# 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:

1 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

In Company Setup Me	enu, go to User Security Maintenance. Fill out the screen and Save.	]
File Records Company Options Ctrl+2	User Manual	
User ID ?		
Email address		
Last Dates: Logged in Limited Access	?         00000000         Password Changed         ?         00000000           □         Hide Cost?         □         Hide Other?         □         EOD Edit Only         □           □         Hide Cost?         □         Hide Other?         □         EOD Edit Only         □	
Default settings: Company	?	
Printer Group Printer	2	
Menu Group Starting Menu	2	
Batch Number Customer Lookup Order	001 Range 001 through 999	
User Scale ID		
Location	At login start at C-Store #	
mport into i21 Using th	ne 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.

Import Origin Users				⊐ ×
Import Close				
Details				
B View - Filter (F3)				
Username	Full Name	Email	User Role	Security Policy
ADHARAN	Ajith Dharan			
AGADMIN	AGADMIN		ADMINISTRATOR	Default User Pol
AGOSKOWICZ	Amy Goskowicz			
ветн	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
- On user's menu panel, go to System Manager menu then open Imports and Conversions screen
   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

i	Import Origin Users				□ ×
	Import Close				
	Details				
l	문 View ▼ Filter (F3)				
;	Username	Full Name	Email	User Role	Security Policy
;	ADHARAN	Ajith Dharan			
3	AGADMIN	AGADMIN		ADMINISTRATOR	Default User Pol
	AGOSKOWICZ	Amy Goskowicz			
	ВЕТН	BETHD			
ľ	MMATTISON	Mike Mattison			
	MWIELINSKI	Matt Wielinski			
i I	TRENNER	Todd Renner			
ì					
r I					
3					
-					
;					
-					
1					

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

Import							
Details	Details						
B View - Filter (F3)							
Username	Full Name	Email	User Role	Security Policy			
ADHARAN	Ajith Dharan						
AGADMIN	AGADMIN		ADMINISTRATOR	Default User Pol			
AGOSKOWICZ	Amy Goskowicz						
🗌 ветн	BETHD						
MMATTISON	Mike Mattison						
MWIELINSKI	Matt Wielinski						
TRENNER	Todd Renner						

6. 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.
 This message will be displayed when user/s is successfully imported.

i
iRely i21
Successfully imported 1 user.
ОК

# 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

- 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

Origin Conversions		^ X
Close		
Details		
System Manager	Migrations	<b>A</b>
General Ledger Financial Report Designer	Migrate Users Creates entity entry for users created on Version 14.2 or lower.	
Cash Management	Import Origin Menus Import Origin Menus	
Purchasing	Import Origin User Roles Import Origin User Roles	
Sales Tank Management	Import Origin Users	
Card Fueling	Import Company Locations Import Company Locations	
	Common Info Migrations	
	Currency Migrates all Origin Currencies into i21 Currencies	
		-
⑦ Ø Ø Keady		

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

Import Origin Users				^	□ ×
Import Close					
Details					
88 Layout Q Filte	r Records (F3)				
Username 🔻	Full Name	Email		User Role	
TINYTIM	Tiny Tim				~
TESTAG	TESTAG		User Role		
TESTA			ADMIN		
TEST USER	Test Test	Test@test.com	USER		
STORE	Store Login		ADMINISTRATO	R	
SSIDEMO	Demonstration User		PETRO ADMIN		
SCAN	Scanner		AP CLERK		
SCALE	SCALE Scale User CUSTOMER SERVICE REP				
RHONDA	Rhonda McCoy		FINANCIAL ADM	/IN	
RANDY	Randy	randy.becht@irely.com	AG USER		
PTDEMO2	Petro Demo		PortalUser		
PTADMIN	PTADMIN		Grain Demo		
MNOE	Mike Noe	mike.noe@irely.com	CAB		
KIM	Kim Higginson	kim.higginson@irely.com	Software Vert		
JACOB	Jacob Schwab	jacob.schwab@irely.com	Help Desk		
DELTA	Delta Liquids Temporary Demo Access				

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

Import Origin Users			^ □ ×
Import Close			
De			
멾 Layout Q Filter R	Records (F3)		
Username 🔻	Full Name	Email	User Role
✓ TINYTIM	Tiny Tim		ADMIN
TESTAG	TESTAG		
TESTA			
TEST USER	Test Test	Test@test.com	
STORE	Store Login		
SSIDEMO	Demonstration User		summit

7. After clicking Import button, this message will prompt

iRely i21
Are you sure you want to import the selected user?
Yes No

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



- 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

Close		
Details		
System Manager	Migrations	
General Ledger	······································	
Tank Management	Migrate Users Creates entity entry for users created on Version 14.2 or lower.	
Sales	ereates entry entry for asers created on version 14.2 or lower.	
Purchasing		
Cash Management	Import Origin Menus Import Origin Menus	
Financial Report Designer		
Card Fueling	Import Origin User Roles Import Origin User Roles	
	Import Origin Users	
	Currency Migrates all Origin Currencies into i21 Currencies	
<b>∂</b> Ω ⊠ Ready		

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

Details					
멾 Layout Q Filter Records	(F3)				1
Username 🔻 🛛 Full Na	ame	Email		User Role	
TINYTIM Tiny Ti	im			~	1
TESTAG TESTA	G		User Role		
TESTA			ADMIN		
TEST USER Test Te	est	Test@test.com	USER		
STORE Store L	Login		ADMINISTRATOR	2	
SSIDEMO Demo	nstration User		PETRO ADMIN		
SCAN Scanne	er		AP CLERK		
SCALE Scale U	Jser		CUSTOMER SER	/ICE REP	
RHONDA Rhond	la McCoy		FINANCIAL ADM	IN	
RANDY Randy		randy.becht@irely.com	AG USER		
PTDEMO2 Petro I	Demo		PortalUser		
PTADMIN PTADN	MIN		Grain Demo		
MNOE Mike N	loe	mike.noe@irely.com	CAB		
KIM Kim Hi	igginson	kim.higginson@irely.com	Software Vert		
JACOB Jacob S	Schwab	jacob.schwab@irely.com	Help Desk		
DELTA Delta L	Liquids Temporary Demo Access				

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

Import Origin Users				
Import Close				
De				
🗄 Layout 🔍 Fi	lter Records (F3)			
Username 🔻	Full Name	Email	User Role	
✓ TINYTIM	Tiny Tim		ADMIN	
TESTAG	TESTAG			
TESTA				
TEST USER	Test Test	Test@test.com		
STORE	Store Login			
SSIDEMO	Demonstration User		summit	

7. After clicking Import button, this message will prompt

iRely i21
Are you sure you want to import the selected user?
Yes No

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, 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

🗊 Import Origin Users	🕽 Import Origin Users 🔹 🖻 🗵		
Import Close			
🖶 Layout 👻 🍸 🗐	ter Records (F3)		
Username	Full Name	Email	User Role
DASHBOARD	Dashboard User		v
DJOELSON	David Joelson	david.joelson@irely.com	User Role
ECOM	eCommerce User		ADMIN
GEORGE	George Olney	george.olney@irely.com	USER
JACOB	Jacob Schwab	jacob.schwab@irely.com	PTUSER
KIM	Kim Higginson	kim.higginson@irely.com	TRANSPORT
MATT	Matt Wielinski		AP
MNOE	Mike Noe	mike.noe@irely.com	Demo USER
SCAN	Scanner		Demo ADMIN
TEST	Ag Demonstrator		
TEST USER	Test Test	Test@test.com	

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

C) Im	🇊 Import Origin Users			
Impo	Import Close			
🔚 Layout 👻 🍞 Filter Records (F3)		Filter Records (F3)		
	Username	Full Name	Email	User Role
	DASHBOARD	Dashboard User		ADMIN
	DJOELSON	David Joelson	david.joelson@irely.com	
	ECOM	eCommerce User		
	GEORGE	George Olney	george.olney@irely.com	
	JACOB	Jacob Schwab	jacob.schwab@irely.com	
	KIM	Kim Higginson	kim.higginson@irely.com	

5. After clicking Import button, this message will prompt

👔 iRely i	21 🗙
?	Are you sure you want to import the selected user?
	Yes No

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:

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

1	🇊 User Roles		≈ □ >	<
	New Save Search Undo Del	ete Close		
	Role Name:	🔲 Enable Administrato	r rights	
	Description:			
	Menu Structure Screen Permissions	s Control Permissions		
	Master Menu	Role Menu Preview		
	✓ Select All Clear All			
		Create New User Role		
		OK Cancel		
		User Role:		
		Description:		
		Enable Administrator rights		
		🕜 😟 👷 Ready		
	4		•	
	🕜 👶 💡 Ready			
. E	inter Role Name and Descri	ption then tick the check box besides the	Enable Administrator rights.	Ī
ſ	🌀 Create New User Ro	le		
	OK Cancel			
	User Role:	Admin Role		
	Description:	Admin Role		

🟮 Create New User R	tole 🔹 🗙		
OK Cancel			
Liser Role: Admin Role			
0001110101			
Description:	Admin Role		
Enable Administrator rights			
🕜 😒 🏆 Ready			

## 5. Then click OK toolbar button

🇊 Crea	te New User Role	× ×
ОК	Cancel	

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

User Roles generated successfully!         OK         User Roles         Image: State Sta	
OK         Image: Search undo Delete Close         Role Name:       Admin Role         Description:       Admin Role         Description:       Admin Role         Menu Structure       Screen Permissions         Control Permissions       Control Permissions         Master Menu       Role Manager         Image: System Manager       Image: System Man	
User Roles         Image: Save Search Undo Delete Close         Role Name:       Admin Role         Description:       Admin Role         Description:       Admin Role         Mew Structure       Screen Permissions         Master Menu       © Enable Administrator rights         Master Menu       © Enable Administrator rights         Master Menu       © Control Permissions         Master Menu       © Select All         © Beneral Ledger       © Common Info         © General Ledger       © General Ledger         © General Ledger       © Credit Card Reconciliation         © © Credit Card Reconciliation       © Inventory         © © Purchasing       © Sales         © © Payroll       © Sales         © © Payroll       © Grain         © © Contract Management       © Contract Management	
Image: Source Permissions       Control Permissions         Mew Save       Search       Undo       Delete       Close         Role Name:       Admin Role       Image: Screen Permissions       Image: Screen Permissions       Image: Screen Permissions         Menu Structure       Screen Permissions       Control Permissions       Role Menu Preview         Image: Screen Permissions       Control Permissions       Image: Screen Permissions       Image: Screen Permissions         Master Menu       Screen Permissions       Control Permissions       Image: Screen Permissions       Image: Screen Permissions         Master Menu       Screen Permissions       Control Permissions       Image: Screen Permissions       Image: Screen Permissions         Master Menu       Screen Permissions       Control Permissions       Image: Screen Permissions       Image: Screen Permissions         Master Menu       Screen Permissions       Control Permissions       Image: Screen Permissions       Image: Screen Permissions         Image: Screen Permission         Image: Screen Permission       Image: Screen Permission       Image: Screen Permission       Image: Screen Permission       Image: Screen Permission         Image: Screen Permission       Imag	× □ ×
Role Name:       Admin Role         Description:       Admin Role         Menu Structure       Screen Permissions         Master Menu       Role Menu Preview         V Select All       Clear All         V Select All       Clear All         V Select All       Clear All         V Select All       Common Info         V Select All       Stem Manager         V Select All       Common Info         V Select All       Stem Manager         V Select All Reports       Stem Manager         V Select Card Reconciliation       Stem Payroll <th></th>	
Description:       Admin Role         Menu Structure       Screen Permissions       Control Permissions         Master Menu       Role Menu Preview         V Select All       Clear All       Image: Common Info         V Image: Common Info       Image: Common Info       Image: Common Info         V Image: Common Info       Image: Common Info       Image: Common Info         V Image: Common Info       Image: Common Info       Image: Common Info         V Image: Common Info       Image: Common Info       Image: Common Info         V Image: Common Info       Image: Common Info       Image: Common Info         V Image: Common Info       Image: Common Info       Image: Common Info         V Image: Common Info       Image: Common Info       Image: Common Info         V Image: Common Info       Image: Common Info       Image: Common Info         V Image: Common Info       Image: Common Info       Image: Common Info         V Image: Common Info       Image: Common Info       Image: Common Info         V Image: Common Info       Image: Common Info       Image: Common Info         V Image: Common Info       Image: Common Info       Image: Common Info         V Image: Common Info       Image: Common Info       Image: Common Info         V Image: Common Info       Imag	
Menu Structure       Screen Permissions         Master Menu       Role Menu Preview         V       System Manager         V       Seles         V       General Ledger         V       Cash Management         V       Cash Management         V       Credit Card Reconciliation         V       Inventory         V       Sales         V       Sales         V       Notes Receivable         V       Sora	
Master Menu       Role Menu Preview         V       System Manager         V       System Manager         V       System Manager         V       Common Info         V       Common Info         V       Dashboard         V       General Ledger         V       General Ledger         V       General Ledger         V       Cash Management         V       Credit Card Reconciliation         V       Credit Card Reconciliation         V       Credit Card Reconciliation         V       Inventory         V       Sales         V       Sales         V       Notes Receivable         V       Grain         V       Contract Management	
V       Select All       General Ledger         V       System Manager       System Manager         V       Common Info       Dashboard         V       Dashboard       General Ledger         V       General Ledger       Financial Reports         V       General Ledger       Cash Management         V       Cash Management       Credit Card Reconciliation         V       Credit Card Reconciliation       Purchasing         V       Dashs       Sales         V       Sales       Payroll         V       Notes Receivable       Grain         V       Grain       Contract Management	
Image: Constraint of the second se	*
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After successfully creating the user roles, Admin can now proceed to importing users from origin system to i21.

- 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

🎝 In	nport Origin Users		
Import Close			
	Username	Full Name	Email
	AGADMIN	AGADMIN	
	AGDEMO	Ag Demonstrator	
	BWARD	Blythe Ward	blythe@harveymilling.com
	DASHBOARD	Dashboard User	
	ECOM	eCommerce User	
	JAN	Jan	
	JEB	Jill Brickley	
	KEVIN	Kevin Hammer	kevin.hammer@irely.com
	KIM	Kim Higginson	kim.higginson@irely.com

4. Click Import button

🇊 Imp	ort Origin Users		
Impor	t Close		
	Username	Full Name	Email
	AGADMIN	AGADMIN	
	AGDEMO	Ag Demonstrator	

5. After clicking Import button, this message will prompt

🔚 iRely	i21 ×
?	Are you sure you want to import the selected user?
	Yes No

Clicking No will close the message and Import Origin Users screen will still open. while Clicking Yes will open the User Roles screen.
 Select a User Role then click Open Selected toolbar button.



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.

👔 iRely i	21
0	User Roles generated successfully!
	ОК

### 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

👔 iRely i	21 🗙
0	User Roles generated successfully!
	OK

blocked URL

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

- 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

🛐 Import Origin Users		* <b>D</b> X
Import Close		
Username	Full Name	Email
AG	Joe Farmer	
AGDEMO	Your Company User	
BLH	Beckey Hoff	
BRUCER	Bruce Ringrose	brucer@summit-soft.com
ETDEMO	Biofuels / Ethanol Bio-Diesel	sales@summit-soft.com
POCOADMI	Paulson Admin account	
PT	Joe Petroleum	
PTDEMO	Your Company User	
RHONDA	Rhonda McCoy	
SCOTT	Scott Wagner	
SHARON	Sharon Kempfer	sharon@summit-soft.com
SSIDEMO	Demonstration User	
STORE	Store Login	

### 4. Click Import button

5.

Import Origin Users					
Import Close					
After clicking Import button, this message will prompt					

📊 iRely i21	×
Are you sure you want to import the selected user?	
Yes No	

- 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.

Select User Role to assign to imported users	× 🗆 ×
Open Selected Refresh Close	
Filter Records (F3) 2 records (1 selected)	
User Role	Description
Admin Role	Admin Role
Role 1	Role 1 Description
🕝 😒 🏆 Ready	

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

iRely i21	
Successfully imported 1 user.	
ОК	

- 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

Import Origin Users		* 🗆 :
import Close		
Username	Full Name	Email
AG AG	Joe Farmer	
AGDEMO	Your Company User	
BLH	Beckey Hoff	
BRUCER	Bruce Ringrose	brucer@summit-soft.com
ETDEMO	Biofuels / Ethanol Bio-Diesel	sales@summit-soft.com
POCOADMI	Paulson Admin account	
PT	Joe Petroleum	
PTDEMO	Your Company User	
RHONDA	Rhonda McCoy	
SCOTT	Scott Wagner	
SHARON	Sharon Kempfer	sharon@summit-soft.com
SSIDEMO	Demonstration User	
STORE	Store Login	

6. Click Import button

Import	Origin Users	⊗ □ x
Import	Close	

7. After clicking Import button, this message will prompt

👔 iRely i21		x
? Ar	e you sure you want to import the selected er?	
	Yes No	

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.

