

How do I...

Set up new users (FP19)

RoboVet Version: Feature Pack 19

Security Permissions: There are 2 areas of security required to add new users.

1. **Options Database – Set Up:** This allows users to access the **Options** from the **System** button.
2. **Security Administrator:** This allows the user to set up and edit user details.

+	Options Database - Set Up (All Barred Except:)
+	Security Administrator (All Barred Except:)

Setup New Users / Passwords and Employee Codes

There are 4 steps to setting up new users: -

1. Add each member of staff as a User - their **User Name**.
2. Enter User details including **Employee Code**.
3. Set up user security to the reports.
4. Set up the security areas. This can be individually for each member of staff or by employee type. (Please see **How Do I set up Security in RoboVet** for details)

A few points to consider: -

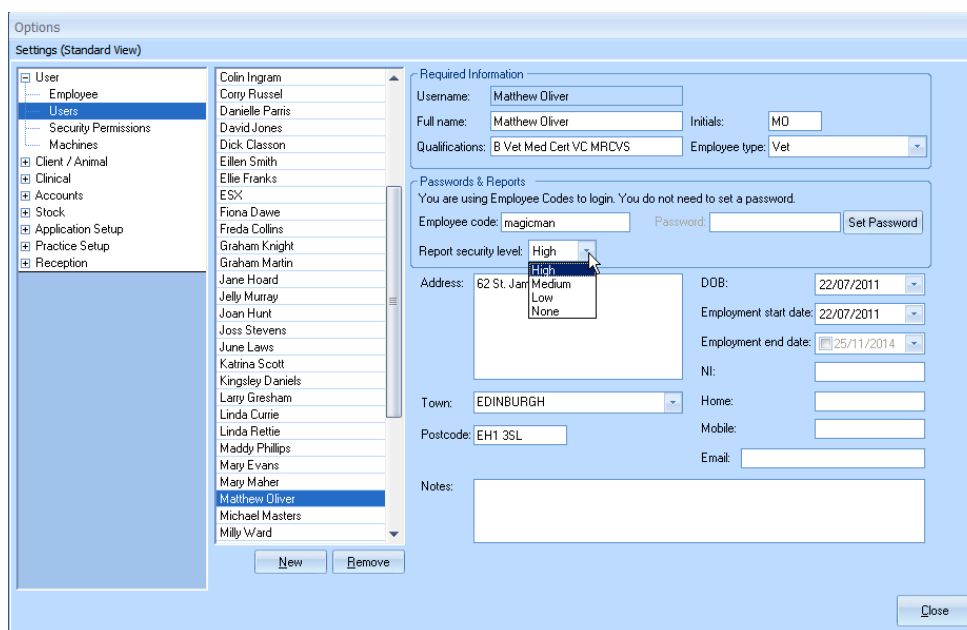
1. The User Name **cannot** be edited. If someone changes their name and you want to use the new name you will have to delete the original user and add a new one. You will not lose their sales history but when analysing the sales of a user you will have to remember that they have 2 names!
2. There are two settings for the name that will appear on client documents (invoices, animal histories etc.) - to change the setting please contact a member of the Support team.
 - a. The **User** name only will appear. In this case make sure you enter the names as you want them to appear. For example, you may want the vets to have their first initial and last name. Be consistent.
 - b. The **Full Name** is used. If a full name is not supplied then the user name will be used. This option gives more flexibility. For example, for vets you could use the **full name** and for other users use the **User** name.
3. The user name **RoboVet Admin** usually has access to all security areas but this can be changed. It is important to have a secure employee code RoboVet Admin.
4. By default all new users will have minimum access and often this is enough for normal RoboVet use.
5. Some practices create a user called Locum Vet and Locum Nurse to be used as appropriate. If you do this do not forget to enter initials for these users, such as LV and LN, so they will appear in dropdown lists of user initials.
6. To control access to all your financial information set the **Report security level** at an appropriate level.
The **Daybook** and **Animal History** reports are accessed directly from toolbars and are not included in the reports security set in the user set-up screen.
7. Users can be removed – their records are not deleted and you can view all their sales/clinical notes etc..
Note: If you delete a user you will no longer be able to see their past appointments.

Creating Logins

It is advisable to create a separate login identity for all users of your RoboVet system, including the administrator of the system. RoboVet uses the login details to mark certain entries and transactions during the normal running of RoboVet in the surgery.

Step 1. Add User

Log in as a user allowed to access the **Options Database** and the **Security Administrator** function. Click on the **System Button** then select **Options** and choose **User** then **Users**.



Click on **New** and enter the name of the user and then **OK**. Some practices use initials, some use first initial and surname, some use first name and the first letter of the surname, some use a mixture of the methods – it is up to you. It is important to remember that this is how will appear on client facing documents (for example, Animal History, Invoices, Statements and receipts) if you do not chose to use the **Full Name** option. This will place the user name in the list.

Step 2. Entering User Details

There are 3 sections for entering information about the user. Very few practices enter any personal information in the lower section (address etc.) – below the **Password and Reports** section as you will have this information elsewhere.

Section 1: Required Information

Make sure that your new user's name is highlighted in the user list. Now you can add details.

Complete Full Name and Qualifications for all vets – this information is printed on Prescriptions.

You do not require the full name or qualifications for other users but if you have opted for the full name to be on client facing documents the entered in this field will be used. So, for example, Sophie the nurse has a **User Name** of **SDB** and a **Full Name** of **Sophie VN**. If the full name option has been configured client facing documents will have **Sophie VN** as the person responsible for the work entries.

Initials: It is ESSENTIAL to enter the initials for each member of staff. Initials against all sales items and can be selected from dropdown lists in many of the dialogue boxes. If you do not enter initials there will be '#' sign followed by a number in the list.

Employee Type: Every user needs to be allocated an **Employee Type**. This can be used for sales analysis and in some practices **Employee Type** is used when setting up security.

Section 2: Passwords and Reports

Employee Code must be entered if you are using this method to login. The code is up to 10 characters and not case sensitive.

Password – this is only required if you are using the old fashioned **User Name/Password** mode for logging in and effectively is a redundant area. If used, the password is case sensitive and is restricted to 19 characters. Passwords are not set by users but set/changed by someone with access to the **Options**.

Security Permissions

If a user forgets their password and you have mislaid your list then do not panic. Simply enter a new password and click in another field – you will be informed that you have been successful.

Reports security level

There are 4 levels.

1. High – access to **ALL** reports
2. Medium – access to non-financial reports, ideal for someone carrying out marketing
3. Low – reminders and filter animal list
4. None - none

Step 3. Enter Security Access Levels

Please see **How Do I set up Security in RoboVet** for full details.

Click on **Security Permissions**. Users or Employee Types listed on the right can be dragged into appropriate areas. It is possible to multi-select several users with **Ctrl Click**.