

CONFIGURATION TRAINING YEAR 2020

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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

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1 Prerequisite

The creation of the company structure is prerequisite before creating users. <u>Which means that the following tables need to get updated with the company details:</u> <u>SAP B1:</u>

- @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.
 - o Team creation
 - Change member type of the user if needed.
 - Add more than one Team (Depending on the Role)
 - o 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!**





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2.1 Users form

Go to User form

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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.

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2.3 **Employee Master Data form**

Go to Employee Master Data selection and open the form

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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.

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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.

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2.5 Resource Capacity form

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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.

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





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.

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3.1 Create User

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

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

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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.

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

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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.

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3.3 Configure User Logins

Click on the User Logins TAB.

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Click on Actions and then select Add a User Login.

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



3.4 Configure Teams

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

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Ł		DAASSERVICE	S4 Computer - Service	iDF7yBkheUmCfFICxpEsJg	204	S4 Computer	OD	OneDealer
ආ		DAASSALES	S4 Computer - Sales	eLQGsoA6jUKhHwYt-nbtiA	204	S4 Computer	OD	OneDealer
<u>-</u>		TGCSALES	TGC - Sales	VXAIdzRw8EinG79P_3vC7g	206	TGC	OD	OneDealer
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Click on the Save button to store the selected Teams.

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3.5 Configure Dimensions Permissions

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

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