▶ **Adding a new user in Sage 200**

Sage 200 Help Sheet

# 1. Adding a new user

Setting up a new user to access Sage 200 is a two-part process.

▶ Add the user to the relevant Sage 200 group in Active Directory. This step is performed by your Internal or 3rd party IT provider.

▶ Enable the user in Sage 200 System Administration. This step can be completed by anyone who is setup with Sage 200 admin privileges.

### 1.1 Add the user's Windows domain account to the relevant Active Directory Group

Log a request with your IT department or service provider to add the new user to one of the two user groups in Active Directory:

▶ Sage200Users – if the user is to have access to Sage 200 only and not the System Administration tool then they must be added to this group only.

▶ Sage200Admins – users added to this group can log in to both Sage 200 and Sage 200 System Administration tool. They will be designated administrators for the Sage 200 system on site.
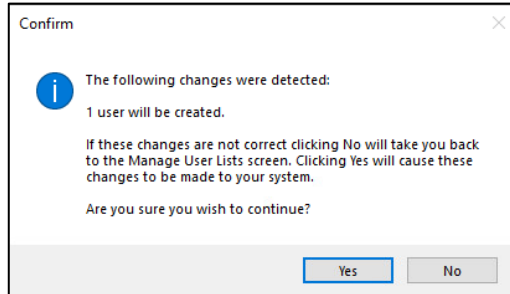
### 1.2 Enable the user in Sage 200 System Administration

When System Administration starts, it will check whether there have been any changes to the Sage200Users or Sage200Admins groups. If any changes are detected, the following wizard appears: -
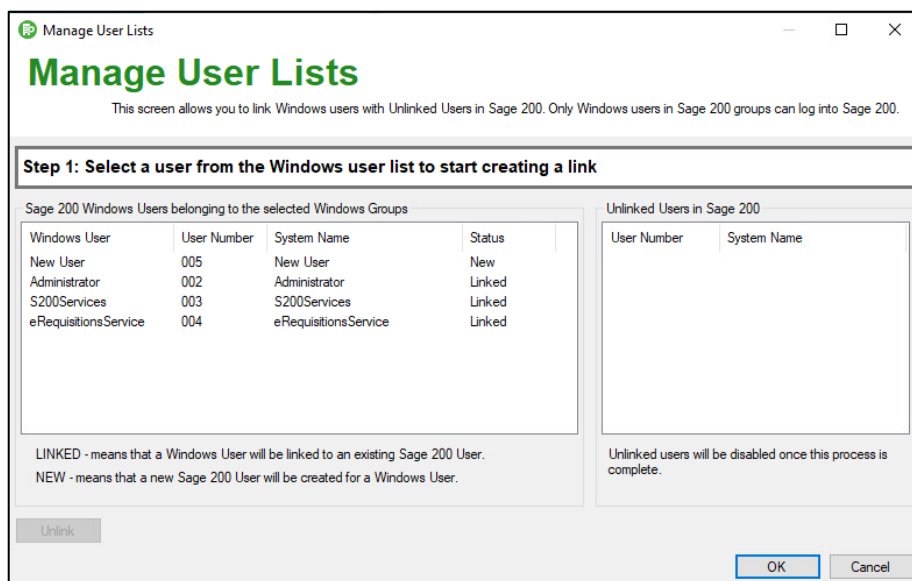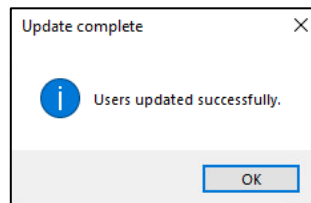


Any new users will appear with a status of "New" as per the screenshot above. Click OK to proceed with the creation of the user.
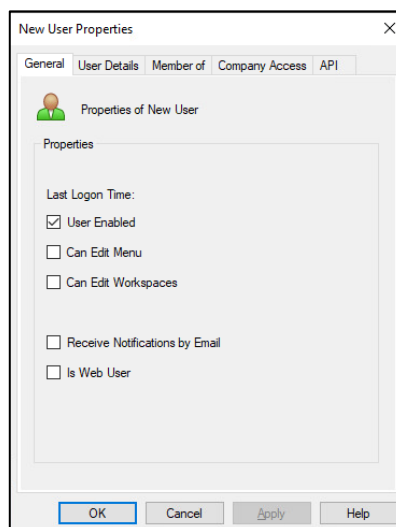
Click OK to the following confirmation prompt: -

Confirm ✕

ⓘ The following changes were detected:

1 user will be created.

If these changes are not correct clicking No will take you back to the Manage User Lists screen. Clicking Yes will cause these changes to be made to your system.

Are you sure you wish to continue?

| Yes | No |

The following prompt appears: -

Update complete ✕

ⓘ Users updated successfully.

OK

Click OK to complete the successful creation of the user. The user will be created with no Roles or Companies assigned.

Remain logged in to the System Administration tool to assign Roles and Company access to the new user.  Navigate to Users on the left-hand side menu and either double click or right click over the new user on the right-hand pane and select Properties.

Assign Roles under the "Member of" tab and decide which companies they are permitted access to under the "Company Access" tab.  You have now satisfied the minimum requirements to set up a new user for access to the Sage 200 program.

New User Properties ✕

General | User Details | Member of | Company Access | API

Properties of New User

Properties

Last Logon Time:

☑ User Enabled

☐ Can Edit Menu

☐ Can Edit Workspaces

☐ Receive Notifications by Email

☐ Is Web User

| OK | Cancel | Apply | Help |

**N.B. The new user may also require extra permissions in the following modules.  These are controlled in the Sage 200 program and not the Sage 200 Administration tool. They are maintained on a per company basis: -**

▸ Sales Order Processing (Sales Order Processing > SOP Utilities > System Set Up > User Permissions)

▸ Accounting period maintenance permissions (Accounting System Manager > Accounting Periods > Maintain Accounting Period User Permissions)

▸ Reports output mode option (Tools (cog symbol in top right-hand corner) > Choose Output Mode)

2.  **Disabling a Sage 200 User**

Sage 200 users cannot be deleted; only disabled. To disable a user, the Windows account needs to be removed from the Sage200Users or Sage200Admins group. Doing this "unlinks" the user from Sage 200. Once this has been done, start Sage 200 System Administration.
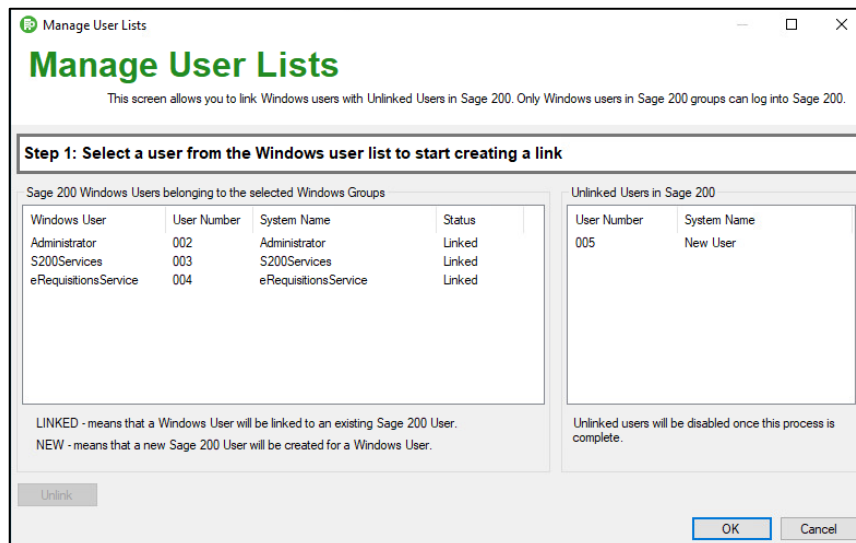


Click on OK to disable the unlinked user as per the screenshot above.
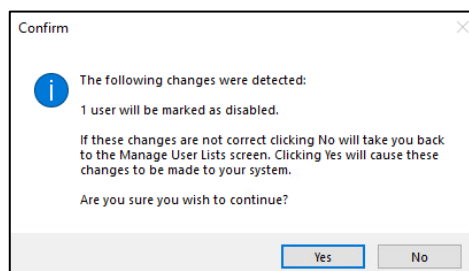


Click OK to confirm the disabling of the user.