C3 Financial

User Maintenance

Accessing the User Management Screen

At the top of the Branch Dashboard, click the "User" tab to the center on the administration menu bar.

Institution	Regions	Branches	Logistics	Users	Roles	Activity	Upload
Branch Requisitions			Ledger Entry			Branch Dashboard	
	Institution Reports			Central Requisitions			

Adding Users

Click the "New" button at the bottom of the page to create a new User.

The following six fields are required to create a new user:

User Name: This field designates the User's login.   This should always be the end-users email address. If the end-user does not have an email address, follow the email naming convention for the Institution, i.e.   Joe Smith at Any Institution is a teller; his email would be joe.smith@anyinstitution.com.

1. Password: There are no application guidelines for password creation.
2. Follow your management's guideline for password security.
3. Role: This is a drop down field that shows the Roles available to the User.
4. First Name
5. Last Name
6. Email Address: In most cases, this should mirror the User Name field and will automatically fill itself out when the User Name is entered. If a user has a non-institution email they would like to be contacted at, it should be entered here.

★ A User for a new branch cannot be given permission to the branch until the branch exists in C3 Financial.

The remaining fields can be entered for more detailed User management, but are not required for a User to login to the C3 Financial.

After the appropriate fields are populated click the "Save" button at the bottom of the window.

Assigning Permissions
After savings the new User, click the "Permissions" button to open the user permission screen.
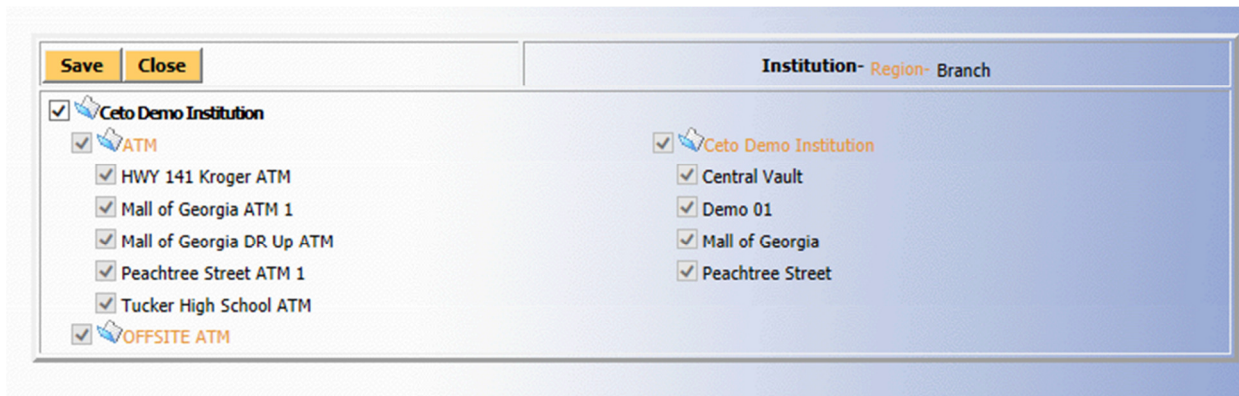
Select the check box next to the Institution name if the User should have permission to all Regions and Branches. Click the folder next to the Institution name to expand for more options. If Regions exist it will be displayed. Select the check box next to a Region(s) if the User should have permission to all the Branches within the Region(s). Click on the Region to display more options.   Select the appropriate Branch(es) if the user should have access to the Branch(es).

⚑ Deleting Users

If a User no longer needs access to the C3 Financial, the User can be deleted. A deleted User cannot be retrieved without technical support. Deleting should be done with great care.   To Delete a User, select the User and click the "Delete" button at the bottom of the page. This will display a warning message asking if you are sure you want to delete, click "OK" to delete or "Cancel" to cancel the delete.

★ Only the Administrator has the ability to add, edit or delete Users.