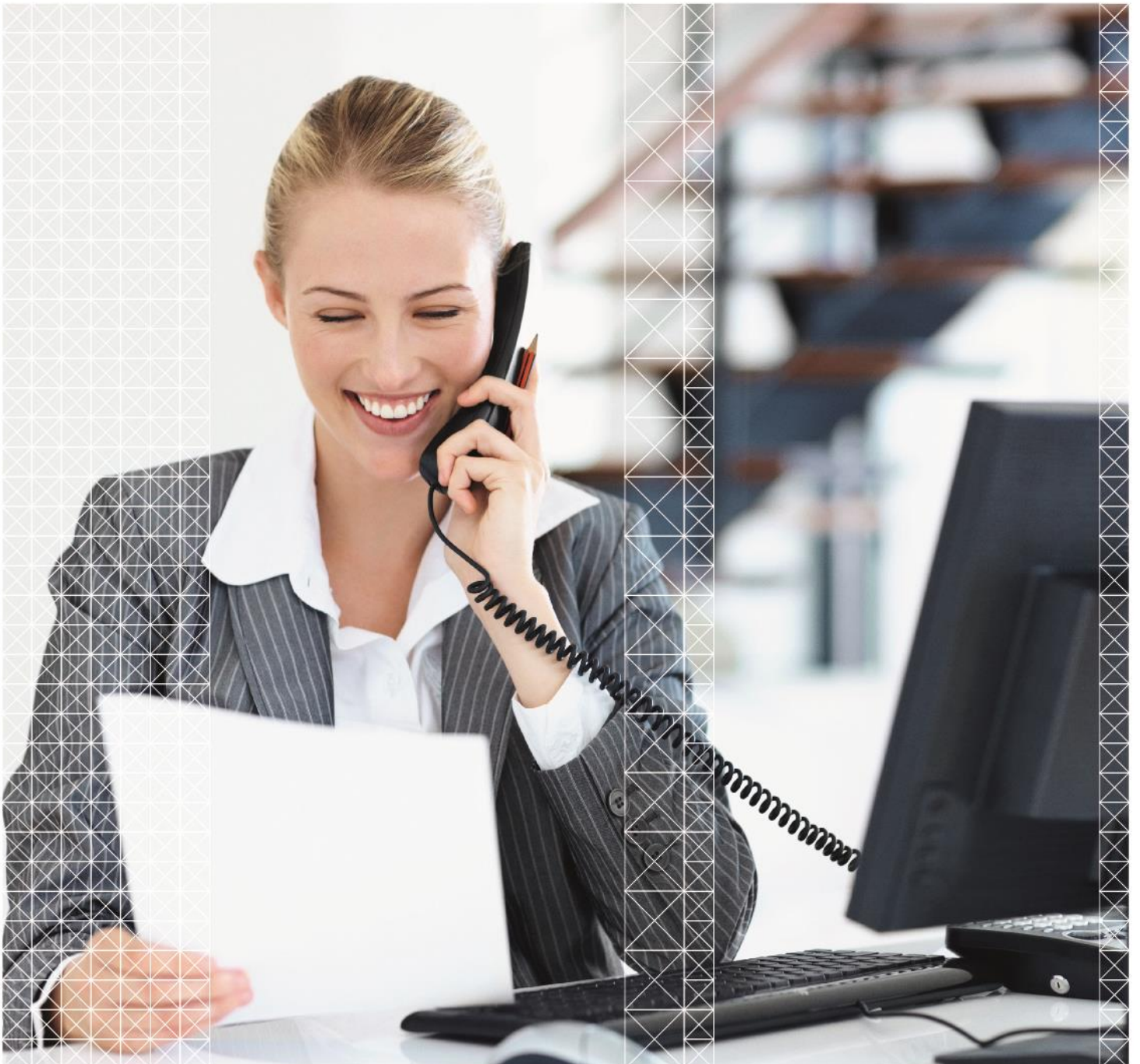


▶ **Creating a new Excel
Connect User**
Fusion Help Sheet



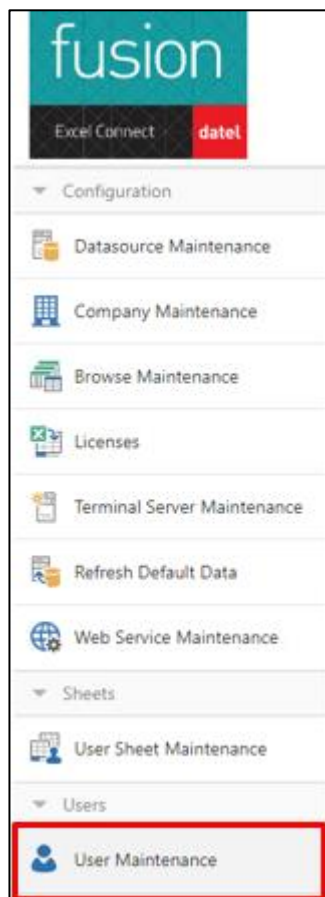
This step should be completed once client installs are done and users have provided their full usernames OR if the person creating users knows the domain usernames to be created.

1. Creating a User

- ▶ To create a new user for Excel Connect please browse to the following web page within your network where *servername* is the name of your Sage 200 server. Please log in using the admin login that was created for you as part of the original implementation.

- ▶ <http://servername/ExcelConnectMaint>

- ▶ Login to the Excel Connect Maintenance site and click on *User Maintenance*



- ▶ Click on *New*

User Maintenance	
New	User Name
Edit Delete	DatelAdmin

- ▶ The *Create New User* form appears as per the screenshot below.

Fill in the *Name* which is the username that the user logs on to the network with and the network *Domain* name.

Check the permissions as per the screenshot below and then click on *Create*.

Create New User

User Details

Name:*

Password:

Domain:

Windows Authenticated:

Locked:

Web Administrator:

Sheet Administrator:

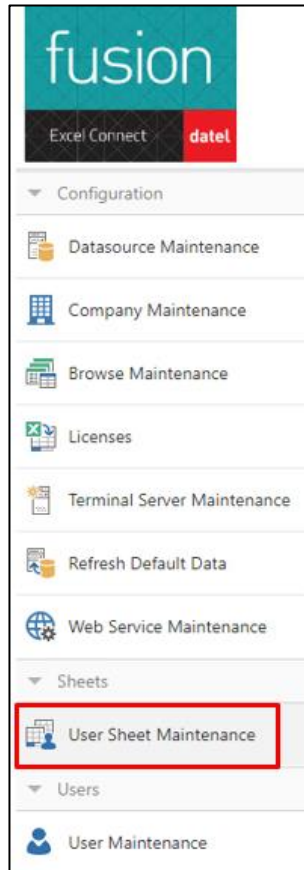
Audit Administrator:

Client Processing:

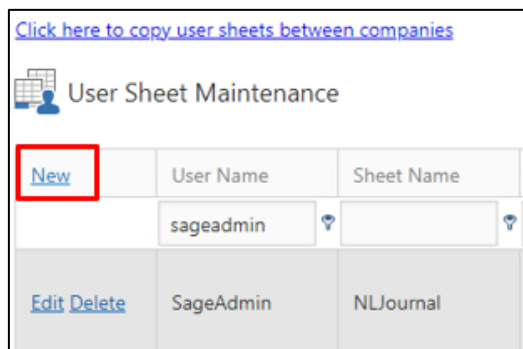
2. User Sheet Maintenance

The system now needs to know which Excel Connect sheets the user can create and which companies they are permitted to post to.

- ▶ Click on *User Sheet Maintenance*



- ▶ Click on *New*



- ▶ The *Create User Sheet* form appears. Select the *User Name* from the drop down and then check the relevant *Sheet Names* that they will have permissions to create. Select the *Company Names* that they will have permissions to post to and make sure *Create Permissions* is checked

Now click on *Create* to finish the user setup.

PLEASE NOTE. The user will obtain a licence upon *Validating* their first Excel Connect sheet. Licences are not assigned to users in the Excel Connect Maintenance website.

Create User Sheet

User Sheet Details

User Name: Administrator

Sheet Name:

- CBCash
- CBCashPayments
- CBCashReceipts
- InterAccountTransfer
- NLJournal
- PLCash
- PLInvoice
- ProjectCost
- PurchaseOrder
- SalesOrder
- SLCash
- SLInvoice
- SOInvoice
- StockMaster
- StockTransfer

Company Names:

	Company Name	User Company Name
<input checked="" type="checkbox"/>	Sage2002020R1	Sage2002020R1
<input type="checkbox"/>	Sage2002020R1_COPY	Sage2002020R1_COPY

Page 1 of 1 (2 items) | Page size: 10

Create Permissions:

Allow Cached Data:

Create

[Back to List](#)