Types of Users

User access to modules and screens as well as the permissions they have within those areas are dictated by the role. Once a user is placed into a role, they acquire the permissions established for that role. However, additional permissions may be granted to the user beyond those granted to the role.

Role

A group of users who will have roughly the same set of permissions, including visibility, module/screen access, available actions (e.g. delete, create, assign), as well as dashboard charts/grids.

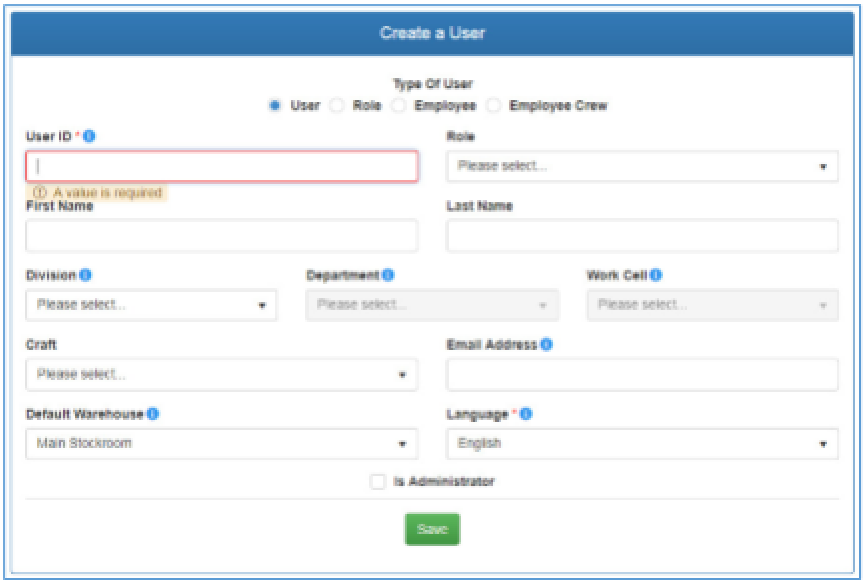
Employee

Employees do not log into eRPortal. They can request work orders, have work orders assigned to them. They can also be set up to Issue parts and have parts Issued to them.

Remote Work Request User In version 5, Work Request (Intranet) users log in to eRPortal, but with limited access to only the Work Request Entry and Work Request Finder screens.

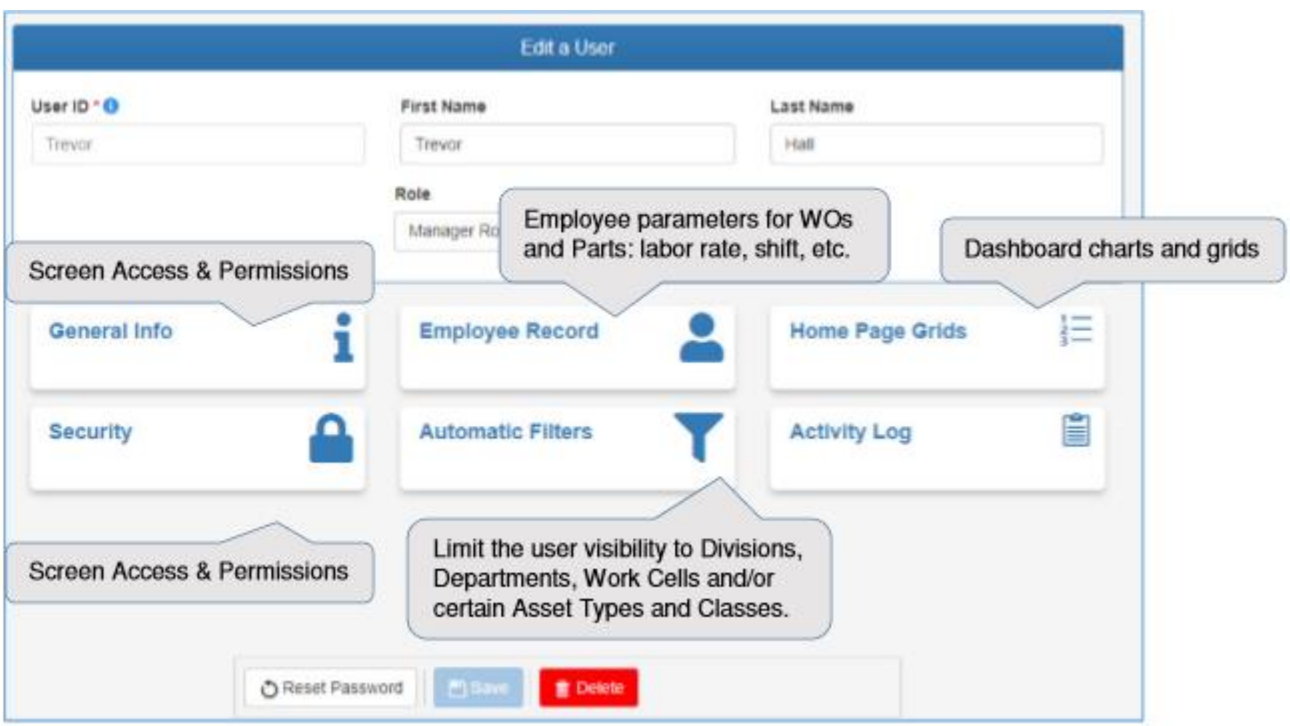
How to Add a User

From the Home screen, click the Gear icon. 2. Choose User Management. 3. From the User/Group Finder screen, click Create 4. The user type “User” will be selected by default. 5. Enter a User Id (this will become the login id). 6. Select a Role. 7. Enter the person’s name, division, craft, etc. 8. Click Save. 9. After saving the user, a banner message appears from which you can click to edit the record further. Alternatively, you can locate the new user from the User/Group finder for editing.



How to Edit or Add Detail

Edit/Add Detail to a User When editing a user record, the fields are accessed via cards, e.g. Employee Record. Clicking a card allows access to the information associated with each category. After clicking any card, a sidebar menu appears allowing for easy navigation from one area to another. Note that when looking at a user in a role, the permissions and settings that are inherited from the role appear in gray, while permissions that can be enabled for the user (adding to those of the role) appear in black.



Questions? Contact the LLumin READYSupport Team: support@llumin.zendesk.com