



Setting Workshop Portal Access

Click on one of the options below to learn how to enable access to users on Classic Gold or Windows Gold.

Did you know?



Existing users
have full access to the
Workshop Portal.



New users
will not have any access
to the portal and will
need to be set up to gain
access.



**Setting portal access
on Classic Gold**



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Setting portal access on Classic Gold

1. Navigate to **System Management > Security > Personnel Security File**
2. Move along the tabs using **F12** to Applications.
3. Select **F5** for Roles.

Application	Description	Status
PARTSAPP	Gold Parts	InActive
SALEAPP	Gold Sales	InActive
SRVAPP1	Gold Service	InActive
WEB CRM	Customer Relationship Management	InActive
SRVAPP2	Gold Service Plus	Active





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- Using the **up and down arrows**, highlight the relevant option you wish to enable or disable.
- Use the **F7 toggle key** to change the Yes or No option.
- Press **F9** when complete and press **enter** to save changes.

Role	Description	This User
WSJ Job	access WSJ Job page	Yes
WSJ Time Appro	access WSJ Time Appro page	Yes
WSJ Kanban	access WSJ Kanban page	Yes
Sales Director	see all events	No
WSJ Engineer	access WSJ Engineer page	Yes
WSJ Scheduler	access WSJ Scheduler	Yes
WSJ Search	access WSJ Search page	Yes
Administrator	special role for admin users	No
WSJ Checklist	access WSJ Checklist page	Yes
Salesman	sees only own events	No
WSJ Request	access WSJ Request page	Yes
Sales Manager	sees team member events	No





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1. Navigate to **System Management > Set-Up and Security > Personnel Security File**
2. Click on the **Applications tab**.
3. Click the **Roles button** at the bottom of the screen.

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4. **Highlight** the relevant option you wish to enable or disable.
5. Click the **Toggle button** at the bottom of the screen to change the Yes or No option.
6. Press the **Escape key** when complete and click **Yes** to save changes.

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Toggle

