CPL SOFTWARE

USER PERMISSIONS

TRAINING GUIDE

CONTENTS

The Permissions system in CPL is the area of the software where you restrict or allow a user access to the different modules/functions/tabs within CPL. You can also define what privileges those users have within the different areas they have access to. Within CPL these privileges are defined as **Permission Types** and specifically as **C.R.U.D.** where **C** is **Create**, **R** is **Read**, **U** is **Update**, and **D** is **Delete**. It is best practice to fully understand and use these available settings as they allow you added control over user access. This can help focus work on specific tasks and define key areas they are able to make changes to; protecting your business from costly mistakes.

Permissions are either applied in groups or individually applied. A Group is a set of related permissions usually created to focus a user's access within CPL on completing specific tasks or based on their job role within the business.

The user permissions grid is accessed by clicking on **System** in the top menu bar in the main CPL screen. Once you have clicked on **System**, select **System Parameter** from the drop-down menu which appears. This reveals another drop-down menu. Scroll through this menu until you see the **Permissions** option and click to select this.
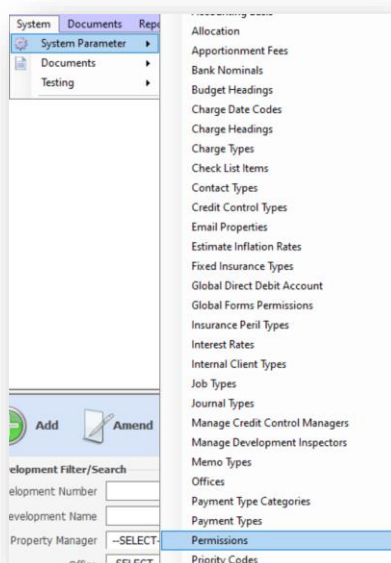
The **Permissions** window is split into two sections, the blue left-hand pane is disabled by default but becomes active when selections are made from the **Permissions Filter** screen on the right.

This section has four drop-down menu options.

Using these dropdown boxes individually is the simplest way of using the tool and gives the best results.
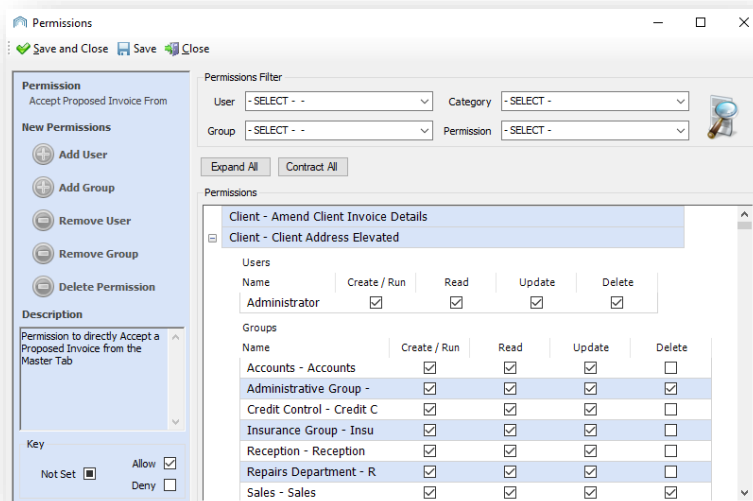
These four filters consist of:

- **User** – a drop-down menu for selecting each user and seeing which individual permissions the user has been granted.
- **Category** – a Category is a section or area in CPL. This is a drop-down menu for selecting individual permissions grouped by category in regards to what they control access to. For example, if you wish to see every permission that relates to Clients, select Clients from the drop-down box.
- **Group** – a drop-down menu for selecting groups of permissions to review which permissions belong to which groups. Groups are sets of permissions a user can belong to. *Please note that if a user is a member of a group, the individual permissions that make up that group will not show on the user drop-down menu.*
- **Permission** – a drop-down menu for selecting an individual permission to add to a user.
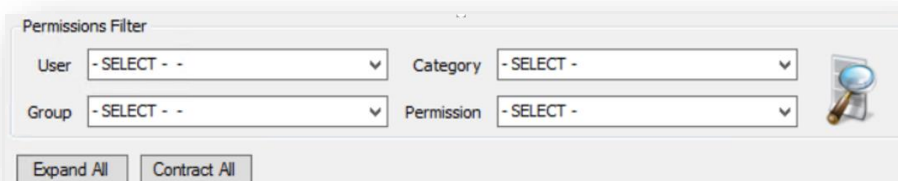

Please note that you must always click on the magnifying glass **search** icon to run a search. Selecting any of the 4 options above without clicking on the search icon will only display the entries from the last search that was viewed. If a search returns no data this normally means that there are no permissions, groups or categories which fulfil the search criteria you have entered.

SETTING AN INDIVIDUAL PERMISSION

From the menu bar at the top of the CPL screen select **System, System Parameter** and scroll down to **Permissions.** This will open a new Permissions window.

In the **Permissions Filter**, select the **Permissions** drop-down menu and choose a permission from the list.

Click on the magnifying glass search icon to see the users who have the chosen permission applied to their account.
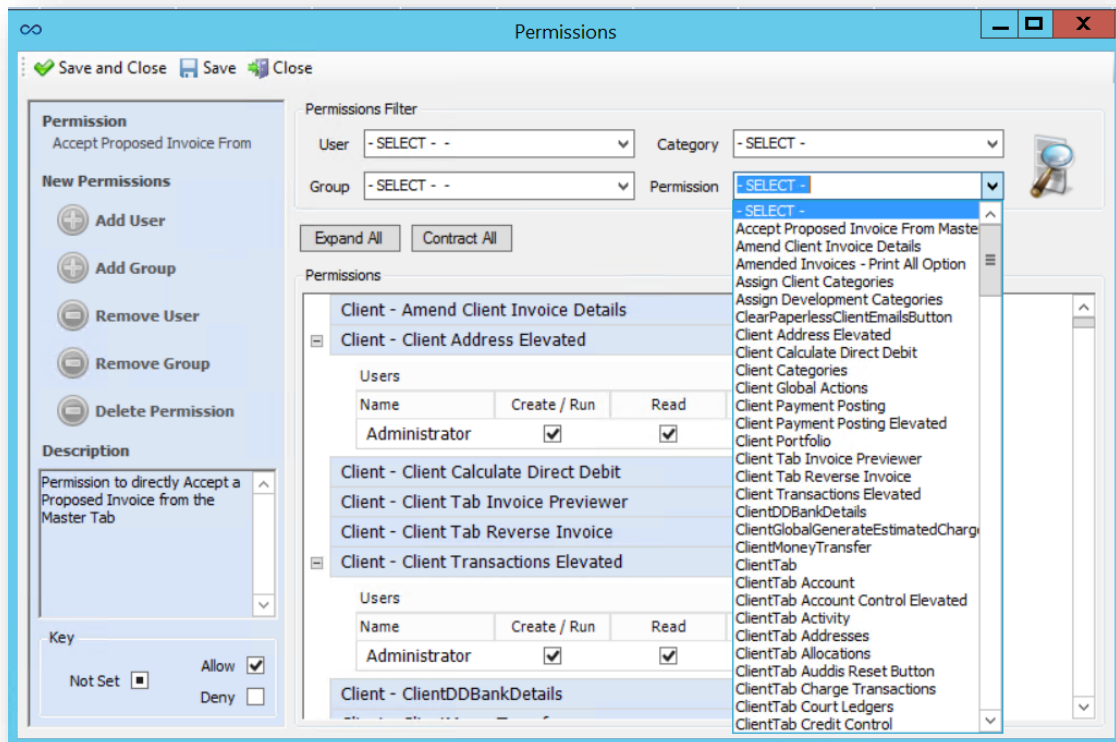

To allow a user to have a permission we have to add that user to the permission.

To do this, click on the title of the permission which will be highlighted in blue in the centre of the screen underneath the **Permissions Filter**:
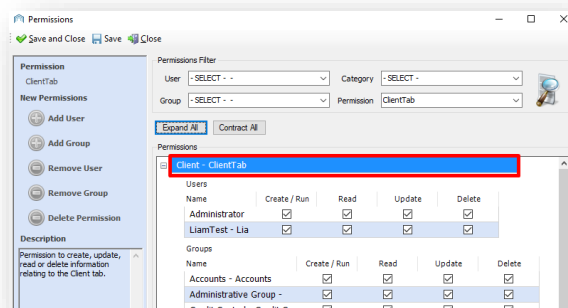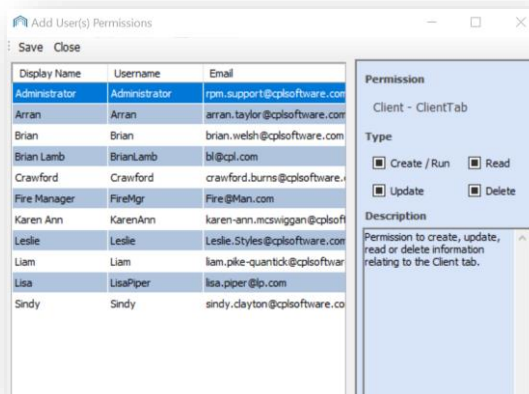

This will activate the **New Permissions** menu in the blue **Action Bar** to the left-hand side of the window.

Within this menu click on the **Add User** icon. This will open a new **Add User(s) Permissions** window with a list of your users.
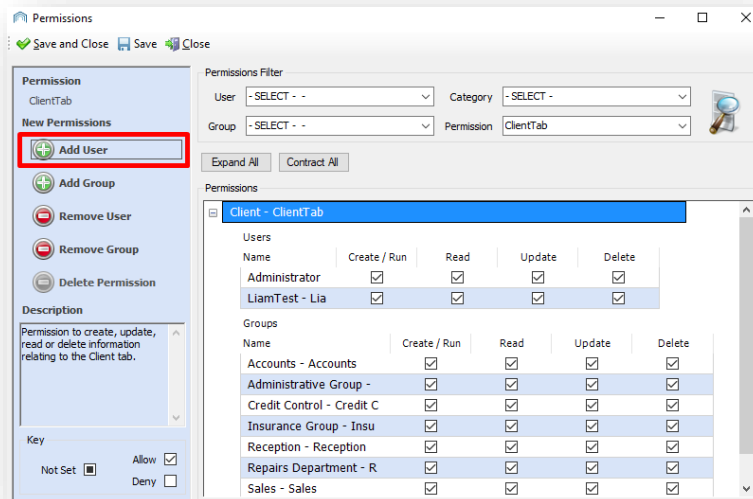
Click the **Add User** icon in the right-hand bar, and click to select the user you wish to add the permission to from the resulting window:

*Please note, you can select multiple users to assign permissions to by holding down the **Ctrl** key on your keyboard.*

You can remove/delete permissions for several users by selecting an individual permission and then choosing to apply the **Delete** option and selecting multiple/all users. You can then grant **Create/Run**, **Read**, or **Update** permissions to appropriate users only.

When you have selected the correct user selected, you can turn your attention to the **PermissionType** checkboxes in the **Action Panel** on the right-hand side of the window:

These allow you to customise the selected privilege assigned to a user by either restricting or allowing additional access for the user within CPL.

PERMISSION TYPES IN CPL

Let's take a quick look at the four checkboxes, how to use them and what they do.

Create, **Read**, **Update** and **Delete** are the four options we have available to set different levels of permission within CPL. They are often referred to in their shortened version as C.R.U.D.

A level can be assigned by selecting the **Type** checkboxes in the blue **Action Panel** on the right of the screen.

These checkboxes have three different states:

- **Unset** is denoted by a black box in a white box
- **Allow** is denoted by a tick in a white box
- **Deny** is denoted by an empty white box

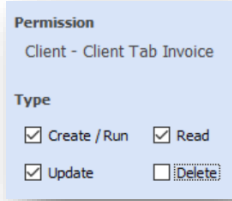Please note that the default state of these boxes is **Unset** denoted by a black box inside a white box.

Pay close attention to how these boxes are set as these checkboxes can dramatically affect a user's ability to perform actions in CPL.

If you want to restrict a user from being able to Create, Read, Update or Delete within a specific area of CPL, you can set the box to its **Deny** status.

It is possible to mix these statuses for permission types in a single permission setting.

For example, you want Bob to be able to create/run invoices, to be able to read them, to update them but not to be able to delete them.

To enable this setting, as below, the **Create** would be set to **Allow**, **Read** would be set to **Allow**, **Update** would be set to **Allow** but **Delete** would be set to **Deny**.
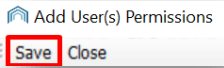
Set the checkboxes as required and click **Save,** in the top left-hand corner of the window.

This will close the **Add User(s) Permissions** window.

You should now see the changes you have made reflected in the main **Permissions** window, and the user added to the chosen permission.

Please note, the user needs to log out of CPL and log back in again to ensure the changes are applied to their account.

Once they have done this, you may wish to verify that they have the permissions you would now expect.

CREATING PERMISSIONS GROUPS IN CPL

A **Group** is a set of permissions. Groups enable us to add a set of permissions to a user rather than adding each different permission separately. This could be useful if you have similar permissions to set for various members of staff in your business.

In order to set up a Permission Group, we must first create a group for the permissions to be added to.

From the menu bar at the top of the CPL screen select **System, System Parameter** and scroll down to **User Groups.**
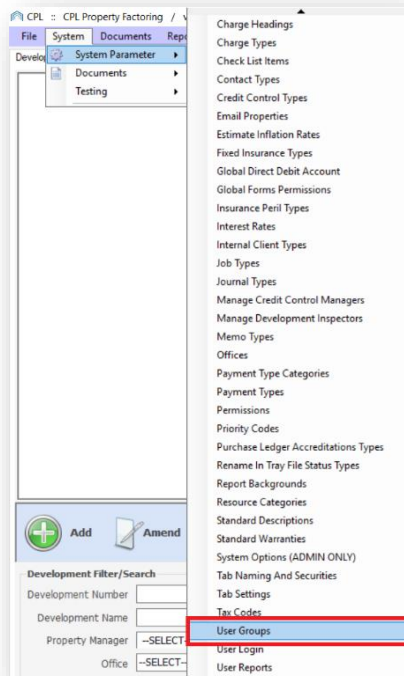
This will open the **User Groups** window.

Within this window, you will see all the groups that are set up in CPL. However, you do not add the permissions to the Groups here. That is done via the permissions screen. This **User Groups** screen is used for amending the name of Groups and adding or removing Groups.
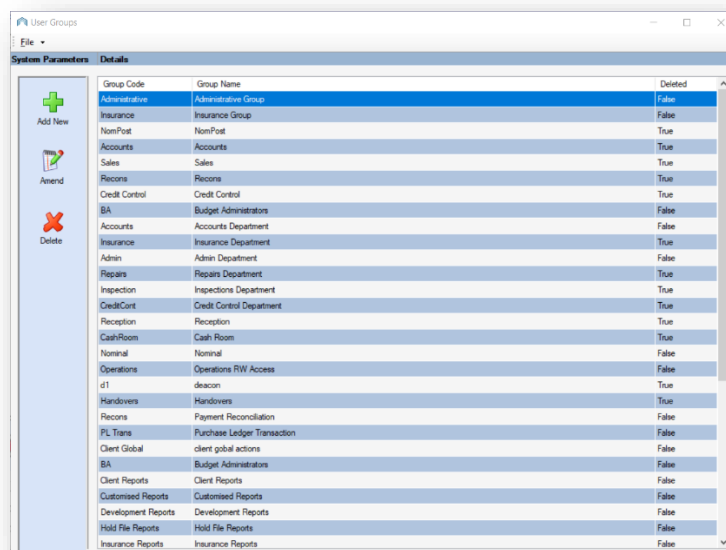

On the left of the screen is the **Action Panel**. This allows us to add, amend and remove Groups.

To the right of this in the window is the grid which contains three columns, one for the **Group Code**, one for the **Group Name** and the last column, titled **Deleted** tells us whether the Group is active or not.

To add a new group, click the **Add** icon, represented by a green plus symbol, in the **Action Panel**.

This will open the **Add User Group** window. Here we can add our **Group Code** and the **Group Name** for a new group we would like to create.
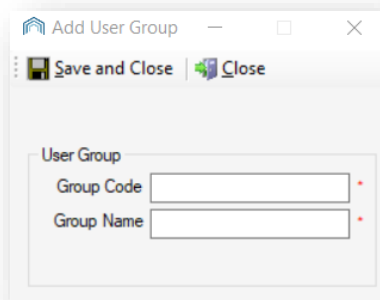

Once we have entered this information, we can click the **Save and Close** icon in the top left-hand corner.

We can now close the **User Groups** window and make our way back to Permissions in order to add permissions to the new group we have created.

From the menu bar at the top of the CPL screen select **System, System Parameter** and scroll down to **Permissions.** This will open a new Permissions window.

In the **Permissions Filter** at the top of the screen, use the **Permissions** drop-down menu to find the permission you want to work with and then click on the **Search** icon.
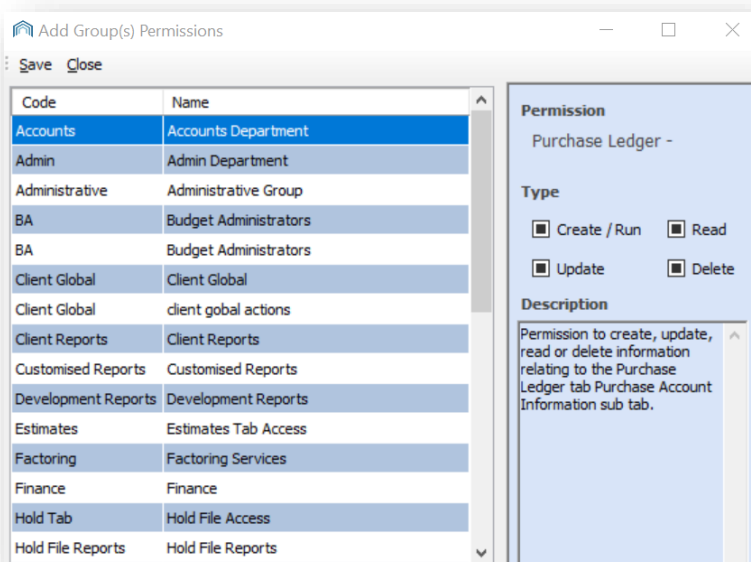
As before, click on the name of the permission in the **Permissions** section of the screen, on the highlighted blue bar. This will activate the **New Permissions** section in the **Action Panel** to the left.
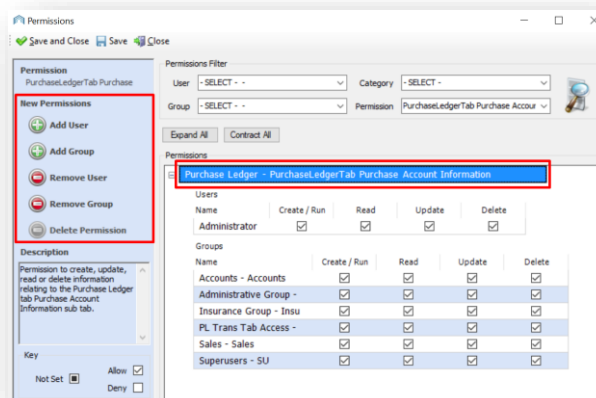
In this instance, instead of clicking on **Add User** you will click on the **Add Group** option in the **Action Panel**.
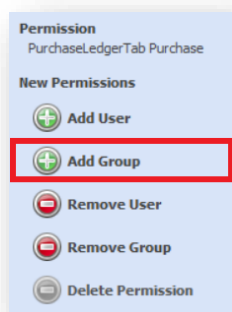
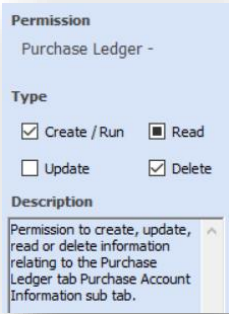This will open the **Add Group(s) Permissions** window.

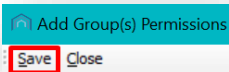This window is similar to the **Add User(s) Permissions** window you saw previously.

This time, instead of selecting an individual user we are selecting an individual group to specify **Permission Types** for. Choose your Group by clicking on this.

It is possible to select multiple groups by using the **Ctrl** key on your keyboard. In this case, the **Permission Types** will be specified with the same set of **Create**, **Read**, **Update** and **Delete** types for each group.

Once you have selected your **Group(s)** on the left of the window, set your **C.R.U.D. Types** in the panel in the **Action Panel** on the right-hand side of the screen.

Once you have selected your **C.R.U.D. Types**, and you are happy with your choices, click **Save** in the top left of the window to apply your permission to the group.
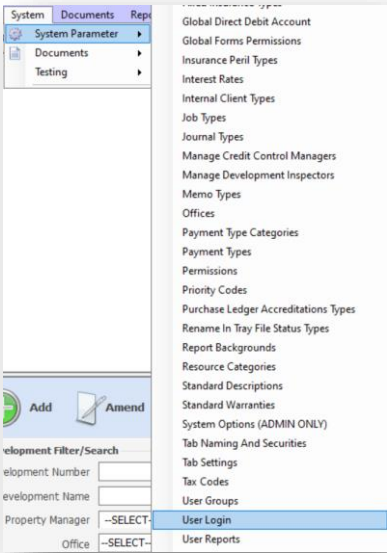

When you add the **Permissions Group** to a User, the next time they log in to CPL these will be applied and either allow or deny them the access privileges based on the types and settings you chose.
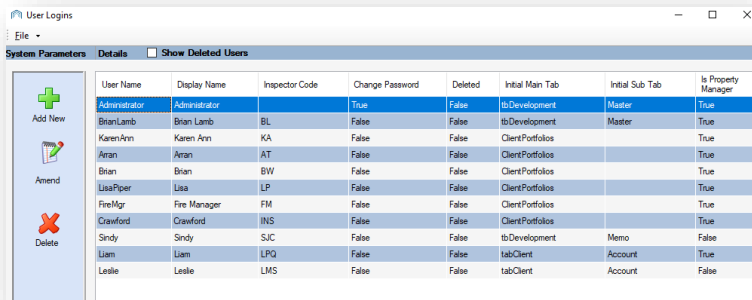
ASSIGNING PERMISSIONS BY GROUP TO A USER

In order to adjust the Permissions Groups a user has applied to their account, we need to visit the **Amend User** window in the **System** menu.

From the menu bar at the top of the CPL screen select **System, System Parameter** and scroll down to **User Login.**
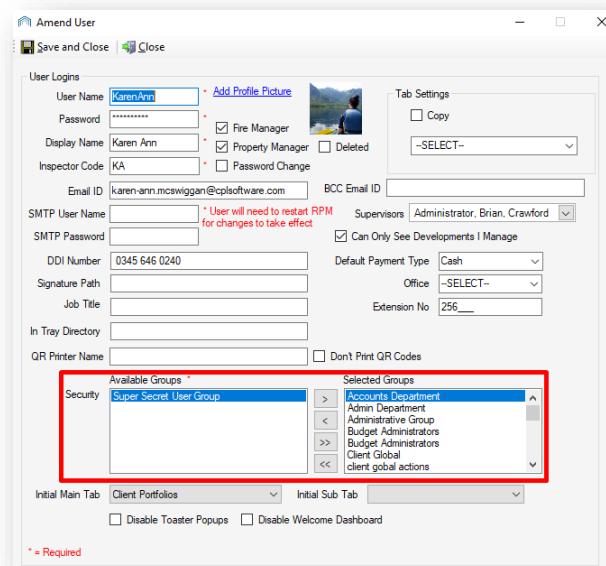
This opens a **User Login** window with a list of your users.

Select the user on the grid who you would like to apply group permissions to and double-click to open the **Amend User** window.

Towards the bottom of this window, you will see two boxes. The one on the left is labelled **Available Groups** and the one on the right is labelled **Selected Groups**.

The entries in the **Available Groups** box are the groups you can add to the user to give them sets or groups of permissions. Entries in the **Selected Groups** box are the groups of permissions which have already been assigned to this user.

In order to add or remove these permission groups for a user, you can use the **arrows** in between the two boxes. In order to do this, select the correct group in either list and click the arrow in the direction you want to send it. Sending it to the left-hand box will remove the group from the user. You can use the double arrows to add/remove all permission groups at the same time.

You may need to assign multiple permission groups to a user for them to be able to complete all the tasks they need to do as part of their role.

The **Superusers** permission group has access to **Create**, **Read**, **Update** and **Delete** in almost all areas of CPL. As such, this group should be used very sparingly and with caution.

Once you have made your required changes to permission groups for a user, click the **save and close** icon at the top-left of the window.
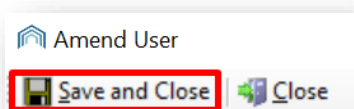
*Please note, any permissions a user has which were set as part of a group may be superseded by permissions set individually. However, anyone set as a Superuser automatically and always has all permissions granted, and they cannot have any permissions denied. For example, Bob is a Superuser, but someone tried to set all permissions for PL Accounts for Bob to **Deny**. Bob will still be able to access PL Accounts because he's a Superuser.*

Any changes to a user's permissions which have been made will only take effect once a user has logged out and logged back into CPL.

CPL KNOWLEDGE BASE

This training guide forms part of CPL's Knowledge Base which is available for all CPL users at https://contact.cplsoftware.com/portal/home

The CPL Knowledge Base will be continually updated with additional guides and information. If you have any questions or suggestions for further guides we'd be happy to hear from you. You can contact CPL Support by emailing us at support@cplsoftware.com or through our portal at https://contact.cplsoftware.com/portal/home or calling us on 0345 646 0240 (option 1).