

Asgard Desktop Job Aide

User Directory – Creating/Disabling Users

NOTE: Users with "Grant Privileges" permissions in Asgard will be able to perform these tasks. If you don't have these permissions and think you should, please contact support@katanasoft.com.

A user may only add or disable other users whose permissions are less than their own.

Part 1: Creating a New User

Step 1: In the Asgard desktop application, click Directory.

A Asgard One Valley Lodge (One Valley Lodge)						
File Organization Site Facilities Tools Help						
Directory Account List Expense Search Locations - Assets - Work Orders - PM - Projects	 Inspections - Supply Characteristics 	ain 🕶 Cleans 🕶				
Welcome Page						
ASGARD ENVICE-DNUZED OPERATIONS						
Add Tools						
Calculator - X	Weather					• - ×
0.	Switch City Extended Fore	cast Change Units				Refresh
Backspace CE C			Beverly Hills, CA (9	0210)		
	Today <u>To</u>	omorrow <u>Friday</u>	Saturday	Sunday	Monday	<u>Tuesday</u>

Step 2: Click New User.

\land Asgard One Valley Lodge (One Valley	.odge)				
File Organization Site Facilities	Tools Help				
Director Account List Expense Search	Locations - Assets - Work Orders -	PM + Projects + Inspect	tions 👻 Supply Chain 👻 🛛 Clea	ns 🕶	
New User Copy Edit Disable Change	Password Show Disabled Users				
Display Directory As: Last Name, First Nam		Find Clear Print -			
Abrix, Leanne	Green, Miles	Manek, Ahme	d na na na	Teplov, Arkad	liy
Mobile Phone: 510-555-6419 Email: <u>leanneabrix@supervaca</u>	o Office Phone: 604-555-3144 Email: <u>miles.green@valle</u>	evresorts Office Phone: Email:	604-555-3141 ahmed.manek@valleyown	Office Phone: Email:	604-555-3140 arkadiy.teplov@valleyresor
Adreno, Porticia	Gustav, Rogelio	Mendosa, CO	RP_Bonnie	Tesco, Lisa	
Mobile Phone: 210.555.7297	Email: conelio gustav@re	estortemai Email:	hmendoea@company.com	Email	Itesco@usestionouners.com

Step 3: Fill in the required fields. While Email and Phone are optional, an email address allows the user to retrieve a forgotten password from the log-in screen, and a mobile number is required for setting up SMS notifications.

ects Inspections Supply Chain Cleans
Last Name: UVR ID:
Limit Work Order View to Department
ffiliation:
Fax Phone:
Mobile Carrier: None 🗸

Asgard v2.0.0.505

NOTE: Please check with your organization to confirm the username standard. Some organizations use Employee ID. If there is no standard, use first initial, last name (no caps). Username Standards can usually be identified by looking at other usernames in the Directory.

Step 4: On the lower half of the New User screen, click New Facilities Department.

Asgard One Vall	ey Lodge						
File Site Facilit	ties Tools Help						
irectory Account	List Expense Search Loca	tions 🗸 Assets	 Work Orders 	• PM • Projects	- Inspections - Supply	Chain 🗸 🛛 Clea	ans 🔹
Welcome Page	User Directory New User	r*					
sable This User 📋 Pr	rint						
Usemame: clange	F	irst Name: Crysta	1	Last	Name: Lange		IVR ID:
ast Site Visited:					Limit Work Order View to	Department	Clear Last Site Visited
Application Language a	and Culture: [Windows Default	ŧJ	~	Third-party Affilia	tion:		
ontact Information							
		Office Phone:			Fax Phone:		
ontact Method: E-m	iail 🗸 🗸	Mobile Phone:	555-555-5555	1	Mobile Carrier: None		~
		Email:	clange@onevalle	v.com			
lser Privileges 🛛 🚺							
lew Facilities Depart	ment Delete						
Organization	Org	ganization Admin	Vendor Editing	Stock Item Editing	Stock Transaction Editing	Department	UserIsExemptFromLogoutTimer
organization				1	1		

Step 5: The dialogue box will show only the sites for which you have permissions. Highlight the site(s) the new user should have access to and click Select.

Facilities Department Select	1			
Organization	Facilities Department			
One Valley Lodge	One Valley Lodge			
			1	
			Select	Cancel
		-		

NOTE: If your organization has a Training site, it is best practice to give new users access to both the Production and Training sites. Access to the training site facilitates practice and future training opportunities.

Step 6: Once the Facilities Department is selected, choose the Department of the new user.

User Privileges				1	
New Facilities Department Delete	1		 		
Organization . One Valley Lodge	Organization Admin	Vendor Editing	Stock Transaction Editing	Department	UserIsExemptFromLogoutTimer
			A B F F I I I I I I I I I I I I I I I I I	ctivities udit ell Staff ngineering ront Office ousekeeping BXPT V	

Step 7: Expand the plus sign next to the name of the Facilities Department to display available permissions. Select the permissions that should apply to the new user by checking the box or selecting the appropriate option.

Organization	Organization Admin	Vendor Editing	Stock Item Editing	Stock Transaction Editing	Department	UserlsExemptFromLogoutTime
One Valley Lodge		None	None	None		
Facilities Dept.	W/O Editing	ls Assignee	Create	Project W/O	Assign	Mark Cancelled
One Valley Lodge	None 🗸		None	None		
	None View					
	Edit					

NOTE: Users will not be able to grant permissions greater than their own. For a full list of user permissions by role, please refer to the Quick Reference Guide, QRG – User Permissions, *in the Knowledge Base.*

Step 8: Select all the permissions that should apply to the new user and click Save or Save/Close.

A Asgard One Valley Lodge														-	0 X
File Site Facilities Tools Help															
Directory Account List Expense Search	Locations • Assets	- Work Orders	• PM • Projects	Inspections Supply	Chain • Cle	ans •									Training/How To
Welcome Page User Directory N	ew User*														
Disable This User Print														Save	Save/Close Close
Usemame: clange	First Name: Crysta	al l	Las	Name: Lange		IVR ID:									
Last Ste Visited:				Limit Work Order View to	Department	Clear Last Ste Visited									
Application Language and Culture: [Window	rs Default]	~	Third-party Affilia	tion:											
Contact Information															
	Office Phone:			Fax Phone:											
Contact Method: E-mail	 Mobile Phone: 			Mobile Carrier: None		~									
	Email:														
User Privileges															
New Facilities Department Delete															
Organization	Organization Admin	Vendor Editing	Stock Item Editing	Stock Transaction Editing	Department	UserIsExemptFromLogoutTimer									
One Valley Lodge		None	None	None											
Facilities Dept.	W/O Editing	Is Assignee	Create	Project W/O	Assign	Mark Cancelled	Mark Completed	Edit Locked Fields	Edit Locked Tasks		Create Custom Billed Actio	Edit PM Schedule	Edit Templates		
One Valley Lodge	None		Assisted	None						View				None	None

If you receive the following message, it means the username already exists in the system. Each username must be unique across all sites and organizations. Please select another username by adding a number or middle initial.



Enter your organization's default password and confirm. Click OK.

Set Password		×
New Password:	•••••	
Confirm Password:		
		OK

New users will be required to personalize their password when they first log in.

Part 2: Disabling a User

Step 1: To disable a user, open the Directory and search for the user. Click Find.

Asgard One Valley Lodge							
File Site Facilities Too	ls Help						
Directory Account List Expe	se Search Location	s 🗸 🛛 Assets	• Work Orders • PM • P	rojects 🕶 Inspecti	ons 👻 Supply Chain 👻 Clear	ns 🕶	
Welcome Page VUser Dire	ctory	111					
New User Edit Disable Cha	nge Password Show	Disabled Us	sers				
Display Directory As: Last Nam	, First Name 🔹 Lo	ok For: harr	ison 🔻 Find Cl	ear Print -			
Abrix, Leanne	Gree	en, Miles		Manek, Ahmed	line a m	Teplov, Arkadiy	(
Mobile Phone: 510-555-6419 Email: <u>leanneabrix@</u>) Psupervacatio Office Emai	e Phone: :	604-555-3144 miles.green@valleyresorts	Office Phone: Email:	604-555-3141 ahmed.manek@valleyown	Office Phone: Email:	604-555-3140 arkadiy.teplov@valleyresor
Adreno, Porticia	Gus	tav, Rogeli	0	Mendosa, CO	RP_Bonnie	Tesco, Lisa	
Mobile Phone: 210-555-738 Email: padreno@re	Emai	:	rogelio.gustav@restortemai	Email:	bmendosa@company.com	Email:	Itesco@vacationowners.com
	Sector and the sector and sector and the	sen, Jerry		Morales, Leece	•	Testuser, Katie	
Aldrich, Candace Mobile Phone: 8016286609	Mobil Emai	e Phone:	307-880-1752 dtree@katanasoft.com	Email:	Imorales@yourvacationres	Mobile Phone: Email:	661-965-8573 ktoil.ocfn@amail.com
Email: cvigil@katan		in provide		Nguyen, Vince		Thuland CODE	
Alfred, Frank	Emai	is, Barry	bharris@katanasoft.com	Office Phone: Email:	604-555-3144 vincent.nguyen@valleyreso	Thukral, CORP Mobile Phone: Email:	415-555-6836 maneet.thukral@vallevreso
Andrews, Christine	Harr	ison, Phil		Palmer, Quinc	1		maneer.makrai@valleyread
Email: <u>support@kat</u>	anasoft.com Mobil Emai	e Phone: :	415-555-7617 philharrison@valleyresort.c	Office Phone: Email:	604-555-3140 guincy.palmer@vacationre	Todd, James Email:	jtodd55@vacationowners.c
Beringer, Richi				D L AP. 1			
Office Phone: 604-555-314 Email: <u>Richi.Beringe</u>	steric sectors and	andez, Jo Phone:	604-555-3144 ihernandez@vallevresort.c	Park, Alicia Office Phone: Email:	604-555-3144 apark@vallevresorts.com	Wales, George Mobile Phone: Email:	4086127421 jalatorre@katanasoft.com
Brown, Janice					aparite randyreserie.com		
Email: jbrown@any	viiere.com	ador, Talia Phone:	604-555-3144	Paul, Pam Mobile Phone:	001 544 7711	Williams, Tyror Mobile Phone:	210-555-4348
Chamblain, William	Emai		talia.herrador@valleyresort	Email:	801-544-7711 pfullmer@katanasoft.com	Email:	210-555-4348 twilliams@valleyresorts.com
Office Phone: 613-555-994 Email: will.chamblai	n@valleyresor How	ard, Kendr	а	Perler, James		Yakushev, Van	ia
win.chambia	Ing runorroad	Phone:	604-555-3144	Office Phone:	706-555-8214	Office Phone:	604-555-3141

Step 2: Highlight the user and click the Disable button on the menu bar.

\land Asgard One	Valley Lodge						
File Site Fa	cilities Tools Help						
Directory Accou	unt Liste Expense Search Lo	ocations +	Assets 🗸 W	ork Orders	PM	• Proje	cts 🕶 Inspecti
Welcome Page	Jser Directory						
New User Edit	Disable Change Password	Show Disa	bled Users				
Display Directory A	As: Last Name, First Name	+ Look Fo	r: harrison	-	Find	Clear	Print -
Harrison, Phil	I						
Mobile Phone: Email:	415-555-7617 philharrison@valleyresort.c						

The user's name will disappear from the active User Directory screen.

To see/edit disabled users, click the Show Disabled Users button. All disabled users will appear with a red X on their name. Any user can be re-enabled by highlighting the user's name and clicking the Enable button.

word Show Disa	bled Users
Silow Disa	bled osers
- Look For:	 ▼ Find Clear
Farro, Royston	1
Office Phone:	604-555-3140
Email:	royston.farro@valleyresorts
Faye, Tina	
Gasparini, Nat	lan
Office Phone:	604-555-3140
Email:	nathan.gasparini@valleyre
Gilda, Radner	
undo, nuditer	
Gompers, Sam	uel
Email:	sgompers@vacationowner
Green, Miles	
Office Phone:	604-555-3144
Email:	miles.green@valleyresorts
Gustav, Rogelia	D
Email:	rogelio.gustav@restortemai
Hansen, Jerry	
Mobile Phone:	307-880-1752
Email:	dtree@katanasoft.com
Harris, Barry	-
Email:	bharris@l_tanasoft.com
Harrison, Phil	
Mobile Phone:	415-555-7617
Email:	philharrison@vallevresort.c

Asgard On	e Valley Lodge
File Site F	Facilities Tools Help
Directory Acco	ount Lise Expense Search Lo
Welcome Pag	ge User Directory
New User Edit	Enable Change Password
Display Directory As: Last Name, First Name	
Abrix, Leanne Mobile Phone: Email: Adreno, Portic	510-555-6419 leanneabrix@supervacatio
Mobile Phone: Email:	210-555-7387 padreno@resortvacations.c.
Aldrich, Cand	ace
Mobile Phone: Email:	8016286609 cvigil@katanasoft.com
Alfred, Frank	
Mobile Phone: Email:	671-545-1233 falfred@onevalley.com