

How do I create new users and edit accounts?

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Your ability to create new user accounts depends on the type of licence you have bought for Synaptic Research. If you have only paid for the basic edition of the software then you may not be able to create new accounts.

The top section of the main **User List** page shows whether you are allowed to create new accounts, and the maximum that you are allowed.

Firm's details	
Company name:	Synaptic Software Limited - Training
Total user accounts:	Maximum of 7 - all in use
Concurrent users:	Maximum of 7
Product module licences:	(unlimited, up to total number of users)
Fund module licences:	(unlimited, up to total number of users)
Create new accounts:	Allowed
<input type="button" value="Save details"/>	

Users - add new user	
Grimshaw, Sara	sarand
Jones, Claire	Claire Fund
Jones, Claire	Claire Product
Sharpe, Emma	emma.sharpe@quayssoftware.co.uk
Sharpe, Emma	emmand
Shine, Claire	Claire
Wood, Amy	Amy.Wood1

Logged in

You can create new user accounts in two ways:

- Click on the new user link in the menu bar of the user list page.
- Open an existing user account and create new details based on it, using the Create copy link. This is a fast way of creating multiple accounts which have most details in common – e.g. the same contact details.

Basic user details

The compulsory fields when creating (or editing) a user account have labels which are highlighted in red. The password field is compulsory when creating a new user account – because users must have a password – but not when editing an existing account, because leaving the field blank leaves the password unchanged.

As ever in Synaptic Research there are shortcuts such as the ability to enter names and addresses in lower case, and have capital reports added automatically by the system.

N.B. The “**Company**” field illustrated in the screenshot below is only available if you have bought a premium edition of Synaptic Research. In the basic editions all users share the same company name, and this field is not displayed.

SYNAPTIC SOFTWARE

Your user details

Edit user details | Save changes | Agency codes | Change your password | Create copy | File check | User list | Home page | Help

Your user details are as follows.

User's details

First name:

Last name:

User name:

Email: If changed, an email will be sent to the specified address for validation and to activate your account.

Company:

Licences

Allow use of the product module

Allow use of the fund module

Report settings

Directly Regulated: **Service Provider:**

Network/National:

Qualifications:

Job title:

Account settings

The account-settings section controls what a user is allowed to do within the system. The available options are illustrated by the screenshot below, and are covered in the sections of this document which they relate to (e.g. file-checks). You will only see the options which are relevant to the modules of the software which your firm has paid for – e.g. no settings for preset criteria if you have not bought a licence for that area.

Password:	<input type="text"/>	
Webline:	Current	New
Number:	<input type="text"/>	
User name:	<input type="text"/>	
Password:	<input type="text"/>	
	<input type="checkbox"/> Remove account	

Account settings	
Account disabled:	<input type="checkbox"/> Disable this account
Administrator:	<input checked="" type="checkbox"/> This person is an administrator of your firm's details
Can edit own details:	<input checked="" type="checkbox"/> Allow this person to edit their own contact details, qualifications etc.
Report editing:	<input checked="" type="checkbox"/> Allow this person to edit Quick Reports
Personal preset criteria:	<input checked="" type="checkbox"/> Allow this person to create personal preset criteria
Change firm's criteria:	<input checked="" type="checkbox"/> Allow this person to create preset criteria for the whole firm
Off-panel:	<input checked="" type="checkbox"/> Always allow this person to change preset criteria, even when they're locked
Create shared research:	<input checked="" type="checkbox"/> Allow this person to create shared research for the whole firm
File checks:	<input checked="" type="checkbox"/> Allow this person to carry out file checks

Password	
Password:	<input type="text"/> (min. 6 chars)
Again, to confirm:	<input type="text"/>

There are two key points which are worth noting here:

- Only people marked as “Administrator” are allowed to amend the firm’s user list. People with the file-check permission can see all user accounts (and get the User List link on the home page) but cannot alter user accounts.
- Users can be barred from changing their own contact details etc. (However, they are always still able to change their password.)

When do changes take effect?

All changes to a user’s account settings take effect immediately once you click on the Save changes button/link. Users don’t need to log out and then log back in again.