

# Logging into NeTIX

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User Guide

1.

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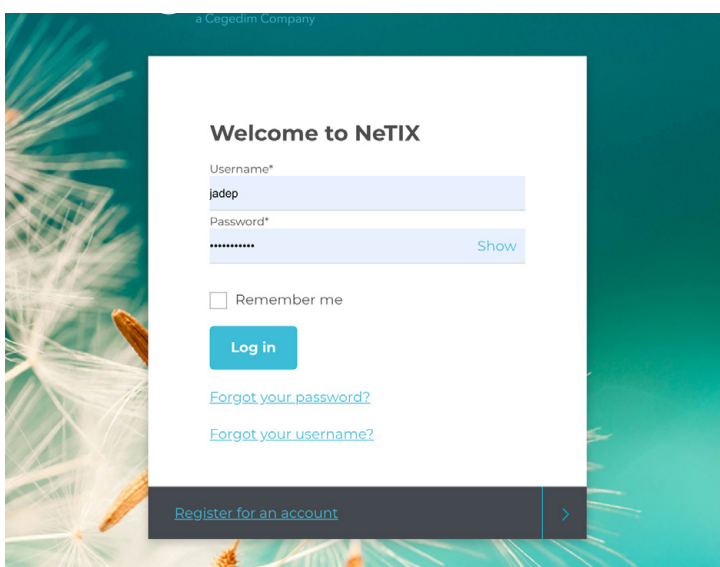
# Registering New Users

One of the benefits of the New NeTIX User Interface (UI) is that clients can reset and control login credentials from the login Page.

You can register new accounts as well as reset passwords.

**A new user can access the Portal Via:**

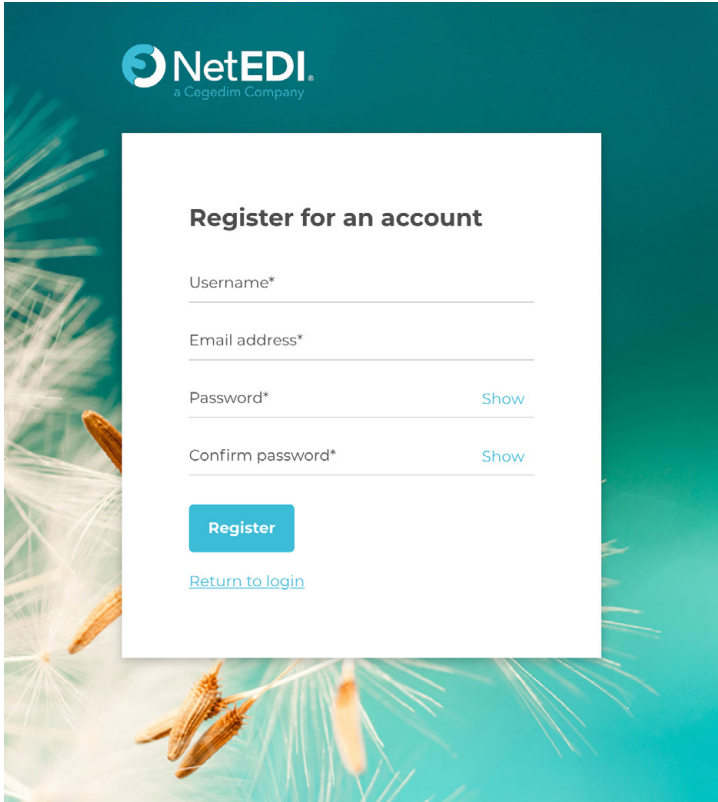
<https://netix.netedi.com>



## 2.

1

Select **'Register for an account'** and you will be prompted to enter the details below.



The screenshot shows the NetEDI registration page. At the top left is the NetEDI logo with the tagline 'a Cegedim Company'. The main heading is 'Register for an account'. Below this are four input fields: 'Username\*', 'Email address\*', 'Password\*', and 'Confirm password\*'. Each of the last three fields has a 'Show' link to its right. At the bottom of the form is a blue 'Register' button and a blue link 'Return to login'.



We advise that the Username is defined as your Email address. When you press **'Register'** to complete the process, you will receive an email. If you click on the link provided in the email, your registration will be authenticated.

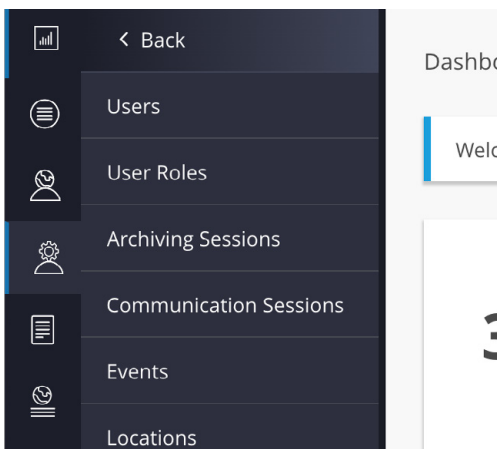
3.

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# Setting Access/ Permissions

2

An Admin user then needs to log into NeTIX and navigate to “Instance Admin -> Users”.



3

From here the Admin user needs to set up the below:

- A) Enter the email address of the “New” user that will be logging into your instance.
- B) Define from the drop down the User “Type”. (See User Type definitions below).

Details

Email Address\*

Type\*

## 4.



**Admin** - If the user requires access to the whole system (all buyers, sellers documents etc.) set them as an "Admin".

**User** - If the user requires access to limited buyers, sellers or document types set them as a "User".

4

Click on "Views -> Add Row" and define the access that needs granting.

Views

Buyer ^	Seller	Location	Message Type
No records available.			

Add row

Edit row

Delete row

5

Here you can define buyers, sellers as well as specific message types:

Profile



Buyer



Seller



Location



Message Type



Sub Type

Supplier ID



State



Direction



Integrated Type



Cancel

Save

5.

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# Defining a Role

6

Finally against each user there is a **“Roles”** tab at the top. This gives the user the actions they can perform, **“Delete, Print and Re-Process”**.

If the User is an Admin pull over **“Unrestricted”** from the right to the left, and if the user is a web supplier then pull over **“Web User”** instead.

The screenshot shows a user management interface with a 'Roles' tab. The interface is divided into two main sections: 'Roles currently assigned to' and 'Add an available role'. In the 'Roles currently assigned to' section, there is a single role 'Unrestricted' with a red 'X' icon to its right. In the 'Add an available role' section, there are two roles: 'SuperAdmin' and 'StandardUser', each with a blue 'X' icon to its right. At the top right of the interface, there are two buttons: 'Cancel' and 'Save all settings'.

Ensure after all changes you click **“save all settings”**.

Save all settings

6.

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# Problems logging in



If any users have problems logging in, on the front screen you can click on **“Forgot your password?”** or **“Forgot your username?”**.

Remember me

**Log in**

[Forgot your password?](#)

[Forgot your username?](#)

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This will then prompt you to either; enter your username, or your email address. You will be sent a link via email enabling you to reset your password, or, you will be reminded by email of your username.

If you have any issues or concerns please contact our support team for further advice.



**NetEDI**<sup>®</sup>

a Cegedim Company