

# How to Import User from Origin System into i21 company

Here are the steps on How to Create a New User for Origin and i21 companies:

⚠ You would only need to do this step if the user is a new user of the iRely system.

- 1. Log in as **Admin User**
- 2. In **Company Setup Menu**, go to **User Security Maintenance**. Fill out the screen and Save.

The screenshot shows the 'User Security Maintenance' window with the following fields and options:

- User ID: [?][ ]
- User Password: [ ]
- User Name: [ ]
- Email address: [ ]
- Last Dates: Logged in [?] [00000000] Password Changed [?] [00000000]
- Limited Access: ☐ Hide Cost? ☐ Hide Other? ☐ EOD Edit Only ☐
- Use Numbers on Menus: ☐ Secured Notes Visible ☒ Access Level: [Not Used]
- Default settings:
  - Company: [?][ ]
  - Printer Group: [?][ ]
  - Printer: [?][ ]
  - Menu Group: [?][ ]
  - Starting Menu: [?][ ]
- Batch Number: [001] Range: [001] through [999]
- Customer Lookup Order: [Name]
- User Scale ID: [ ] User Default Scale ID: [ ]
- Use Touch Screen: ☐ Scale Override: [No] Distribute from Scale: ☐
- Location: [ ] At login start at C-Store #: [ ]

- 3. Import into i21 Using the next steps below.

Users from Origin can be imported to i21 company through Import Origin Users screen. Only the Admin user can import origin users to i21 company.

The screenshot shows the 'Import Origin Users' window with a table of users. The table has columns for Username, Full Name, Email, User Role, and Security Policy.

Username	Full Name	Email	User Role	Security Policy
ADHARAN	Ajith Dharan			
AGADMIN	AGADMIN		ADMINISTRATOR	Default User Pol...
AGOSKOWICZ	Amy Goskowicz			
BETH	BETHD			
MMATTISON	Mike Mattison			
MWIELINSKI	Matt Wielinski			
TRENNER	Todd Renner			



### Pre-requisite

Before proceeding to importing Origin Users, User Role must first be created where the user will be assigned. User Roles can either be created manually or imported from Origin system.

1. See [How to Import Origin Roles into i21](#) on how to import Origin Roles.
2. See [How to Add User Role Type](#) on how to manually create user roles

Here is how to Import user from Origin System into i21 company:

1. Login as **Admin** user
2. On user's menu panel, go to **System Manager** menu then open **Imports and Conversions** screen
3. On **Imports and Conversions** screen, click **Import Origin Users** button to open **Import Users** screen
4. On **Import Origin Users** screen, select a **User Role** and **Security Policy** first from the drop down list for the user you want to import to i21

The screenshot shows the 'Import Origin Users' window with the 'Details' tab selected. At the top, there are 'Import' and 'Close' buttons. Below them is a 'Filter (F3)' input field. A table lists several users with checkboxes in the first column. The 'AGADMIN' user is highlighted in green. The table has columns for Username, Full Name, Email, User Role, and Security Policy.

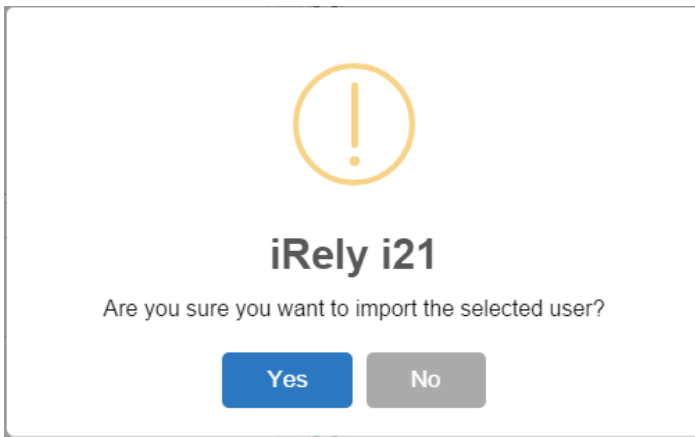
	Username	Full Name	Email	User Role	Security Policy
<input type="checkbox"/>	ADHARAN	Ajith Dharan			
<input checked="" type="checkbox"/>	AGADMIN	AGADMIN		ADMINISTRATOR	Default User Pol...
<input type="checkbox"/>	AGOSKOWICZ	Amy Goskowicz			
<input type="checkbox"/>	BETH	BETHD			
<input type="checkbox"/>	MMATTISON	Mike Mattison			
<input type="checkbox"/>	MWIELINSKI	Matt Wielinski			
<input type="checkbox"/>	TRENNER	Todd Renner			

5. Select the user you want to import by checking the check box besides the username then click **Import** button

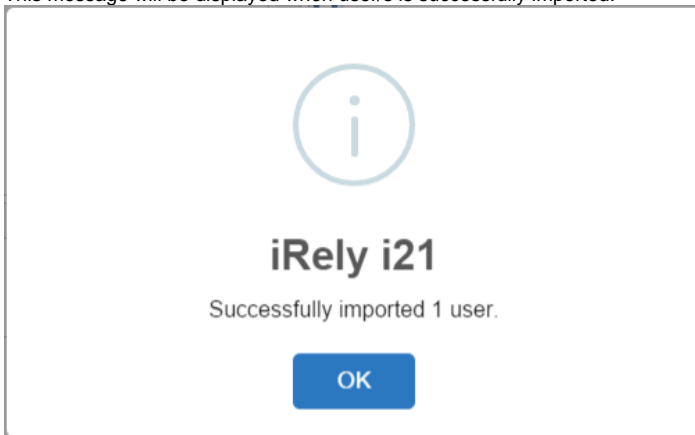
This screenshot is similar to the previous one, but the 'AGADMIN' user is now selected with a checked checkbox. The 'Import' button at the top left is highlighted with a mouse cursor, and the 'AGADMIN' row is highlighted in blue.

	Username	Full Name	Email	User Role	Security Policy
<input type="checkbox"/>	ADHARAN	Ajith Dharan			
<input checked="" type="checkbox"/>	AGADMIN	AGADMIN		ADMINISTRATOR	Default User Pol...
<input type="checkbox"/>	AGOSKOWICZ	Amy Goskowicz			
<input type="checkbox"/>	BETH	BETHD			
<input type="checkbox"/>	MMATTISON	Mike Mattison			
<input type="checkbox"/>	MWIELINSKI	Matt Wielinski			
<input type="checkbox"/>	TRENNER	Todd Renner			

6. After clicking Import button, this message will prompt



7. Clicking **No** will close the message and Import Origin Users screen will still open. while Clicking **Yes** will import the selected user.
8. This message will be displayed when user/s is successfully imported.



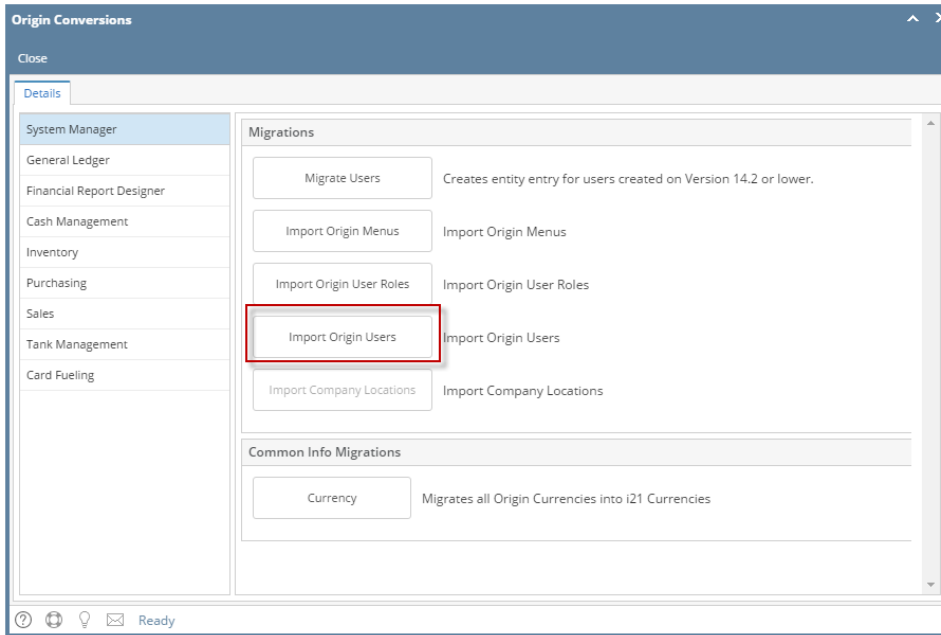
#### Notes

- To check if the user has been imported, go to **System Manager > Users**, the user's record should appear in the list
- You can import multiple users at the same time in i21. Just select the users you want to import before clicking the import button

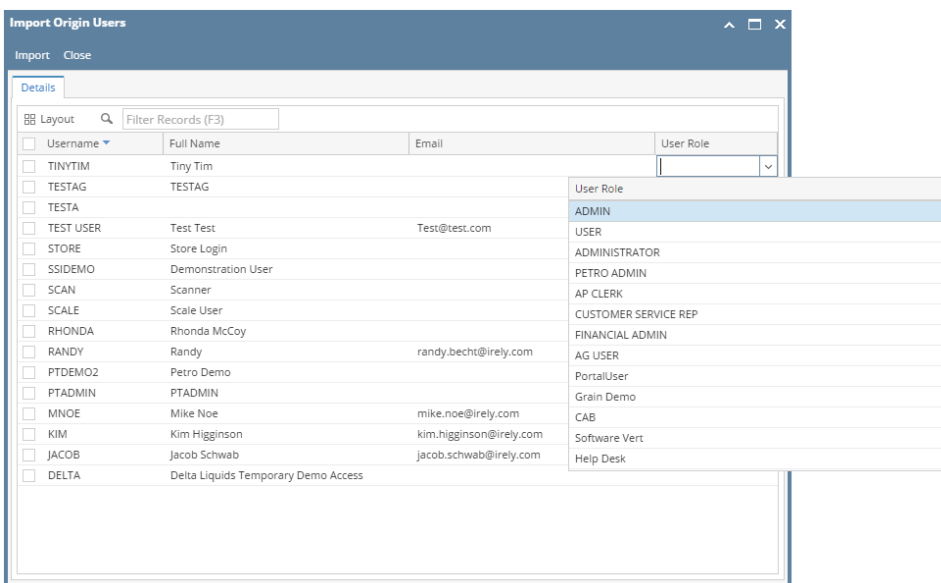
**Here is how to Import user from Origin System into i21 company:**

1. Login as **Admin** user
2. On user's menu panel, go to **System Manager** folder then click **Utilities** folder
3. Click **Origin Conversions** menu to open screen

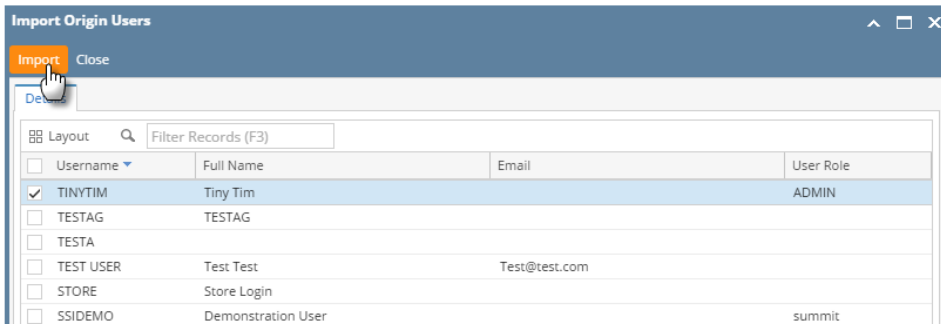
4. On **Origin Conversions** screen, click **Import Origin Users** button to open **Import Users** screen



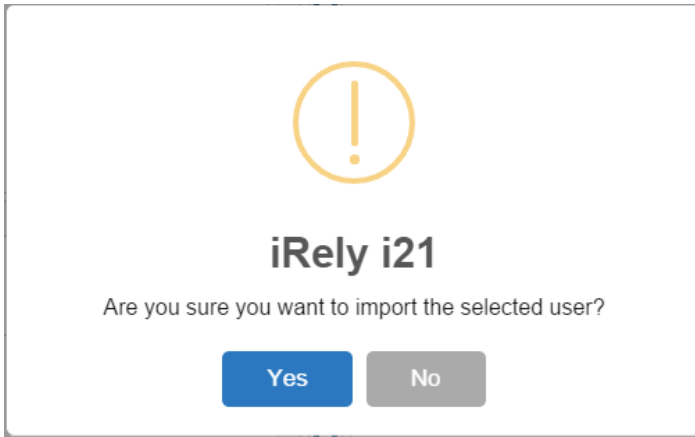
5. On **Import Origin Users** screen, select a User Role first from the drop down list for the user you want to import to i21



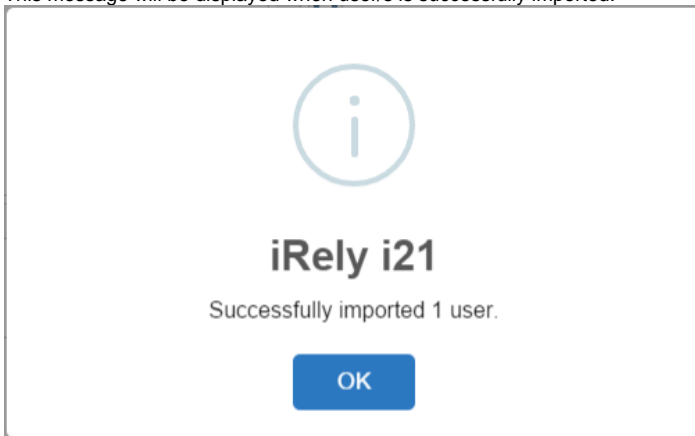
6. Select the user you want to import by checking the check box besides the username then click **Import** button



7. After clicking Import button, this message will prompt

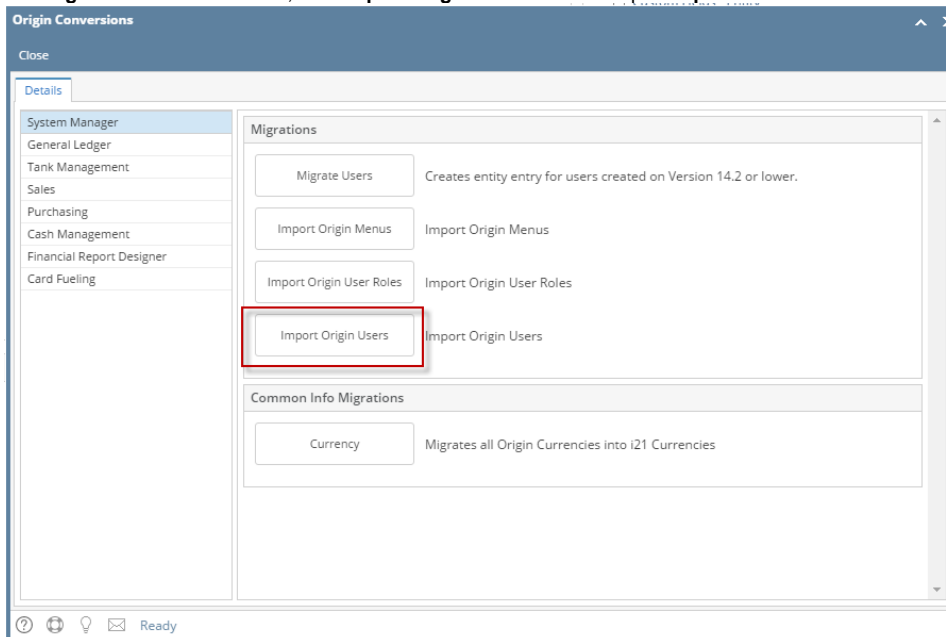


8. Clicking **No** will close the message and Import Origin Users screen will still open. while Clicking **Yes** will import the selected user.
9. This message will be displayed when user/s is successfully imported.

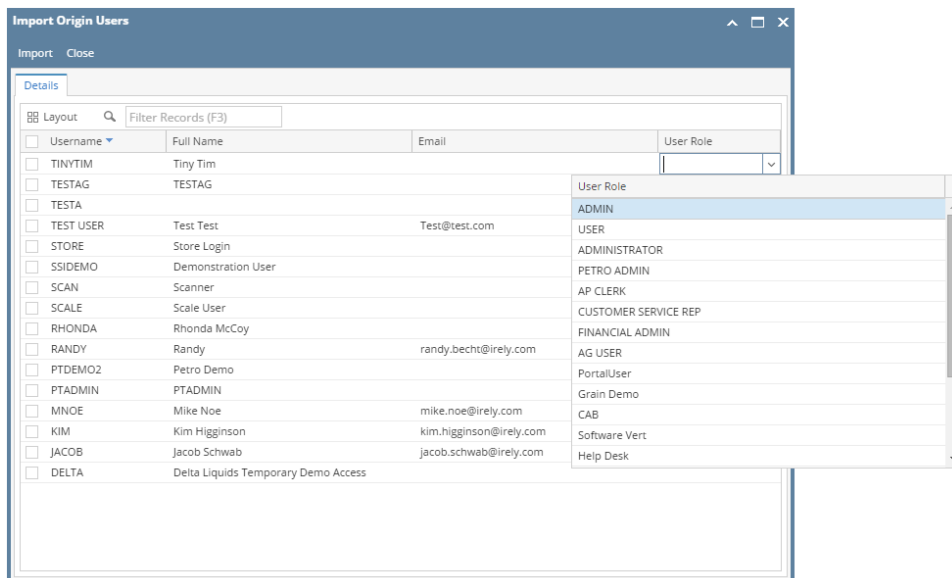


Here is how to Import user from Origin System into i21 company:

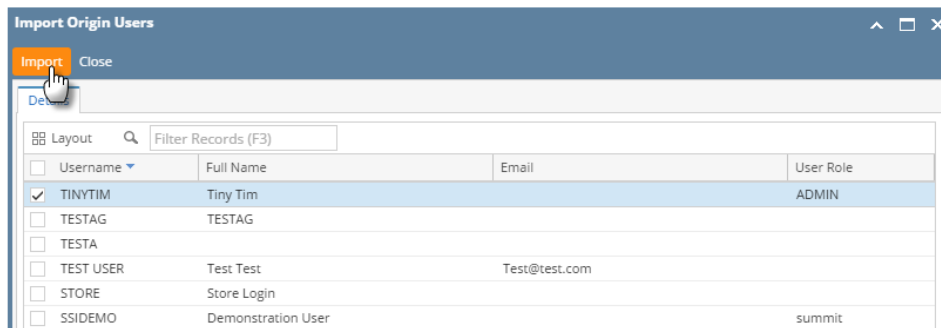
1. Login as **Admin** user
2. On user's menu panel, go to **System Manager** folder then click **Utilities** folder
3. Click **Origin Conversions** menu to open screen
4. On **Origin Conversions** screen, click **Import Origin Users** button to open **Import Users** screen



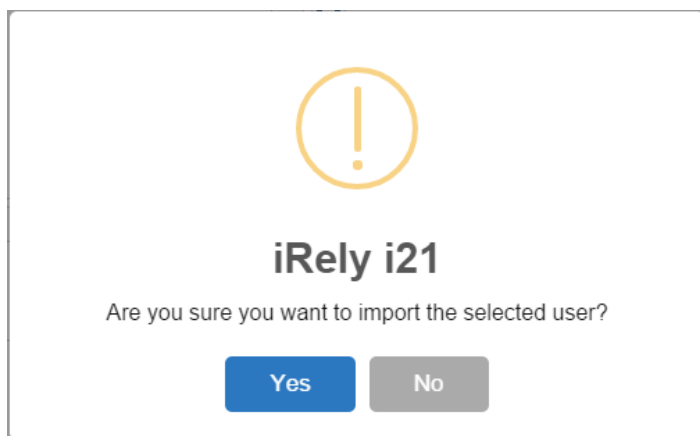
5. On **Import Origin Users** screen, select a User Role first from the drop down list for the user you want to import to i21



- Select the user you want to import by checking the check box besides the username then click **Import** button

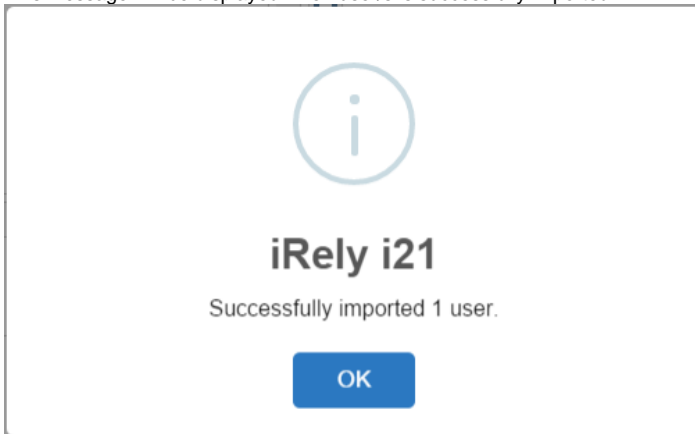


- After clicking Import button, this message will prompt



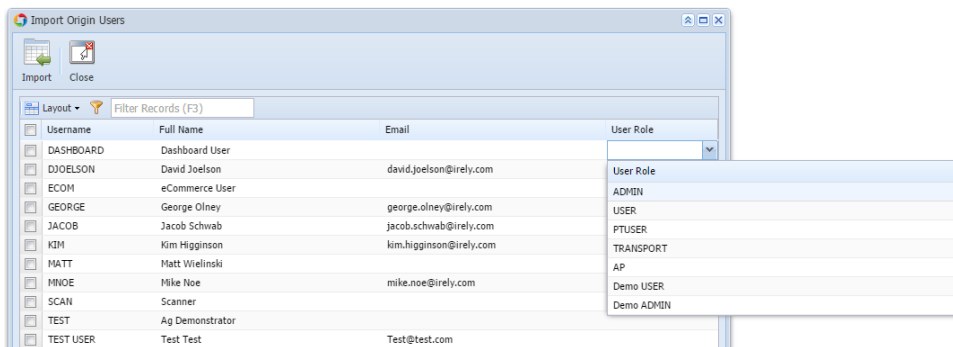
- Clicking **No** will close the message and Import Origin Users screen will still open. while Clicking **Yes** will import the selected user.

9. This message will be displayed when user/s is successfully imported.

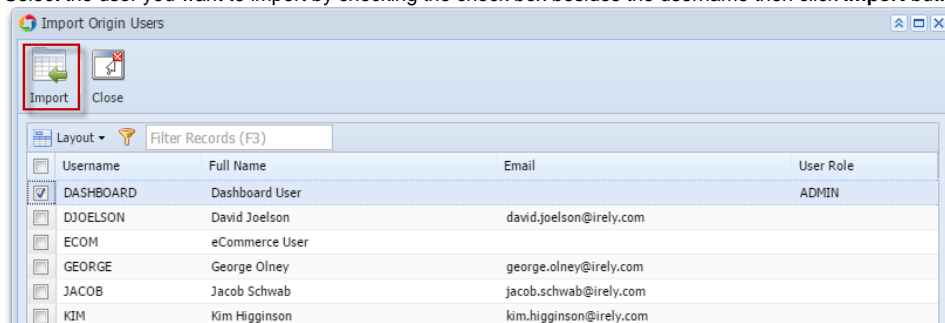


Here is how to Import user from Origin System into i21 company:

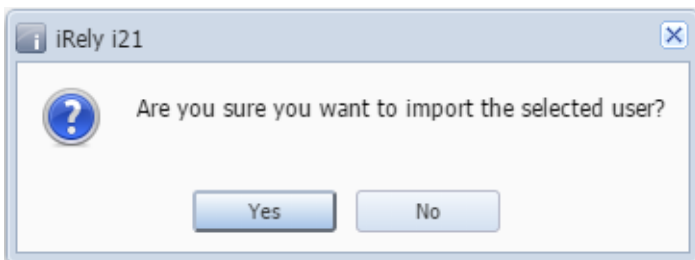
1. Login as Admin User
2. On User's Menu panel, select **System Manager Folder > Utilities folder > Import Origin Users menu**
3. On **Import Origin Users** screen, select a User Role first from the drop down list for the user you want to import to i21



4. Select the user you want to import by checking the check box besides the username then click **Import** button

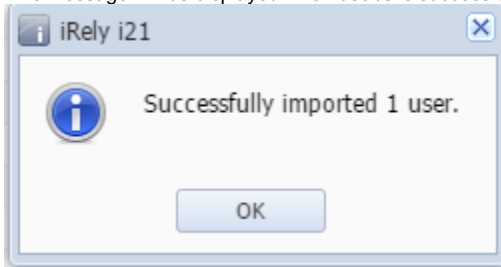


5. After clicking Import button, this message will prompt



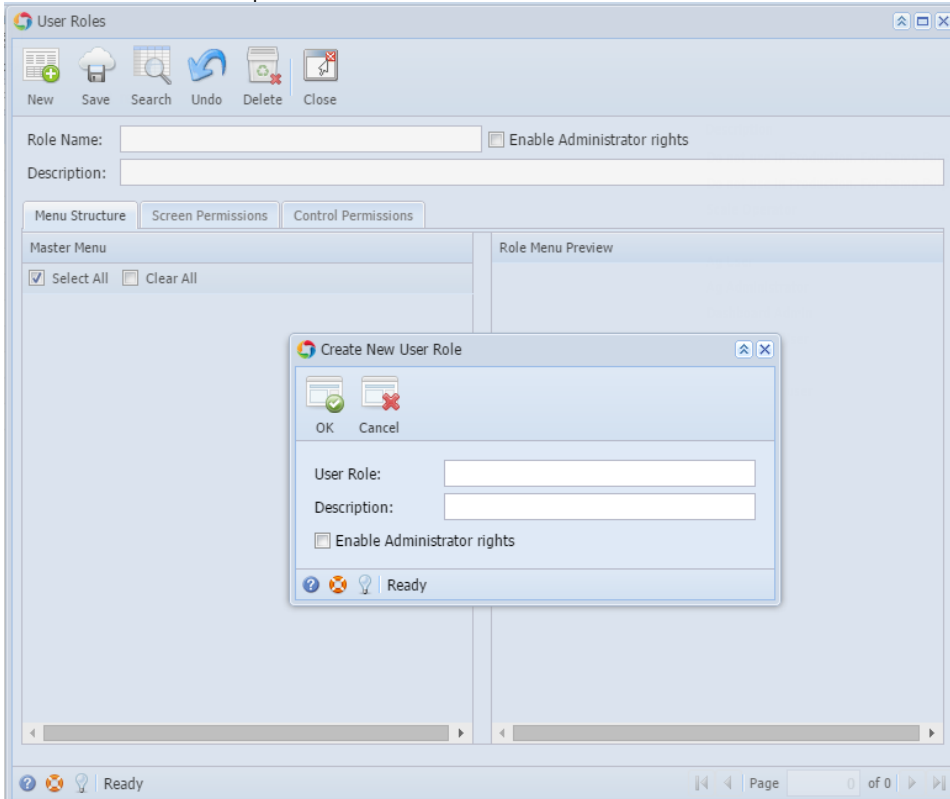
6. Clicking **No** will close the message and Import Origin Users screen will still open. while Clicking **Yes** will import the selected user.

7. This message will be displayed when user/s is successfully imported.

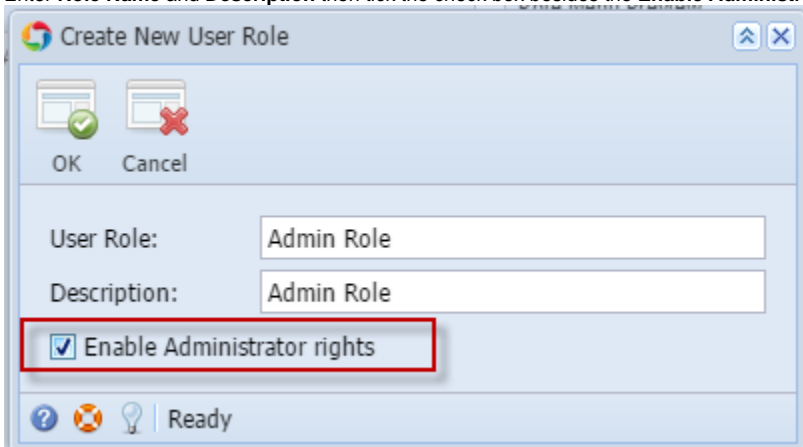


Here are the steps on How to Add an Admin User Role Type:

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**
3. Click **New** action button to open a new record.

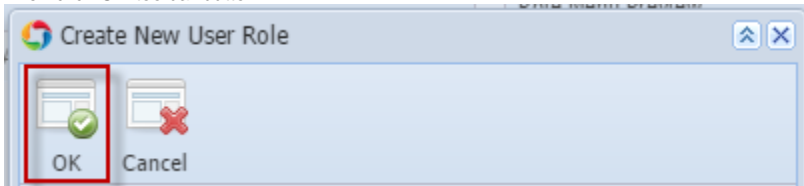


4. Enter **Role Name** and **Description** then tick the check box besides the **Enable Administrator rights**.

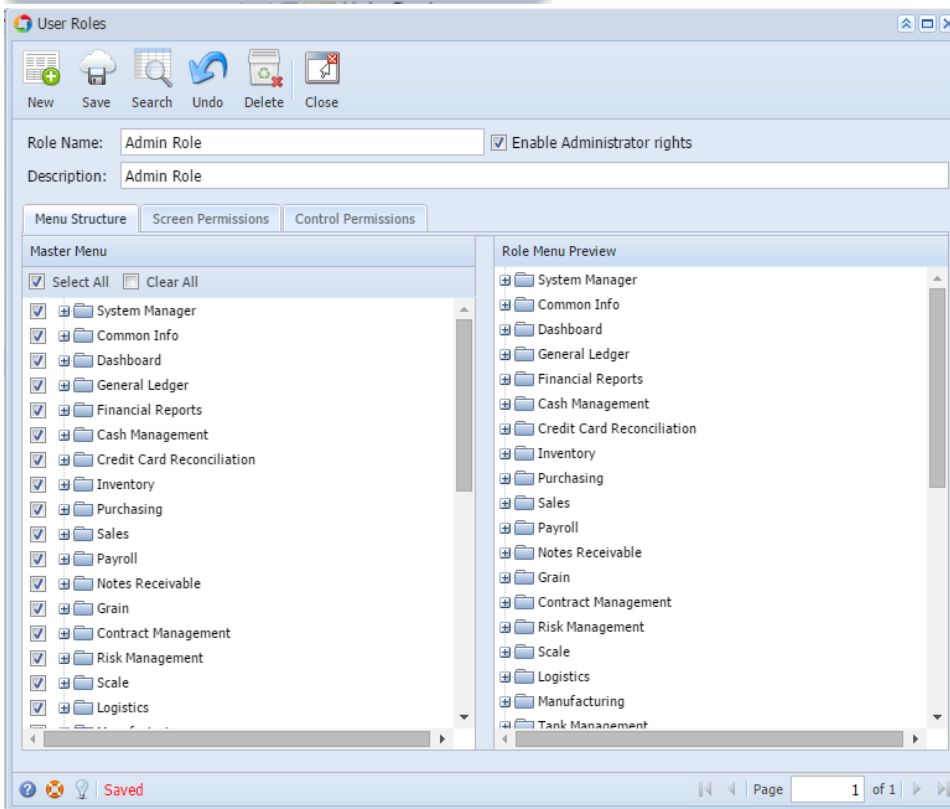




5. Then click **OK** toolbar button



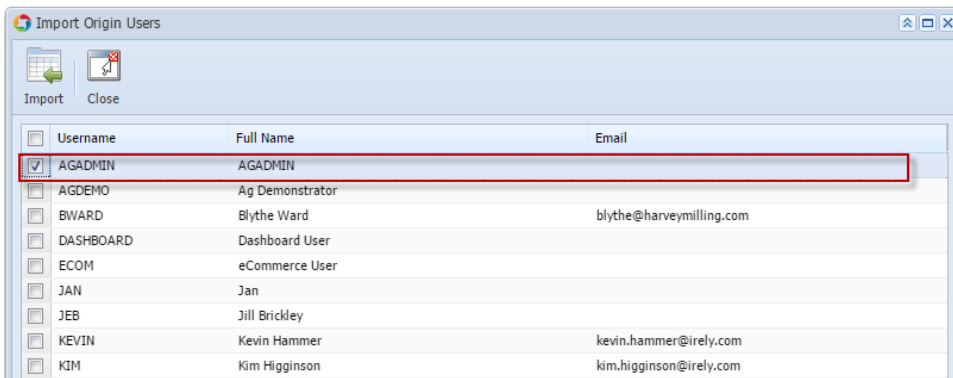
6. After the menus are generated successfully, all menus on the Menu Structure will have a check mark and Admin folder is displayed



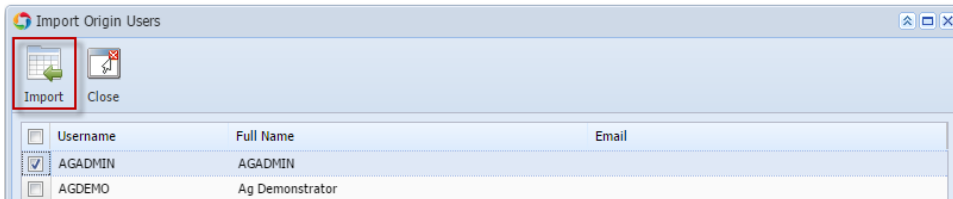
After successfully creating the user roles, Admin can now proceed to importing users from origin system to i21.

**Here is how to Import user from Origin System into i21 company:**

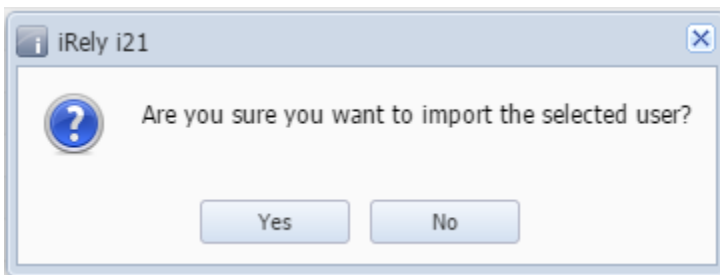
1. Login as Admin User
2. On User's Menu panel, select **System Manager Folder > Utilities folder > Import Origin Users menu**
3. On **Import Origin Users** screen, select the user you want to import to i21 by checking the check box besides the username



4. Click **Import** button

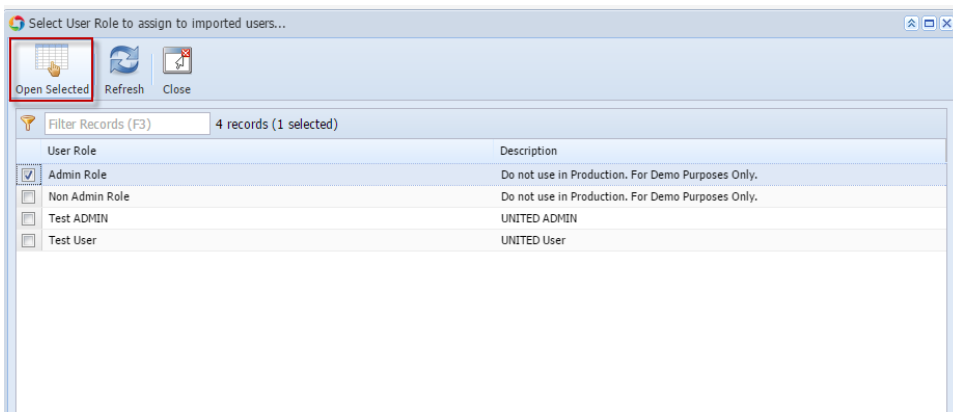


5. After clicking Import button, this message will prompt

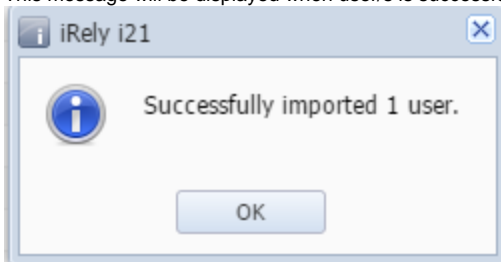


6. Clicking **No** will close the message and Import Origin Users screen will still open. while Clicking **Yes** will open the User Roles screen.

7. Select a User Role then click **Open Selected** toolbar button.



This message will be displayed when user/s is successfully imported.



Here are the steps on How to Add a Non-Admin User Role Type:

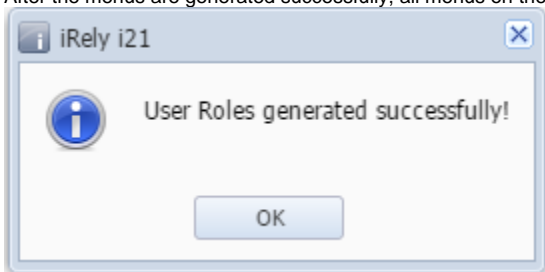
1. Open User Role screen. To do this, go to **i21 Main Menu > Menu Panel > Admin > User Roles**.  
[blocked URL](#)

2. Click **New** action button to open a new record.  
[blocked URL](#)
3. Enter **Role Name** and **Description**. Then click **OK** button  
[blocked URL](#)
4. Select the menus. When you deselect the root folder, all its sub-menus will also be deselected. Note that whatever menu you select on this screen will be accessible to the users with this role.  
[blocked URL](#)
5. Click **Save** button to save the new User Role type. This message will prompt.



**Here are the steps on How to Add an Admin User Role Type:**

1. Open User Role screen. To do this, go to **i21 Main Menu > Menu Panel > Admin > User Roles**.  
[blocked URL](#)
2. Click **New** action button to open a new record.  
[blocked URL](#)
3. Enter **Role Name** and **Description** then tick the check box besides the **Enable Administrator rights**.  
[blocked URL](#)
4. Then click **OK** toolbar button  
[blocked URL](#)
5. After the menus are generated successfully, all menus on the Menu Structure will have a check mark and Admin folder is displayed

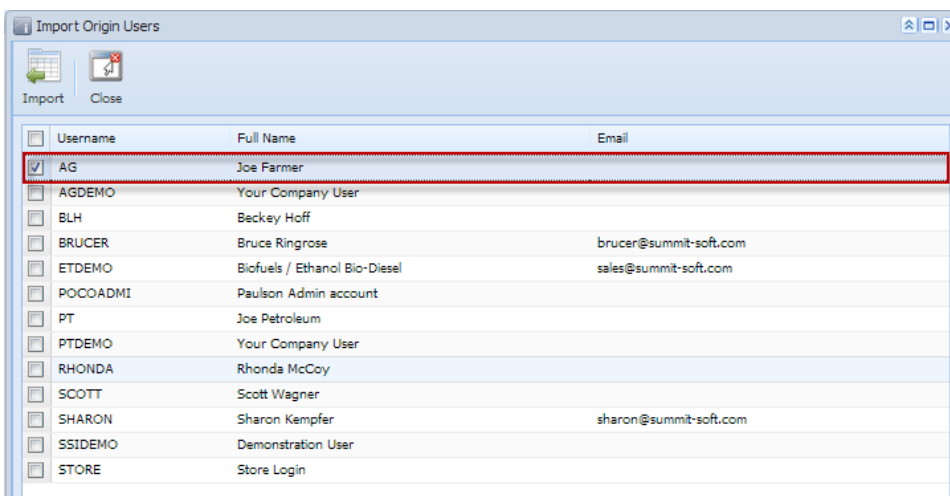


[blocked URL](#)

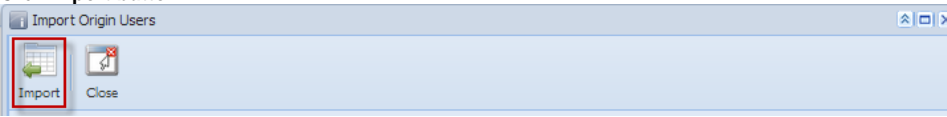
After successfully creating the user roles, Admin can now proceed to importing users from origin system to i21.

**Here is how to Import user from Origin System into i21 company:**

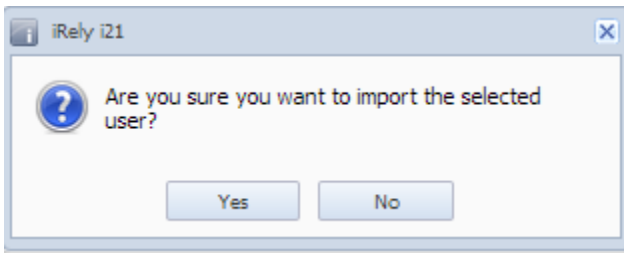
1. Login as Admin User
2. On User's Menu panel, select **Admin Folder > Utilities folder > Import Origin Users menu**
3. On **Import Origin Users** screen, select the user you want to import to i21 by checking the check box besides the username



4. Click **Import** button

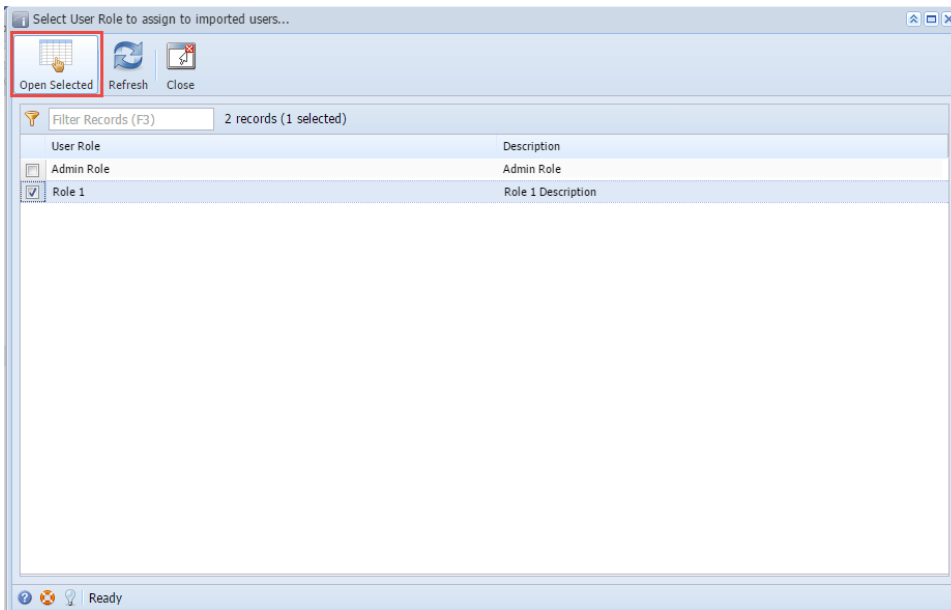


5. After clicking Import button, this message will prompt

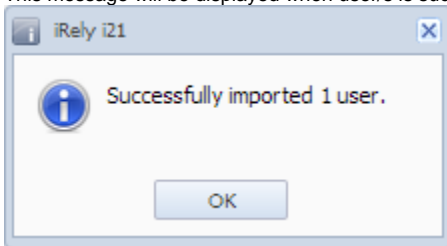


6. Clicking No will close the message and Import Origin Users screen will still open. while Clicking Yes will open the User Roles screen.

7. Select a User Role then click Open Selected toolbar button.

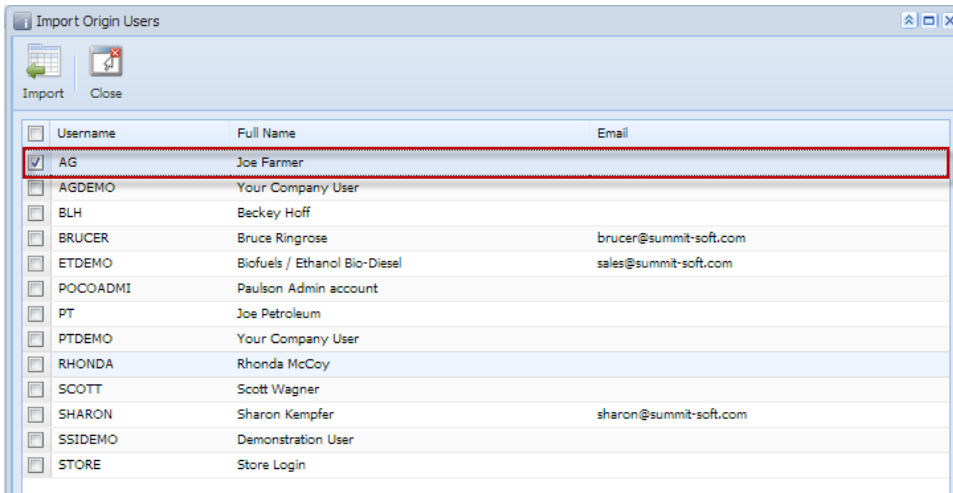


This message will be displayed when user/s is successfully imported.

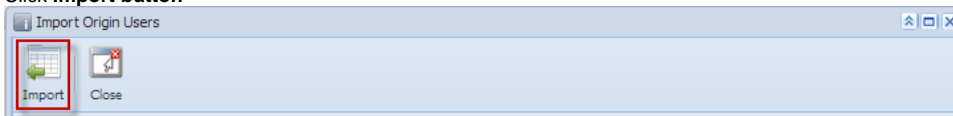


Here is how to Import user from Origin System into i21 company:

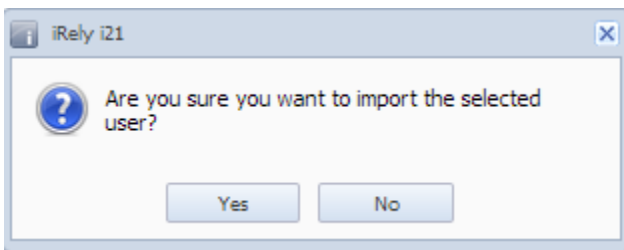
1. Login as Admin User
2. On User's Menu panel, select an **Admin Folder**
3. Under Admin folder, open **Utilities folder**
4. Select and open **Import Origin Users** menu
5. On Import Origin Users screen, select the user you want to import to i21 by checking the check box besides Username



6. Click **Import** button



7. After clicking Import button, this message will prompt



8. Clicking No will close the message and Import Origin Users screen will still open. while Clicking Yes will continue the importing. This message will be displayed when user/s imported successfully.

