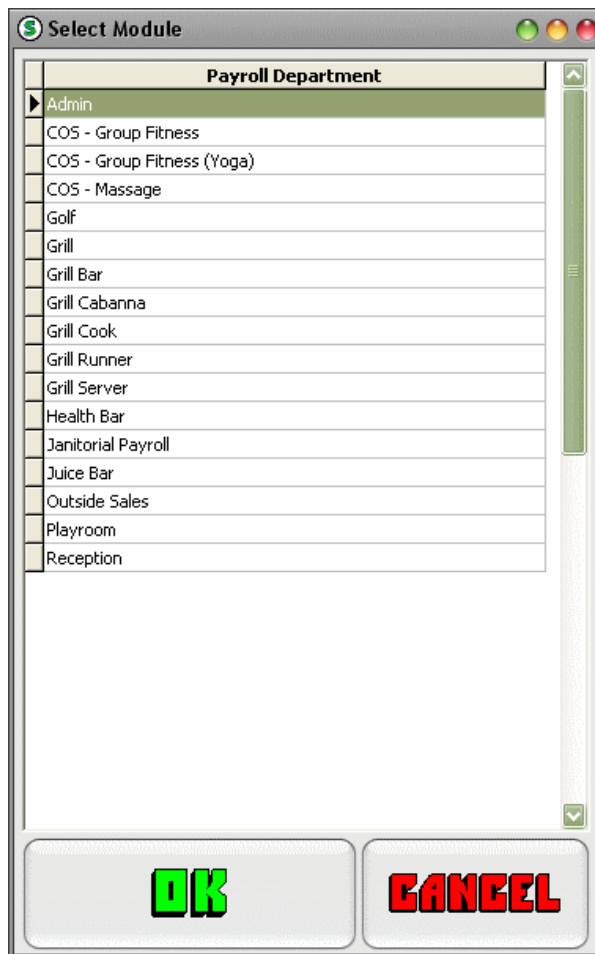
Setting the Default Payroll Department for a User

To set the default Payroll Department for a User:

- Get to the Payroll Departments tab in User Central
- HIGHLIGHT** the desired User in the Active Users grid
- SELECT** the 'Set Default Payroll Department' button



- This opens the 'Select Module' Screen



- HIGHLIGHT** the desired Payroll Department

-**SELECT** the 'Ok' button

The highlighted Payroll Department will be set as the Default Payroll Department for the highlighted User, and will appear in the Active Users grid in the Default Payroll Department column next to the highlighted User.

Setting the Pay Rate for Payroll Departments for a User

To set the pay rate for Payroll Departments linked to a User:

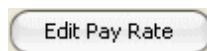
-Get to the Payroll Departments tab in User Central

-**HIGHLIGHT** the desired User

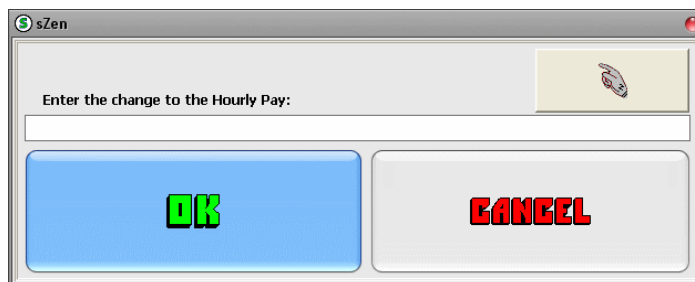
-**HIGHLIGHT** the desired Payroll Department in the Linked Payroll Departments grid

Linked Payroll Departments		
<input checked="" type="checkbox"/>	Payroll Department	Pay
<input type="checkbox"/>	Admin	
<input type="checkbox"/>	Outside Sales	

-**SELECT** the 'Edit Pay Rate' button



-This opens a data entry screen

A dialog box window titled "sZen". It contains a text input field with the label "Enter the change to the Hourly Pay:". Below the input field are two buttons: a blue button with the text "OK" in green, and a gray button with the text "CANCEL" in red.

-**ENTER** the Pay Rate

-**SELECT** the 'Ok' button

The Pay Rate will be added to the highlighted Payroll Department for the highlighted User, and will appear in the Linked Payroll Departments grid in the Pay column.

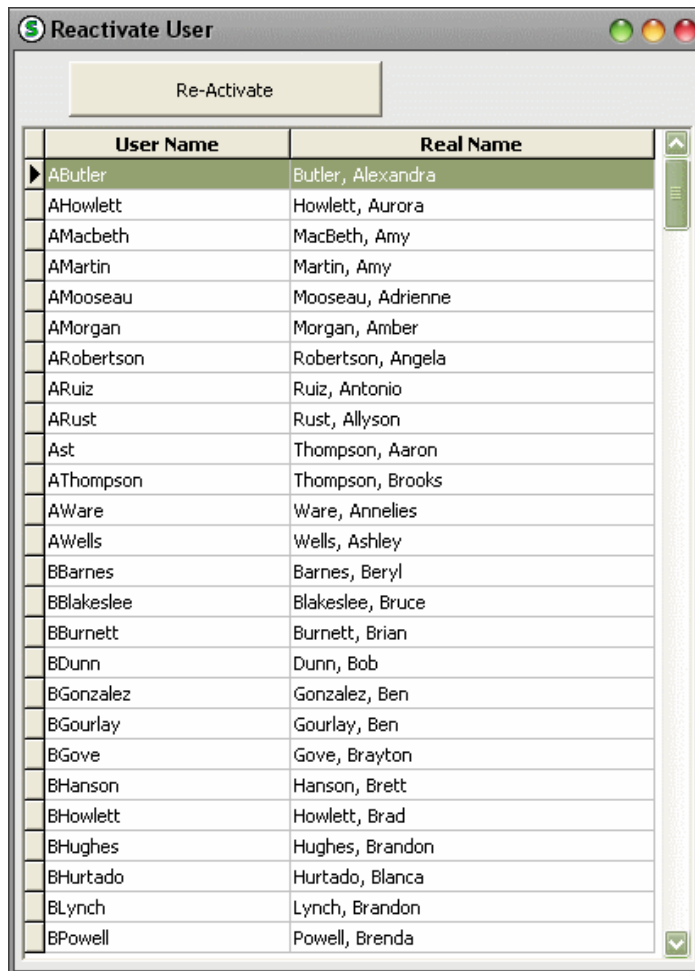
1.4 Reactivating Users

If a User has been inactivated, but they need to be used again, or they came back to work at the facility, they can be reactivated.

The Reactivate User Screen

Reactivating Users happens in the Reactivate User Screen. To get here, and then reactivate a User:

- SELECT** File from the menu bar then choose Administrator from the drop down
- This opens the Administrator Screen
- SELECT** Admin from the menu bar then choose Reactivate Users from the drop down
- This opens the Reactivate User Screen



- HIGHLIGHT** the desired User Account
- SELECT** the 'Re-Activate' button

The highlighted User Account will be reactivated and may now be used as it was before inactivation.