Users in InTouchPro

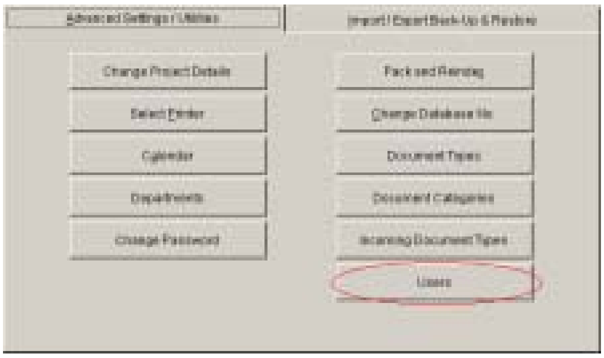
In order to access information within InTouchPro, you have to identify yourself using a user name and password.

This is done for a number of reasons, the first one being that by identifying yourself, InTouchPro can create 'reference numbers' for documents using your ID – without having to continually ask 'who are you' every time you start a new document.

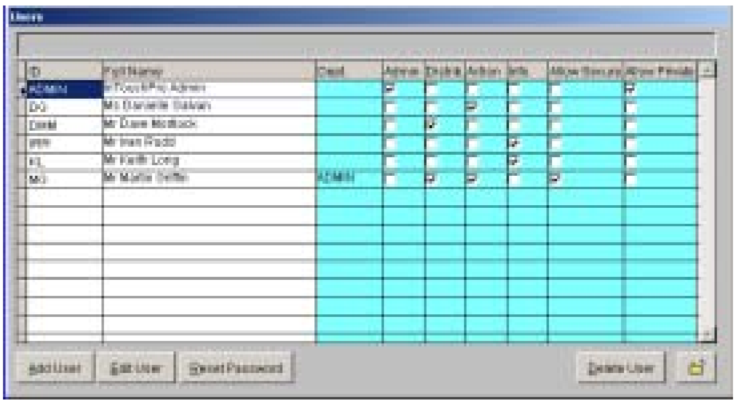
IDs also help InTouchPro with the internal distribution of documents, the two levels of security that encompasses and with documents marked as 'private'.

In order to review the user list, to be able to add new users or amend the details of existing ones, you must have InTouchPro administrator rights. The user list is accessed by clicking on the 'Other Utilities' button from the main menu.

InTouchPro will present the Other Utilities menu and you should click on the 'Users' button.



InTouchPro will then present you with the Users list – *the columns headed up 'Distrib', 'Action' and 'Info' only appear when the administrator has selected to register incoming documents, so my not be apparent on your system.*



The grid across the centre of the form has columns for :

- **ID** This is the users 'login ID' and is used to identify them to InTouchPro. Generally, this would just be the users initials – as this makes document references clear and apparent, although there are circumstances where an indication of the users position might be more appropriate – *such 'QS' for Quantity Surveyor or 'ACCT' for the accounts department.*
- **Full Name** This is the users full name, which is built up from their Title, Forename and Surname in the same way contacts are.
- **Department** This is the department the user belongs to, and is optional
- **Administrator Rights** This tick box allows the administrator to assign other users administration rights.
- **Distribution** This tick box controls whether the user is part of the 'default distribution' of incoming documents – but given a default 'Action' or 'Info' status.
- **Action** This controls whether the user is by default given an 'Action' status for incoming documents.
- **Info** This controls whether the user is by default given an 'Info' status for incoming documents.
- **Allow Secure** This controls whether the user can create documents which are saved in a more secure area than the 'run of the mill' ones and whether they can view documents marked as secure.
- **Allow Private** This controls whether the user can create documents in a 'private' area which other users cannot view.

In the example, you will see that some of the columns have a light blue background – this is how InTouchPro indicates that the column can be edited in the grid directly, rather than having to click on the 'Edit' button.

Adding A New User

To add a new user to an InTouchPro database – so they can log in, raise new documents, register incoming correspondence and review documents distributed to them – you should click on the 'Add User' button on the Users List.

InTouchPro will present you with a form like the one below:

The details required are:

- **Title** The users 'title' such as Mr, Mrs, Miss or whatever.
- **Forename** The users full forename.
- **Surname** The users surname.
- **User ID** This would generally be the users initials, or a short name for them, which is used when compiling document references.
- **Department** The department the user is in – optional.
- **Position** The users job title or position.
- **Tel. No.** The direct-dial telephone number for the user, or the switchboard number if a direct line is not available.
- **Fax. No.** The users fax machine number.
- **Mob. No.** The users mobile phone number.
- **E-Mail** The users e-mail number.
- **Web Address** The users web address.
- **Comments** Any comments about the user that the administrator feels are relevant.

- **Path for 'Private' Correspondence**
  This is the location where any correspondence raised by this user would be stored – should the user mark it as 'Private'. *Care should be taken if using this feature – as documents can become 'unmanageable' if they are stored on 'local' drives or on network drives where access is restricted.*

Only the User ID is compulsory, but the more information you complete – the more can be used when creating new documents.

When you have completed the details, click on the 'Save' button to make the details permanent.

Once the user is saved, you can tick the various columns on the grid to control the features available to the user.

Note that the newly created user will have a password assigned to them on creation, this will be the name of the day of the week that they have been added to InTouchPro *– i.e. if they were added on a Friday, then their password will initially be 'Friday'.*

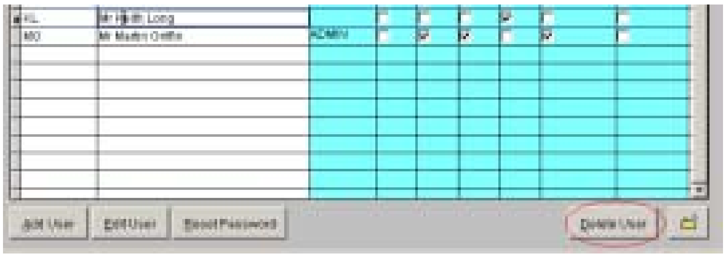
Resetting a Users Password

Should a user forget their password, you can reset it by locating the user in the User List – clicking on their name, then on the 'Reset Password' button.

InTouchPro will present you with a message – showing the new password for the user.

Deleting a User

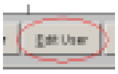
You can delete a user, which will not delete any of their documents or records of documents distributed to them, by locating them in the User List – clicking on their name, then on the 'Delete User' button.



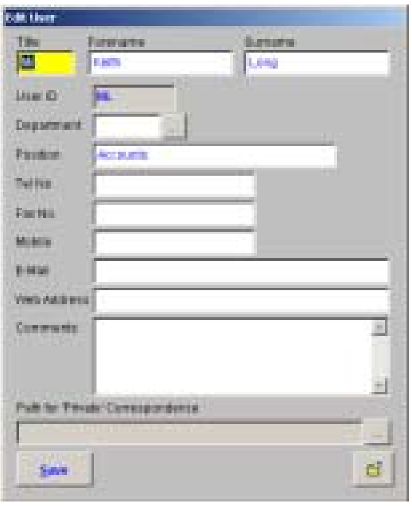
InTouchPro will expect you to confirm the deletion before it is performed.

Editing a Users Details

If you need to edit a users details in InTouchPro, and the particular details are not shown on the grid section of the User List in a column with a blue background, you can do so by locating the user in the User List - clicking on their name, then on the ‘Edit User’ button.



InTouchPro will present a form very like the one for adding a new user:



The details available to change are:

- **Title** The users ‘title’ such as Mr, Mrs, Miss or whatever.
- **Forename** The users full forename.
- **Surname** The users surname.
- **Department** The department the user is in – optional.
- **Position** The users job title or position.
- **Tel. No.** The direct-dial telephone number for the user, or the switchboard number if a direct line is not available.
- **Fax. No.** The users fax machine number.
- **Mob. No.** The users mobile phone number.
- **E-Mail** The users e-mail number.
- **Web Address** The users web address.
- **Comments** Any comments about the user that the administrator feels are relevant.

- **Path for ‘Private’ Correspondence**
  This is the location where any correspondence raised by this user would be stored – should the user mark it as ‘Private’. *Care should be taken if using this feature – as documents can become ‘unmanageable’ if they are stored on ‘local’ drives or on network drives where access is restricted.*

When you have completed all the details, click on the ‘Save’ button to return to the list of users.

Deleting a User

If you need to delete a user (perhaps they have left the company or moved to another project). you can do so by locating the user in the User List - clicking on their name, then on the ‘Delete User’ button.

InTouchPro will require confirmation before the user is deleted.