ICE Business System

User Management

(Version – 1.1)

Learning Unit Guide

Signature Software

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I : Introduction

This Learning Unit Guide is reference-based, in that most of the information for the tasks can be found in the **Signature Learning Centre**.

This guide is designed as a workbook to be used during facilitator led learning.

It includes instructional materials, descriptions of business processes and details of demonstrations to be undertaken by the facilitator.

There are references to **menu paths** for accessing the functions within **ICE** application and **SLC References** for locating additional information in the **Signature Learning Centre**.

II : Objectives

Ensure correct use and provide regular maintenance of the User Management to provide optimal use within the ICE Business System.

III : Target Audience

Administration staff responsible for the maintenance of Staff and User details.

IV : Prerequisites

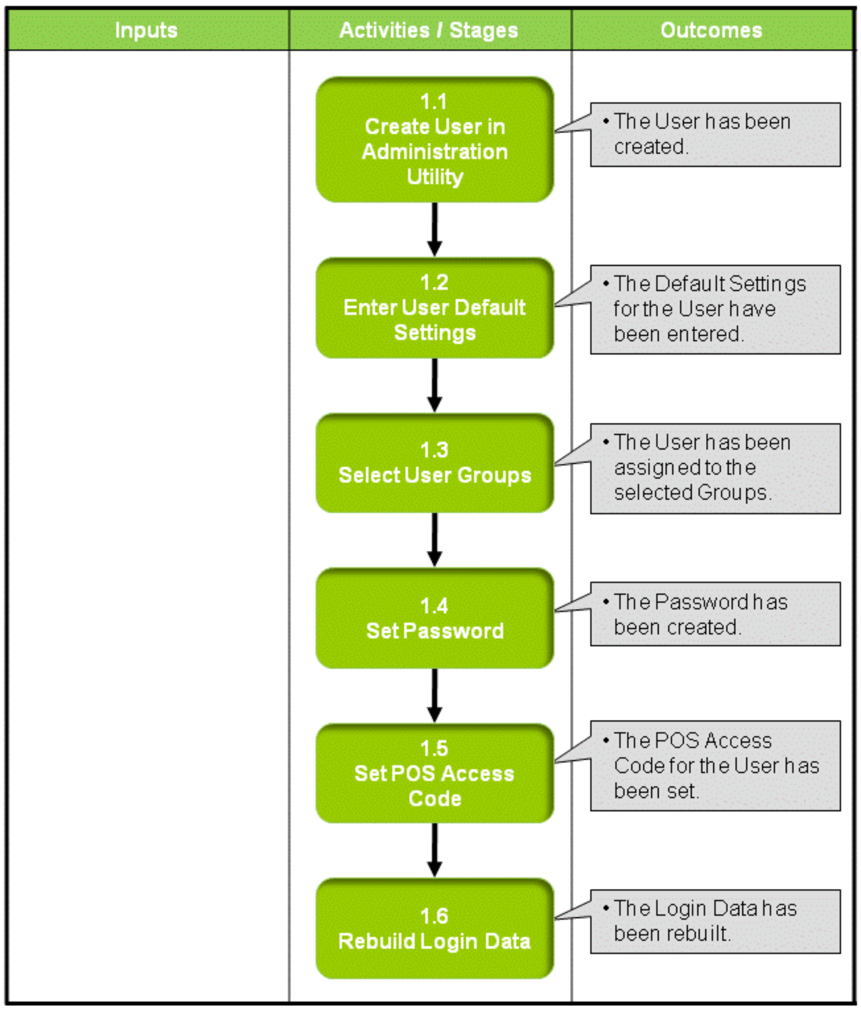
- Database & User Administration Setup Activities
- Database & User Administration Processing Activities

V : Scenarios

V.1 : Create New User

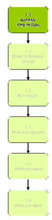
Workflow

Workflow :	Create New User
Scenario 1:	A new User of the ICE Business System needs to be created.



Scenario 1: Create New User

A new User of the ICE Business System needs to be created.



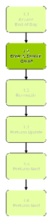
1.1: Create User in Administration Utility

Objectives:
• *Access User Administration within the ICE Administration Utility and create a User.*
SLC Reference:
• *ICE Business Systems > Database & User Administration > Processing Activities*

Work Instructions

Screen: ICE Utility Main
1. Access **Users & Groups.** Select menu path: **Security > Users and Groups.**
Screen: Users and Groups > Users tab > Details tab
2. Select the **Users** tab. 3. Insert a new **User.** Press **F9** or the **Green "+"** speed button to insert a new User. 4. Enter a **User Name** that is unique and consistent with a standard user name convention for existing user names. 5. Enter the **First Name** of the User. 6. Enter the **Last Name** of the User. 7. Select the applicable **Staff Type(s)** of the User. ***Note:*** *By selecting applicable Staff Type(s), the User will be made available in the respective search screens within ICE.* 8. If the Service Module is used, enter the **Technician Charges.** 9. If accessing the **Scheduler,** select whether User is Scheduler Only. 10. Select Employment status of **Employed** and enter the **Date Commenced**. 11. If applicable, enter the User's **Position Title.** 12. If applicable, enter the User's **Job Description.** 13. If applicable, enter a User **Comment.** 14. If the Service Module is used, select whether the **Warnings dialogue** is required for exceeded default times and which **Job Types** they are required for. 15. Select the **Default Settings** tab.

Outcomes:
• *The User has been created.*
Notes:
• *N/A*



1.2: Enter User Default Settings

Objectives:
• *Enter the Default Settings for the User.*
SLC Reference:
• *ICE Business Systems > Database & User Administration > Processing Activities*

Work Instructions

Screen: Users and Groups > Users tab > Default Settings tab
1. Select the default **Company** of the User. 2. Select the default **Branch** of the User. 3. If the User is a Technician, select the default **Location** for stock of the User. 4. If Sales Prospecting is applicable, select the applicable **Diary Format** and enter **Start/Finish/Call** times. 5. If Service Module is used, select a default **Service Job Type.** 6. Select the **Groups** tab.

Outcomes:
• *The Default Settings for the User have been entered.*
Notes:
• *N/A*

1.3: Select User Groups

Objectives:
• *Select the Groups for the User.*
SLC Reference:
• *ICE Business Systems > Database & User Administration > Processing Activities*

Work Instructions

Screen: Users and Groups > Users tab > Groups tab
1. From the **Available Groups** in the left panel, select the applicable User Group(s) for the User to determine which functionality of ICE they can access. **Note:** *Refer to scenario **"Create New Group"** if a new User Group is required.* 2. Select the right facing **red arrow** to move the selected User Group(s) to Selected Groups in the right panel. 3. Press **F10** or the **Green "✓"** speed button to save the new User.

Outcomes:
• *The User has been assigned to the selected Groups.*
Notes:
• *N/A*

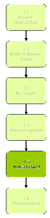
1.4: Set Password

Objectives:
• *Set the Password for the User.*
SLC Reference:
• *ICE Business Systems > Database & User Administration > Processing Activities*

Work Instructions

Screen: Users and Groups > Users tab > Groups tab
1. Select the **Modify Password** button to set a password for the User.
Screen: Set Password
2. Enter a **Password** for the User. 3. Reenter the **Password** for confirmation. 4. Select **OK.**

Outcomes:
• *The Password has been created.*
Notes:
• *N/A*



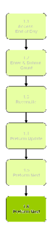
1.5: Set POS Access Code

Objectives:
• *Set a POS Access Code for the User to be used when accessing Point of Sale.*
SLC Reference:
• *ICE Business Systems > Database & User Administration > Processing Activities*

Work Instructions

Screen: Users and Groups > Users tab
1. If the user will not be accessing Point of Sale, complete scenario **1.6 Rebuild Login Data.**
2. If the User is to access Point Of Sale, select the **New Access Code** button.
Screen: Information
3. The window will display the new Access Code to be used for POS. ***Note:*** *The User will be prompted to reset their POS Access Code on their first login to POS.*
4. Select **OK.**

Outcomes:
• *The POS Access Code for the User has been set.*
Notes:
• *N/A*



1.6: Rebuild Login Data

Objectives:
• *Rebuild the Login Data to incorporate the changes made to the User.*
SLC Reference:
• *ICE Business Systems > Database & User Administration > Processing Activities*

Work Instructions

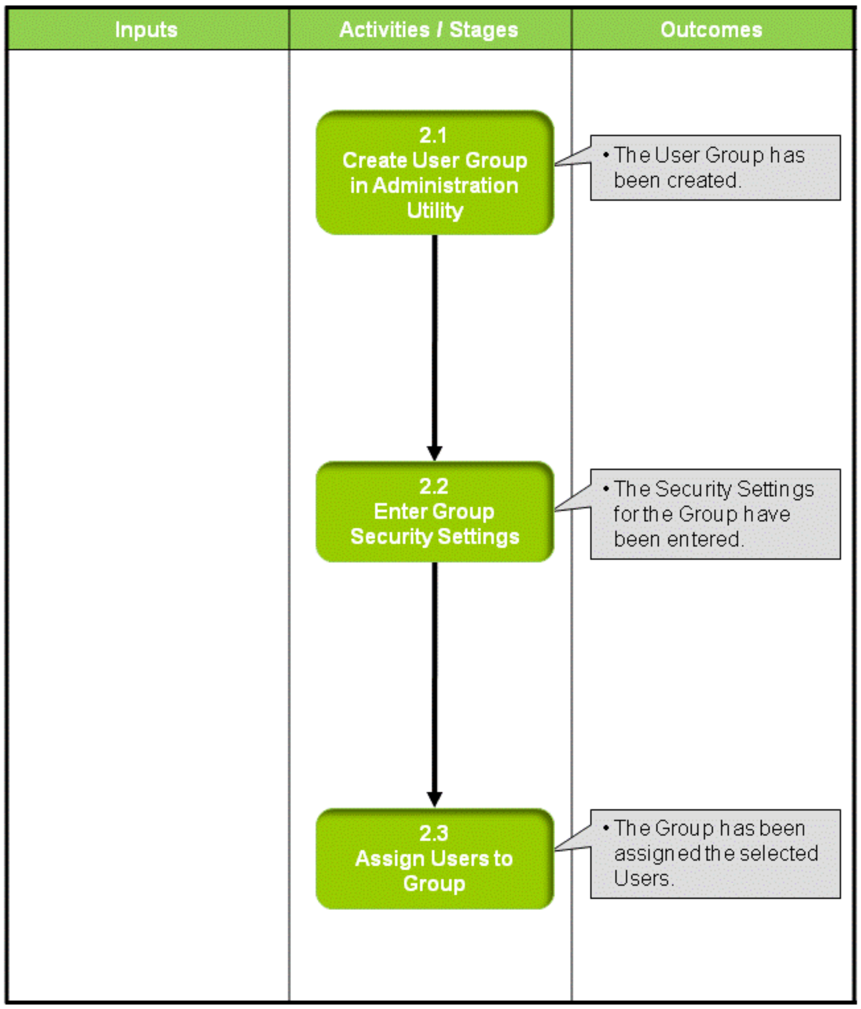
Screen: Users and Groups > Users tab
1. Select **Close** to rebuild the login data and make the User's User Name and Password active.

Outcomes:
• *The Login Data has been rebuilt.*
Notes:
• *N/A*

V.2 : Create New Group

Workflow

Workflow :	Create New Group
Scenario 2:	Each User must be attached to at least one User Group. A User Group determines the security settings for a User outlining the functionality they can access within the ICE Business System.

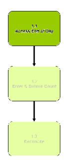


Scenario 2: Create New Group

Each User must be attached to at least one User Group. A User Group determines the security settings for a User outlining the functionality they can access within the ICE Business System.

It is recommended that User Groups be created, based on similar roles staff undertake as the example below outlines.

- Sales Staff – access to sales transactions, inventory enquiry & relevant reports.
- Sales Manager – same as sales staff plus additional report and End of Day functionality.
- Service Works Controller – access to service module and relevant reports and End of Day.
- Service Technicians - access to service module and relevant reports.
- Accounts Payable Clerk – access to Accounts Payable transactions only.
- Debt Collection Clerk – access to Customer information only.
- Financial Administrator – access to all financial transactions, operations and reports.
- System Administrator – access to all areas of the System



2.1: Create User Group in Administration Utility

Objectives:
• *Access User Administration within the ICE Administration Utility and create a User Group.*
SLC Reference:
• *ICE Business Systems > Database & User Administration > Processing Activities*

Work Instructions

Screen: ICE Utility Main
1. Access **Users & Groups.** Select menu path: **Security > Users and Groups.**
Screen: Users and Groups > Groups tab > Browse tab
2. Select the **Groups** tab. 3. Insert a new **Group.** Press **F9** or the **Green "+"** speed button to insert a new Group. 4. Enter a **Group Name** that is unique and consistent with a standard group name convention for existing group names. 5. Press **F10** or the **Green "✓"** speed button to save the new Group. 6. Select the **Security** tab.

Outcomes:
• *The User Group has been created.*
Notes:
• *N/A*

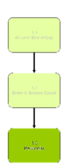
2.2: Enter Group Security Settings

Objectives:
• *Enter the Security Settings for the Group.*
SLC Reference:
• *ICE Business Systems > Database & User Administration > Processing Activities*

Work Instructions

Screen: Users and Groups > Groups tab > Security tab
1. For each option, select whether the Group is able to perform the option. **Note:** *If most or all options are to be selected, the **Select All** button can be used.*
2. Press **F10** or the **Yellow "✓"** speed button to save the changes to the Group.

Outcomes:
• *The Security Settings for the Group have been entered.*
Notes:
• *N/A*



2.3: Assign Users to Group

Objectives:
• *Assign Users to the Group.*
SLC Reference:
• *ICE Business Systems > Database & User Administration > Processing Activities*

Work Instructions

Screen: Users and Groups > Groups tab > Users tab
1. From the **Available Users** in the left panel, select the applicable User(s) for the Group to determine which Users have the functionality of this Group within ICE. **Note:** *A User can also be assigned a Group through User Administration. Refer to scenario **“Create New User”** 1.3 for further information.* 2. Select the right facing **red arrow** to move the selected User(s) to Selected Users in the right panel.

Outcomes:
• *The Group has been assigned the selected Users.*
Notes:
• *N/A*

V.3 : Floating POS Staff

Workflow

Workflow :	Floating POS Staff
Scenario 3:	Floating Staff are users that undertake POS transactions for multiple Branches within the ICE Business System.

Inputs	Activities / Stages	Outcomes
	3.1 POS Access Code Allocation	• The functionality of POS Access Codes assigned to Users has been explained.

Scenario 3: Floating POS Staff

Floating Staff are users that undertake POS transactions for multiple Branches within the ICE Business System.

3.1: POS Access Code Allocation

Objectives:
• *To identify the functionality of POS Access Codes*
SLC Reference:
• *N/A*

Work Instructions

Screen: Off Screen

- POS Access Codes are assigned to Users of the ICE Business System.
- Each User is assigned to a default Branch. The POS Access Code is only applicable to that default Branch. A User is unable to have a POS Access Code for more than one Branch.
- On entry into the Point of Sale module in the ICE Business System a default Branch must be selected.
- POS Access Codes for Users assigned to that Branch can only be entered.
- If a User is required to access POS for multiple Branches the following 2 options are available:
  - Change the default Branch for the User each time they need to access POS for a different Branch.

    The default Branch for a User can be modified within Users & Groups of the Utility program (**Security > Users & Groups > Users tab > Default Settings**).

  - Create multiple User accounts for the same User, each with a different default Branch.

    Create as many User Accounts for each Branch the User access POS for.

    The User then enters different POS Access Codes based on which Branch they are at.

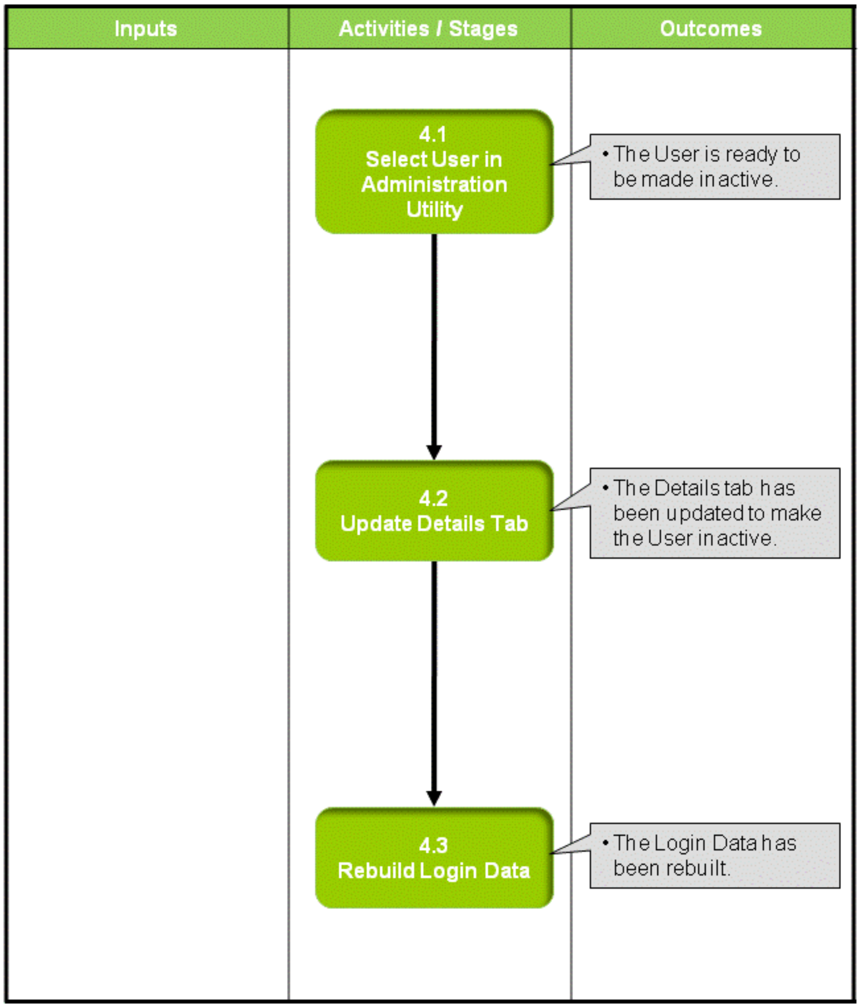
    Multiple User Account can be created within Users & Groups of the Utility program (**Security > Users & Groups > Users tab**).

Outcomes:
• *The functionality of POS Access Codes assigned to Users has been explained.*
Notes:
• *N/A*

V.4 : Inactive Staff

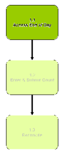
Workflow

Workflow :	Inactive Staff
Scenario 4:	A staff member is no longer working for the Company and needs to be made inactive.



Scenario 4: Inactive Staff

A staff member is no longer working for the Company and needs to be made inactive.



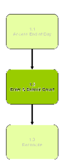
4.1: Select User in Administration Utility

Objectives:
• *Access User Administration within the ICE Administration Utility and select the User.*
SLC Reference:
• *ICE Business Systems > Database & User Administration > Processing Activities*

Work Instructions

Screen: ICE Utility Main
1. Access **Users & Groups.** Select menu path: **Security > Users and Groups.**
Screen: Users and Groups > Users tab > Browse tab
2. Select the **Users** tab. 3. Select the **Browse** tab. 4. Locate and select the **User** to be made inactive. 5. Select the **Details** tab.

Outcomes:
• *The User is ready to be made inactive.*
Notes:
• *N/A*



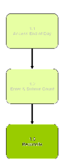
4.2: Update Details Tab

Objectives:
• *Modify the Details tab to make the User inactive.*
SLC Reference:
• *ICE Business Systems > Database & User Administration > Processing Activities*

Work Instructions

Screen: Users and Groups > Users tab > Details tab
1. Ensure no **Staff Type** is ticked so that the User is no longer displayed for selected within ICE. 2. Select the Employment status of **Terminated.** 3. Enter a **Date Terminated**. 4. Press **F10** or the **Yellow "✓"** speed button to save the changes.
Screen: Transfer Staff Reviews
5. If any Reviews for the User are outstanding, select the **User** search icon.
Screen: Staff Search
6. Search for the **Staff** Member, the Reviews are to be transferred to, by typing in any of the searchable fields. 7. Press **F12** to retrieve the search results. 8. Select the **Staff** Member required. 9. Press **OK** to select the **Staff** Member and close the Staff search.
Screen: Transfer Staff Reviews
10. Select the **OK** button.

Outcomes:
• *The Details tab has been updated to make the User inactive.*
Notes:
• *N/A*



4.3: Rebuild Login Data

Objectives:
• *Rebuild the Login Data to incorporate the changes made to the User.*
SLC Reference:
• *ICE Business Systems > Database & User Administration > Processing Activities*

Work Instructions

Screen: Users and Groups > Users tab
1. Select **Close** to rebuild the login data and make the User's User Name and Password active.

Outcomes:
• *The Login Data has been rebuilt.*
Notes:
• *N/A*

V.5 : Troubleshoot User Management

Workflow

Workflow :	**Troubleshoot User Management**
Scenario 5:	Common questions relating to the use of the User Management facility are addressed .

Inputs	Activities / Stages	Outcomes
	5.1 Troubleshoot User Management	• The common questions relating to the use of the User Management facility have been addressed.

Scenario 5: Troubleshoot User Management

Common questions relating to the use of the User Management facility are addressed below.

5.1: Troubleshoot User Management

Objectives:
• Outline the common questions and answers relating to the use of the User Management facility
SLC Reference:
• *N/A*

Work Instructions

Screen: Off Screen
1. How do I record **fully loaded labour rates**? A labour rate is recorded against a User on the **Details** tab under Technician Charges. A fully loaded labour rate factors in all on costs and overheads associated with the technician on top of the standard wage such as car expenses, mobile phone, fuel, superannuation etc. It can be difficult to determine a definitive loaded labour rate, however they are often 2 to 2.5 times the standard labour rate. Travel time is best not included in the fully loaded labour rate factor but recorded separately in the Internal Travel Rate field. However if required, it can be added to the fully loaded labour rate calculation instead. 2. How do I **assign Reviews** from one staff member to another? To automatically assign Reviews from one staff to another, the User the Review is to be assigned from needs to be temporarily made inactive. Refer to scenario 4 **Inactive Staff** for instructions on how to make a User inactive and automatically assign their outstanding reviews. Once completed, reinstate the User by changing their Employment Status back to Employed, clear any termination date that may have been entered and save the changes.

Outcomes:
• *The common questions relating to the use of the User Management facility have been addressed.*
Notes:
• *N/A*