User Creation

24/10/2024 2:26 pm BST

Summary

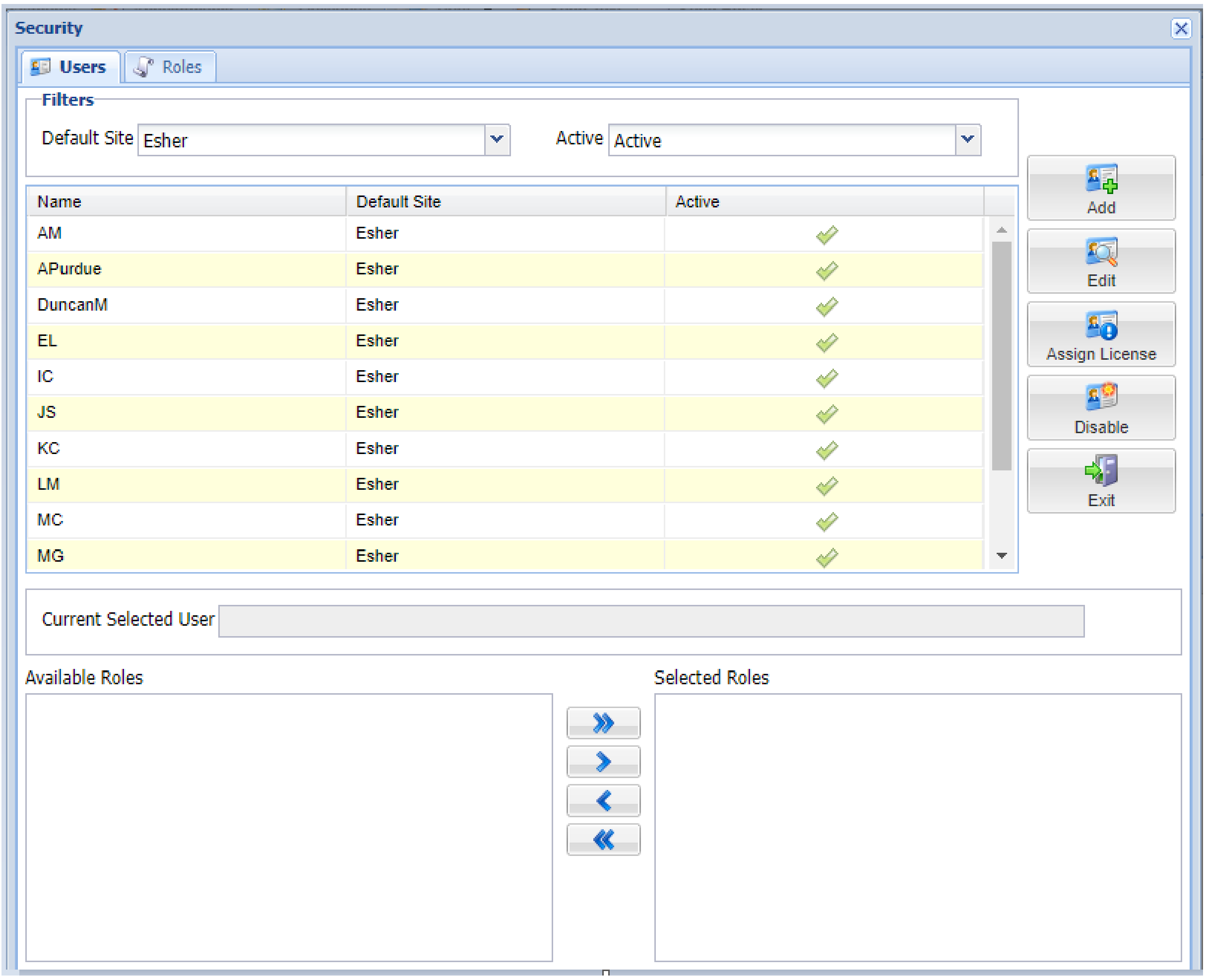
This page of the manual is a guide to user creation within Merlin.

Details

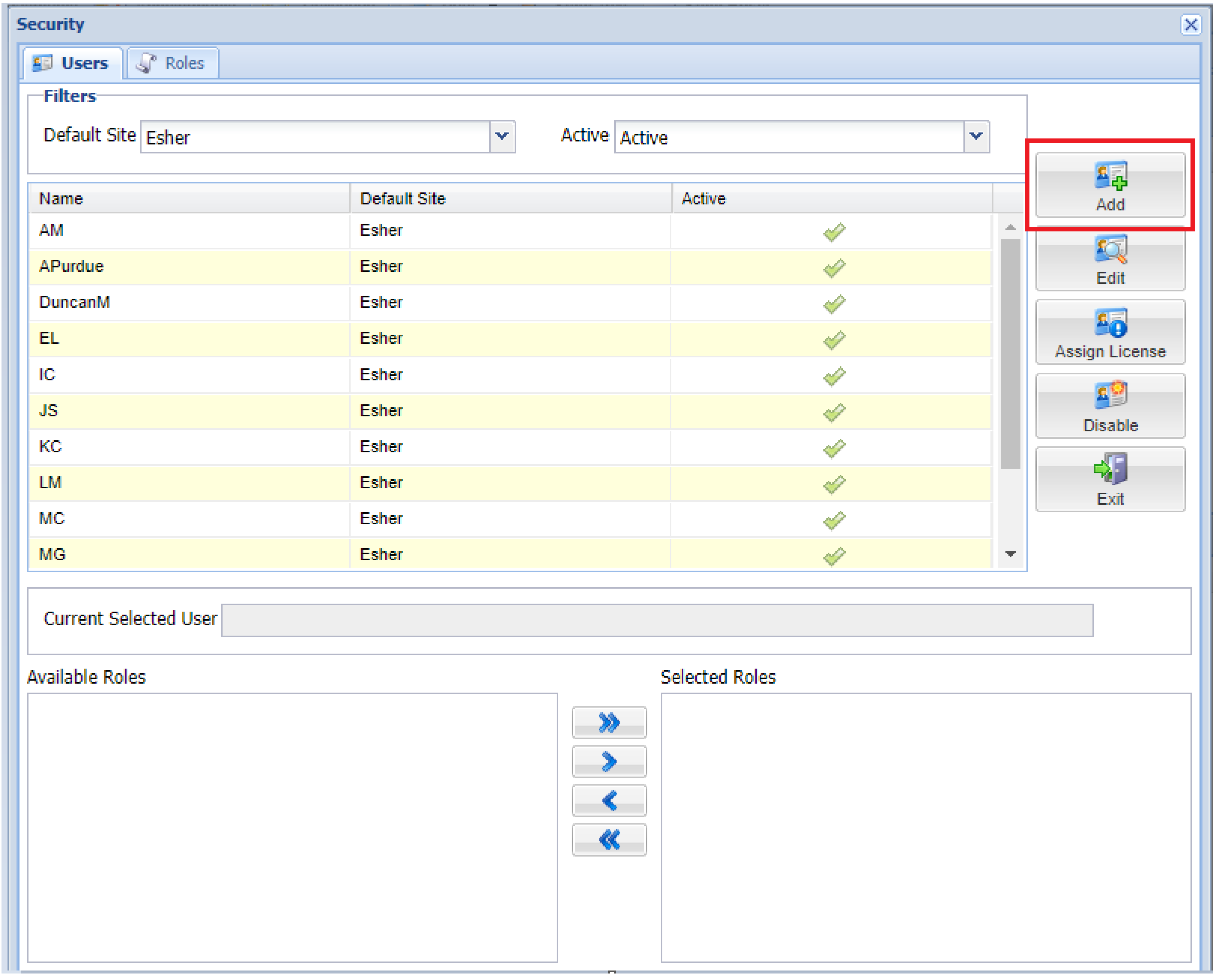
A User is an identity which can be used to log in to and access different areas of the software system depending on access-rights assigned to that user. This is separate from the surgeon list.

Adding a User

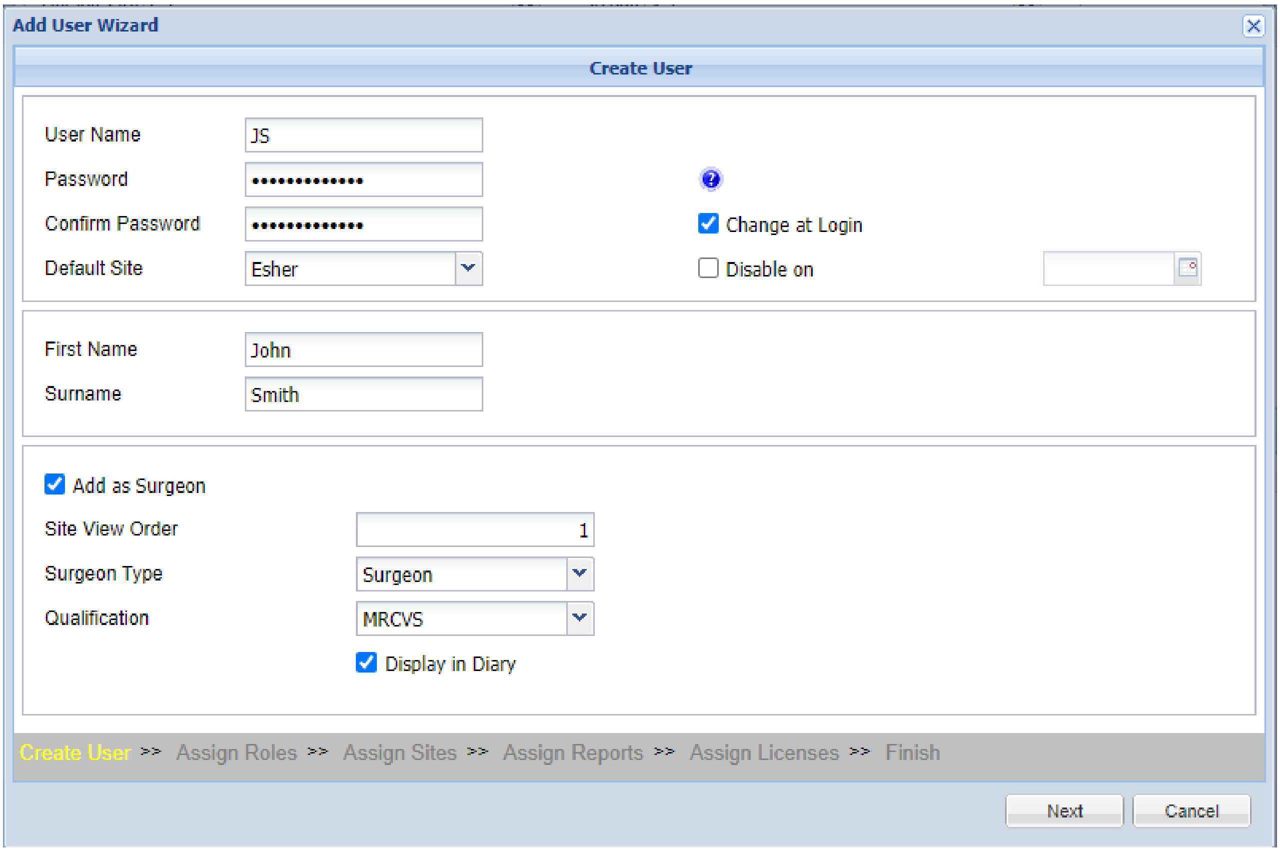
1. Navigate to **Administration > System > Security**.



2. To open the 'Add User Wizard', select the '**Add**' button.



3. This window prompts you to enter the following information:



User Name = The name the user will log in as.

Password & Confirm Password = The users chosen password. This needs to meet the Merlin Complexity requirements. (Hover over the **?** icon for further information).

Default site = The user's main site they work at.

First Name = The user's first name (appears in messaging).

Surname = The user's surname (appears in messaging).

Change at Login = This prompts a first time user to set their own password (if previously created by an Administrator).

Disable on = This field gives the Administrator the option to set a date when the User is no longer eligible to login to Merlin.

Add as Surgeon = If the user is not yet added as a surgeon for use in the treatment screen then select the “Add as Surgeon” check box.

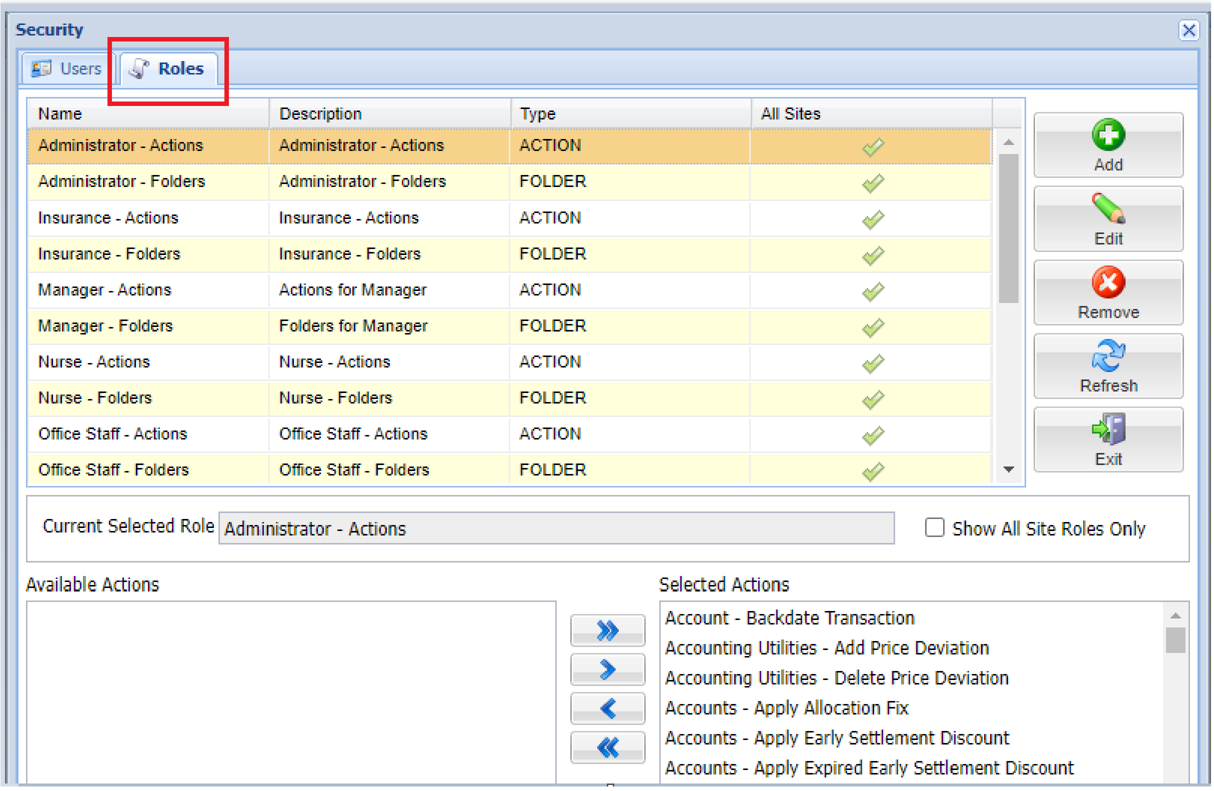
Site View Order = If above has been ticked, specify the view order for the Surgeon.

Surgeon Type = Specify the Surgeon Type (Surgeon, Nurse etc).

Qualification = Surgeons Qualification can be set here. This will print on treatment labels.

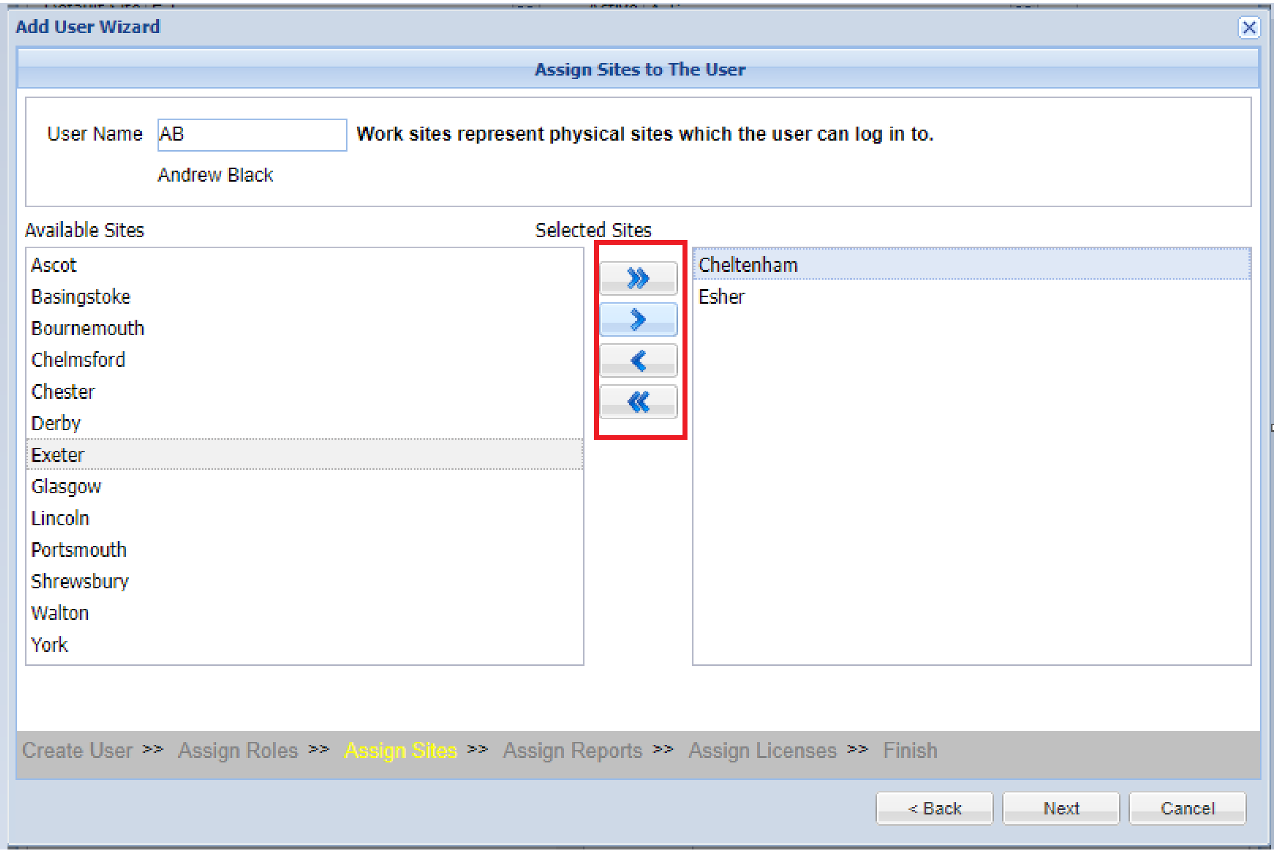
4. Once you have specified the above information, select the **'Next'** button to proceed.

5. The next step is to **Assign user roles** to the user using the arrows provided. 'Roles' are your configured user access and limitation settings.

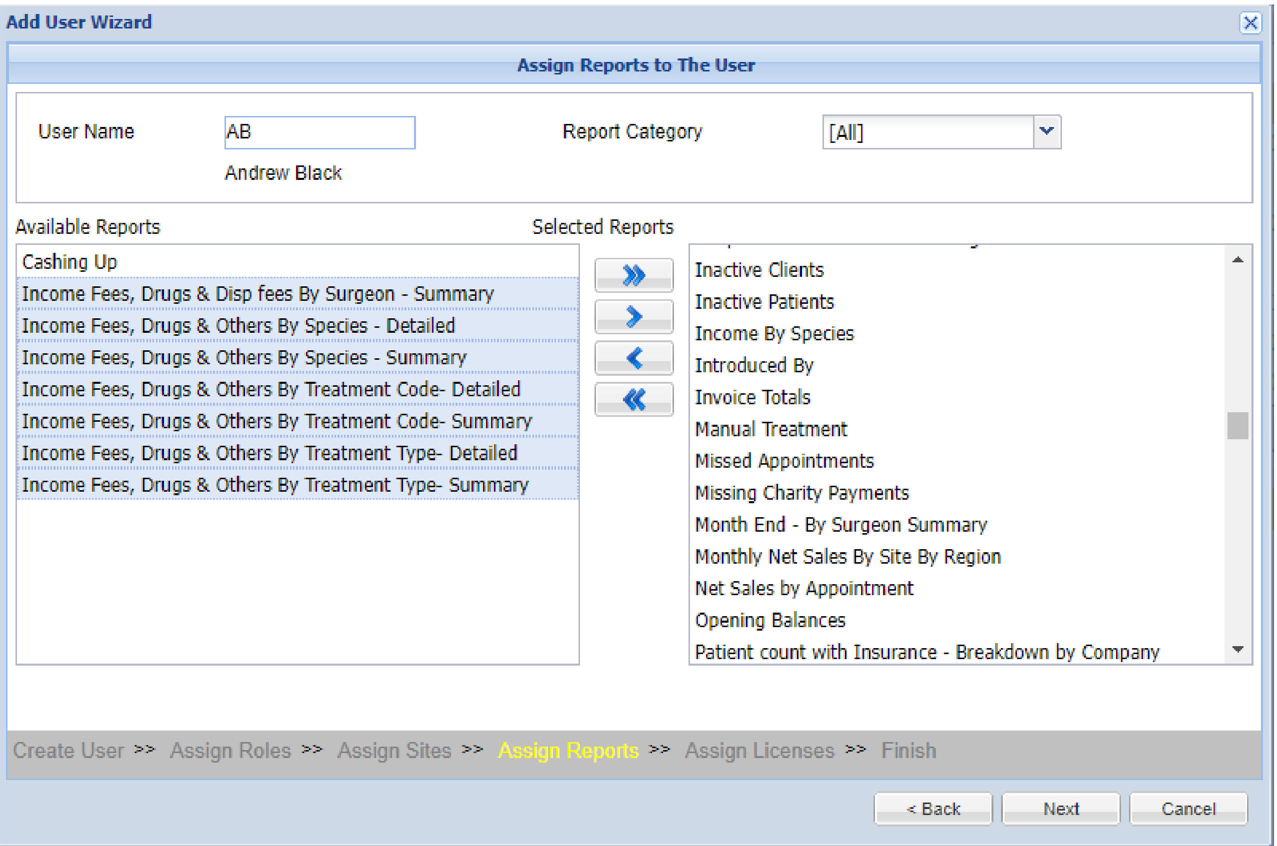


6. Select the '**Next**' button to proceed.

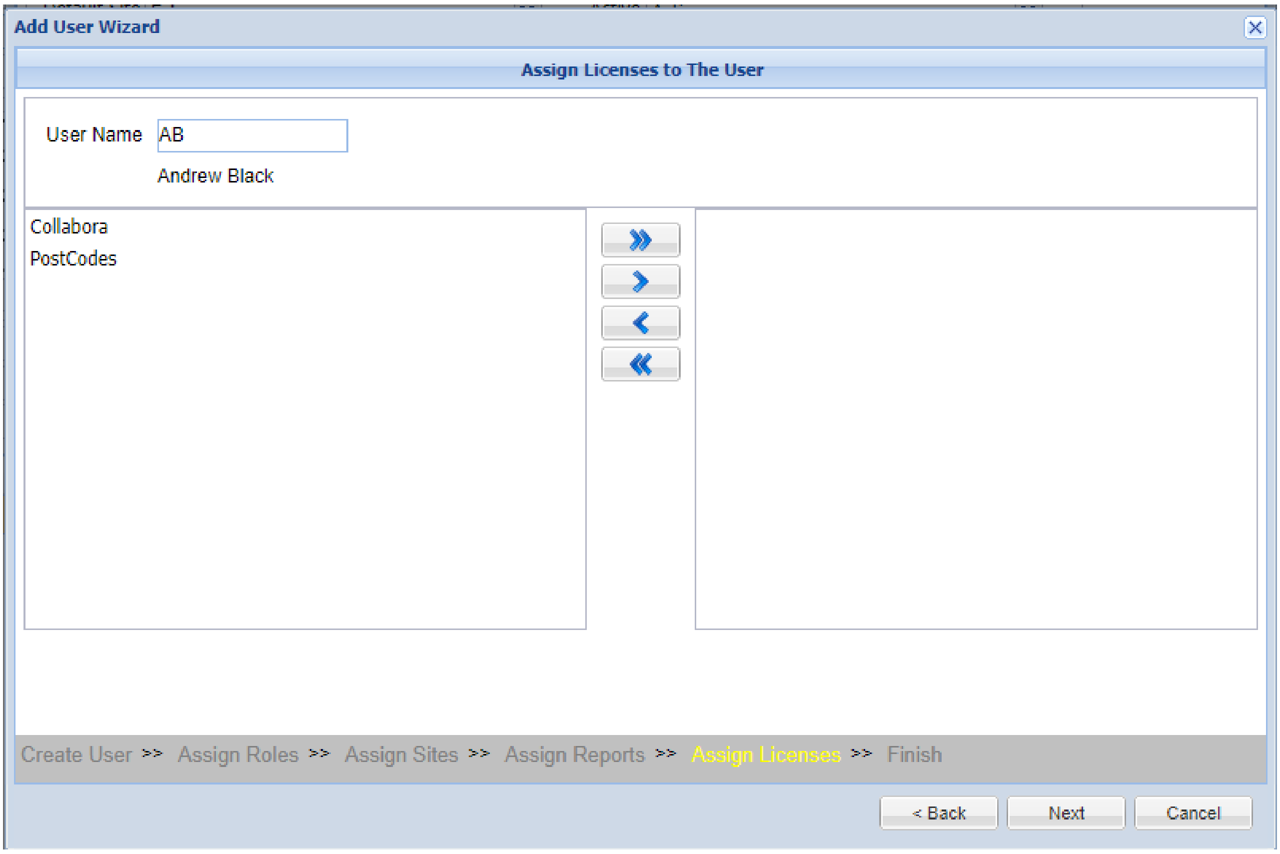
7. **Assign site access** to the using the arrows provided. When this is complete press the '**Next**' button.



8. You will now **assign the reports** that this user needs, then press the '**Next**' button.



9. You now **assign licences** to the user, then press the “Next” button.



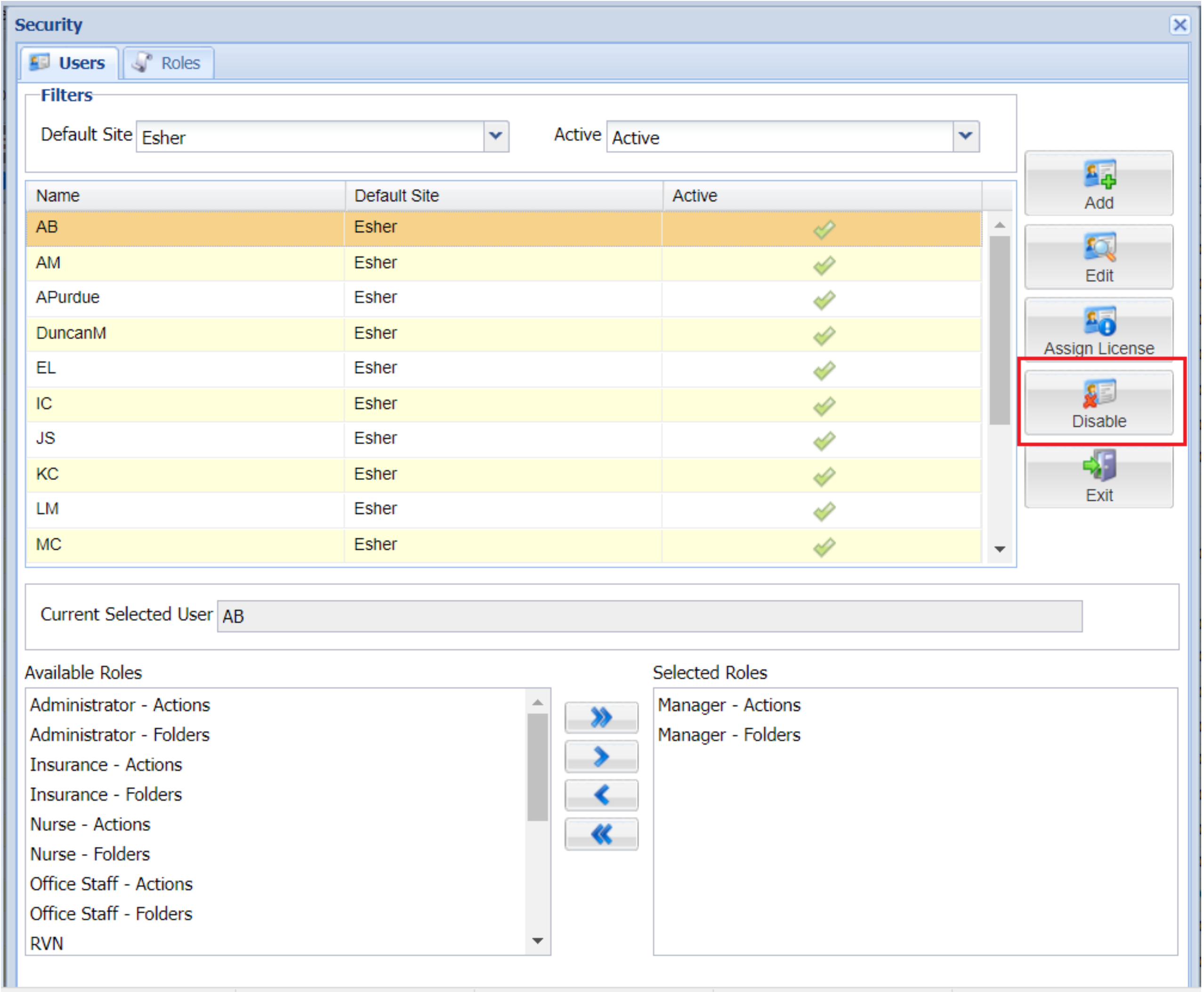
10. Finally, you will see the summary page. Check the user details being assigned and press the '**Create**' button.

Editing/Disabling a User

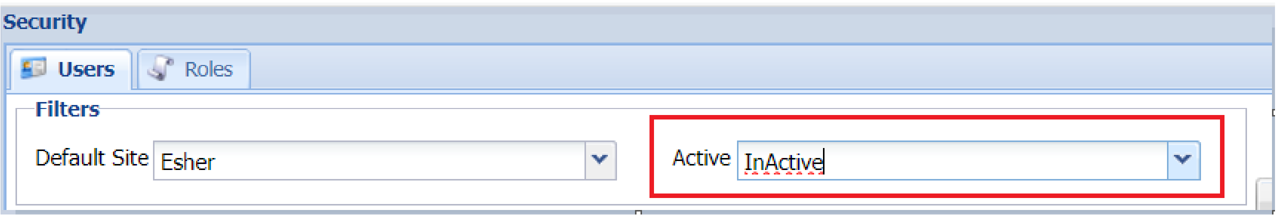
Users can also be edited and removed from this screen.

1. Select the user from the users list and select the '**Edit**' button. This button will open an Edit User Wizard.

2. To remove a user, select '**Disable**'.



3. The user will now be removed from the active system and will be held in the Inactive folder.



Library Configuration

Library Data

User/Sites Library (Administration > System > Users > User/Sites)

The User/Sites library screen allows the practice to determine which users may log in at each site. This screen is used so that you can control which users are able to log in at which sites either on a site basis or on a user basis rather than setting this for each individual user through System > Security.

User/Reports Library (Administration > System > Users > User/Reports)

If you set a user to be able to access the system's reports, it is possible to restrict which reports can be seen by which user.

The process is the same as described for Logins/Sites, with the added functionality that you can filter reports based on the reporting category, allowing you to transfer an entire reporting category in one go.

User/Reports Library (Administration > System > Users > User/Licence Maintenance

The User/Licence library screen allows the practice to determine which users can use Collabora Document Editor and the Postcode Module.