Job Tracker Professional
Managing Users and Acces Levels

MANAGE USERS-
ADD AND AMEND USERS, AMEND ACCESS LEVELS

Those with System Administration rights within Job Tracker can add and delete users, manage the access levels of other users and change/ reset passwords.
- Start by clicking on Control Panel.
- In the top left click the Security / Users tab, then click Manage Users.
- On the left hand side, you will see a list of all the users that are currently programmed into the system.
- To modify an existing user, to start with simply double click on their name.

PASSWORD RESET
If want to reset the password because the user has forgotten it or for security reasons, follow the simple steps above then click in the password box and type the new password. Re key the new password in the confirm password field.
Once you're happy with your changes, click on "Save User" at the bottom left. in.

ADD A NEW USER or CHANGE ACCESS LEVELS FOR EXISTING USERS

If you'd like to add a new user, click the "Add New User" button towards the bottom of the screen, and fill in the boxes. If it is an existing user that you wish to adjust access levels for, simply double click on their name in the list on the left of the screen.
For all users, the core details that are needed are
- Full Name
- The User Name, the ID they're going to log into Job Tracker with. It's case sensitive.
- Set the security level required. There are five different security groups built into Job Tracker, and we can basically slot our users into one of those groups.
The permissions assigned to those groups can be managed under 'Control Panel', Security / Users.
Fill in the remainder of the fields as appropriate. Most are self-explanatory.
A few are explained in more depth on page 2.
Once you're happy you've entered or amended all the details correctly and assigned the correct access levels, click 'Save User' towards the bottom of the screen.
If this is a new user, their details will now appear on the left hand side of the screen.

Explanation of the settings available

The Home Folder is a handy short cut to get to a specific folder on your network or on the local computer. For example, you might have a networked scanner that scans PDF documents into a certain folder on your network. We can program up a button that means whenever we press is it, it'll open up that particular folder for you then you can Drag N Drop those PDF documents directly into Job Tracker, so if when you click on Browse, it'll give access to the local filing system and you can just go and pick a folder and allocate that.

Default Printer. Click on the down arrow at the far left of the field and you will see a list of all the printers available to you. Select the appropriate printer.

The **Show Select Printer** means whenever you go to print it'll show you the printers properties before it actually prints.

Show Mobile Updates If the user has Job tracker Mobile this enables a window to float on screen so whenever your mobile engineers make any kind of updates the details will appear.

Add **User To Staff Member List** If you tick this box, the users details will automatically appear in the staff member section where you program up your engineers and other staff members.

Say Mobile Updates again if using Job Tracker Mobile, audio updates will be provided. Job Tracker will talk and it'll say "Bobs updated Job 1234"

Keep Me logged In, if this is ticked, after one initial successful sign in, Job Tracker will log the user in automatically each time without needing the user name or password to be manually entered.
If you do want to stop this function for any reason, ie if you're going on holiday or want to enforce manual password entry, simply untick this field. You will then need to log out - click on File at the top of the screen and select "Log Me Out".

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Can Enter Card Details and **Can View Card Details**, Job Tracker has the ability to securely collect credit card details and store credit card details, ticking these options allows you to specify who has what level of access to this data.
To minimise fraud, most companies would set this up so that the users can collect card details but never be able to view them again.

Can Close Jobs If you tick this it means this user has the ability to mark jobs as closed. In the jobs screen, at the bottom there is a little tick box that says "Job Finished" and this relates to that tick box.

Email Settings If you want to authenticate each user individually on your SMTP server this is where you would specify the authentication details, you will need to enter their username and password as required by the server (not their Job Tracker user name and password.

Pick Email Signature This will allow you to pick and assign an existing email signature. If you use Outlook, click, Pick Email Signature. All available Outlook email signatures will be displayed and you can pick which one to use in Job Tracker. Preview Signature shows a preview of that signature.

Edit Signature will open Notepad and allow you look at the HTML part of that signature.

If you don't currently use Outlook you can click **Make Blank Signature** and Job Tracker will create a new blank email signature for you to edit and personalise.

Make Signature Compatible For technical reasons sometimes the Outlook signature may contain code that causes issues in use, clicking 'Make Signature Compatible' will strip out all unnecessary code.

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