



Create User Accounts

In Equitrac

Instructor Led Training
Chapter 3 – Exercise C


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Manually Create an Equitrac User

In a production domain environment, this process would likely be performed using other means, such as Active Directory or synchronization. However, since we are using a workgroup in this training environment, the creation of user accounts is a manual process.

NOTE: In order to be able to complete future exercises, please use the information provided below exactly as shown; do not make any substitutions or skip any of the entries.

1. Start **Equitrac System Manager** and connect to your accounting server.
2. In the left pane, click  **Users**.
3. In the right pane, right-click in the white area, and then left-click **Add User**.
4. In the Add User dialog box, type the flowing information:

User ID: **sallys**
Full name: **Sally Struthers**
Email address: **sallys@equitrac.local**
Current balance: **\$20.00**
Primary PIN: **4413**
Secondary PIN: Leave blank

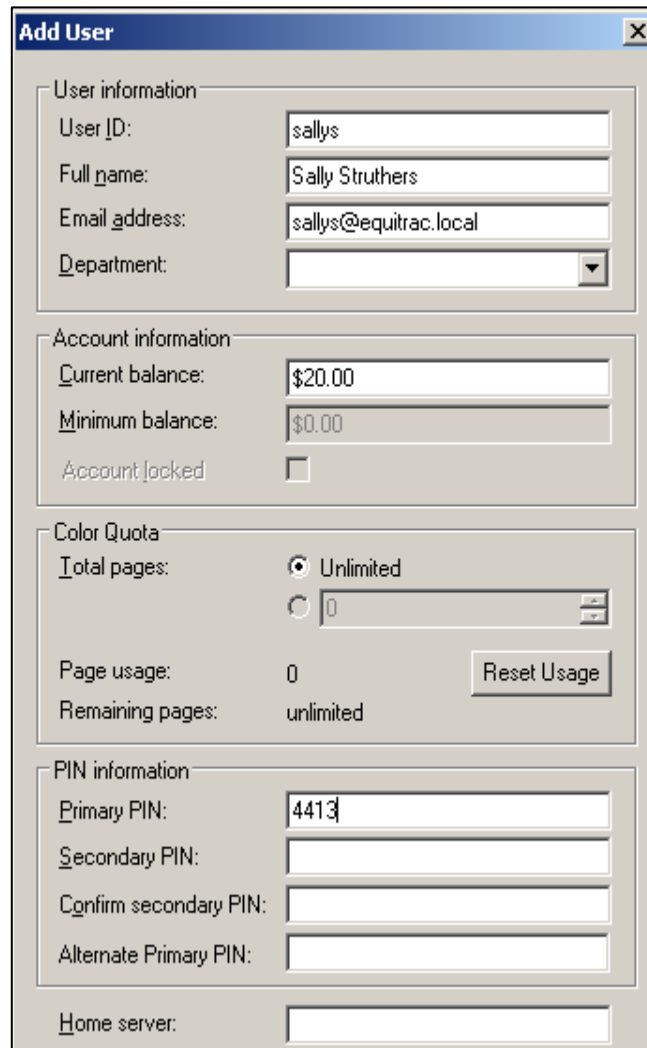
5. Click the  button to create the user.

6. Create two more user accounts using the following information:

User ID: **alana**
Full name: **Alan Alda**
Email address: **alana@equitrac.local**
Current balance: **\$20.00**
Primary PIN: **2201**
Secondary PIN: Leave blank

User ID: **bugsys**
Full name: **Bugsy Siegel**
Email address: **bugsys@equitrac.local**

I
Current balance: **\$20.00**
Primary PIN: **4404**
Secondary PIN: Leave blank



Add User

User information

User ID: sallys

Full name: Sally Struthers

Email address: sallys@equitrac.local

Department: [dropdown]

Account information

Current balance: \$20.00

Minimum balance: \$0.00

Account locked: ☐

Color Quota

Total pages: ☒ Unlimited ☐ [0]

Page usage: 0 [Reset Usage]

Remaining pages: unlimited

PIN information

Primary PIN: 4413



Secondary PIN: []

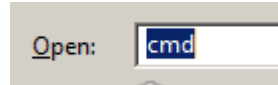
Confirm secondary PIN: []

Alternate Primary PIN: []


Home server: []


Use a Script to Create Additional Equitrac Users


1. Click  then select Run.
2. Type **cmd** then press the  key.

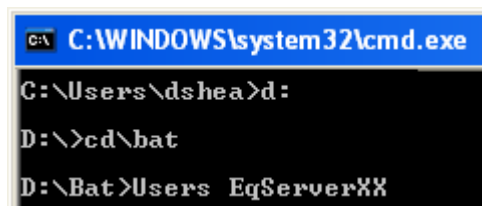


3. In the DOS window, type the following:



D: and press the  key

CD\bat and press the  key

Users [Server Name] and press the  key
where [Server Name] = the name of the accounting server





```
C:\WINDOWS\system32\cmd.exe
C:\Users\dshea>d:
D:\>cd\bat
D:\Bat>Users EqServerXX
```

- As each user is successfully added to the database, the line “ADD command processed successfully” appears in the window. If the record already exists in the database, an error message is returned, and the entry is skipped.
4. When the process is complete, type **Exit**, and then press the  key to close the DOS window.
 5. Start **Equitrac System Manager** and review the list of users; 25 users should appear. If Equitrac System Manager is already running, press the  button.



NOTE: The syntax of the batch file to add multiple users is as follows:

add ur (user_ID) [(init_bal) (user_name) (min_bal) (email) (dept_name) (PrimaryPIN) (SecondaryPIN)]



Assign a Single User to a Department


1. In **Equitrac System Manager**, click  in the left pane; the list of users appears in the right pane.
2. In the right-pane, click the User ID column heading to sort the list in ascending order by User ID.
3. Left-click the user ID **Alana**; the user Properties dialog box appears.
4. Click the **Department** drop-down arrow and select **Administrator**.
5. Click the  button; this assigns the single user Alan Alda to the department Administrator; Administrator now appears in the Department column of the user Alan Alda.

Unassign a Single User from a Department




1. In **Equitrac System Manager**, click  in the left pane; the list of users appears in the right pane.
2. In the right-pane, click the User ID column heading to sort the list in ascending order by User ID.
3. Left-click the user ID **Alana**; the user Properties dialog box appears.
4. Click the **Department** drop-down arrow and select **<None>**.
5. Click the  button; this removes the user from the department.

Assign Multiple Users to the Same Department

To select multiple, non-sequential users, left-click the first user to be selected, press and hold down the  key, and then left-click each additional user; each selected user remains highlighted as the next user is selected. To select a range of consecutive users, left-click the first user in the range, press and hold down the  key, and then left-click the last user in the range; all users in the range become highlighted.



1. In **Equitrac System Manager**, click  in the left pane; the list of users appears in the right pane.
2. In the right-pane, click the User ID column heading to sort the list in ascending order by User ID.
3. Left-click the full user name **Alan Alda** (not the user ID **Alana**).

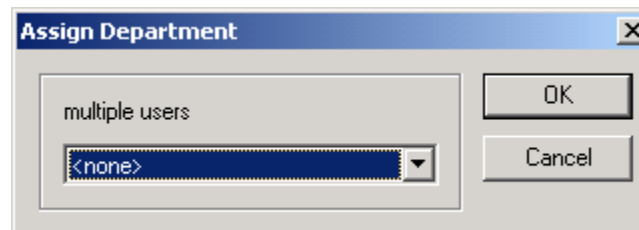
NOTE: If the Properties dialog box appears, you clicked the user ID instead of the full user name. Close the Properties dialog box and try again.


4. Press and hold down the  key and then left-click **Bud Abbot**.
5. With the  key still pressed left-click **Connie Selleca**, **Dan Akroyd** and **Danny Thomas**.
6. Right-click and select **Add to Department**; the Assign Department dialog box appears.
7. Click the **Multiple users** drop-down arrow and select **Administrator**.
8. Click the  button; Administrator appears beside each user in the Department column.

Unassign Multiple Users from a Department

NOTE: The multiple users do not have to belong to the same department when being unassigned.

1. In **Equitrac System Manager**, click  in the left pane; the list of users appears in the right pane.
2. In the right-pane, click the User ID column heading to sort the list in ascending order by User ID.
3. Left-click **Connie Selleca**.
4. Press and hold down the  key.
5. Left-click **Danny Thomas**; three users are highlighted.
6. Right-click and select **Add to Department**; the Assign Department dialog box appears.
7. Click the **Multiple users** drop-down arrow and select **<None>**.




8. Click the  button; Administrator is removed from each user in the Department column.
9. Refer to the **Department** section in the Classroom Scenario document to assigned additional users to departments.

Assign Users to a Different Department

The steps to assign a single user or multiple users to a **different** department are the same as to assign a user or multiple users to a department as described previously. When prompted to enter a department, select the NEW department the user(s) are to be assigned to.

Confirm Department Membership

NOTE: A user can only belong to one department.

1. In **Equitrac System Manager**, left click  **Users** in the left pane.
2. In the right pane, right-click a user ID; the Properties of...dialog box appears. Note the value in the Department field.

