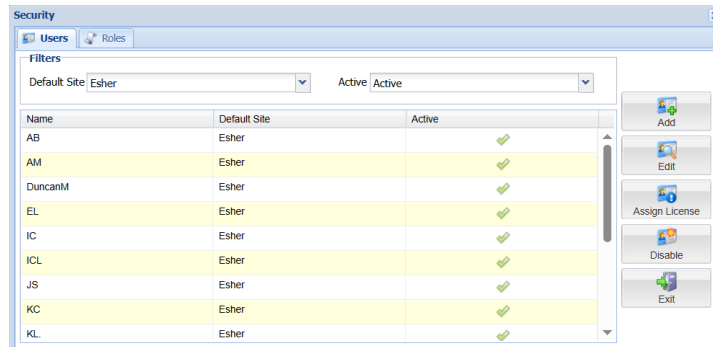


Create a New User

17/04/2025 2:43 pm BST

Create a New User

1. To create a new user, navigate to Administration > System > Security.



2. Click 'Add' on the right hand side and you'll be presented with the new user workflow.

The screenshot shows the 'Add User Wizard' window, specifically the 'Create User' step. It contains several input fields and checkboxes for user creation.

Create User

User Name:

Password: ⓘ

Confirm Password:

Default Site:

☐ Change at Login

☐ Disable on:

First Name:

Surname:

☐ Add as Surgeon

Site View Order:

Surgeon Type:

Qualification:

☐ Display in Diary

Progress: Create User >> Assign Roles >> Assign Sites >> Assign Reports >> Assign Licenses >> Finish

Buttons: Next, Cancel

User Name = The name the user will log in as.

Password & Confirm Password = The users chosen password. This needs to meet the Merlin Complexity requirements. (Hover over the ? icon for further information).

Default site = The user's main site they work at.

First Name = The user's first name (appears in messaging).

Surname = The user's surname (appears in messaging).

Change at Login = This prompts a first time user to set their own password (if previously created by an Administrator).

Disable on = This field gives the Administrator the option to set a date when the User is no longer eligible to login to Merlin.

Add as Surgeon = If the user is not yet added as a surgeon for use in the treatment screen then select the "Add as Surgeon" check box.

Site View Order = If above has been ticked, specify the view order for the Surgeon.

Surgeon Type = Specify the Surgeon Type (Surgeon, Nurse etc).

Qualification = Surgeons Qualification can be set here. This library of options is created via [Qualification Libraries](#)

4. Once you have specified the above information, select the 'Next' button to proceed.
5. The next step is to Assign user roles to the user using the arrows provided. 'Roles' are your configured [user access and limitation settings](#). These control what permissions and access the user has.

The screenshot shows the 'Security' window with the 'Roles' tab selected. The table below lists the roles and their permissions:

Name	Description	Type	All Sites
Administrator - Actions	Administrator - Actions	ACTION	✓
Administrator - Folders	Administrator - Folders	FOLDER	✓
Insurance - Actions	Insurance - Actions	ACTION	✓
Insurance - Folders	Insurance - Folders	FOLDER	✓
Manager - Actions	Actions for Manager	ACTION	✓
Manager - Folders	Folders for Manager	FOLDER	✓
Nurse - Actions	Nurse - Actions	ACTION	✓
Nurse - Folders	Nurse - Folders	FOLDER	✓
Office Staff - Actions	Office Staff - Actions	ACTION	✓
Office Staff - Folders	Office Staff - Folders	FOLDER	✓

Current Selected Role: ☐ Show All Site Roles Only

Available Actions: [Empty box]

Selected Actions:

- Account - Backdate Transaction
- Accounting Utilities - Add Price Deviation
- Accounting Utilities - Delete Price Deviation
- Accounts - Apply Allocation Fix
- Accounts - Apply Early Settlement Discount
- Accounts - Apply Expired Early Settlement Discount

6. Select the 'Next' button to proceed.
7. Assign site access to the using the arrows provided. When this is complete press the 'Next' button.

Add User Wizard

Assign Sites to The User

User Name Work sites represent physical sites which the user can log in to.
Andrew Black

Available Sites		Selected Sites
Ascot	»	Cheltenham
Basingstoke	»	Esher
Bournemouth	»	
Chelmsford	«	
Chester	«	
Derby	«	
Exeter		
Glasgow		
Lincoln		
Portsmouth		
Shrewsbury		
Walton		
York		

Create User >> Assign Roles >> **Assign Sites** >> Assign Reports >> Assign Licenses >> Finish

< Back Next Cancel

8. You will now assign the reports that this user needs, then press the 'Next' button.

Add User Wizard

Assign Reports to The User

User Name Report Category
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Available Reports		Selected Reports
Cashing Up	»	Inactive Clients
Income Fees, Drugs & Disp fees By Surgeon - Summary	»	Inactive Patients
Income Fees, Drugs & Others By Species - Detailed	»	Income By Species
Income Fees, Drugs & Others By Species - Summary	«	Introduced By
Income Fees, Drugs & Others By Treatment Code- Detailed	«	Invoice Totals
Income Fees, Drugs & Others By Treatment Code- Summary	«	Manual Treatment
Income Fees, Drugs & Others By Treatment Type- Detailed		Missed Appointments
Income Fees, Drugs & Others By Treatment Type- Summary		Missing Charity Payments
		Month End - By Surgeon Summary
		Monthly Net Sales By Site By Region
		Net Sales by Appointment
		Opening Balances
		Patient count with Insurance - Breakdown by Company

Create User >> Assign Roles >> Assign Sites >> **Assign Reports** >> Assign Licenses >> Finish

< Back Next Cancel

9. You now assign licences to the user, then press the "Next" button.

Add User Wizard [X]

Assign Licenses to The User

User Name
Andrew Black

Collabora	»»	
PostCodes	»	
	«	
	««	

Create User >> Assign Roles >> Assign Sites >> Assign Reports >> **Assign Licenses** >> Finish

< Back Next Cancel

10. Finally, you will see the summary page. Check the user details being assigned and press the 'Create' button.
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