Adding Users

Prevail 8

1. Click Administration > Employee Setup . Then, click "Add" in the upper-left area of the "Employee Setup" window.

2. Enter as much information as desired on the right side of the window.

    a. The "Login" field is required, and defaults to an ALL CAPS display.

3. You will also want to enter the First Name, Last Name, and Initials, as this information may be needed in merge document templates. This is all done on the "Contacts" tab.

4. Click "Save" in the upper-right corner of the window.

5. Next, click on the "Security" tab to set the Administrative Security for the newly added user and click "Save" in the upper-right corner of the window.

6. Finally, close out of the Employee Setup. You will then go back to the Administration drop down and select "Security/Group Setup".

7. Highlight a "Group" on the left side, then click the "Attach to Group" button to attach the new user to the specified group.

8. Select the "User" from the dropdown list and the select the "Action" or roll they will perform within the office. Each "Action" is defined by the Security tab within the "Security/Group Setup".