

User Creation

31/07/2025 12:10 pm BST

Summary

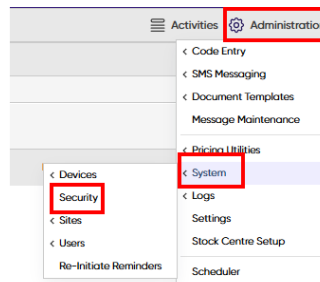
This page of the manual is a guide to user creation within Merlin.

Details

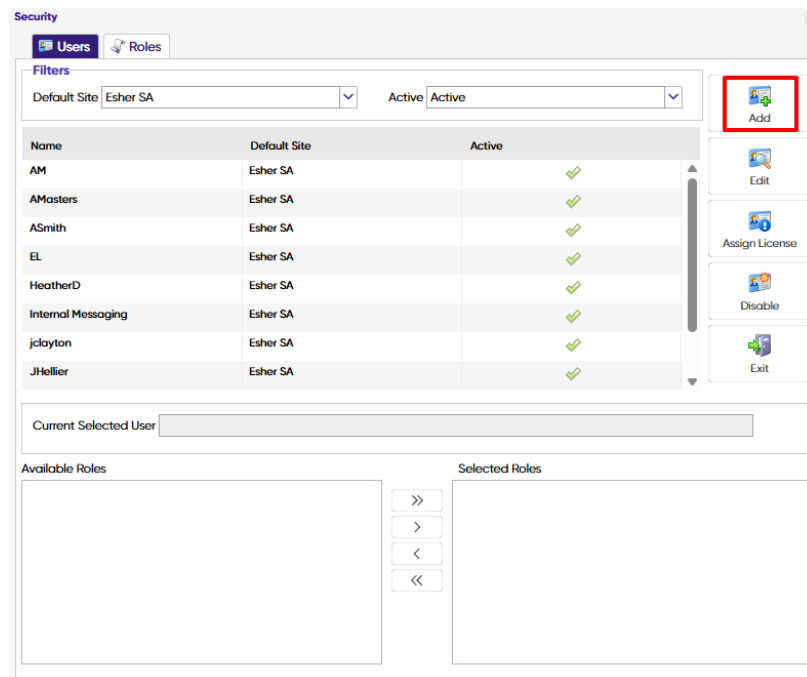
A User is an identity which can be used to log in to and access different areas of the software system depending on access-rights assigned to that user. This is separate from the surgeon list.

Adding a User

1. Navigate to Administration > System > Security.



2. To open the 'Add User Wizard', select the 'Add' button.



3. This window prompts you to enter the following information:

Add User Wizard ×

Create User

User Name:

Password:

Confirm Password:

Default Site: ▼

☒ Change at Login

☒ Disable on:

First Name:

Surname:

☒ Add as Surgeon

Site View Order:

Surgeon Type: ▼

Qualification: ▼

☒ Display in Diary

Create User >> Assign Roles >> Assign Sites >> Assign Reports >> Assign Licenses >> Finish

User Name = The name the user will log in as.

Password & Confirm Password = The users chosen password. This needs to meet the Merlin Complexity requirements. (Hover over the ? icon for further information).

Default site = The user's main site they work at.

First Name = The user's first name (appears in messaging).

Surname = The user's surname (appears in messaging).

Change at Login = This prompts a first time user to set their own password (if previously created by an Administrator).

Disable on = This field gives the Administrator the option to set a date when the User is no longer eligible to login to Merlin.

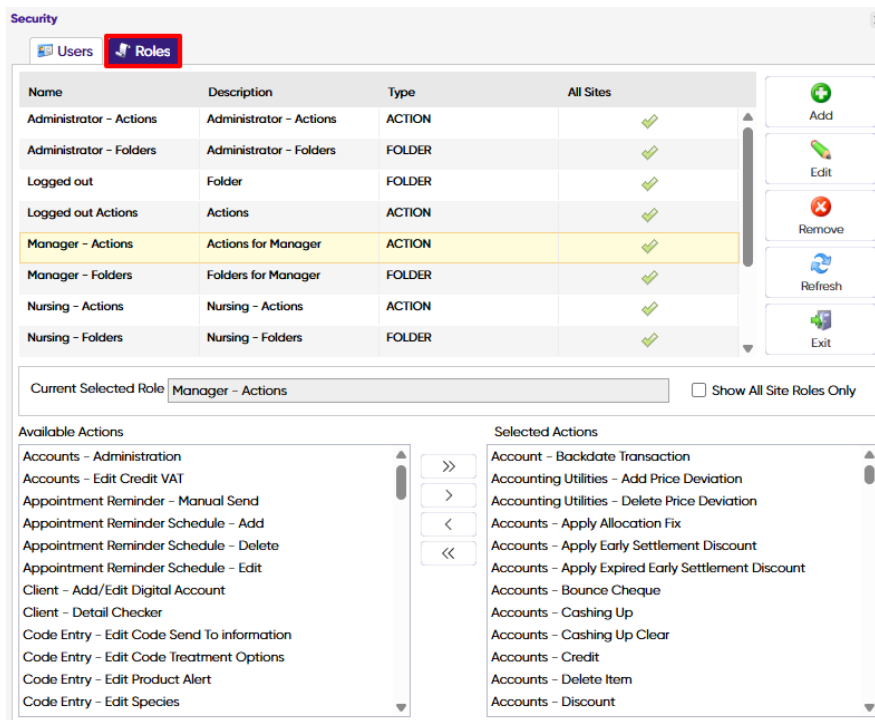
Add as Surgeon = If the user is not yet added as a surgeon for use in the treatment screen then select the "Add as Surgeon" check box.

Site View Order = If above has been ticked, specify the view order for the Surgeon.

Surgeon Type = Specify the Surgeon Type (Surgeon, Nurse etc).

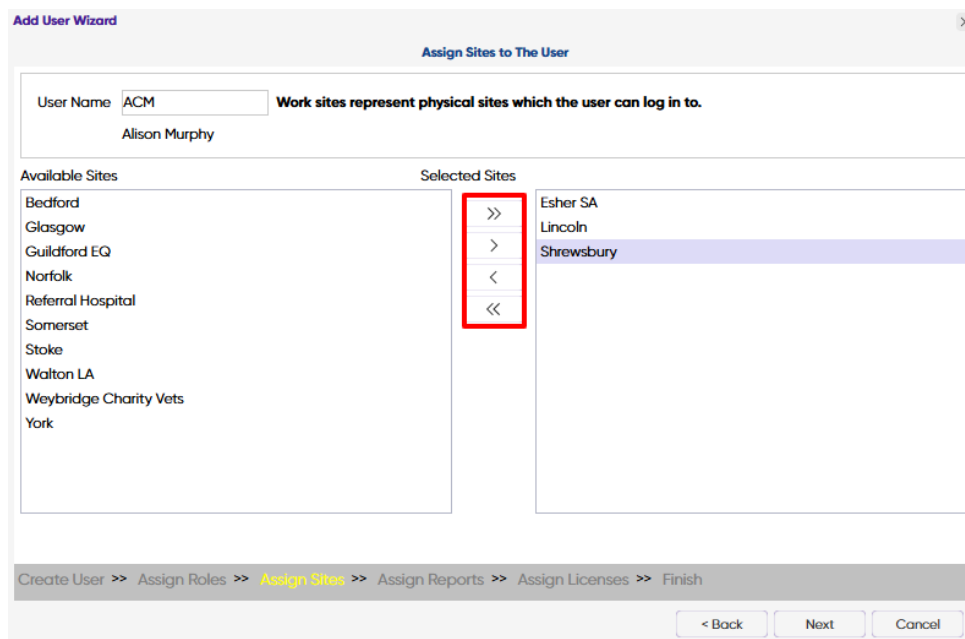
Qualification = Surgeons Qualification can be set here. This will print on treatment labels.

4. Once you have specified the above information, select the 'Next' button to proceed.
5. The next step is to Assign user roles to the user using the arrows provided. 'Roles' are your configured [user access and limitation settings](#).



6. Select the 'Next' button to proceed.

7. Assign site access to the using the arrows provided. When this is complete press the 'Next' button.



8. You will now assign the reports that this user needs, then press the 'Next' button.

The screenshot shows the 'Add User Wizard' window with the title 'Assign Reports to The User'. At the top, there is a 'User Name' field containing 'ACM' and a 'Report Category' dropdown menu set to '[All]'. Below these fields, the name 'Alison Murphy' is displayed. The main area is divided into two panes: 'Available Reports' on the left and 'Selected Reports' on the right. Between the panes are four buttons: '>>', '>', '<', and '<<'. The 'Available Reports' pane is currently empty.

9. You now assign licences to the user, then press the “Next” button.

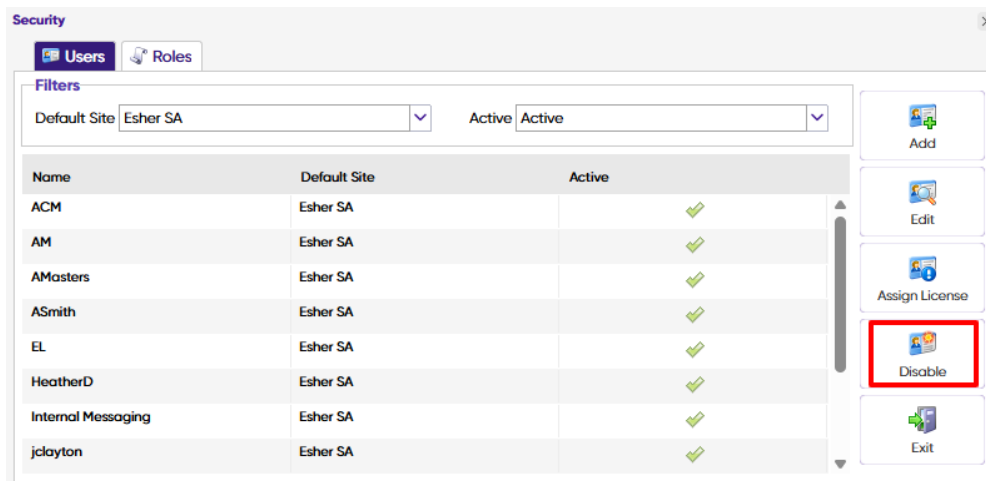
The screenshot shows the 'Add User Wizard' window with the title 'Assign Licenses to The User'. The 'User Name' field still contains 'ACM' and 'Alison Murphy' is listed below it. The main area is divided into two panes: 'Available Licenses' on the left and 'Selected Licenses' on the right. Between the panes are four buttons: '>>', '>', '<', and '<<'. The 'Selected Licenses' pane contains two items: 'Collabora' and 'PostCodes'. At the bottom of the window, there is a progress bar with the following steps: 'Create User >> Assign Roles >> Assign Sites >> Assign Reports >> Assign Licenses >> Finish'. The 'Assign Licenses' step is highlighted in yellow. Below the progress bar are three buttons: '< Back', 'Next', and 'Cancel'.

10. Finally, you will see the summary page. Check the user details being assigned and press the 'Create' button.

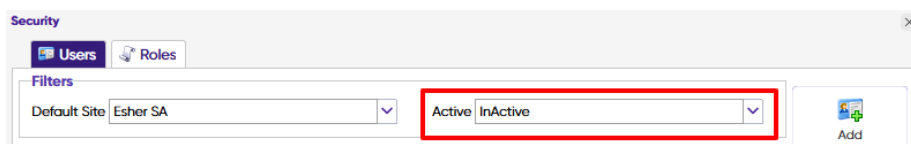
Editing/Disabling a User

Users can also be edited and removed from this screen.

1. Select the user from the users list and select the 'Edit' button. This button will open an Edit User Wizard.
2. To remove a user, select 'Disable'.



3. The user will now be removed from the active system and will be held in the Inactive folder.



Library Configuration

Library Data

User/Sites Library (Administration > System > Users > User/Sites)

The User/Sites library screen allows the practice to determine which users may log in at each site. This screen is used so that you can control which users are able to log in at which sites, either on a site basis or on a user basis, rather than setting this for each individual user through System > Security.

User/Reports Library (Administration > System > Users > User/Reports)

If you set a user to be able to access the system's reports, it is possible to restrict which reports can be seen by which user.

The process is the same as described for Logins/Sites, with the added functionality that you can filter reports based on the reporting category, allowing you to transfer an entire reporting category in one go.

User/Reports Library (Administration > System > Users > User/Licence Maintenance)

The User/Licence library screen allows the practice to determine which users can use Collabora Document Editor and the Postcode Module.