

## User Setup

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### **Purpose of this document**

This document outlines the steps to setup Users in Ceres 4.

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## Purpose

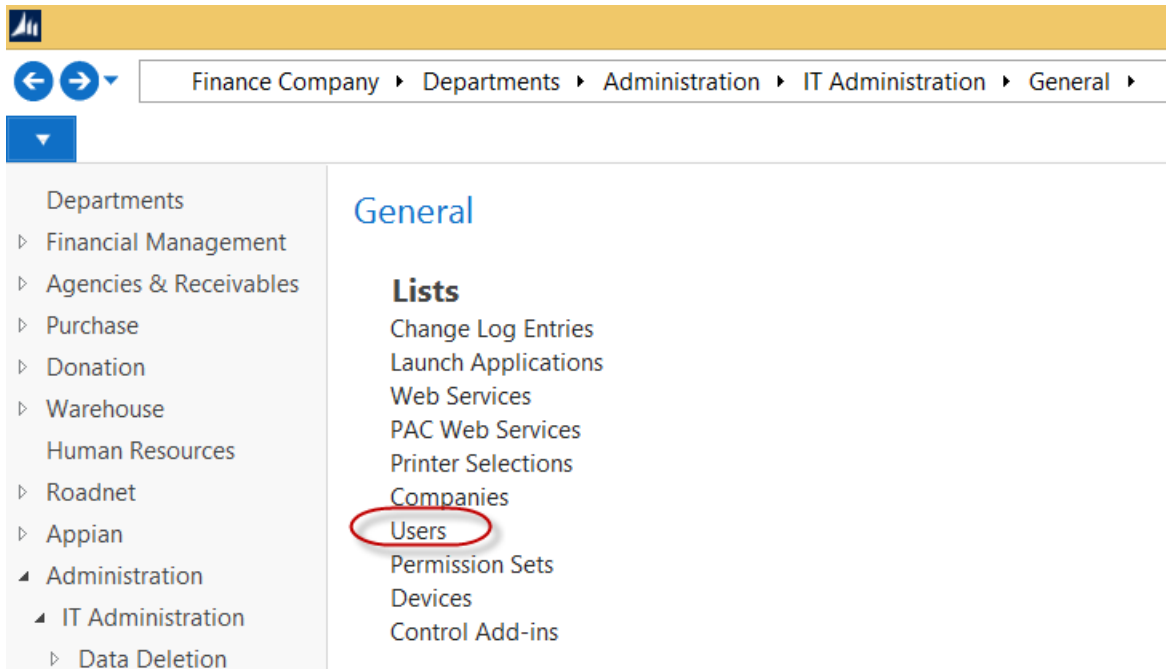
Before users can access and use Ceres 4, they need to be set up in multiple areas in Ceres 4. Some setup is mandatory whereas other setup is optional based on the functionality each user will utilize. The setup that is covered in this document includes Users, User Personalization, User Setup, Warehouse Employees, and ADCS Users. User Security rights/ permissions are referenced here, however – the details regarding Security permissions are out of scope for this procedure. If you need detailed coaching on Security, it is recommended that you reach out to your Ceres VAR for assistance.

*Ceres object release 4.00.00 is required for the functionality documented in this procedure.*

## Users

Ceres utilizes Windows Logins when accessing the database, thus all users must first have a Windows User Name before they can be setup within Ceres. Each user's Windows User Name is linked to the Ceres User name via the User Card. The User Card is also where Security rights/ permissions are assigned which define what functionality each user can access.

1. The Users Page can be accessed from Departments → Administration → IT Administration → General → Lists → Users.



2. To setup a new user, click Home → New.
3. Update the fields on the Users Card as follows.

## General FastTab

### User Card

General			
User Name:	<input type="text" value="SWPROS\ESP-NA..."/>	State:	<input type="text" value="Enabled"/>
Full Name:	<input type="text" value="ESP-NAV-SVCS"/>	Expiry Date:	<input type="text"/>
License Type:	<input type="text" value="Full User"/>		

**User Name** – Input the user’s name using the format domain\username.

**Full Name** - Enter the full name of the user.

**License Type** - From the drop down select from the options:

**Full User:** Full User licenses provide users full read and full write capabilities to all of the licensed solution functionality through any and all modes of access, including the Microsoft Dynamics NAV Windows client, the Microsoft Dynamics NAV Web client, or any other mode of access including web services. Full User licenses are for users requiring unlimited read and write access. As long as the number of users needing simultaneous access to the solution does not exceed the number of Full User licenses you have acquired, these users are properly licensed for full read and write access to the complete solution functionality.

**NOTE:** *This is the recommended selection based on how users are currently licensed for food banks. Limited Users are a consideration when purchasing new users but should be discussed in advance with your NAV/Ceres VAR before purchasing.*

**Limited User:** Limited User licenses provide users full read, but limited write, capabilities to all of the licensed solution functionality through any and all modes of access including the Windows client. The Limited User license is designed to give organizations a lower-cost alternative for extending ERP to users who only require limited access to the Ceres application:

- Read access to data contained in the solution through any client accessing the application, including but not limited to the Microsoft Dynamics NAV Windows client, the Microsoft Dynamics NAV Web client, and web services.
- Write access to a maximum of three application tables in the object range 0 - 99,999,999 other than the General Ledger Entry table, through any client accessing the application. Access to the General Ledger Entry Table requires a Full User license.

**Device Only User** - Device-only licenses enable a user to connect, provided there is an enabled device available to use. Devices can be full or limited. Device users have either full or limited access, as determined by the device. Currently this option is not supported in Ceres.

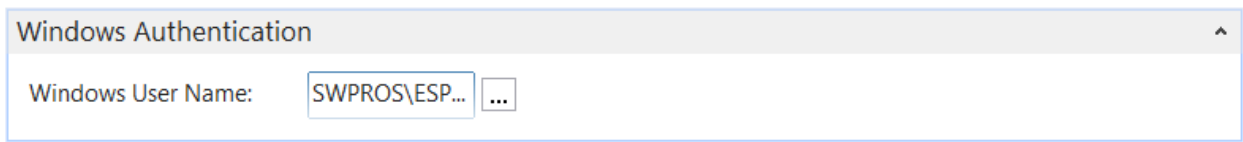
**Windows Group** - Use this license type to create a Microsoft Dynamics NAV user based on a Windows group. All members of the group inherit permissions for the user. However, you must also add each member of the group in Microsoft Dynamics NAV as a user without explicit permissions. Windows Group licensing is a form of license multiplexing. Multiplexing does not reduce the number of user licenses required to access a Microsoft Dynamics NAV solution.

**External User** - This license type is specific to individual users of Ceres\Microsoft Dynamics NAV and therefore currently is not supported. External user licenses must not be shared with other individual users. You do not need concurrent user CALs for external users. External users must not use any clients provided by the Microsoft Dynamics NAV Application Programming Interface (API), such as the Microsoft Dynamics NAV Windows client or the Microsoft Dynamics NAV Web client. External user licenses must not be used for business process outsourcing purposes.

**State** - For active users, select Enable from the drop down. This specifies that the user's login is enabled. To suspend access for a user, select Disabled.

**Expiry Date** - Specifies a date past which the user will no longer be authorized to log on to the Ceres Role Tailored client.

### Windows Authentication FastTab

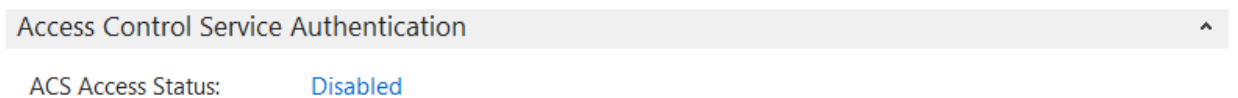


Windows Authentication

Windows User Name:

**Windows User Name** - Specify the name of a valid Active Directory user (i.e. Windows User Name), using the format domain\username.

### Access Control Service Authentication FastTab



Access Control Service Authentication

ACS Access Status: Disabled

**ACS Access Status** - Indicates the user's status for ACS authentication. When you start creating a user, the status is "Disabled". After you create a user, the status changes to Pending. After the user logs on successfully, the status changes to Enabled.

## Microsoft Dynamics NAV Password Authentication FastTab

Microsoft Dynamics NAV Password Authentication ^

Password:  ... User must change password at next login:

**Password** – Specifies an initial password for the user.

**User must change password at next login** - Place a check mark in this field to indicate that the user will be prompted to change the password at next login.

## Web Services FastTab

If you need this information, please request more information from your Ceres VAR.

Web Service Access ^

Web Service Access Key:  ... Web Service Expiry Date:

**Web Service Access Key** – Generates a key that Microsoft Dynamics NAV web service applications can use to authenticate to Ceres services.

**Web Service Expiry Date** – In this field you can specify an expiration date for the web services access key.

## Office 365 Authentication FastTab

Office 365 Authentication ^

Authentication Email:  Authentication Status:

**Authentication Email** – In this field you can specify the Microsoft account that this user signs into Office 365 or SharePoint Online with. The authentication email address must be the organizational email account that the users log in to Office 365 with, such as an account from Windows Azure Active Directory (Windows Azure AD). The Microsoft Dynamics NAV Server instance must be configured to accept the relevant credential types that support integration with Office 365, such as Windows Azure AD.

**Authentication Status** - When you enter an authentication email address for the user, the Authentication Status field changes to Inactive.

## User Permission Sets FastTab

Permission Set	Description	Company
SUPER	▼ This role has all permissions.	

User Permission Sets are where you define what functionality each user has access to within Ceres. This is referenced above as Security rights/ permissions. Each users must be assigned at least one Permissions Set (ALL-CERES or SUPER) to access Ceres. Please note that SUPER gives the new User permissions to all Ceres tables to edit, insert, delete etc. This should only be used in limited circumstances. For more detail on Security permissions, talk to your Ceres VAR. Update the fields as follows.

**Permission Set** - From the drop down, select the Role Id that you want to assign each user. The Role SUPER gives users full access to all functionality within Ceres and supersedes all other permissions. Therefore you will want to be selective as to which users are assigned the SUPER Role. Further all users that are not assigned the SUPER Role, must be assigned the ALL-CERES Role for base access to Ceres.

**Description** – Automatically fills in with the name of the Role is assigned based on the Role Id that is selected in the Permission Set field.

**Company** – Select which company you want to assign each Permission Set to. Generally this field is only filled in if multiple companies are setup within the database and you only want this user to have access to a specific company. Leaving this field blank means that the user has access to all companies within the database.

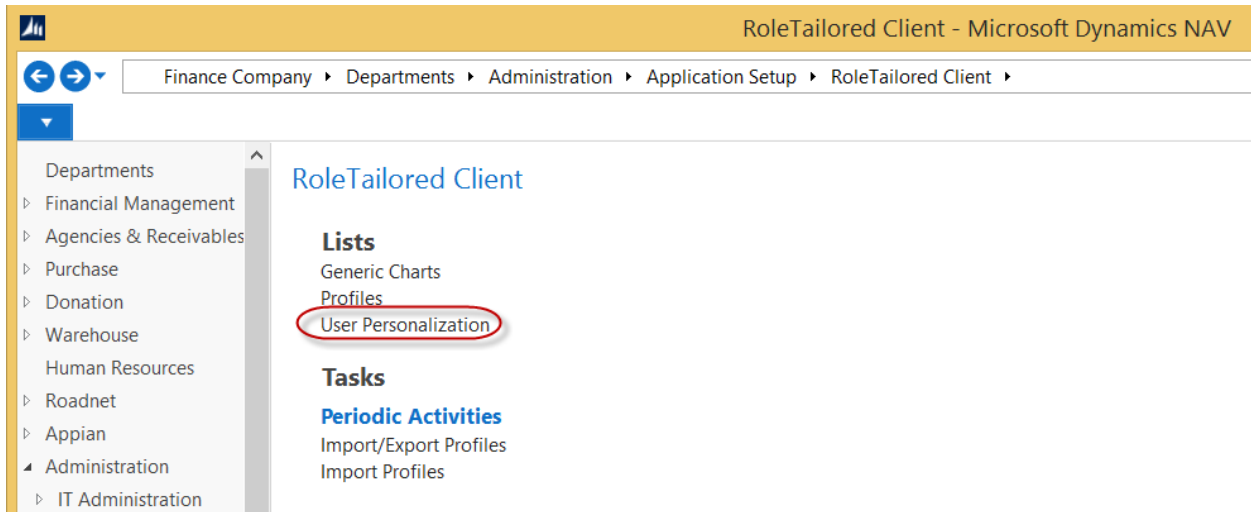
4. To modify an existing user, click Home → Edit.
5. Once the setup has been complete, click OK.

## User Personalization

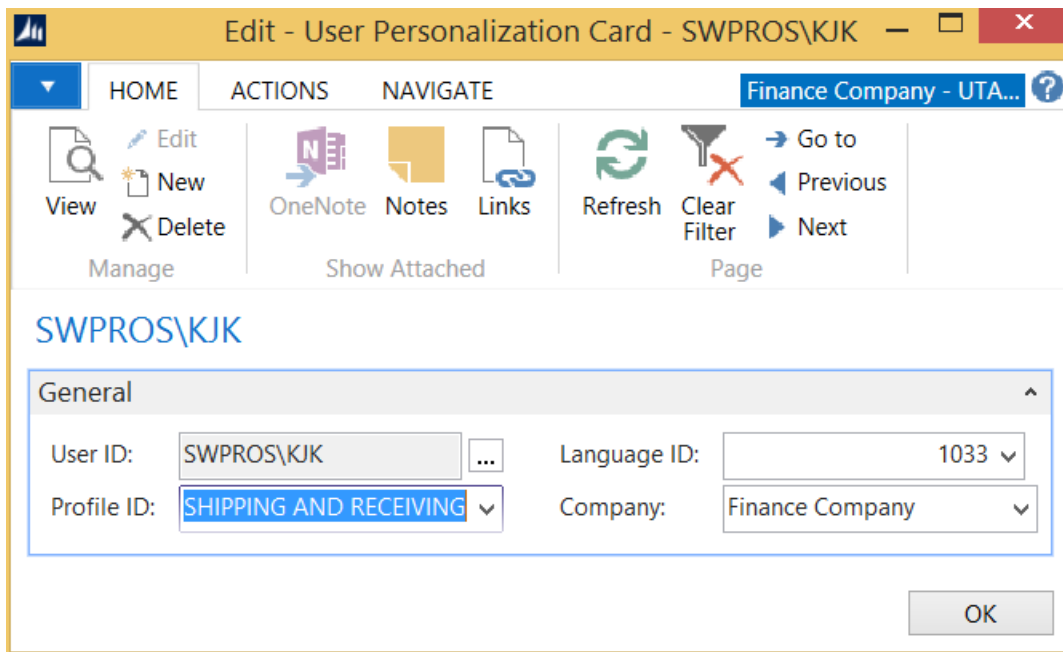
Ceres uses Pages as the main way to display and organize data in the Role Tailored Client. The Role Center is the main Page of the Role Tailored Client and it displays when Ceres opens. The Role Center Page is a home page that helps users focus of their most important daily activities. It gives an overview of the information relevant to a user’s tasks on one page. Please note that the Profile assigned here overlaps with User Permissions. Just because someone can see a menu item on the page does not grant them access. Conversely, if you can only find a menu item by searching, it does not mean you can’t access it.

In Ceres, each profile is linked to a Role Center Page. The User Personalization window is used to link a Profile ID (Ceres look & feel) to the User that was established above. When the users starts the Role Tailored client, Ceres checks the user's credentials, finds the profile assigned, and displays the corresponding Role Center. Users who are not assigned a profile, are assigned the Default Profile. The Default Profile is the profile with Default Role Center field set to yes.

1. The User Personalization Page can be accessed from Departments → Administration → Application Setup → Role Tailored Client → Lists → User Personalization.



2. To setup new user, click Home → New and update the fields as follows:





**User Id** - Click on the ellipsis button and select the User.

**Profile ID** - From drop down menu, select the Profile that best defines the role and tasks the user will perform within Ceres. The three most used in Ceres are: Shipping & Receiving Order by Order, Accounting Manager and Agency Relations Manager.

**Language Id** – Select 1033- English from the drop down menu.

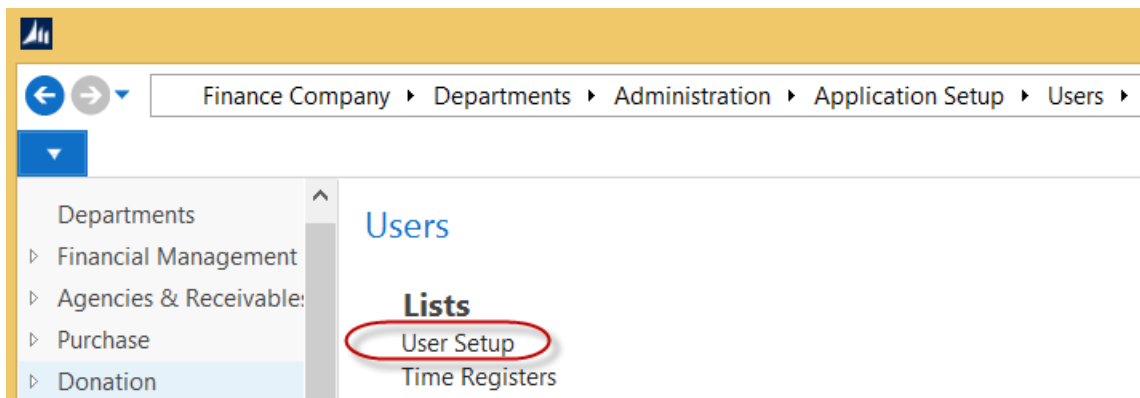
**Company** – From the drop down menu, select the Company that you want this Profile to apply to for this user. This way a different Profile can be assigned to different companies for each user. If left blank then this Profile will apply to all Companies within the database for this user.

3. To modify an existing user, click Home → Edit.
4. Then click OK.
5. Once a different Profile has been assigned, have the user log out of Ceres and log back to display the new Role Center linked to the Profile.

## User Setup Table

Once a user has been setup in Ceres, you can further restrict specific functions they can perform in User Setup. For example, this allows you to grant access full access to a user to enter positive and negative adjustments in the Item Journal yet restrict them from utilizing the kitting functionality in the BOM Journal. You can also expand or restrict the allowable posting date ranges in the User Setup by user to supplement the posting date range default in General Ledger Setup.

1. The User Setup Page can be accessed from Departments → Administration → Application Setup → Warehouse → Users → Lists → User Setup.



2. To setup a new user, click Home → New.
3. In the User ID field, select the user's login.

4. In each of the corresponding fields, indicate which tasks or functionality the users should be able to perform or have access to. A description of the fields follows.

User Setup

Type to filter (F3) | User ID

No filters applied

User ID	Allow Posting From	Allow Posting To	Register Time	Override Activ. Status ...	Modify Credit Limit	Over... Credit Limi...	View Web Sync	Allow Credit/Recreate Order	Change Donor on Posted Orders	Allow Advanced Kitting	Override Item Recall Status	Default CMobile Route Code	Temp Path
SWPROS\DCC			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
SWPROS\KJK			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

**Allowable Posting From and To** - Input From and To dates that a user is allowed to post transactions to. Dates in these fields supersede the default Allowable Posting From and To Date fields in the General Ledger Setup. If the fields here are blank, as shown, then the defaults from the General Ledger setup apply.

**Register Time** – Place a check mark in this field to register the amount of time that a user spends while logged into Ceres. The amount of time spent in Ceres can be viewed from the Time Registers.

**Override Activity Status** – Place a check mark in this field to designate that this user is authorized to override the UNC Activity Status field on the Agency Card. At least one user should be setup in Ceres to override the Activity Status field. Any user with this right can approve an Agency Order to proceed for an Agency with a status like Suspended.

**Modify Credit Limit** - Place a check mark in this field to designate that this user is authorized to modify the Credit Limit field on the Agency Card. If credit limits are used, then at least one user should be setup in Ceres to override the Credit Limit field.

**Over Credit Limit** - Place a check mark in this field to designate that this user is authorized to override the credit limit warning on an Agency Order when an Agency has exceeded their credit limit. If credit limits are used, then at least one user should be setup in Ceres to override the Over Credit Limit field.

**View Web Sync** - Place a check mark in this field to designate that this user is authorized to view the Agency Express Web Queue to view pending and processed transactions to/from the web site.

**Allow Credit/Recreate Order** - Place a check mark in this field to designate that this user is authorized to utilize the “Credit Order and Recreate” function on a Posted Agency Invoice. Please refer to the Procedure for this function for more information.

**Change Donor on Posted Orders** - Place a check mark in this field to designate that this user is authorized to change the Donor No field on posted Donation Orders. This is a very powerful feature, and should be used only after reviewing the related Procedure document carefully.

**Allow Advanced Kitting** - Place check mark in this field to designate that this user is authorized to utilize the Advanced Kitting functionality in the BOM Journal within Ceres. This is a very

powerful feature, and should be used only after reviewing the related Procedure document carefully.

**Override Item Recall Status** - Place check mark in this field to designate that this user is authorized to override the Item recall status. This field is part of the GTIN functionality.

**Default CMobile Route Code** – In this field select a CMobile Route Code that default for this user.

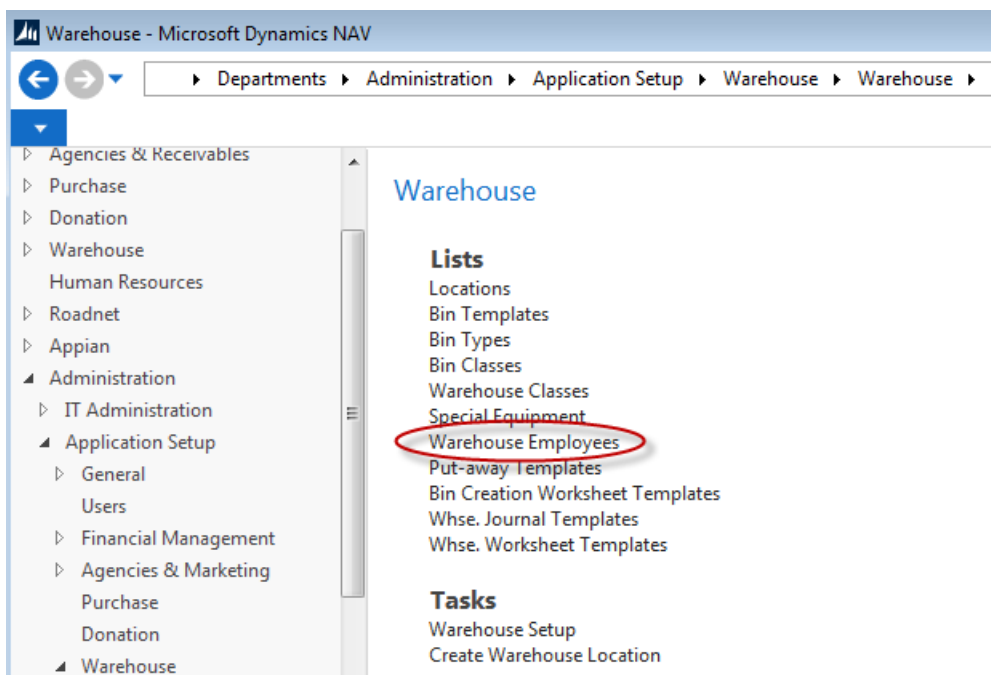
**Temp Path** - Input a Temp Path where Ceres will export the Blue Receipt Export file and the QPR Reports Exports. See Feeding America Reporting Procedure and webinar for more information.

5. To modify an existing user, click Home → Edit List.
6. Then click OK.

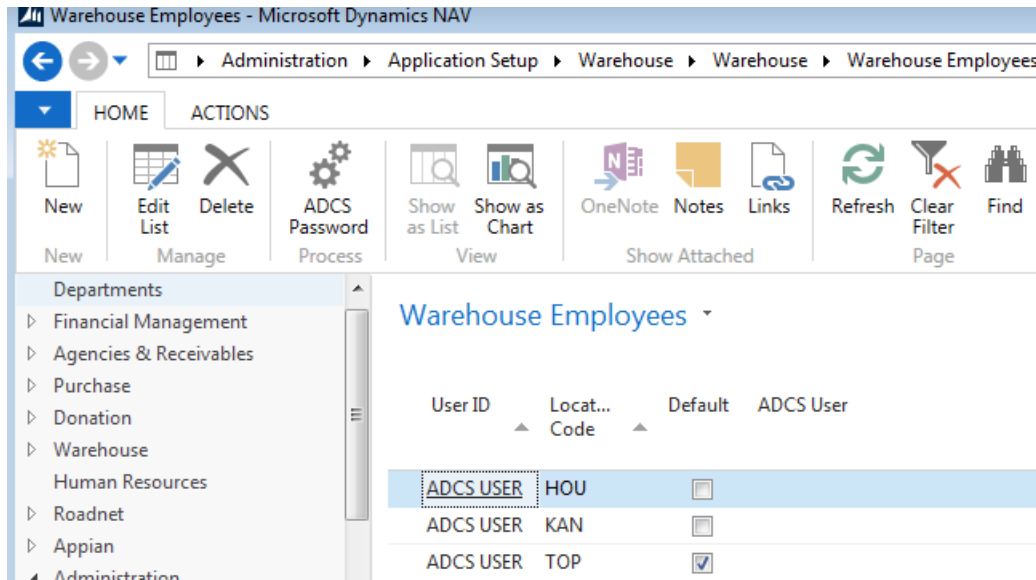
## Warehouse Employees

All users who will be processing inventory related transactions need to be setup as a Warehouse Employee for the location(s) they need access to. This includes accessing Agencies, Donors, Vendors and their transactions. In the Warehouse Employee setup you can assign a user to a single, multiple, or all locations. If a user is not setup as a Warehouse Employee for a given Location, they will not be able to access or view the transactions for that location.

1. The Warehouse Employees form can be accessed from Departments → Administration → Application Setup → Warehouse → Warehouse → Lists → Warehouse Employees.



2. To setup a new user, click Home → New.
3. In the User ID field, select the user's login.
4. In the Location Code, enter the location(s) the user needs access to.
5. Check the Default box if this is the user's main location to perform work. Each user must have a default location.

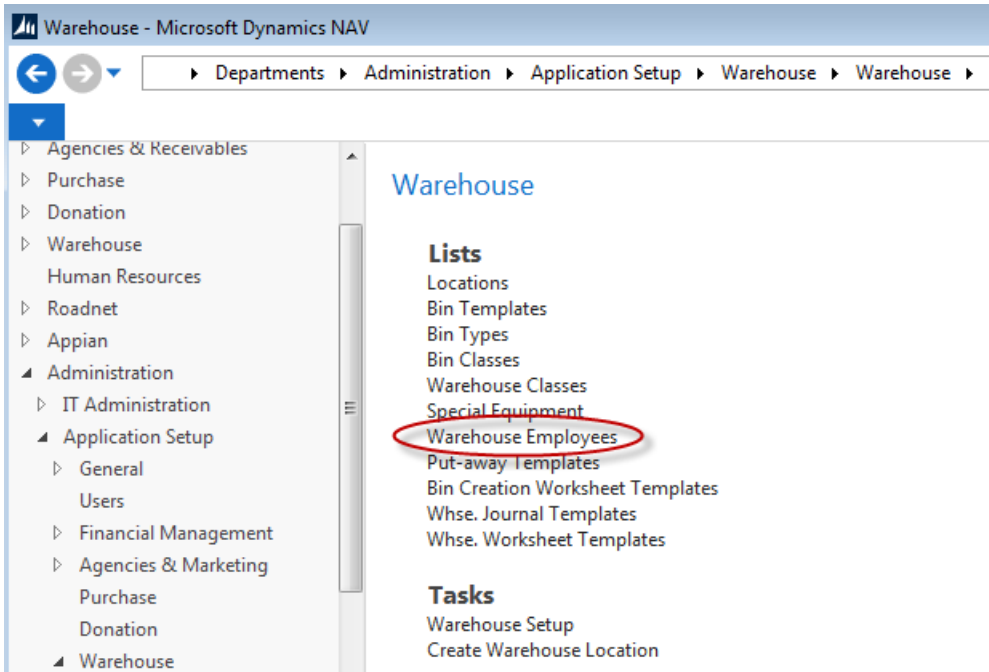


6. To modify the setup for an existing Warehouse Employee, select Home Edit → List.
7. Then Click OK.

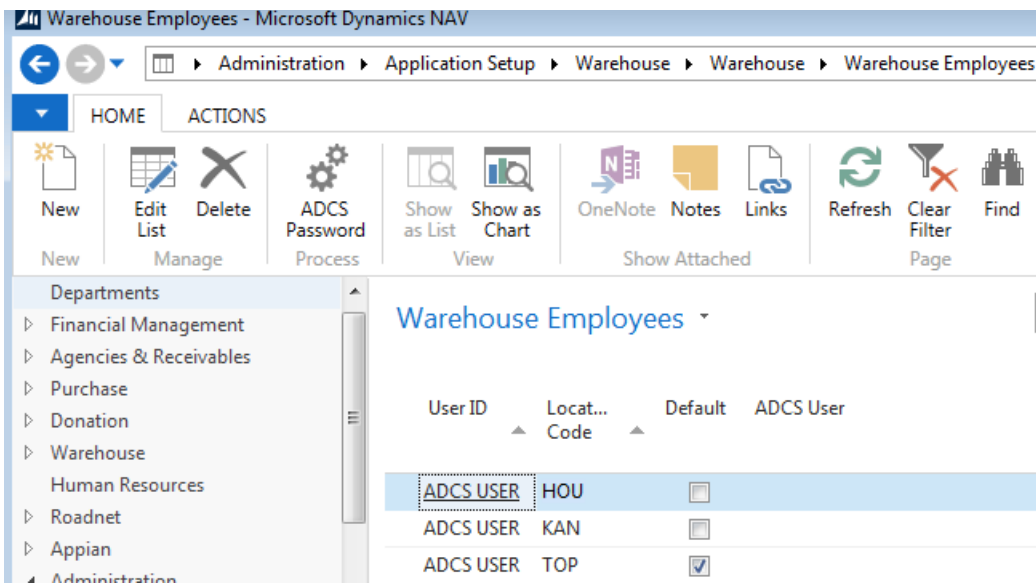
## ADCS Users

ADCS is an acronym for Automated Data Capture System; aka warehouse barcoding. Windows Logins are not accessible from the ADCS scanner or terminal. Please contact your system administrator, the Service Desk (if hosted) or your Ceres VAR if you need to have user credentials added as a database user to support ADCS. To begin using the ADCS functionality, you must set up the ADCS login as a Warehouse Employee.

1. The Warehouse Employees form can be accessed from Departments → Administration → Application Setup → Warehouse → Warehouse → Lists → Warehouse Employees.



2. To setup a new user, click Home → New.
3. In the User ID field, select the user's login.
4. In the Location Code, enter the location where the user may perform ADCS interaction.
5. Check the Default box if this is the user's main location to perform work. Each user must have a default location.



6. Click Home → ADCS Password.

7. In the Password field, enter the password for use with the ADCS terminal.
8. Then Click OK.

**Note:** *The ADCS password is not the same as the Ceres login password. In other words, you could make your users log into the Ceres database with one password, and log into the ADCS terminal with a separate password.*

### **Related Topics:**

1. Warehouse ADCS Barcode Processing
2. Advanced Kitting Overview
3. Agency Express Overview of File Structure and Data Syncing
4. Agency Order Overview
5. Donor Change on Posted Donation
6. Agency Credit Limits and Credit Management
7. Agency Invoice Credit and Recreate