



Quick
Start
Guide



Adding a New User



Adding a New User

Add a New User Save

Please enter the following basic information about the new user.

Add a New User

User ID

User Name

Title

Enabled

Shared User License

Comment

Address

Primary Telephone Number

Alternative Telephone Number

Instant Messaging Address

Instant Messaging Type

Email Address

Event Notification Email Address

Region

Password

Password Confirmation

Six characters or more; capitalisation matters.

Go to 'Add a New User'.

Enter the 'User ID'. This is used when logging into the Formpak application.

Enter the 'User Name'

Enter a 'Password'. This is also used when logging into the Formpak Application

Confirm the Password

Click 'Save'

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Please select the roles to which the new user will belong.

Role Name	Description	Member of
ADMINISTRATOR	Administrators	<input type="checkbox"/>
Certification Administrator	All the permissions required to add, organise and modify Certifications, including ability to view raw materials and formulations. It does not include ability to view compositions or view Certified Sources for the Composition of an Item.	<input type="checkbox"/>
Document Administrator	High level access to produce, modify and manage documents, the circumstances under which they are supplied and to whom.	<input type="checkbox"/>
Document Producer	Ability to print a document and view other information including raw materials and formulations (but not compositions).	<input type="checkbox"/>
Formulation Administrator	Higher level of access than Formulation Composition Developer. In addition to adding and modifying formulations, can perform global replacements of items. Check in User's pending changes, can add new cross references.	<input type="checkbox"/>
Formulation Composition Developer	Can develop and modify formulations and interact with jobs in a way appropriate to a developer. The Role can interact with formulation classes as specified by the Formulation Permissions.	<input type="checkbox"/>
Job Administrator	Role can add, modify, review and manage jobs. Role can add customers and applications. They can view other information which relates to items, but cannot see compositions.	<input type="checkbox"/>
Party Administrator	Can add and modify customers, suppliers and party groups, but not TO's. Can manage cross references and print documents required.	<input type="checkbox"/>
Product Administrator	Permissions are similar to Product Evaluator with additions of ability to add, modify and organise classifications and applications. Role can also add new properties and view other information in the application.	<input type="checkbox"/>
Product Evaluator	Role can view and modify RM and / or Formulation details, including classifying items. They cannot view compositions. They can review development jobs and assign new cross references to items and view other information.	<input type="checkbox"/>
Project Manager	Permissions to Add and Manage a Project, to Add a New Task to a project, to Modify a Task when it already exists and to Action Tasks. Also to view Project Templates, Task Types and Project Properties and Search Projects and Tasks.	<input type="checkbox"/>
Raw Material Administrator	Higher level of access than Raw Material Developer. In addition to adding and modifying raw materials, can remove raw material compositions and perform global replacements of items. Check in User's pending changes, can add new cross references.	<input type="checkbox"/>
Raw Material Developer	Can add and modify raw materials and their compositions. Can interact with Jobs in a way appropriate to product developers. The Role can interact with raw material classes as specified by the Raw Material Permissions.	<input type="checkbox"/>
Regulatory Role	Can produce and manage regulatory and technical documents. Can view raw materials, formulations and their compositions.	<input type="checkbox"/>
System Administrator	A user who can add, modify and manage Users, Roles and Permissions. They can view many system functions and undertake some system set up. They cannot produce documents or see compositions.	<input type="checkbox"/>
System Communication Administrator	A user who can manage system communication, for example importing information from other systems or exporting to other systems.	<input type="checkbox"/>
System Viewer	Can view raw materials and formulations, but not their compositions. Customers, suppliers and generic documents can also be viewed.	<input type="checkbox"/>
Technical Administrator	High level technical and regulatory permissions. Includes ability to add raw materials and compositions, to view formulations and compositions. Also to add and manage technical properties, suitability conditions, party groups and documents.	<input type="checkbox"/>

Assign a 'Role' to the new user.

Roles are included in the application as a way to manage permissions for Users with similar requirements.

Users can be assigned multiple roles.

Click 'Save'





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Frequently Asked Questions

Can I restrict User permissions for specific operations such as modifying a formulation or creating the first version of a document?

The permissions of a User can be configured for individual operations. You can also set permissions based on different entities such as Item Class, Party Class and Project Templates.

Can I amend the default permissions for User Roles?

The default permissions of a role can be modified. The permissions for a role are split into different categories such as Operations, Formulations and Raw Materials.

You can also create new roles and set the permissions.

How can I see the existing Users on my system?

Simple User information can be found in 'Search for a User' The 'Show System Information' report contains in depth information about existing users on your system, including a list of enabled users, current license configuration and a list of disabled users.

Further training on this topic is available in our [Managing Users & Permissions Training Plan](#).

Tips



- Formpak has a built in Help Centre. Click the 'Help' button to access.
- Additional information about roles and permissions can be found on our Support Centre.
- You can add additional information to a user such as contact details.
- When adding or modifying User's, your license is automatically checked to ensure you remain within your User license agreement. This includes numbers of Users and their permissions.
- A User's role can be modified in 'Manage a User's Role'
- The password for a User can be changed in 'Change User's Password'
- Users can be disabled or enabled using 'Enable/Disable a User'

