



CONFIGURATION TRAINING

YEAR 2020

OneDealer International GmbH
www.onedealet.com

This document contains commercially sensitive and confidential information of OneDealer International GmbH and is the subject of copyright owned by or licensed to OneDealer International GmbH. Except with prior written consent of OneDealer International GmbH, the contents of this document shall not be used, copied, reproduced or disclosed other than as is strictly necessary for the direct evaluation of OneDealer International GmbH Proposal. Disclosure for such purpose shall be on a confidential basis and limited to

CONFIGURATION TRAINING USER MANAGEMENT

Revision History

Revision Date	Revision No.	Revised by	Summary of Changes
28/09/20	2.4	Nikos Ioannou	Final document consistent with the training delivered in QR3-2020

USER MANAGEMENT

- **SAP Business One**
- **Digital Sales Workplace**

Contents

- 1 PREREQUISITE4**
- 2 CREATE USERS IN SAP BUSINESS ONE5**
 - 2.1 USERS FORM.....6
 - 2.2 SALE EMPLOYEES/BUYERS – SETUP FORM7
 - 2.3 EMPLOYEE MASTER DATA FORM8
 - 2.4 RESOURCE MASTER DATA FORM9
 - 2.5 RESOURCE CAPACITY FORM11
- 3 CREATE USERS IN DIGITAL SALES WORKPLACE.....13**
 - 3.1 CREATE USER.....14
 - 3.2 CONFIGURE GROUP.....15
 - 3.3 CONFIGURE USER LOGINS.....18
 - 3.4 CONFIGURE TEAMS20
 - 3.5 CONFIGURE DIMENSIONS PERMISSIONS23

1 Prerequisite

The creation of the company structure is prerequisite before creating users.

Which means that the following tables need to get updated with the company details:

SAP B1:

- @XIS_Branches - **Branches**
- OUBR - **Branches**
- @IDMS_EMPLWRKHRM - **Employee working hours start-end**
- @IDMS_EMPLWRKHRR - **@IDMS_EMPLWRKHRM entries**

COMMON DB.

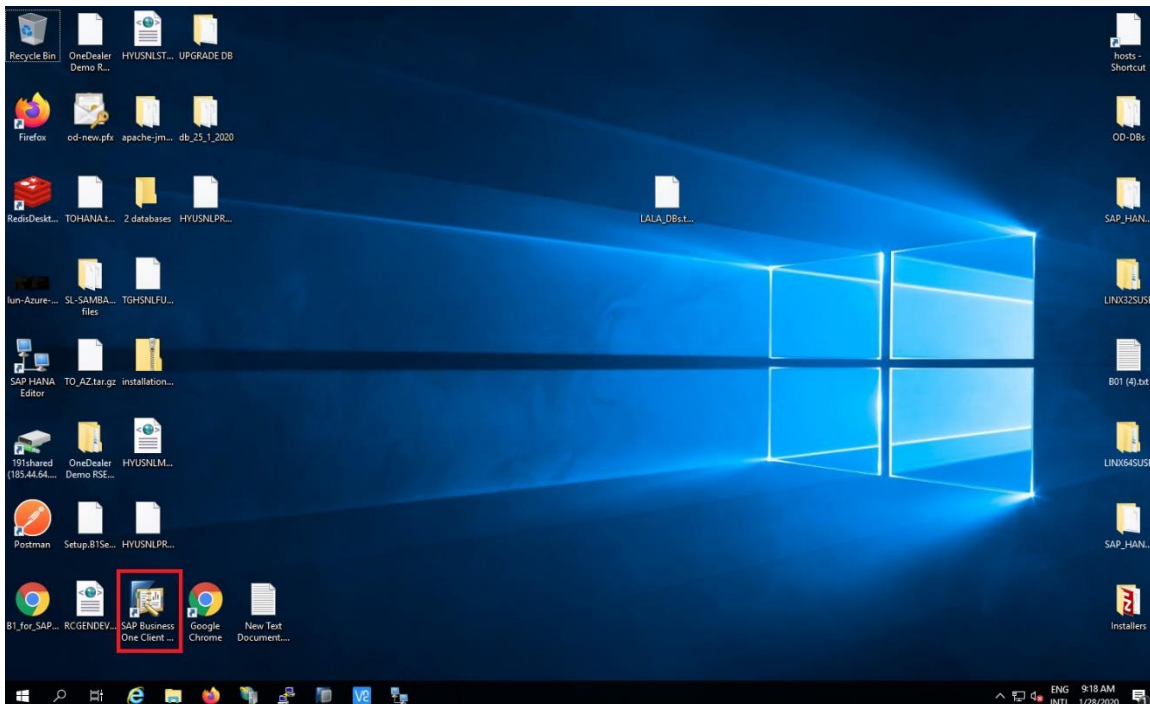
- **Company** creation
- **Branch** creation
- **Location** creation
- **User** creation - Before creating users, entries must get created at the following sections:
 - **Group** creation
 - Assign Roles to Groups
 - Assign Business Cases to Roles.
 - **Team** creation
 - Change member type of the user if needed.
 - Add more than one Team (Depending on the Role)
 - **Login** creation
 - Add more than one login (Depending on the Role).
 - **Dimension** creation
 - Add more than one-dimension set ((Depending on the Role).

2 Create users in SAP Business One

Please login to RDP server: **13.95.30.52: 3389**

Username: **azlocaladm**

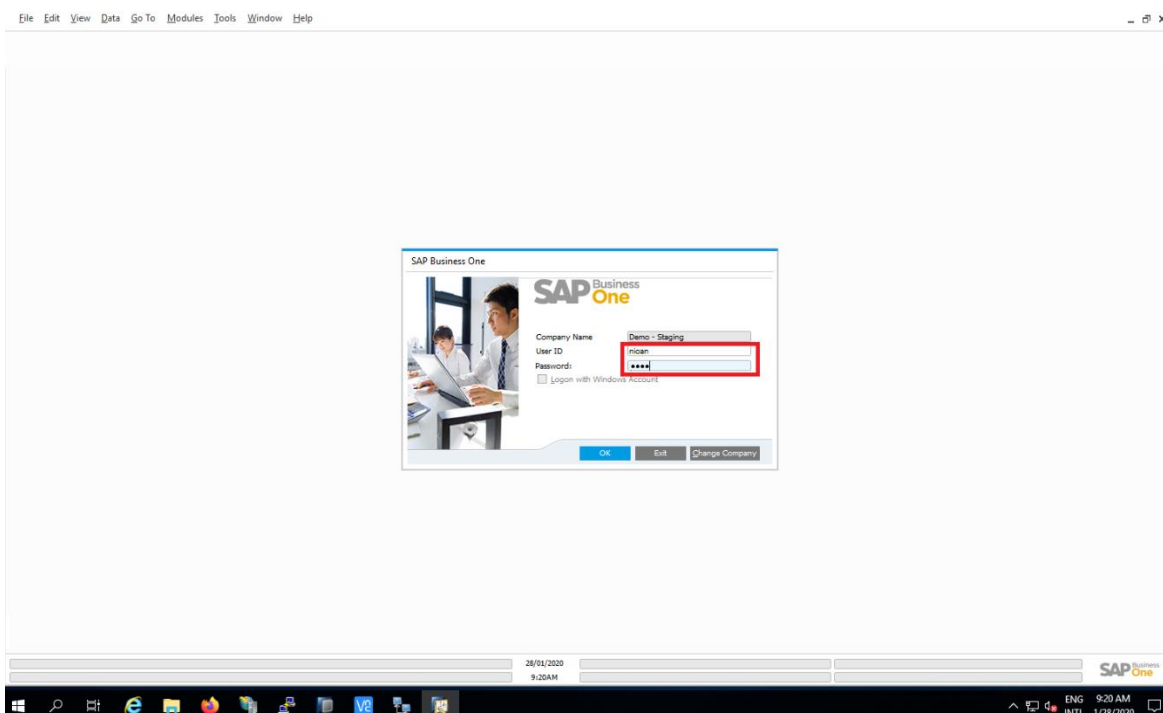
Password: *********



Please login in SAP Business One

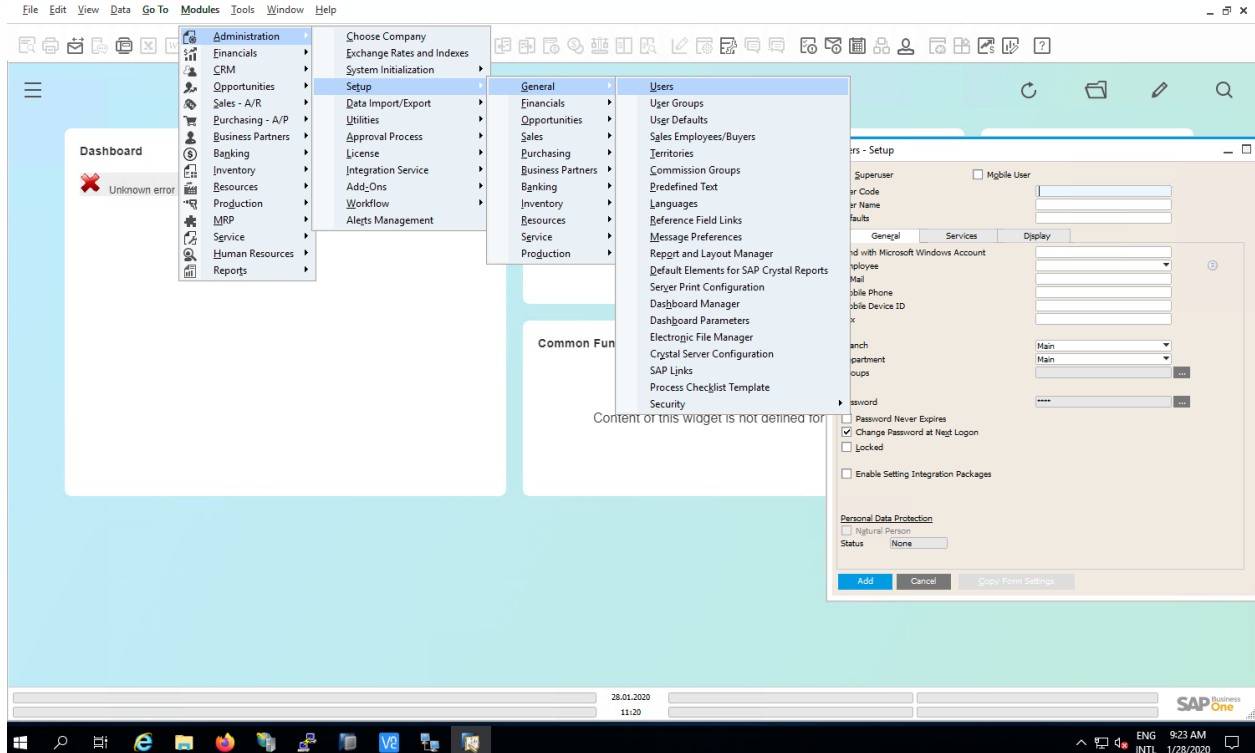
Username: **nioan**

Password: **123!**

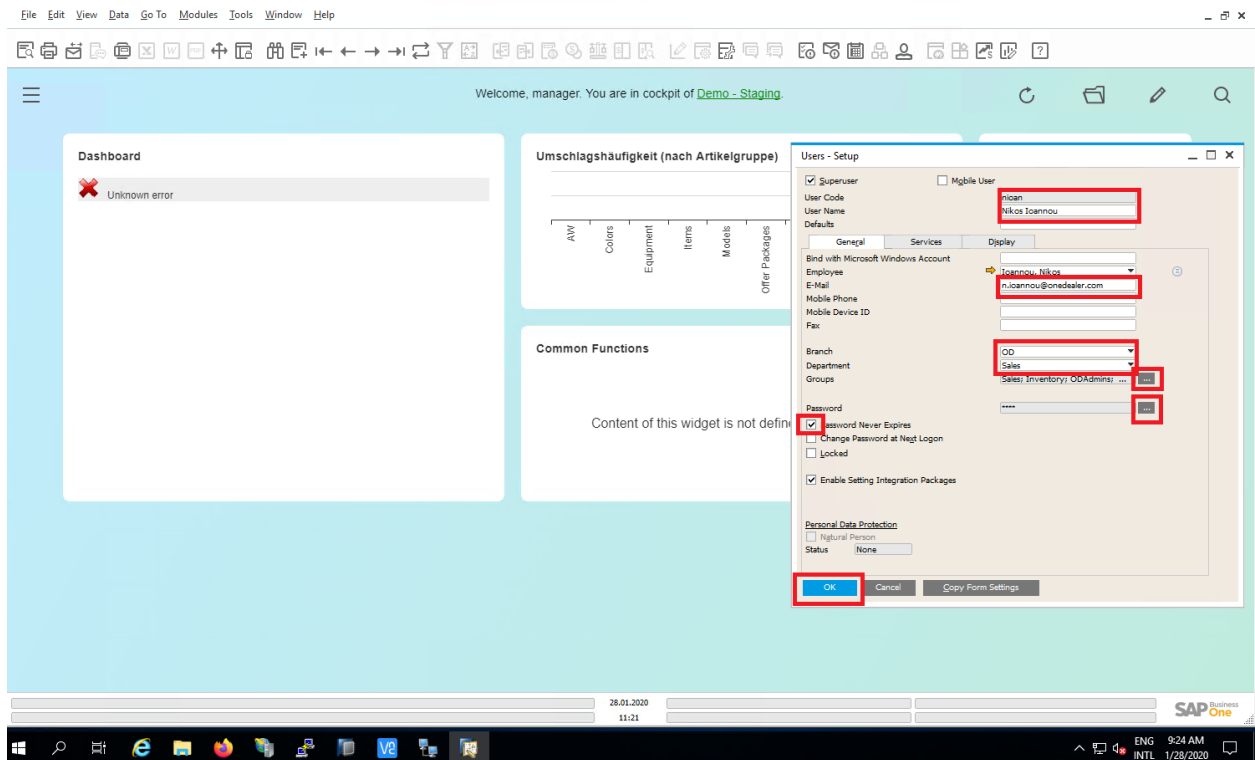


2.1 Users form

Go to User form

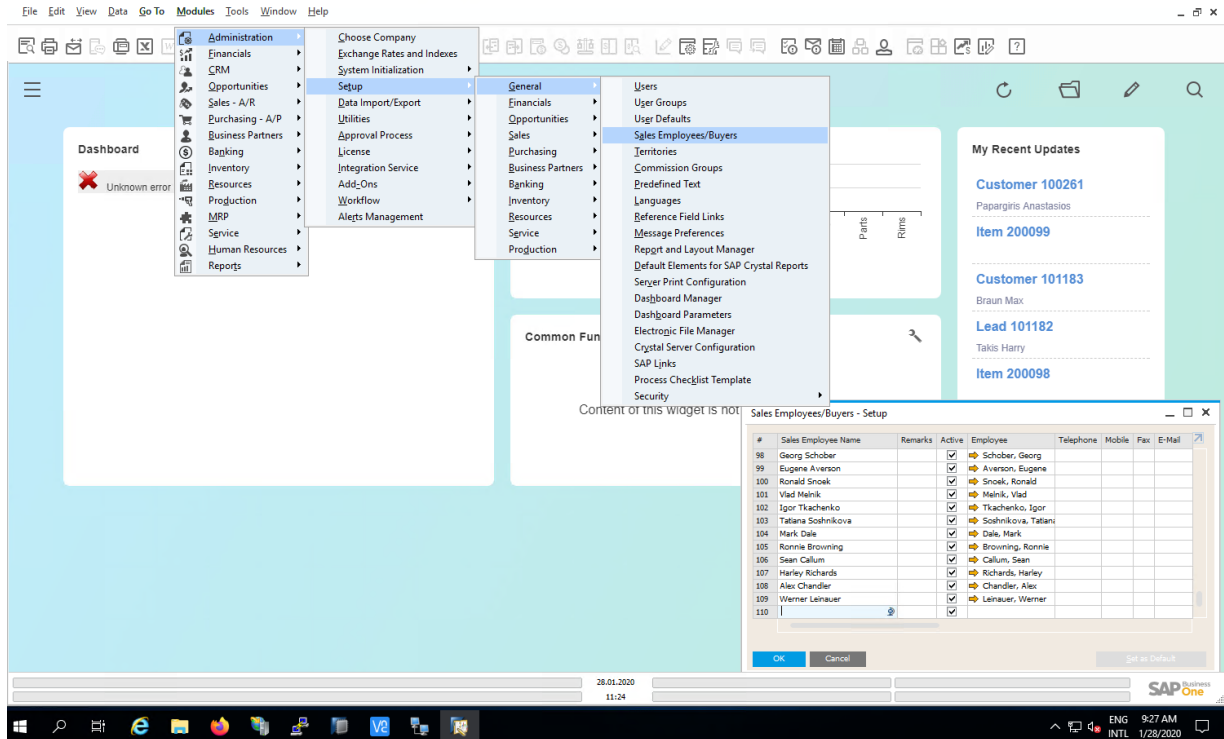


Please provide the fields as it is indicated at the screenshot below and click on **Add** to store the data of this form.

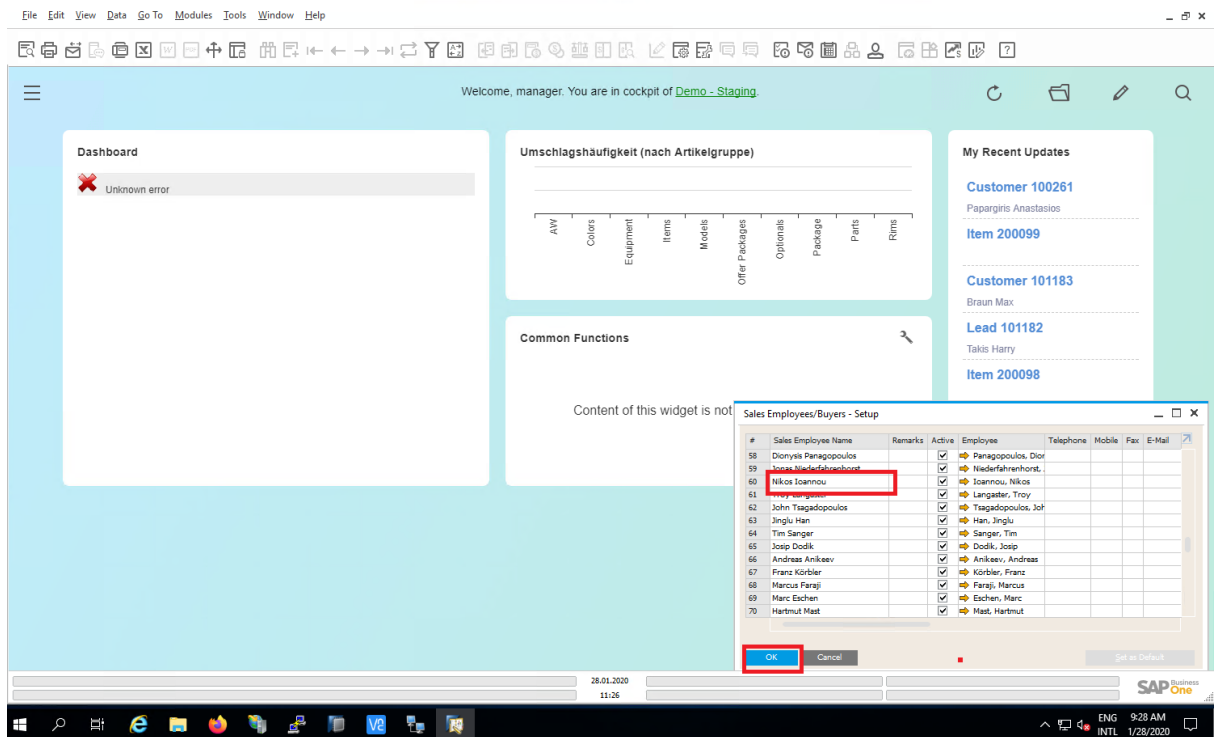


2.2 Sale Employees/Buyers – Setup form

Go to **Sale Employees/Buyers – Setup** form (you can skip this step if the user is not sales person).

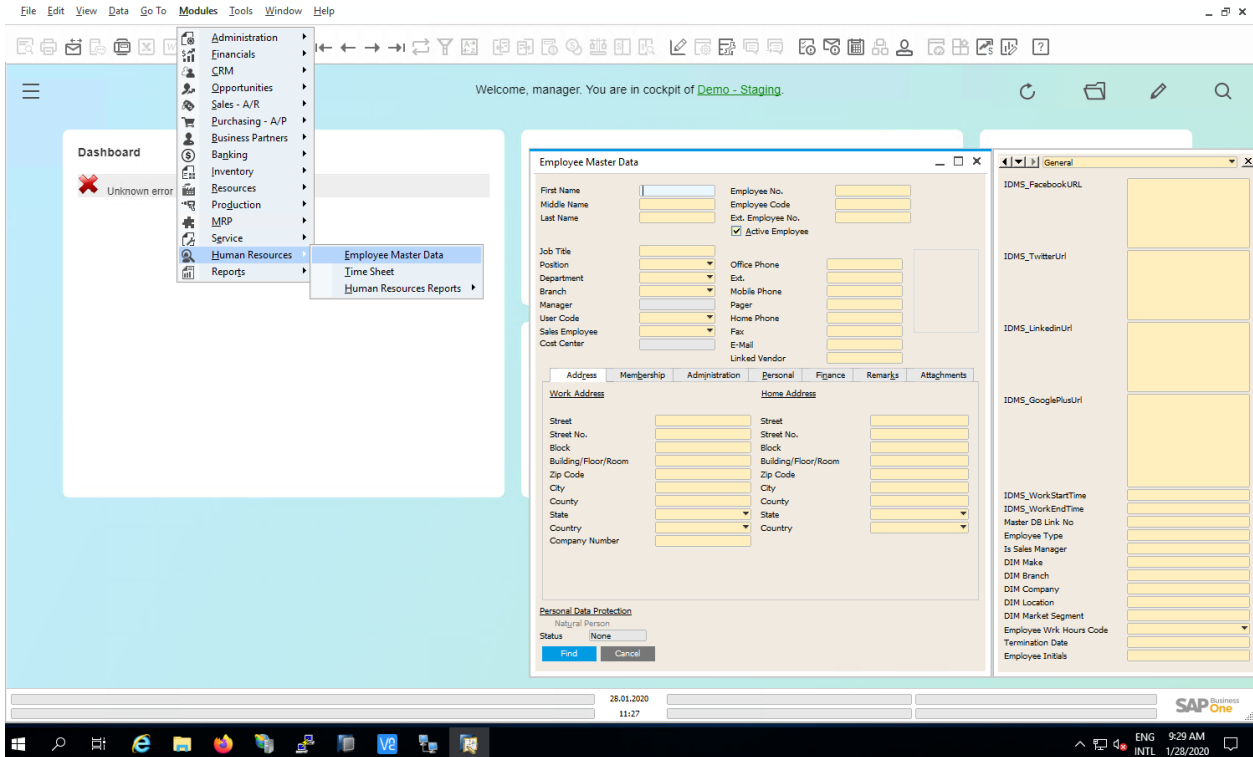


Please provide the fields as it is indicated at the screenshot below and click on **Add** to store the data of this form.



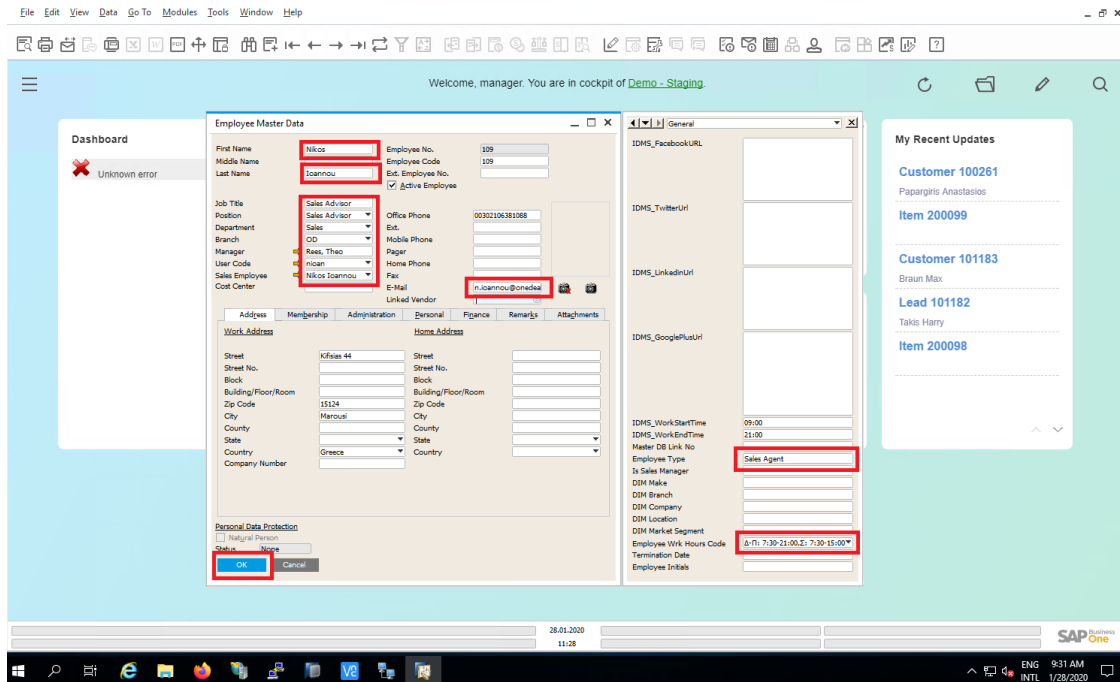
2.3 Employee Master Data form

Go to **Employee Master Data** selection and open the form



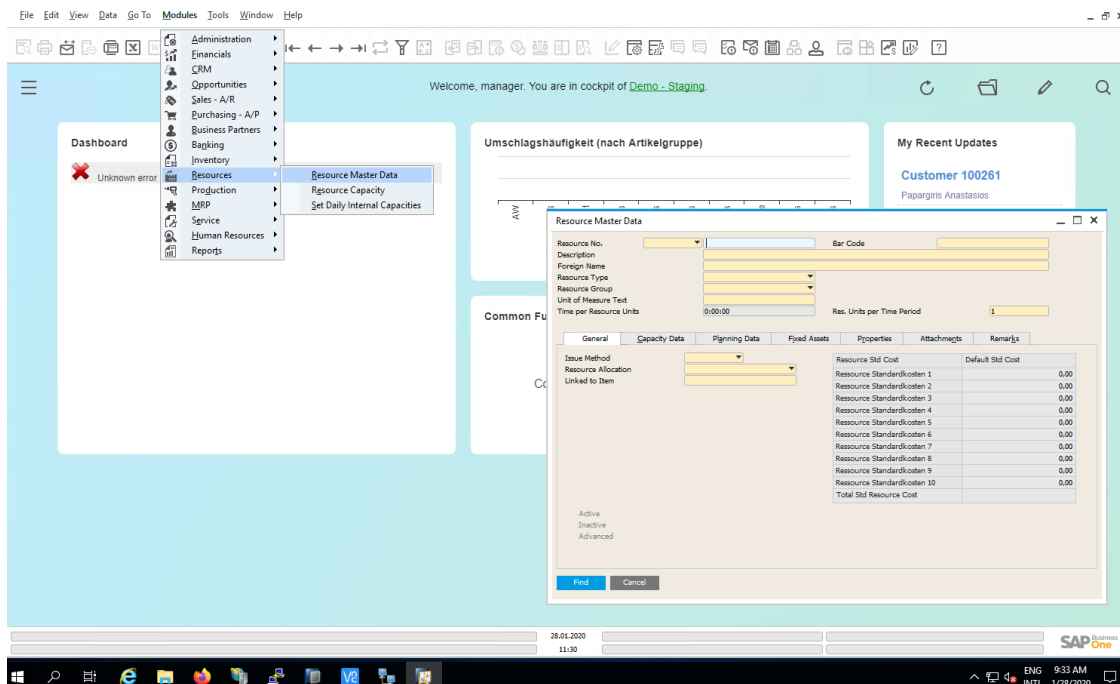
Please provide the fields as it is indicated at the screenshot below.

- Notes:** Link the **User code** field with the user previously created at the “Users-Setup” form.
- Link the **Sales Employee** field with the Sales Employee previously created at the “Sales Employees/Buyers - Setup” form (you can skip this step if the user is not sales person).
- Finally, the user clicks on **Add** to store the data of this form.



2.4 Resource Master Data form

Go to **Resource Master Data** selection and open the form. (You can skip this step if the user do not need to have calendar)

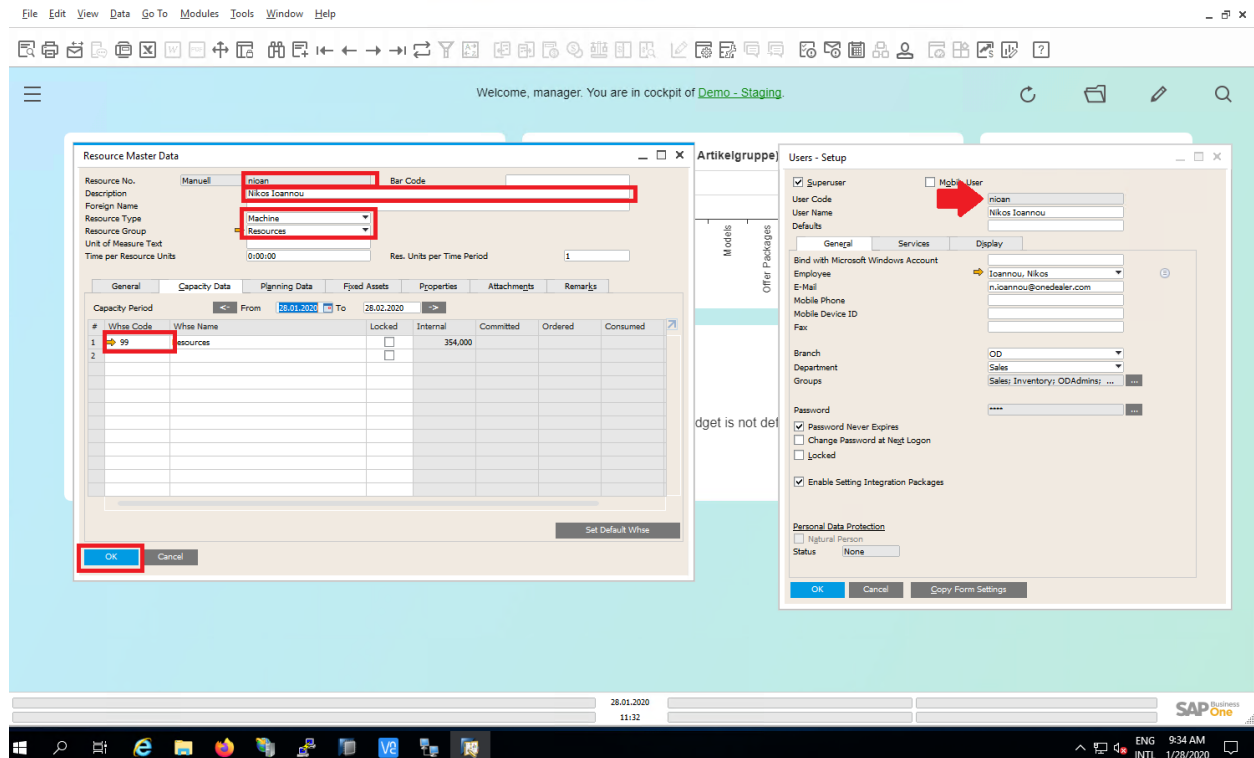


Please provide the fields as it is indicated at the screenshot below.

Make sure that

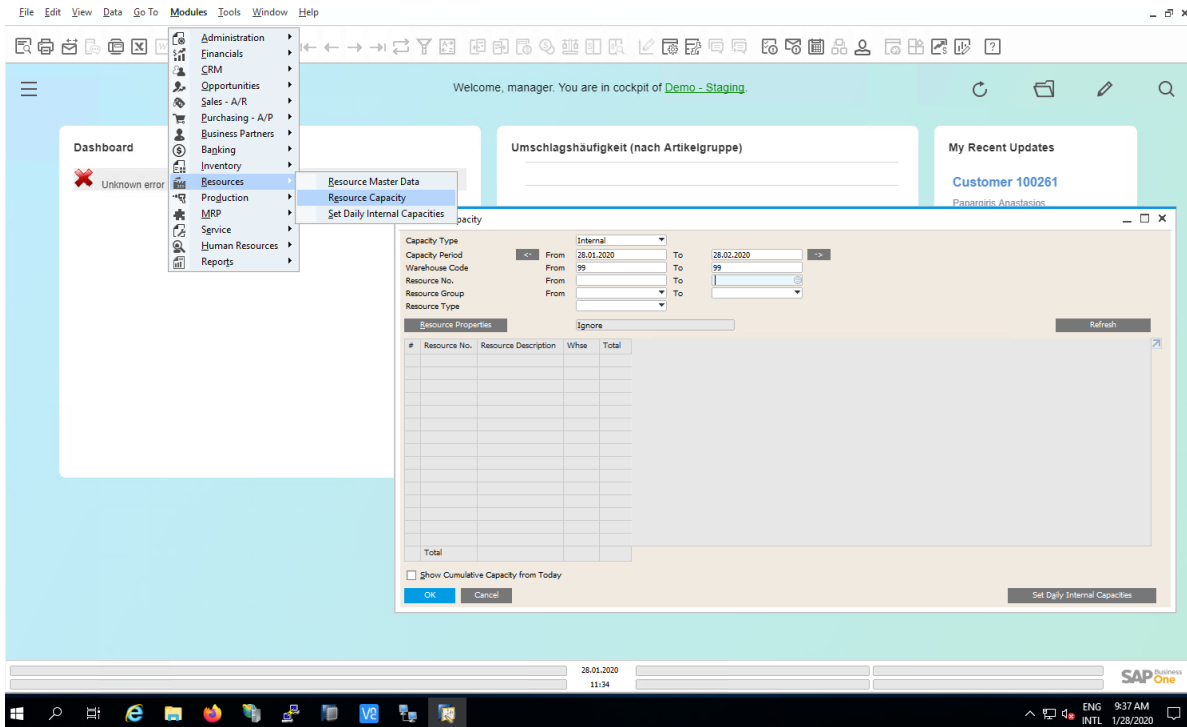
- the "Resource no" is the same as "User code" in "Users-Setup" form
- at the Capacity Data (TAB) you create only the 99 warehouse (Whse Code)

Finally, the user clicks on **Add** to store the data of this form.

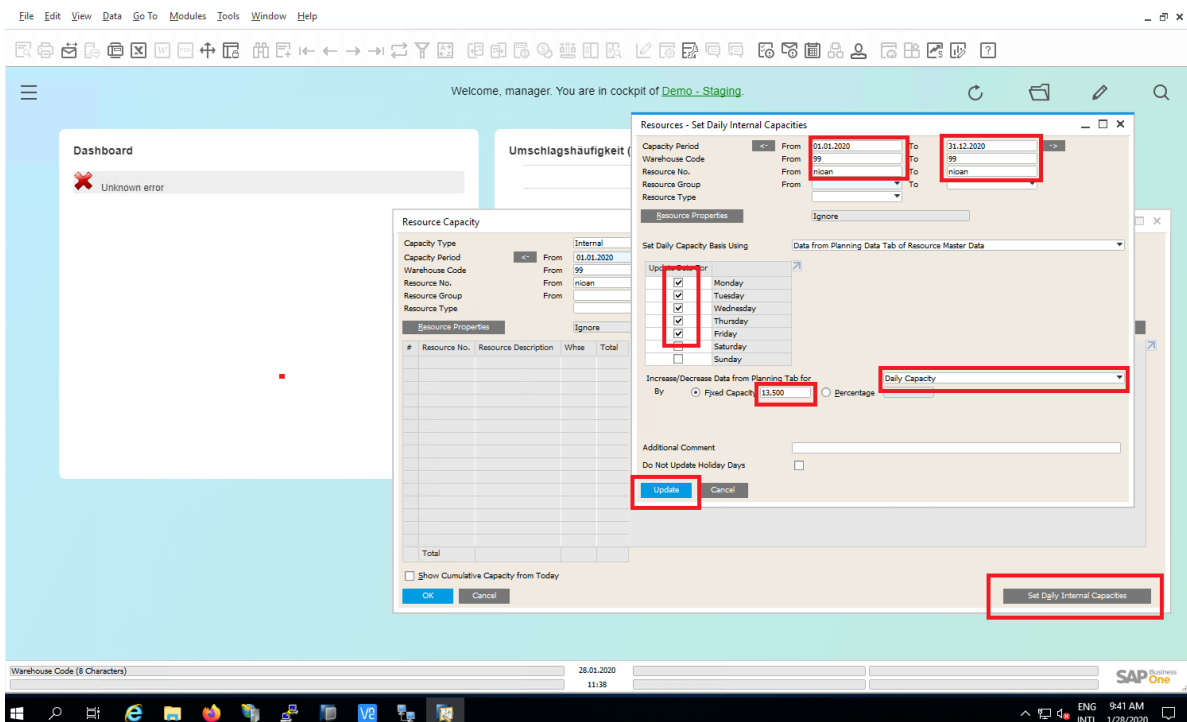


2.5 Resource Capacity form

Go to **Resource Capacity** selection and open the form.



Please provide the fields as it is indicated at the screenshot below. Then, the user clicks on **Update** to store the data of this form. The **Fixed Capacity** field contains the total number of hours the worker works per day.



After that click on **OK** to close the **Resources – Set Daily Internal Capacities** form. At the end, you click **OK** to finish the process

Resource Capacity

Capacity Type: Internal 0.0000 %

Capacity Period: From 01.01.2020 To 31.12.2020

Warehouse Code: From 99 To 99

Resource No.: From nican To nican

Resource Group: From To

Resource Type: From To

Resource Properties: Ignore

#	Resource No.	Resource Description	Whse	Total	01.01	02.01	03.01	04.01	05.01	06.01	07.01	08.01	09.01	10.01	11.01	12.01	13.01	14.01
1	nican	Nikos Ioannou	99	3.927	13,5	13,5	13,5	7,5		13,5	13,5	13,5	13,5	13,5	7,5		13,5	13,5
Total				3.927	13,5	13,5	13,5	7,5		13,5	13,5	13,5	13,5	13,5	7,5		13,5	13,5

Show Cumulative Capacity from Today

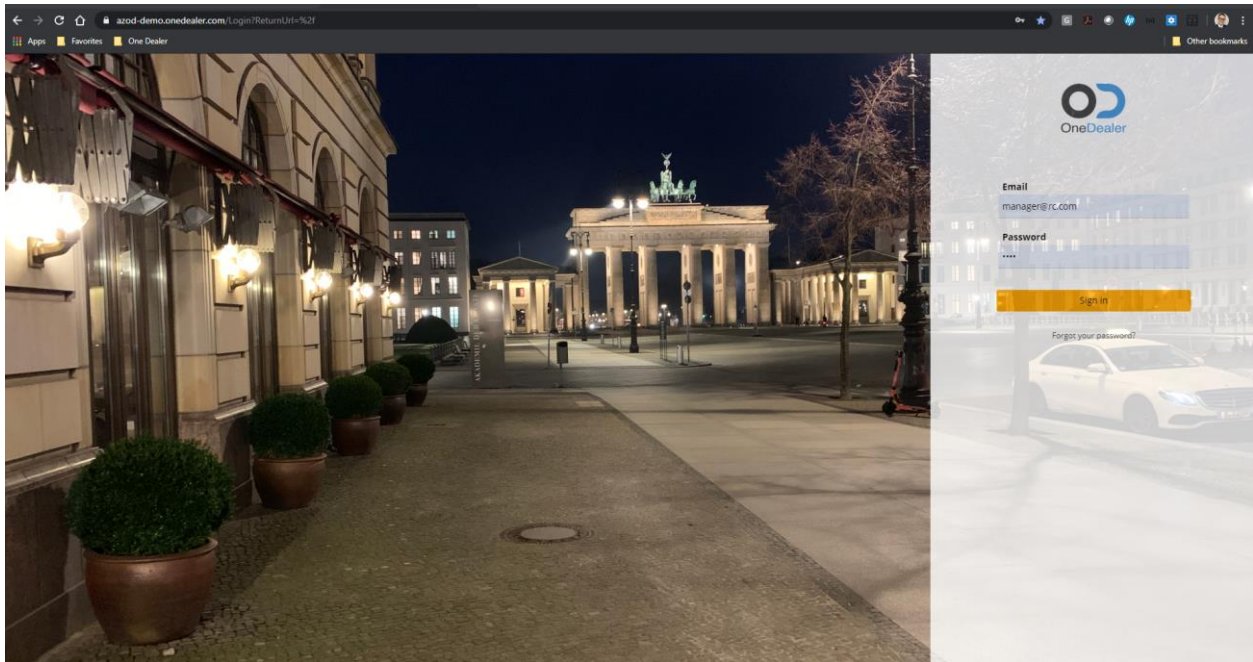
OK Cancel Set Daily Internal Capacities

3 Create users in Digital Sales Workplace

Please login to OneDealer with admin account

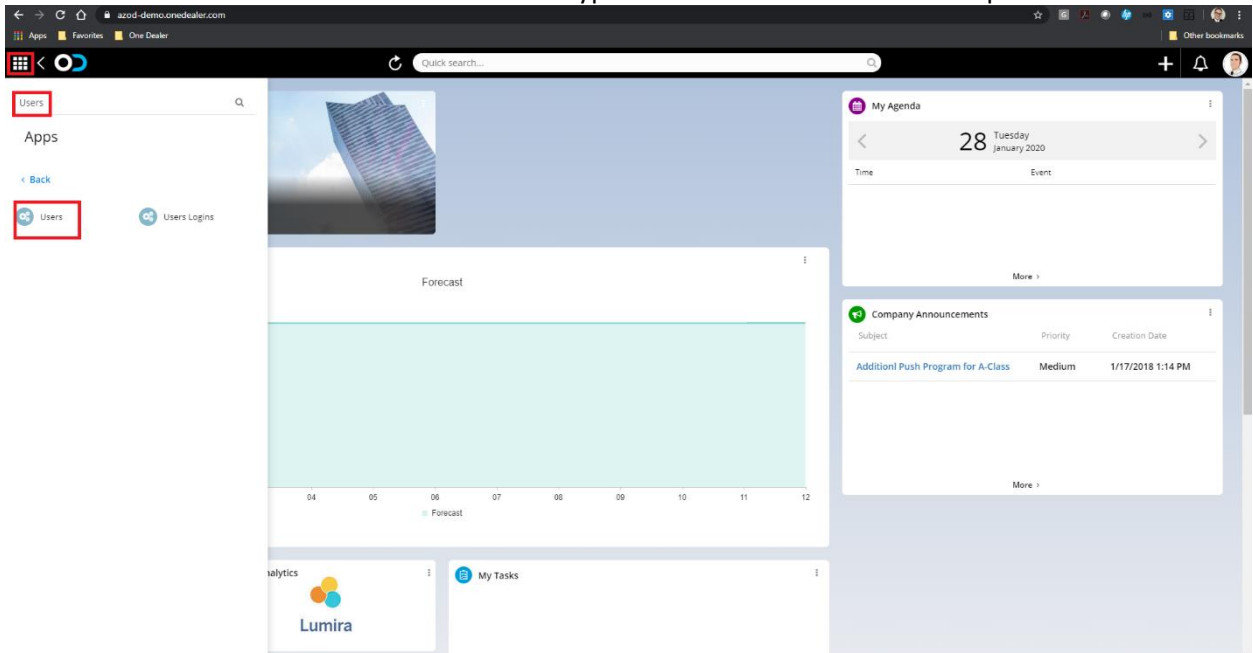
Username: manager@rc.com

Password: 123!



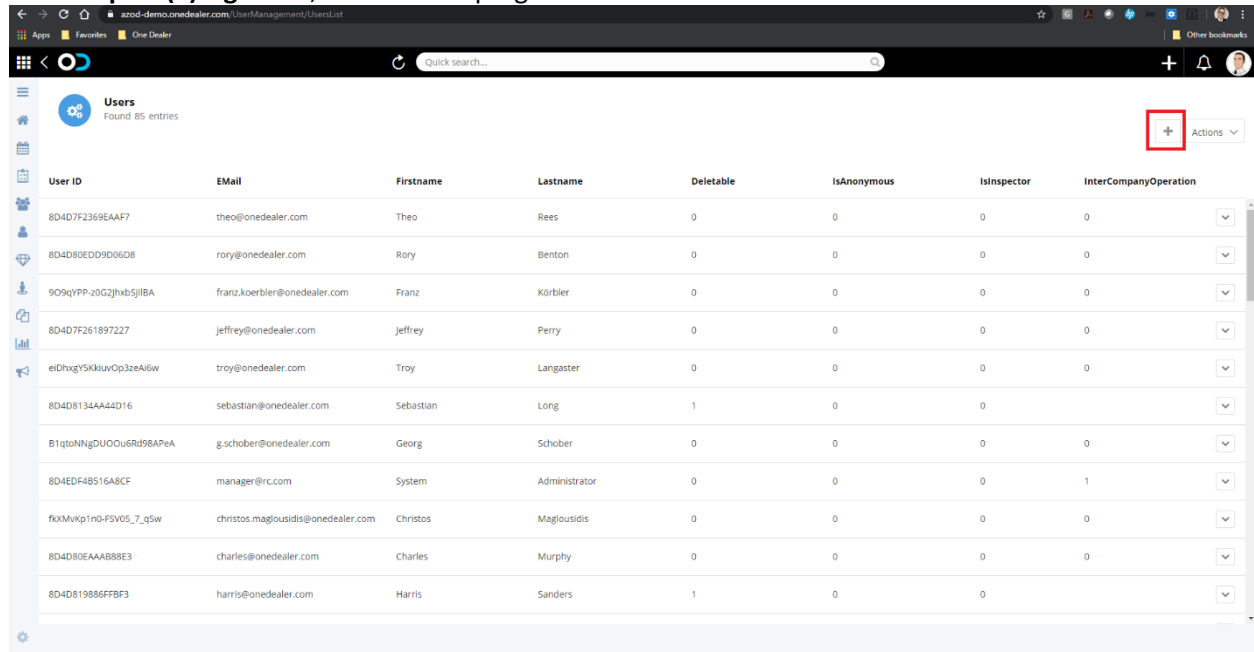
Open User's form

Click on **9 dot menu** icon. At menu search field type "Users". Then click on **Users** option.

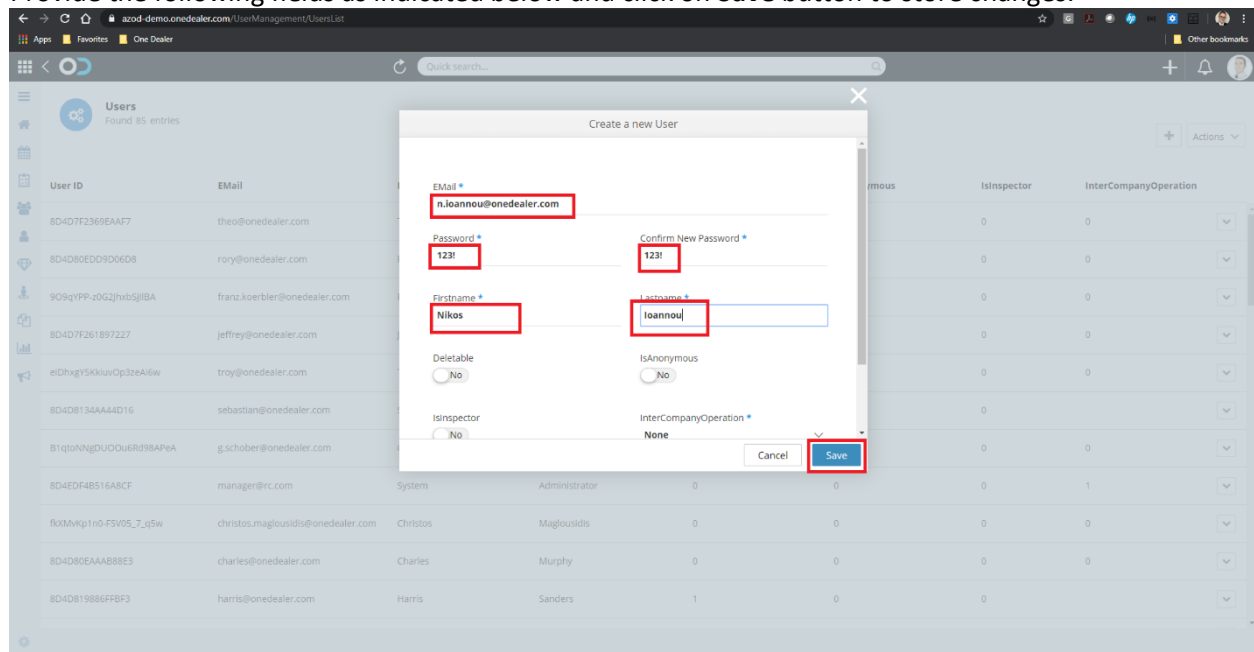


3.1 Create User

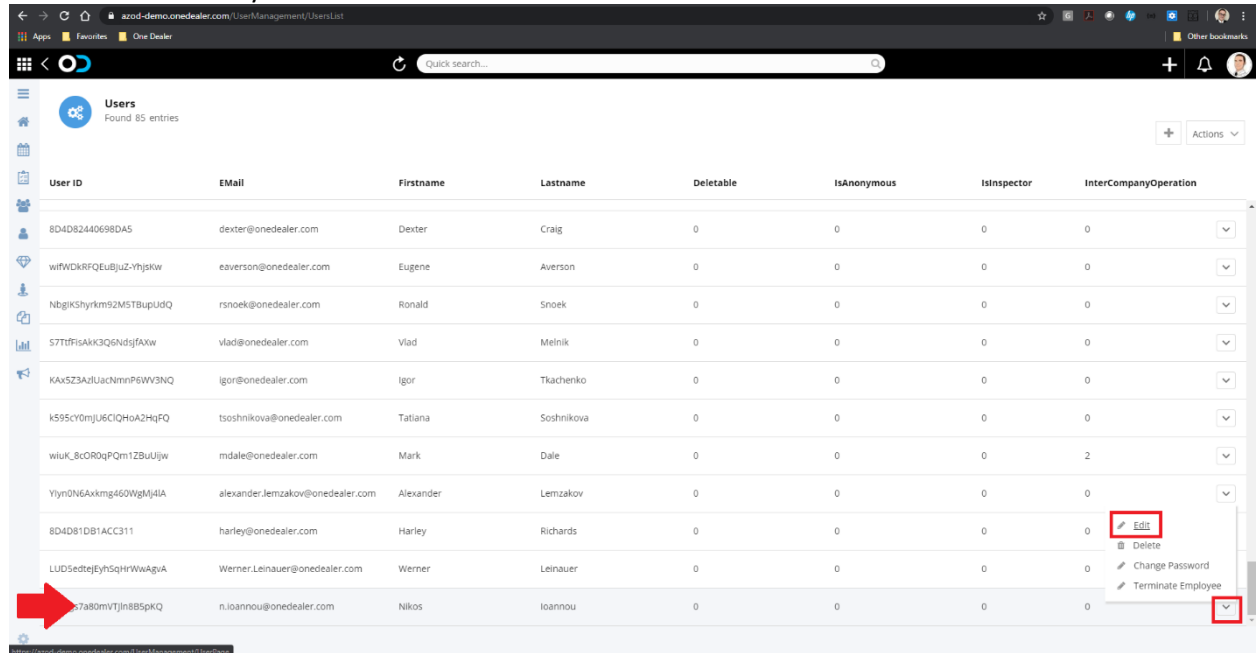
Click on **plus (+) sign icon**, located at top right corner.



Provide the following fields as indicated below and click on **Save** button to store changes.

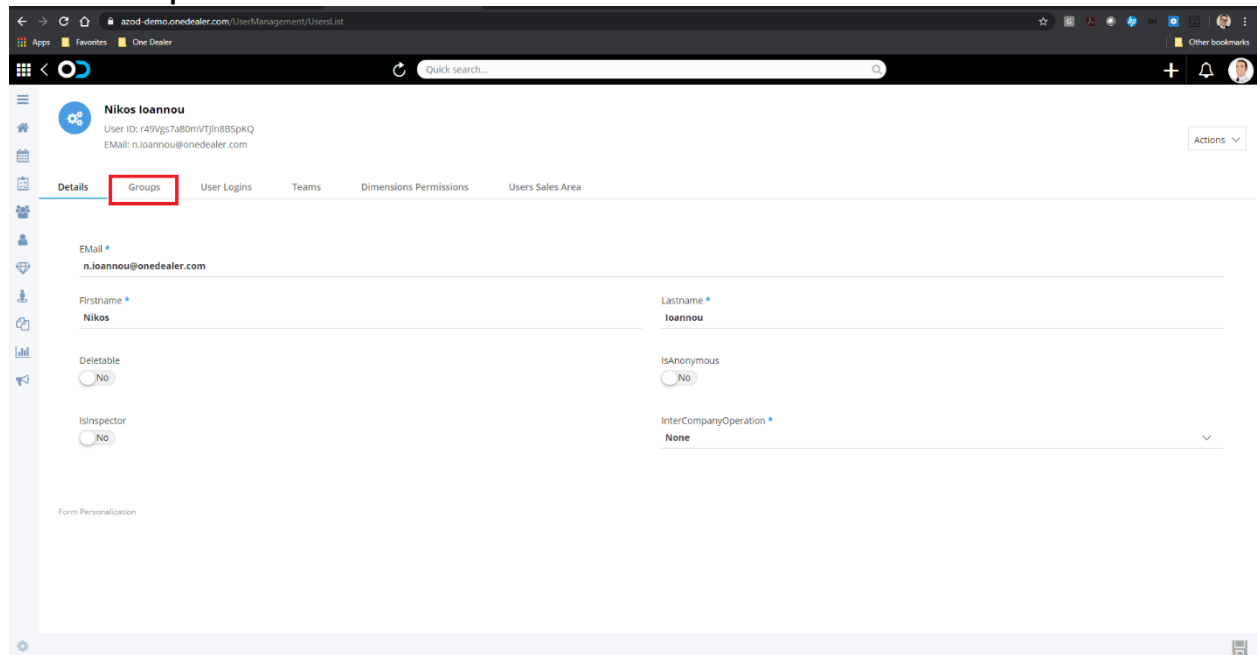


Locate the new entry at the end of the list. Click on **downwards arrow** icon and select **Edit**.

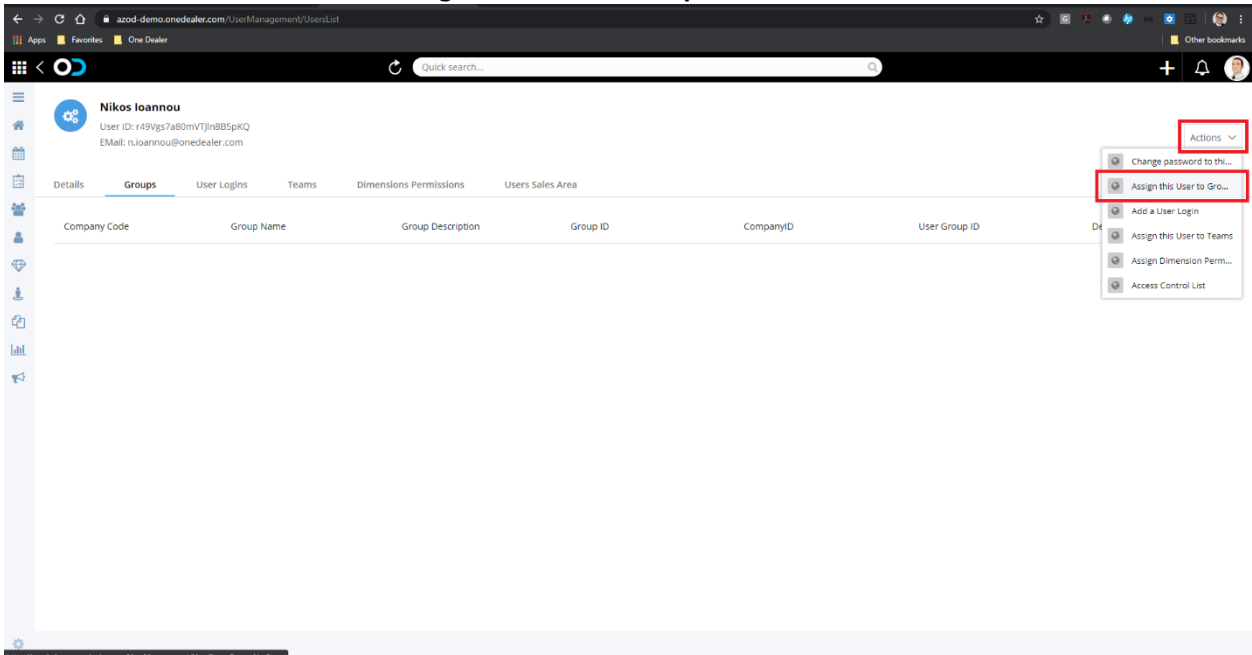


3.2 Configure Group

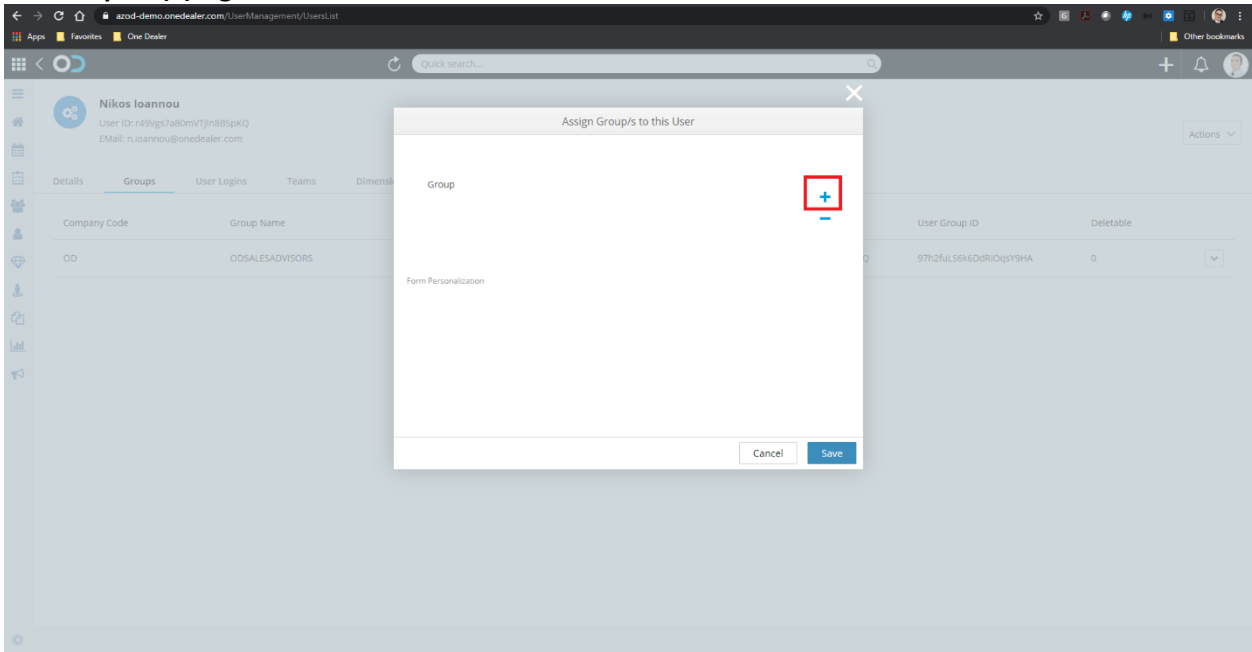
Click on **Groups** TAB.



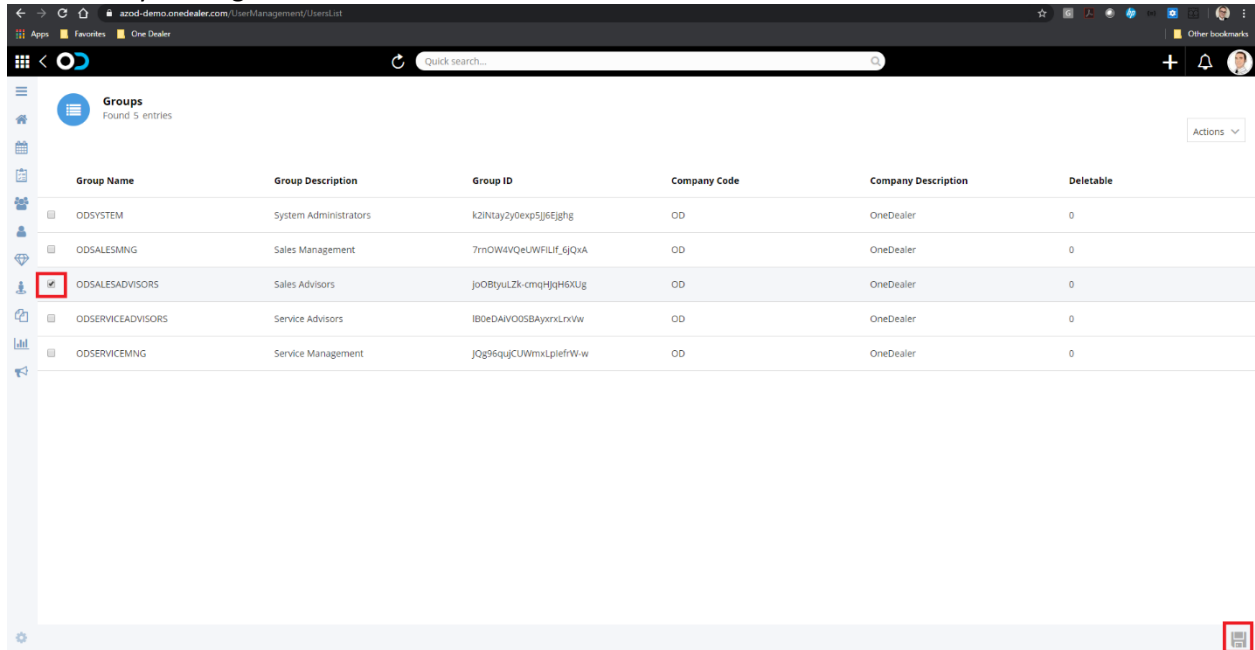
Click on **Actions** and then select **Assign this User to Group**.



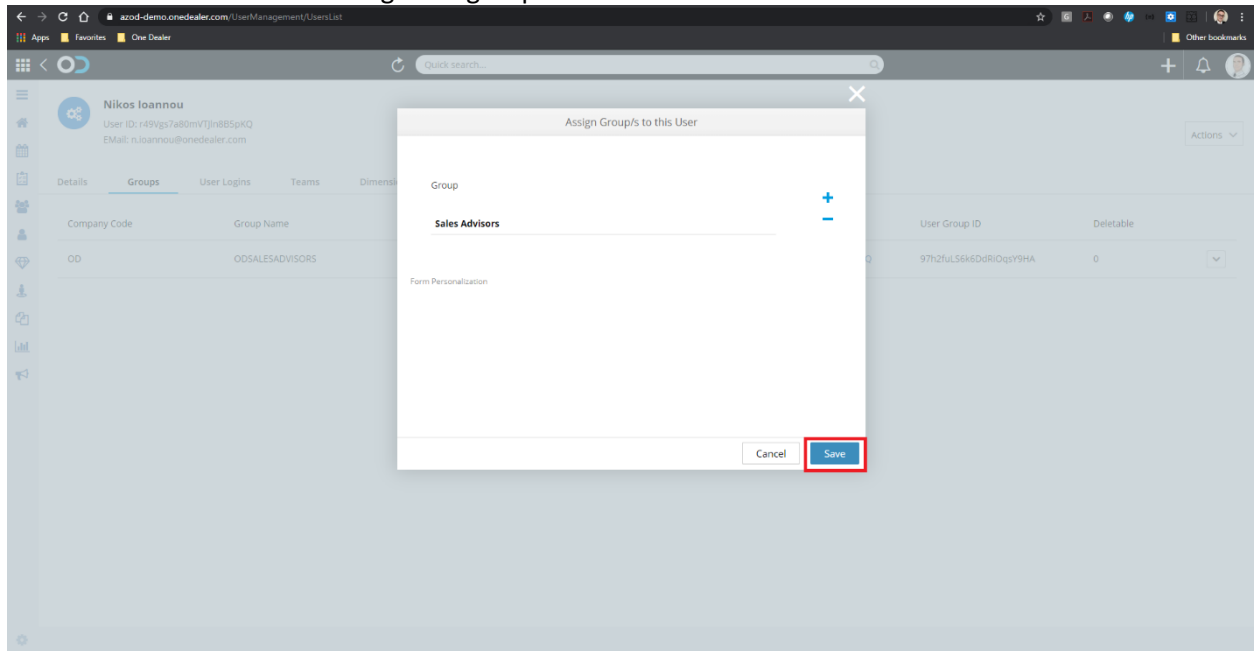
Click on **plus (+) sign icon**.



Select the appropriate group by clicking on **check box** at the beginning of the row and then store your selection by clicking on the **disk icon**.

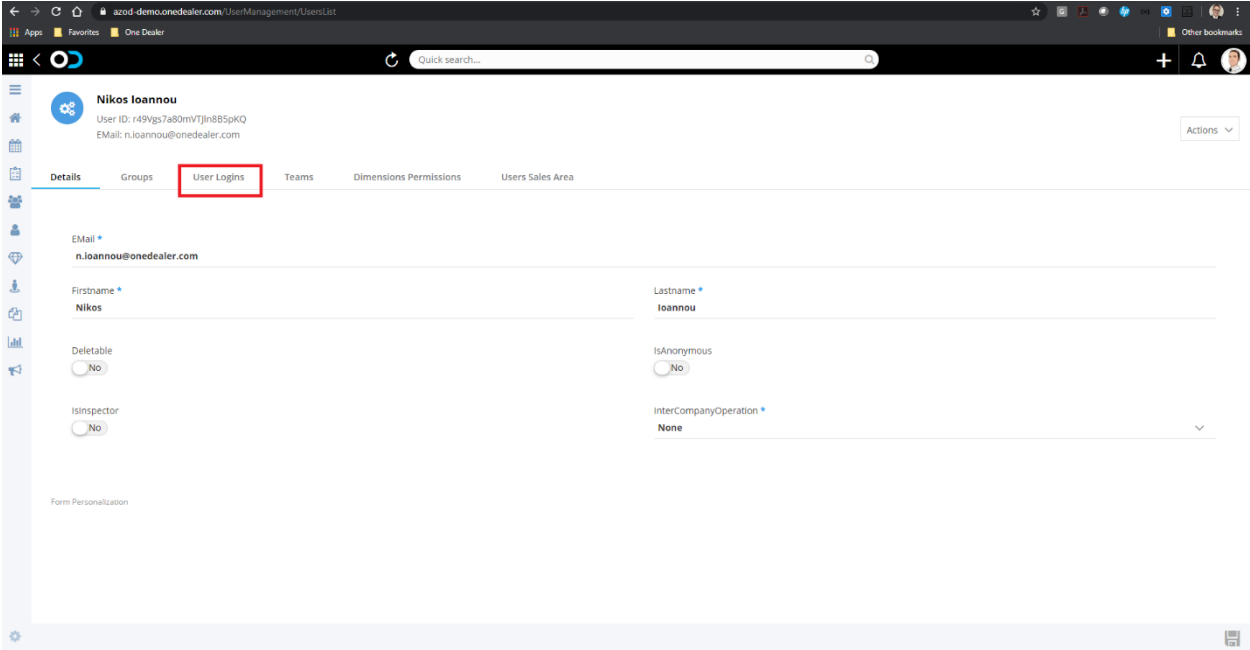


Click on the **Save** button to assign this group to the User.

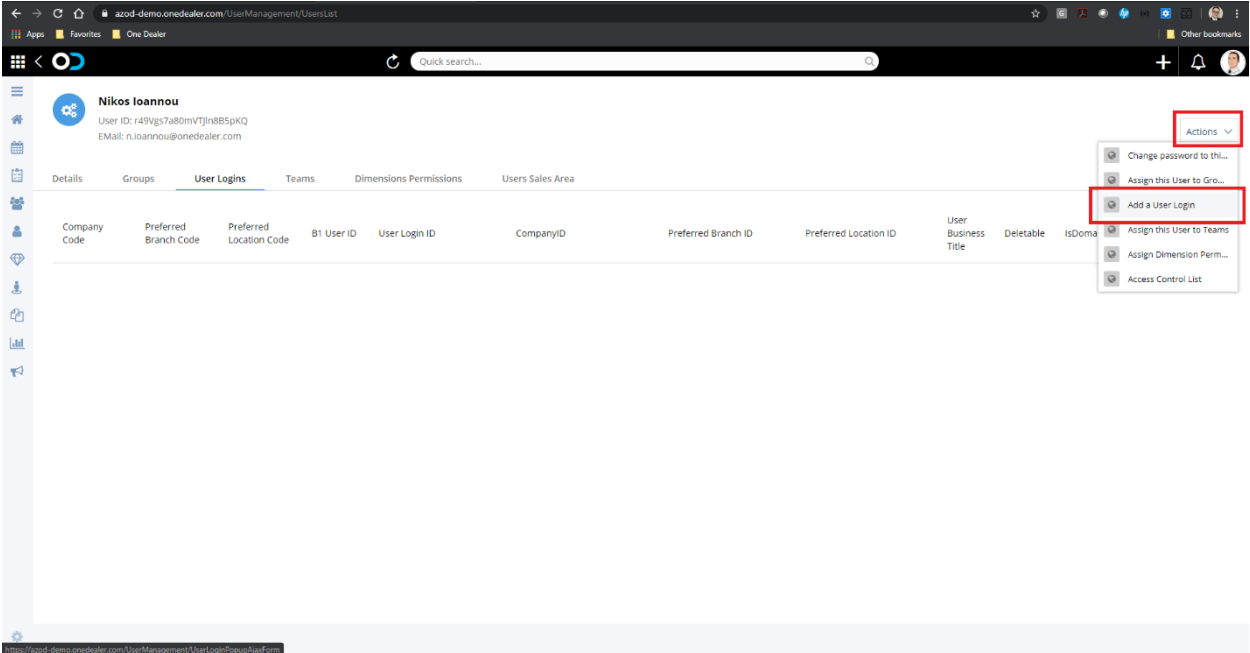


3.3 Configure User Logins

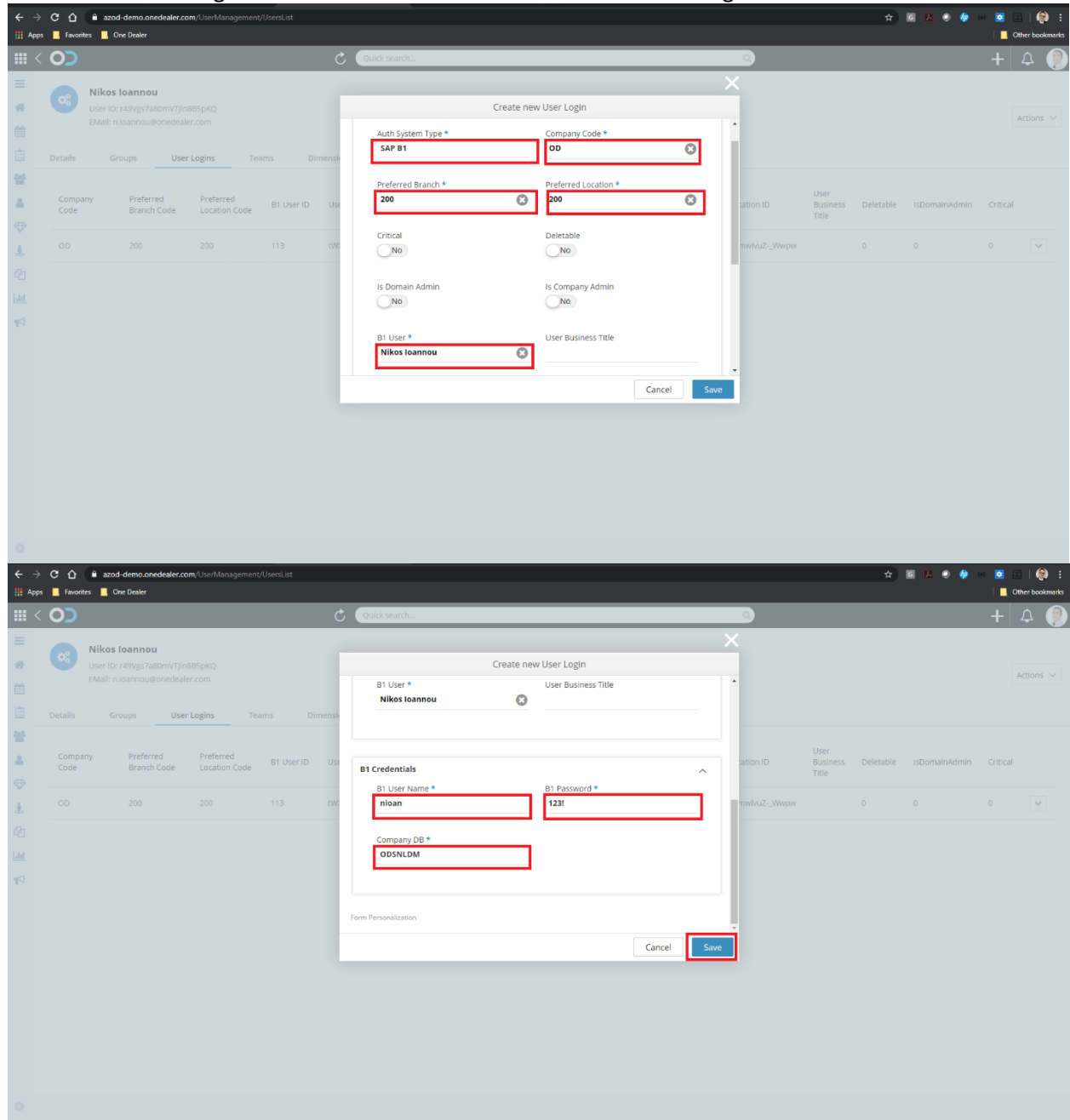
Click on the **User Logins** TAB.



Click on **Actions** and then select **Add a User Login**.

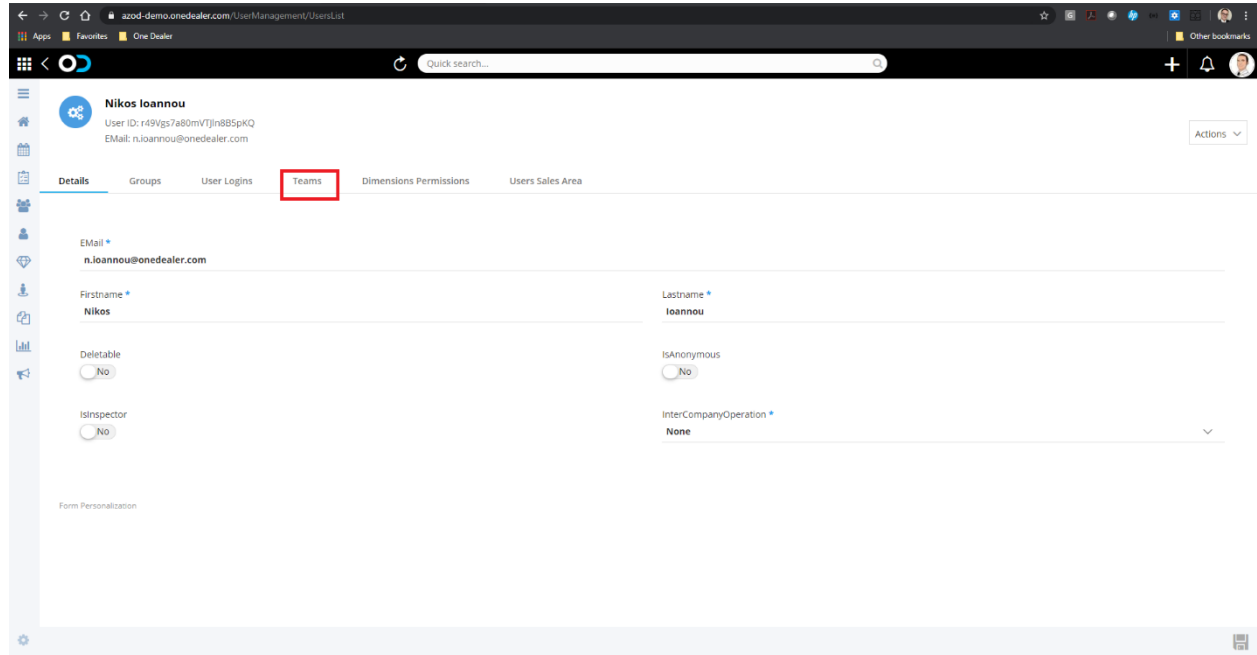


Provide the following fields and click on **Save** button to store User's Login.

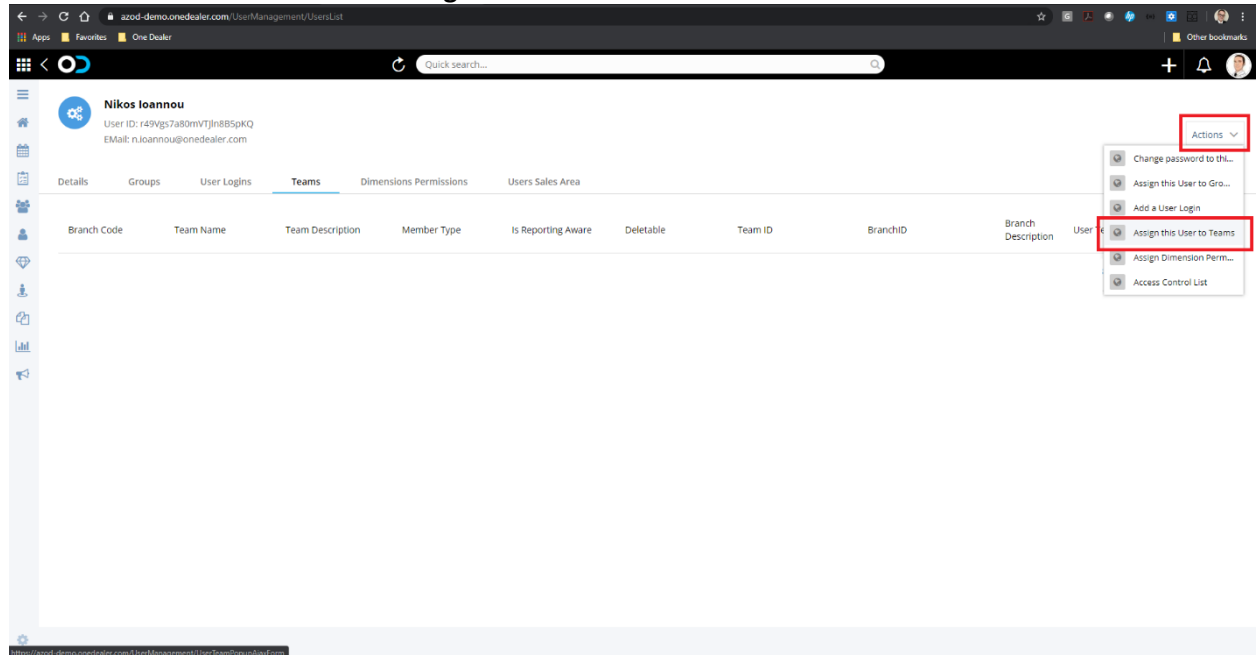


3.4 Configure Teams

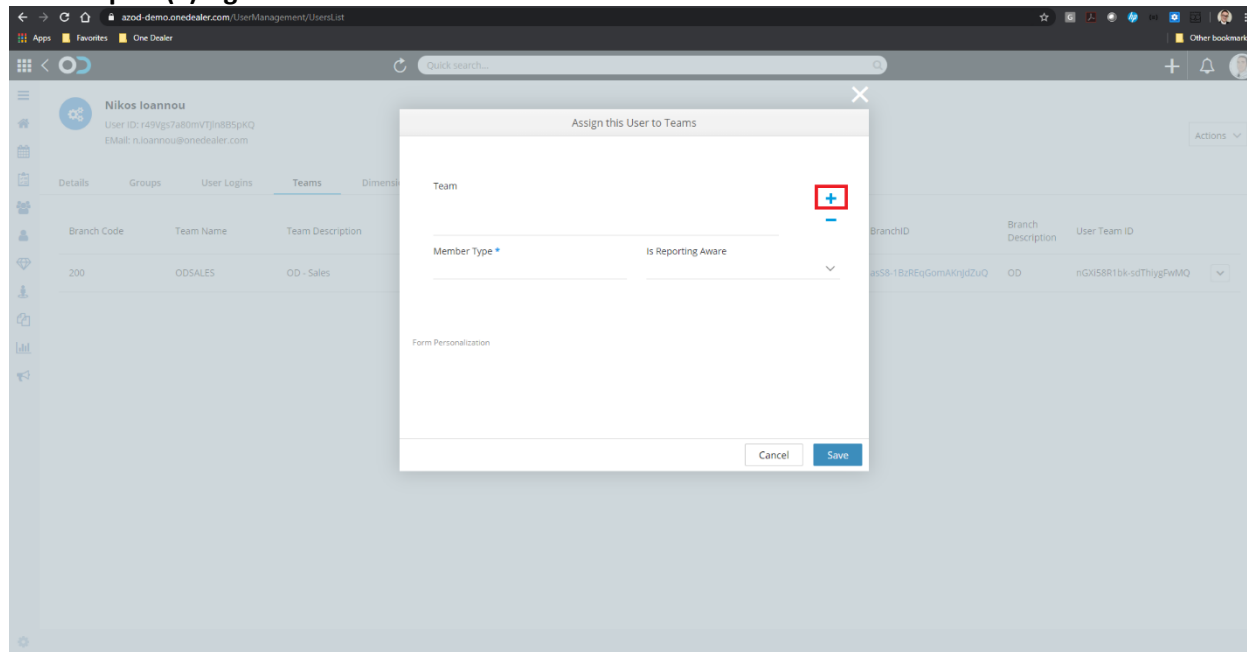
Click on **Teams** TAB.



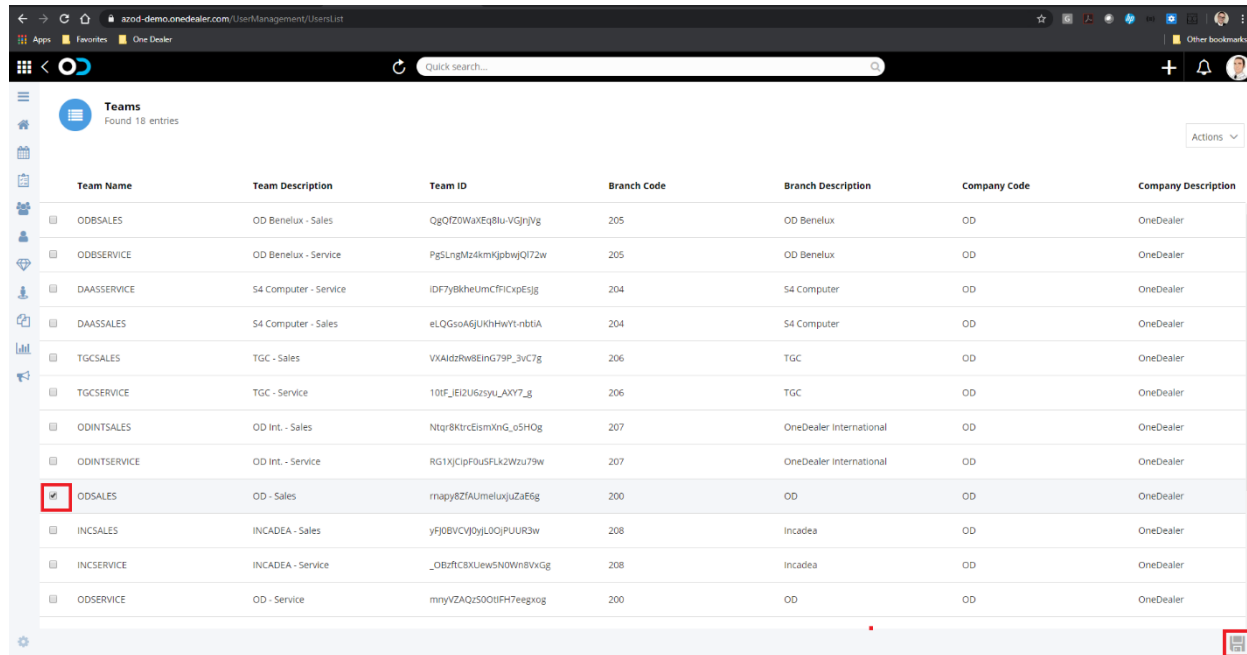
Click on **Actions** and then select **Assign this user to Teams**



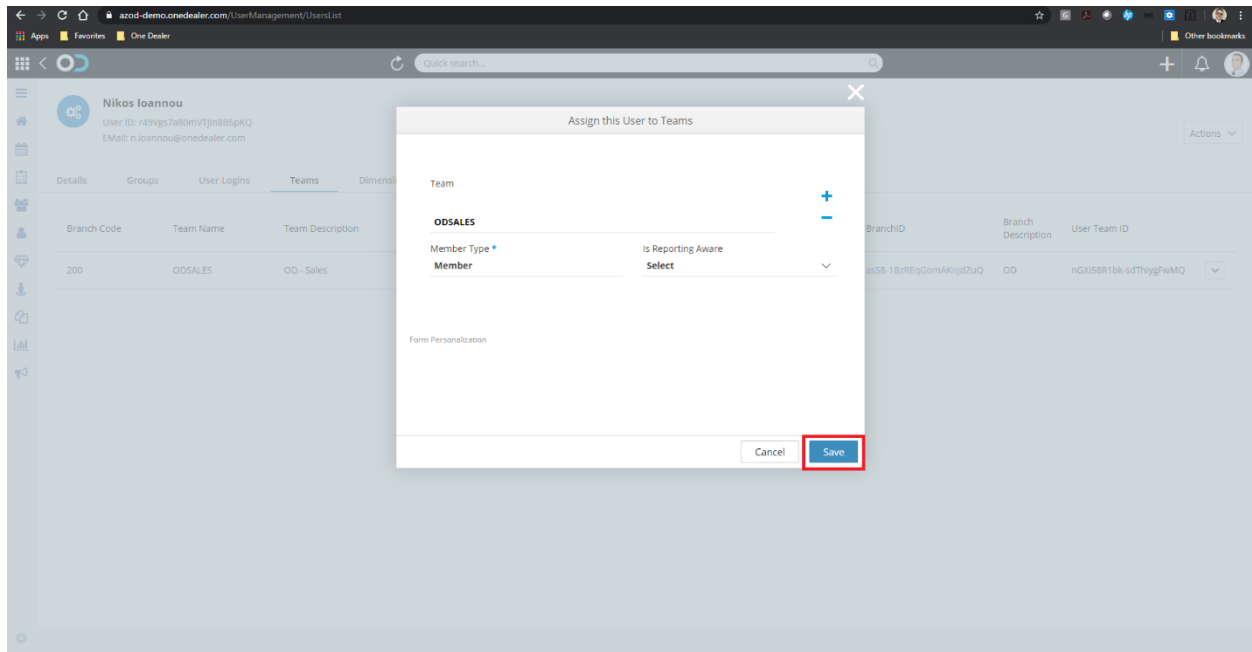
Click on **plus (+) sign icon**.



Select the appropriate Team by clicking on the **checkbox** and then store the Teams by clicking on the **disk icon**.

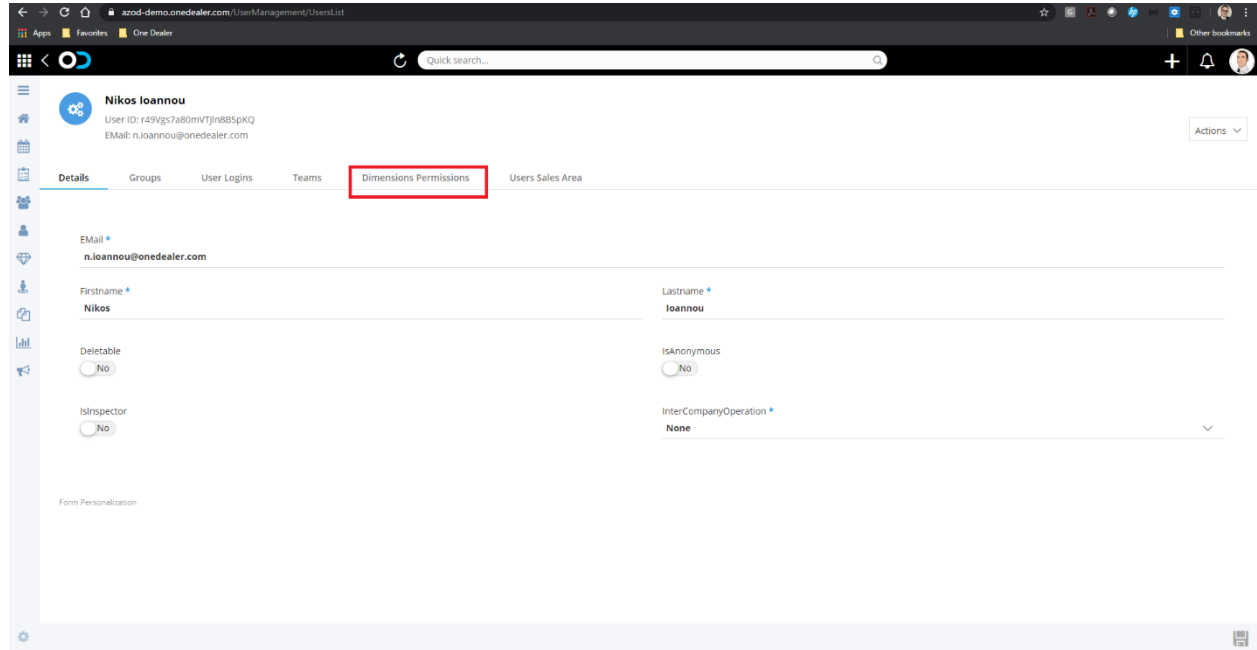


Click on the **Save** button to store the selected Teams.

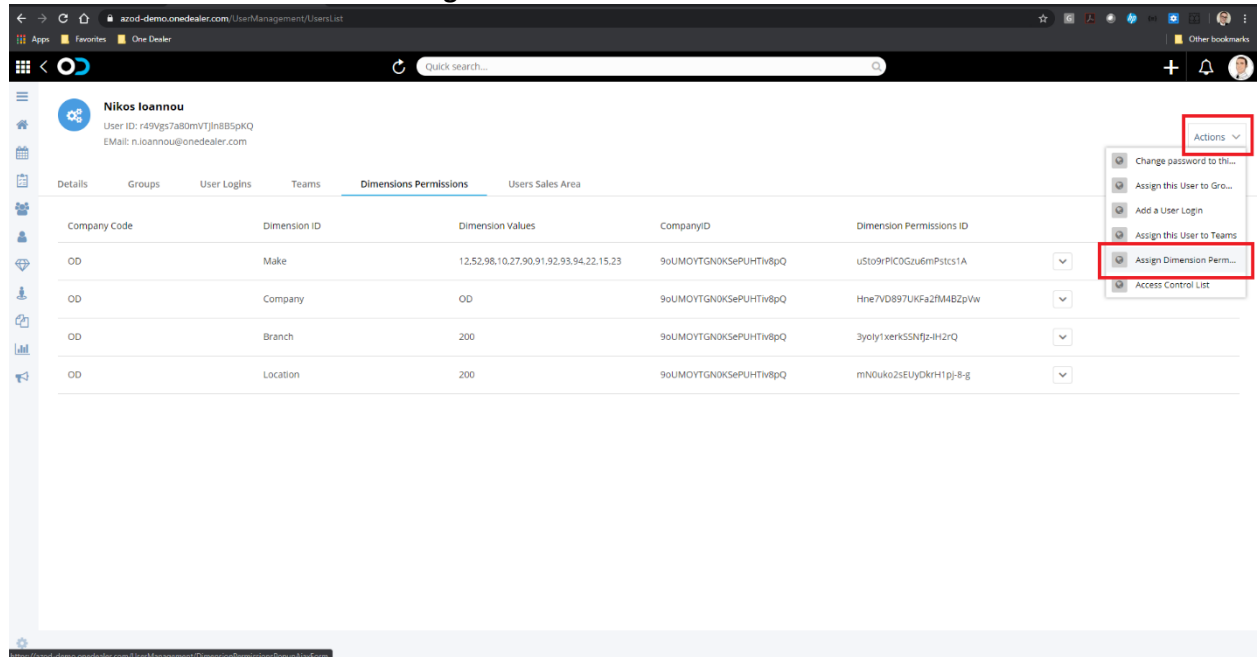


3.5 Configure Dimensions Permissions

Click on **Dimensions Permissions** TAB.



Click on **Actions** and then select **Assign Dimension Permissions**.



Provide content of the selected fields by clicking on the **plus (+) sign** icon and click on **Save** button to store the selected dimension permissions.

