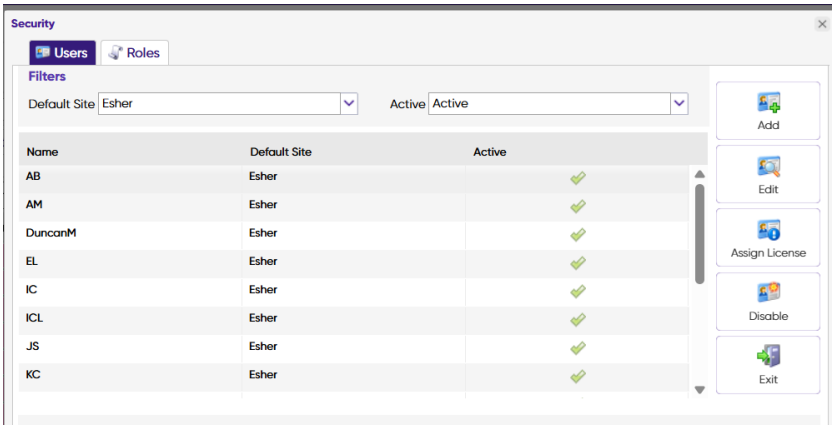
Create a New User

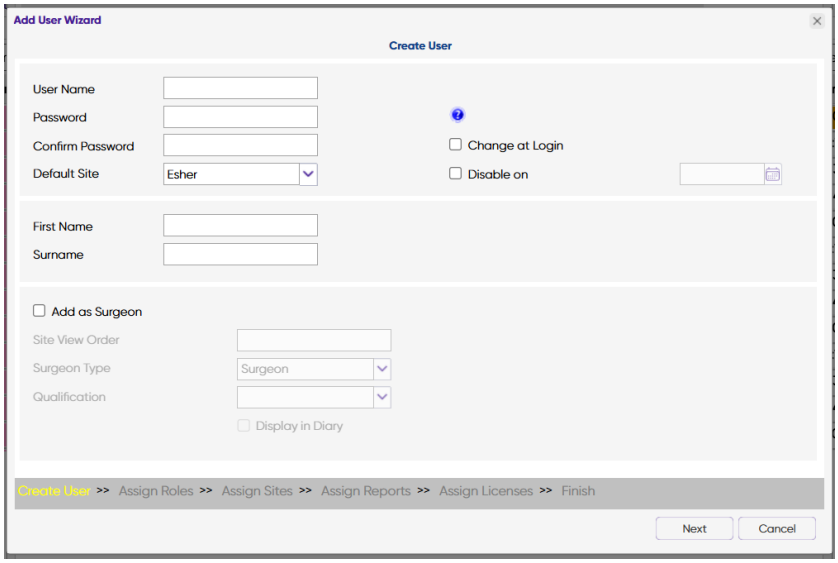
13/10/2026 9:20 am BST

Create a New User

1. To create a new user, navigate to Administration > System > Security.



2. Click 'Add' on the right hand side and you'll be presented with the new user workflow.



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.

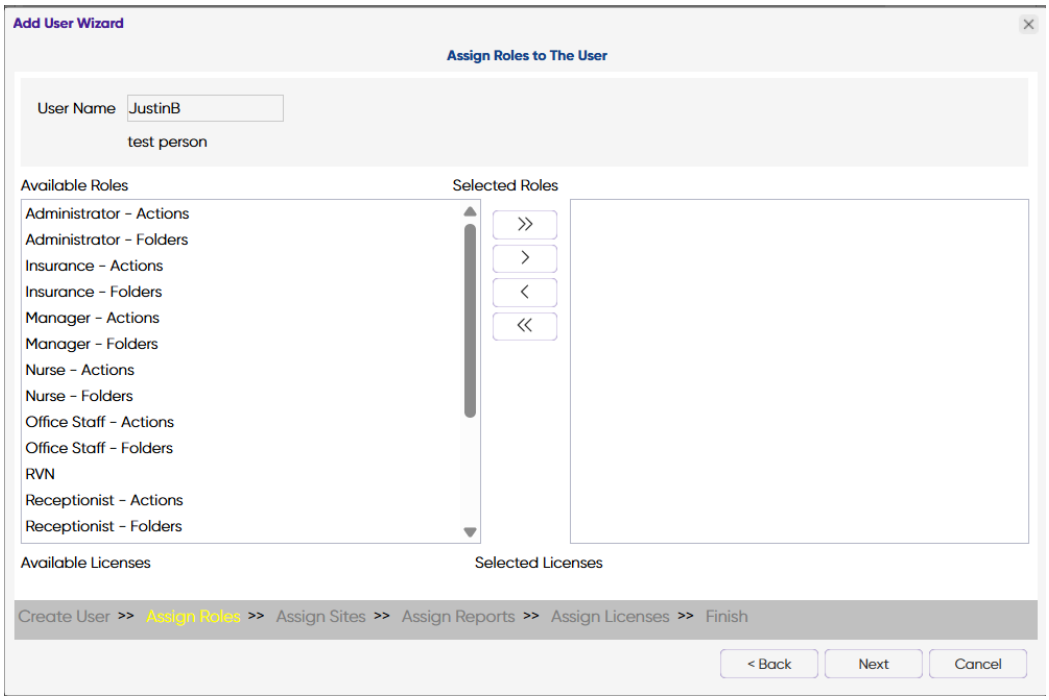
Site View Order = If above has been ticked, specify the view order for the Surgeon.

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

Qualification = Surgeons Qualification can be set here. This library of options is created via Qualification Libraries

4. Once you have specified the above information, select the 'Next' button to proceed.

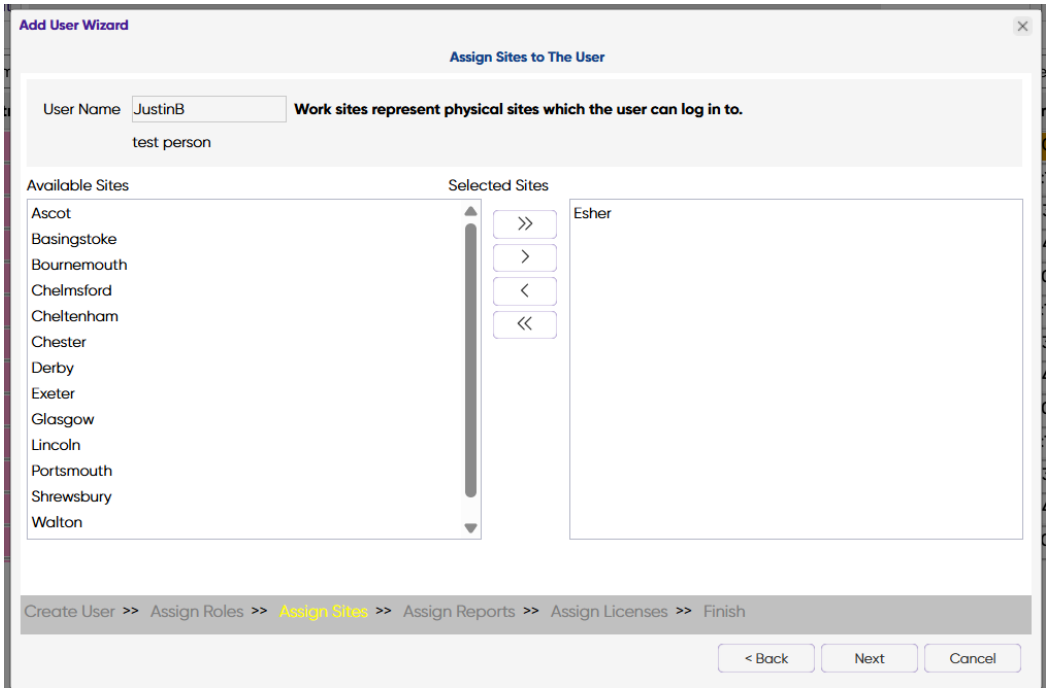
5. The next step is to Assign user roles to the user using the arrows provided. 'Roles' are your configured user access and limitation settings. These control what permissions and access the user has.



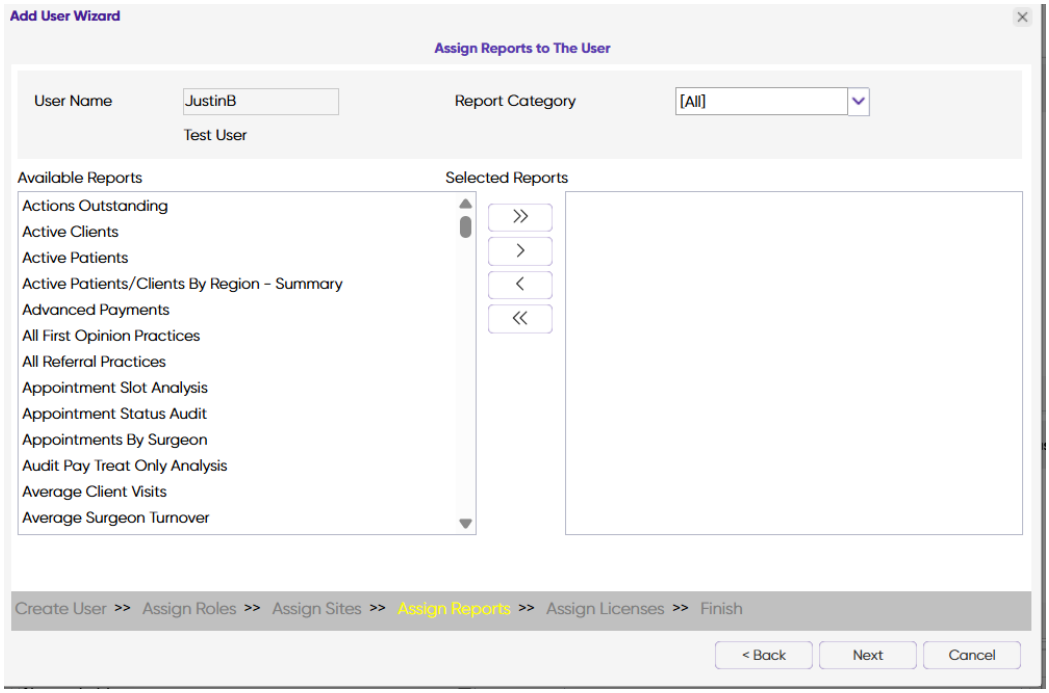
   By default, users are provided with some default role types (Reception, Manager, Administrator) with permissions pre-set to choose from. Additional new one's can be created at practice level. User Roles

6. Select the 'Next' button to proceed.

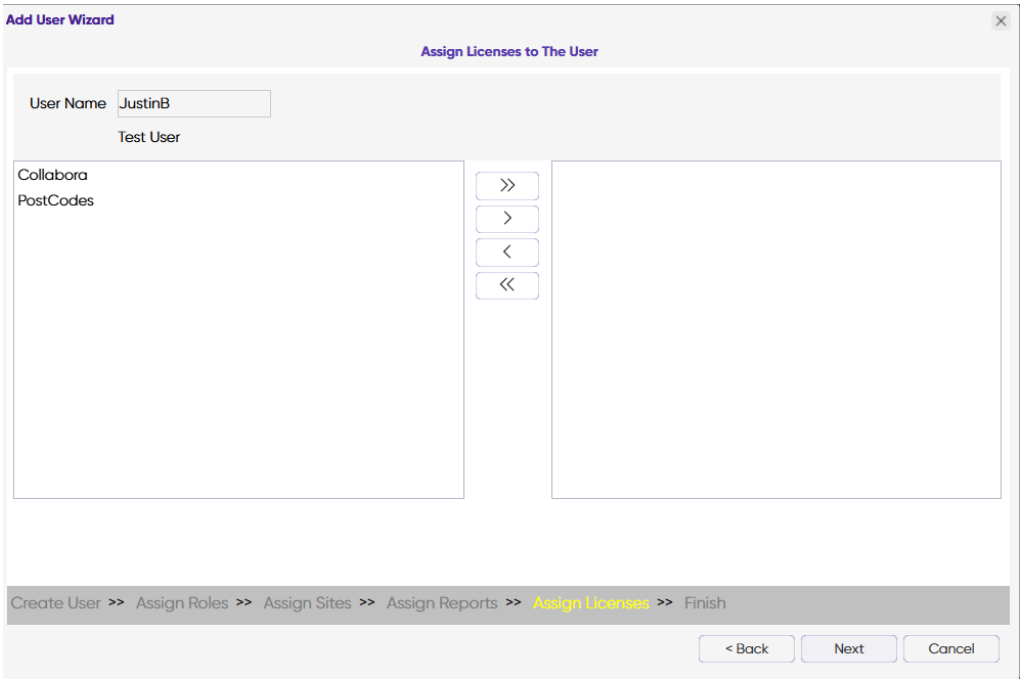
7. Assign site access to the using the arrows provided. When this is complete press the 'Next' button.



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



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



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