



Managing User Access

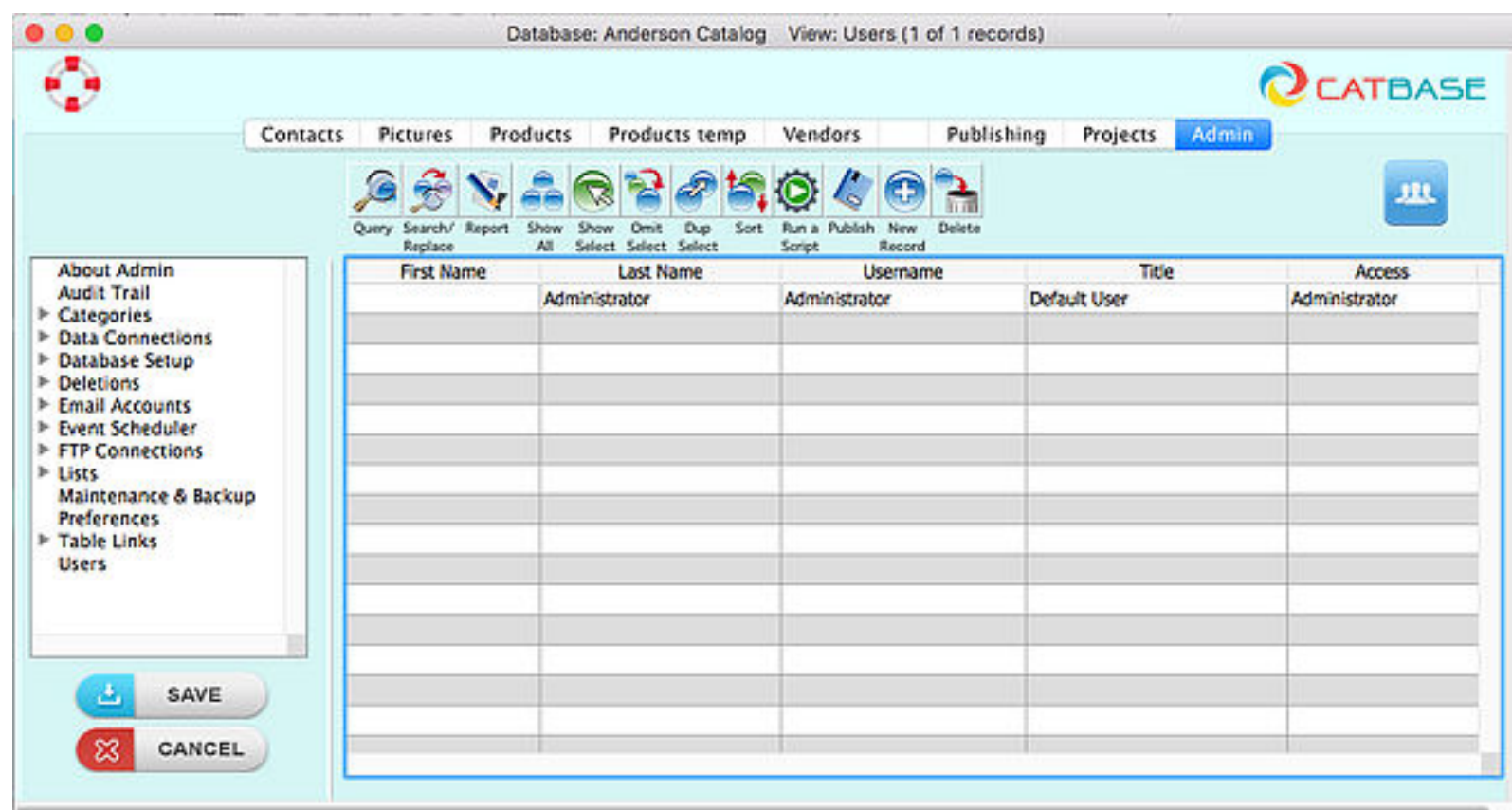
You can manage the access that various CatBase users have to the program's functions.

Users

To manage your Users, go to the **Admin** main tab and then select the **Users** topic in the panel on the left of the window. You'll see a list of existing Users.

Administrator

There is always at least one User with Administrator access:



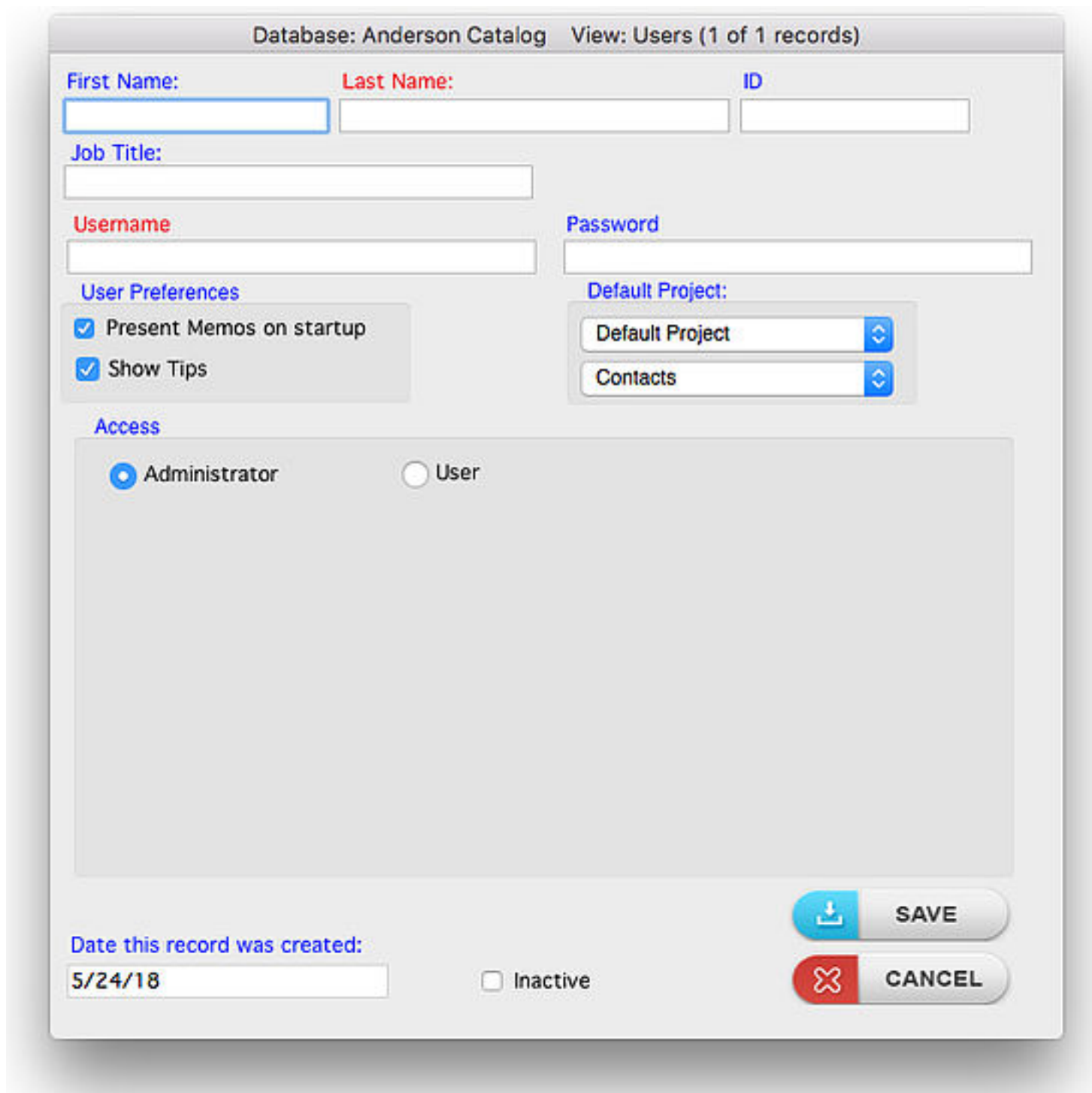
You can edit this user's name, username, and password, but you cannot delete it.

Adding a new User

To add a new User, click the **New Record** button at the top of the list.

Editing a User

The User details page looks like this:



Fields with headings in **red** are mandatory.

First Name

Optionally enter the user's first name.

Last Name

The user's last name or role.

ID

You can enter an ID number, such as an employee number, here. This is for your own reference; it is not used within catBase.

Job Title

Optionally enter the user's job title for your reference.

Username

Each User must have a unique Username. This can be any combination of letters and numbers, with a maximum length of 30 characters. Note that CatBase user names are NOT case-sensitive.

Password

Passwords are not mandatory, although we do urge you to use them! They can be any combination of letters and numbers, up to 15 characters in length.

Passwords are obfuscated - you cannot read them. If a user forgets their password, an Administrator can go into the user's record and change their password but he cannot read it.

User Preferences

Present Memos on startup

If this option is selected, each time this user opens CatBase it will search for any current Memos for him, and if it finds any, opens a floating window listing them. [More info about Memos.](#)

Show Tips

This refers to those little yellow messages that pop up when you mouse over certain fields and objects. They can be very helpful, but some people find them annoying. So they can be turned off here.

Default Project

If you have multiple Projects in your database, you can choose which one will be the default Project to open each time the user opens CatBase. [More info about Database Projects.](#)

Having selected a Default Project, you can then select the table that will initially be selected for that Project.

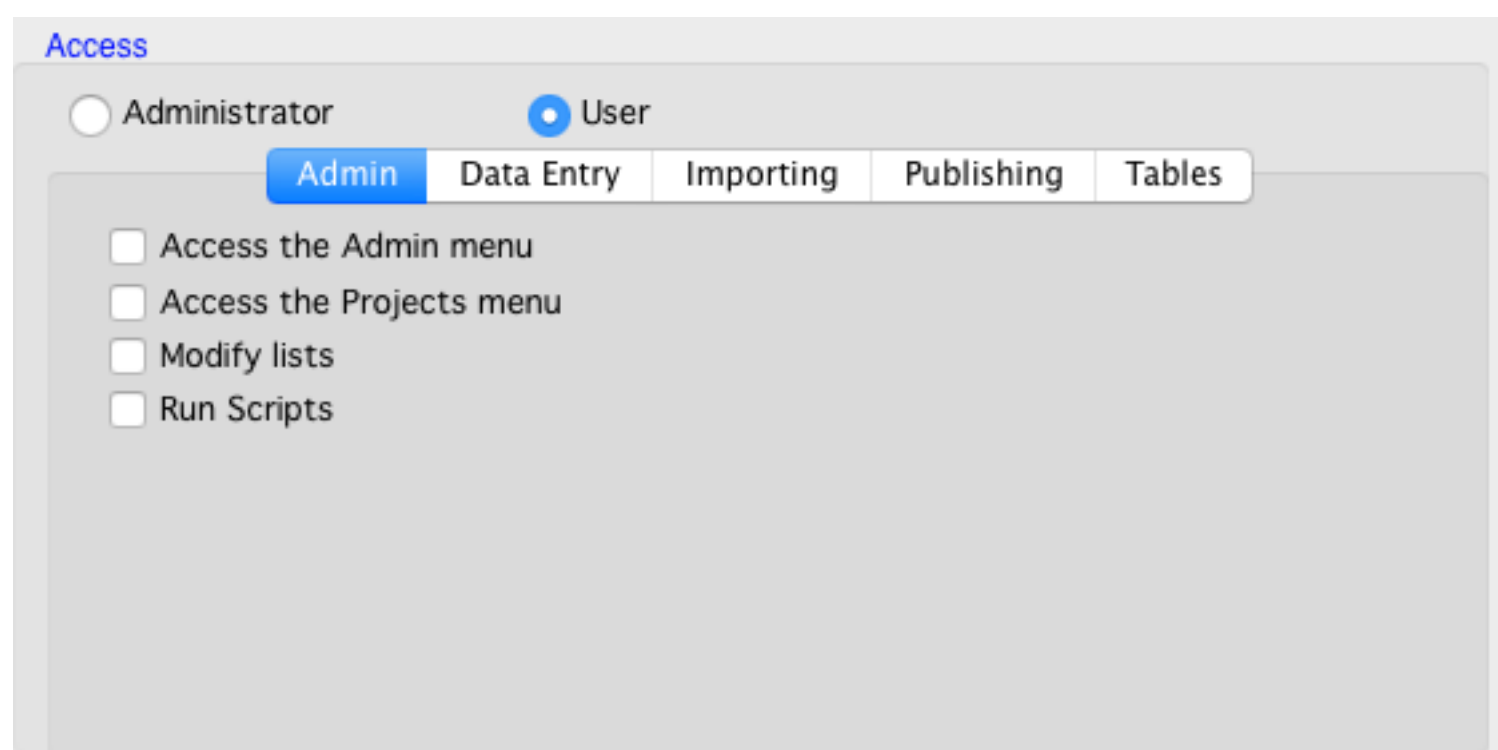
Access

In this are you can specify exactly what access each user has to the database and its functions.

When a new user is added, the default Access level is **Administrator**. An Administrator has access to all features and functions.

NOTE: These options have been greatly enhanced in Version 8. If you are using an earlier version, you'll see different options.

To specify an individual's user access, select the **User** radio button. The view changes:



The screenshot shows a window titled "Access" with two radio buttons: "Administrator" (unselected) and "User" (selected). Below the radio buttons is a tabbed interface with five tabs: "Admin" (selected), "Data Entry", "Importing", "Publishing", and "Tables". Under the "Admin" tab, there are four unchecked checkboxes: "Access the Admin menu", "Access the Projects menu", "Modify lists", and "Run Scripts".

Admin

All checkboxes are initially unselected. If you want to allow the user access to any of these functions, select the appropriate checkbox(es).

Data Entry

In this section you have precise control over whether the user can add or edit data:

Access

Administrator User

Admin Data Entry **Importing** Publishing Tables

Add new records Access custom Modules

Delete records Access Sets

Create/edit Emails Use Query Editor

Send Emails Use Search & Replace

Create/edit Letters Use the Quick Report editor

Send Letters Use the Label editor

Create/edit Memos

View Memos

Note that in the **Tables** tab you'll be able to manage which specific tables the user has access to.

Importing

Here you can manage whether the user can create Import Styles and/or import data:

Access

Administrator User

Admin Data Entry **Importing** Publishing Tables

Create/modify Import styles

Import data

Publishing

Specify what access the user has to the Publishing options:

Access

Administrator User

Admin Data Entry Importing **Publishing** Tables

Access the Publishing menu

Create/modify Publishing Stylesheets

Publish data

Tables

In this section, you have precise control over which tables the user has access to:

Access

Administrator User

Admin Data Entry Importing Publishing **Tables** Projects

For Database Project: The Sweet-Tooth Fairy

Table Name	Hidden (Main View)	Hidden (Included Views)
Products	<input type="checkbox"/>	<input type="checkbox"/>
Variants	<input type="checkbox"/>	<input type="checkbox"/>

By default, each new User has access to all tables in Database Projects. You can hide each table in the Main and/or Included views.

Table Name

List of tables in the selected Project.

Hidden (Main View)

The Main View is the view shown in the CatBase main window.

Hidden (Included Views)

The Included View is the list of related "child" data that might be displayed in a related "parent" record. For example, in our Demo Database, Products is a "parent" table and Variants is a related "child" table. On each Product record's detail page you can see a list of the Variants - this is an Included List (or Included View).

Projects

If you have more than one Database Project set up, you will also see the Projects tab:

Access

Administrator User

Admin Data Entry Importing Publishing Tables **Projects**

Can access the Projects menu

Project Name	Can Access
Auction Catalogue	<input type="checkbox"/>
Car Dealership	<input type="checkbox"/>
Classified Ads	<input type="checkbox"/>
Course Catalogue	<input type="checkbox"/>
Furniture Retailer	<input type="checkbox"/>
Membership Directory	<input type="checkbox"/>
Parts Catalogue	<input type="checkbox"/>

Crown
Commercial
Service
Supplier

TECHNOLOGY
PARTNER

SILVER
PARTNER



support@catbase.com

© Copyright 2019 CatBase Publishing Systems Ltd.