Climsoft – Users Administration and General Settings Configuration Guide

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Contents

1. Introduction .................................................................................................................................. 3
2. Administration of Users in Climsoft .............................................................................................. 3
   2.1 Getting Started ......................................................................................................................... 3
   2.2 Adding Users ............................................................................................................................ 4
   2.3. Change Password / Change own password ............................................................................. 5
   2.4 Deleting Users ........................................................................................................................ 5
3. General Settings Configuration ...................................................................................................... 6
1. Introduction

Welcome to the Climsoft version 4 Users Administration and General Settings configuration Guide. This guide will instruct administrators on how to manage Climsoft users (add or delete users, assign roles and permissions to users, etc.) and perform essential and general settings configuration required by Climsoft. It is important to set up user roles correctly in order to safeguard the database from errors and inadvertent modification.

2. Administration of Users in Climsoft

The default user of the Climsoft CDMS is "root". This is the super user of the system with access to all the features of the CDMS. In order to allow other users to make use of the system, the "root" user must add new users and assign them to different user groups. Different user groups that have been pre-defined for Climsoft are shown in table1 below:

<table>
<thead>
<tr>
<th>User Group</th>
<th>Summarized access rights</th>
</tr>
</thead>
<tbody>
<tr>
<td>ClimsoftAdmin</td>
<td>All Climsoft features including creating and deleting other users</td>
</tr>
<tr>
<td>ClimsoftDeveloper</td>
<td>Modification of all Climsoft features</td>
</tr>
<tr>
<td>ClimsoftMetadata</td>
<td>Updating of metadata e.g. station information, instruments, etc.</td>
</tr>
<tr>
<td>ClimsoftOperator</td>
<td>Key-Entry of observation data</td>
</tr>
<tr>
<td>ClimsoftOperatorSupervisor</td>
<td>Key-Entry plus uploading key-entry data to observation initial table</td>
</tr>
<tr>
<td>ClimsoftProducts</td>
<td>Extracting products from Climsoft</td>
</tr>
<tr>
<td>ClimsoftQC</td>
<td>Key-Entry, upload to observation initial and Quality Control</td>
</tr>
<tr>
<td>ClimsoftRainfall</td>
<td>Key-Entry of only rainfall data</td>
</tr>
<tr>
<td>ClimsoftTranslator</td>
<td>Translation of text on controls and messages</td>
</tr>
</tbody>
</table>

Table 1: Climsoft user roles

2.1 Getting Started

To start, sign into Climsoft, then click on the "Users Administration" icon, located in the welcome window. This will open the dialog box shown in Figure1.
2.2 Adding Users

1. To add a new user, first enter a user name;
2. Click on the drop-down arrow located to the right of the "User Role" box and select the desired user classification;
3. Create and confirm their password in the boxes provided;
4. To save, click "Add New" button;
5. To exit the "User Information" window click "Close".

The user management dialog is intuitive and self-explanatory. The “Add New” button is enabled after filling in all the textboxes and picking the user role from the dropdown list (Figure 2).

Important

You should get a message confirming successful creation of each user (Figure 2). As each user is created, the username created should be added to the grid display on the right of the user creation dialog (Figure 2). You should also be able to login to Climsoft version 4 with the created users.

Figure 1- User Management dialog

Figure 2 - Confirmation message of successful user creation
2.3. Change Password / Change own password

After creating new users, Climsoft administrator can change the password of any user via the "Administration" menu item as follows. Any user can change as well his/her own password via the menu item "Change own password". Passwords must be at least 6 characters long; if you try to set a password that has fewer than 6 characters you will receive an error message (Figure 3).

![Change Password](image)

**Figure 3 - Change password/Change own password**

2.4 Deleting Users

To delete a user, follow the steps below:
**Step 1.** Select the user in the grid and then click on "Delete" button (Figure 4);
**Step 2.** A message will pop up ask you to confirm your decision. Click "OK";
**Step 3.** To exit the "User management" dialog, click "Close".

![Delete user](image)

**Figure 4 - Delete user**

**Important**

The password length must be greater or equal to 6 characters (Figure 5) Administrators are advised to keep a log of usernames and passwords for easy retrieval in case of forgotten information.
Figure 5 - Password length

3. General Settings Configuration
In order to customize Climsoft for local use, Climsoft administrator must configure the system as follow:
1. Go to Main Menu, then “Tools”, select “General Settings”.
   The dialog shown below (Figure 6 (a)) will display, showing one record at a time.

Figure 6 (a): General settings in single record view mode
The screenshot above Figure 6 (a), shows the default path set for the QC reports folder that will be generated from Climsoft. Users can decide to adjust this path to suits their preference or leave this path the way it is.
To view the record in datasheet view (table format), click the “View” button (Figure 6 (b)).
Important

The Administrator must navigate through all the records in the dialog and change the contents in the textbox to the right of the label “Key Value” (second column) to suit the required local configuration and give a clear description in the third column and click the update command to validate the changes. For each setting (on each record) to take effect, the “Update” button must be clicked.

With reference to the screenshot above (Figure 6 (b)), the folder name and path must match the folder and path that exist or have been created on the computer where the Climsoft database has been installed. The folder name and path do not necessarily have to be the same as the default value shown in the screenshot.

Note: For any question or further clarifications, contact the Climsoft Helpdesk: support@climsoft.org