



CONFIGURATION TRAINING

YEAR 2020

OneDealer International GmbH

www.onedealer.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

<u>1 PREREQUISITE</u>	4
<u>2 CREATE USERS IN SAP BUSINESS ONE</u>	5
 2.1 USERS FORM.....	6
 2.2 SALE EMPLOYEES/BUYERS – SETUP FORM	7
 2.3 EMPLOYEE MASTER DATA FORM	8
 2.4 RESOURCE MASTER DATA FORM	9
 2.5 RESOURCE CAPACITY FORM	11
<u>3 CREATE USERS IN DIGITAL SALES WORKPLACE</u>	13
 3.1 CREATE USER.....	14
 3.2 CONFIGURE GROUP.....	15
 3.3 CONFIGURE USER LOGINS.....	18
 3.4 CONFIGURE TEAMS	20
 3.5 CONFIGURE DIMENSIONS PERMISSIONS	23

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.

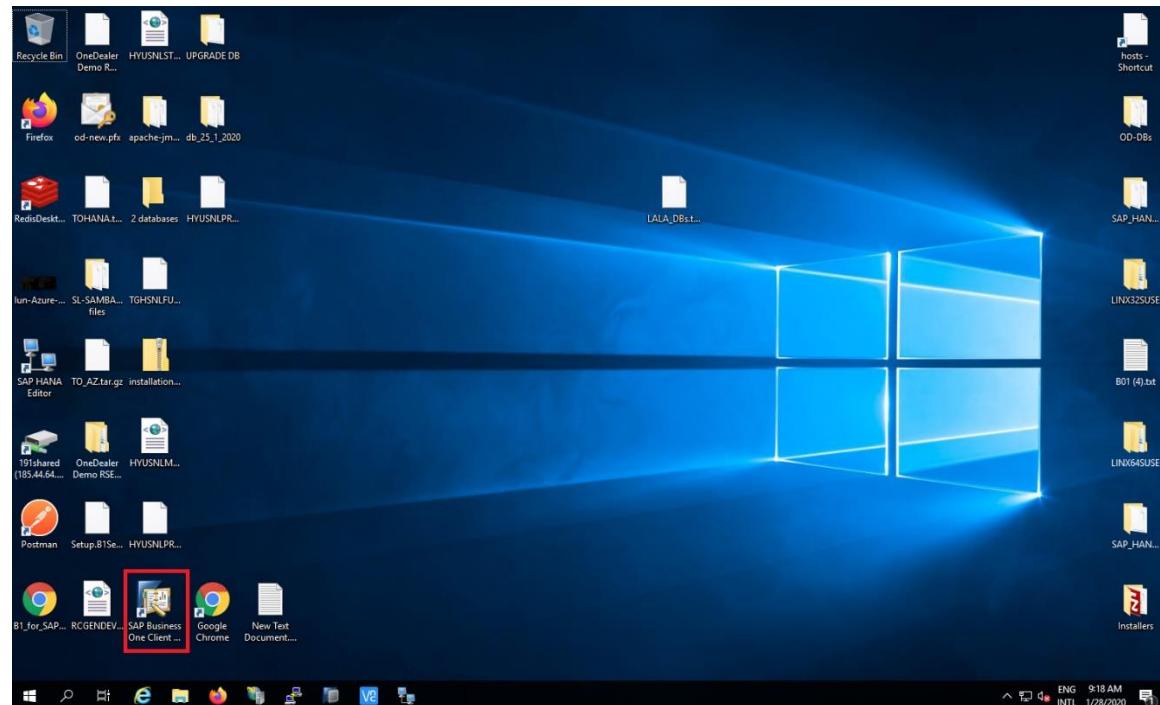
- **Company** creation
- **Branch** creation
- **Location** creation
- **User** creation - Before creating users, entries must get created at the following sections:
 - **Group** creation
 - Assign Roles to Groups
 - Assign Business Cases to Roles.
 - **Team** creation
 - Change member type of the user 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**

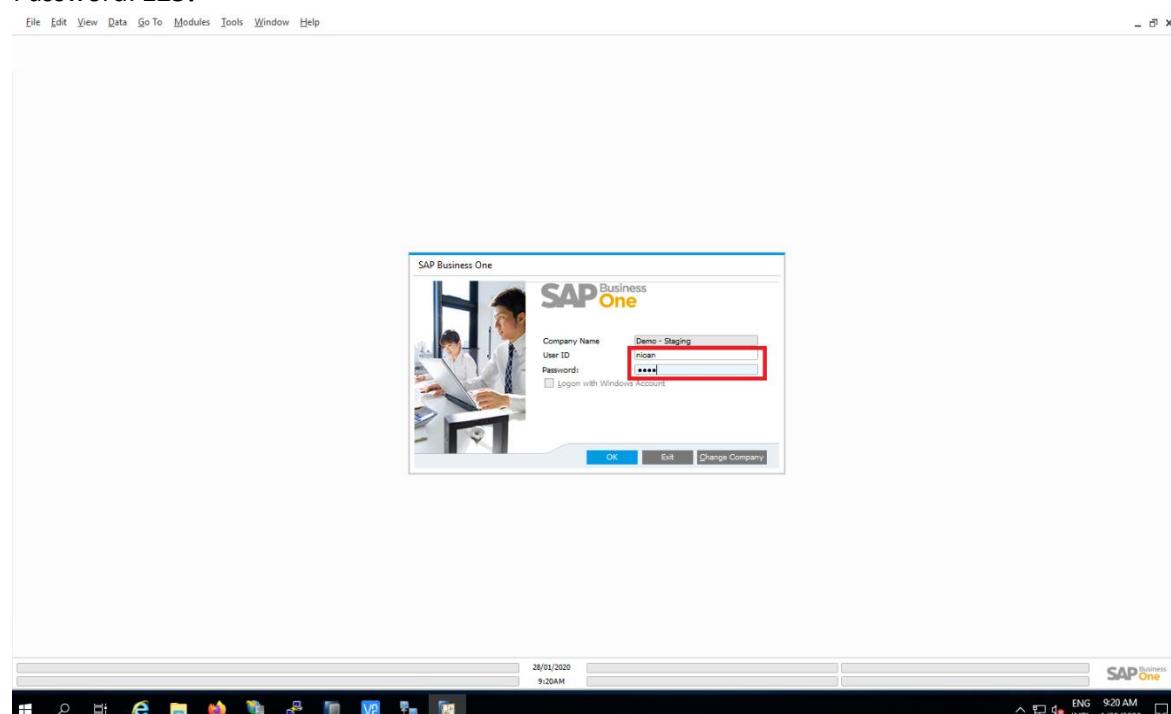
Password: *********



Please login in SAP Business One

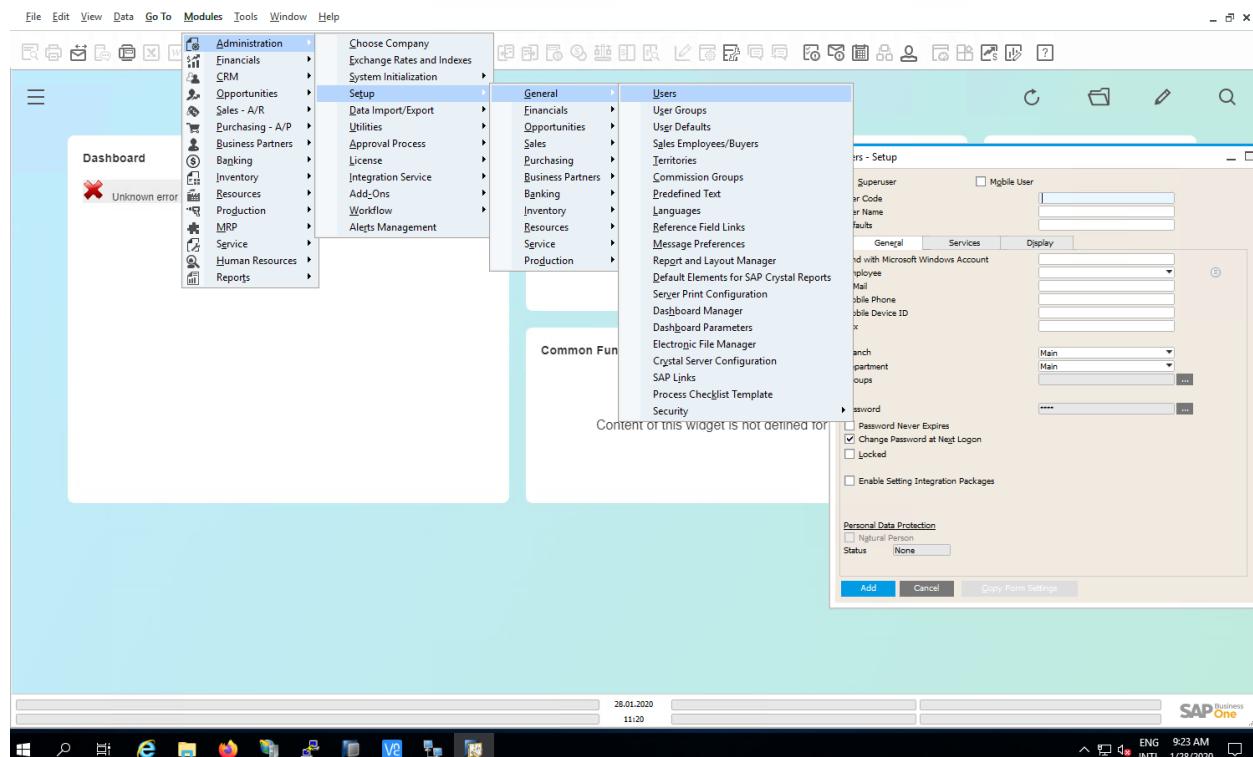
Username: **nioan**

Password: **123!**

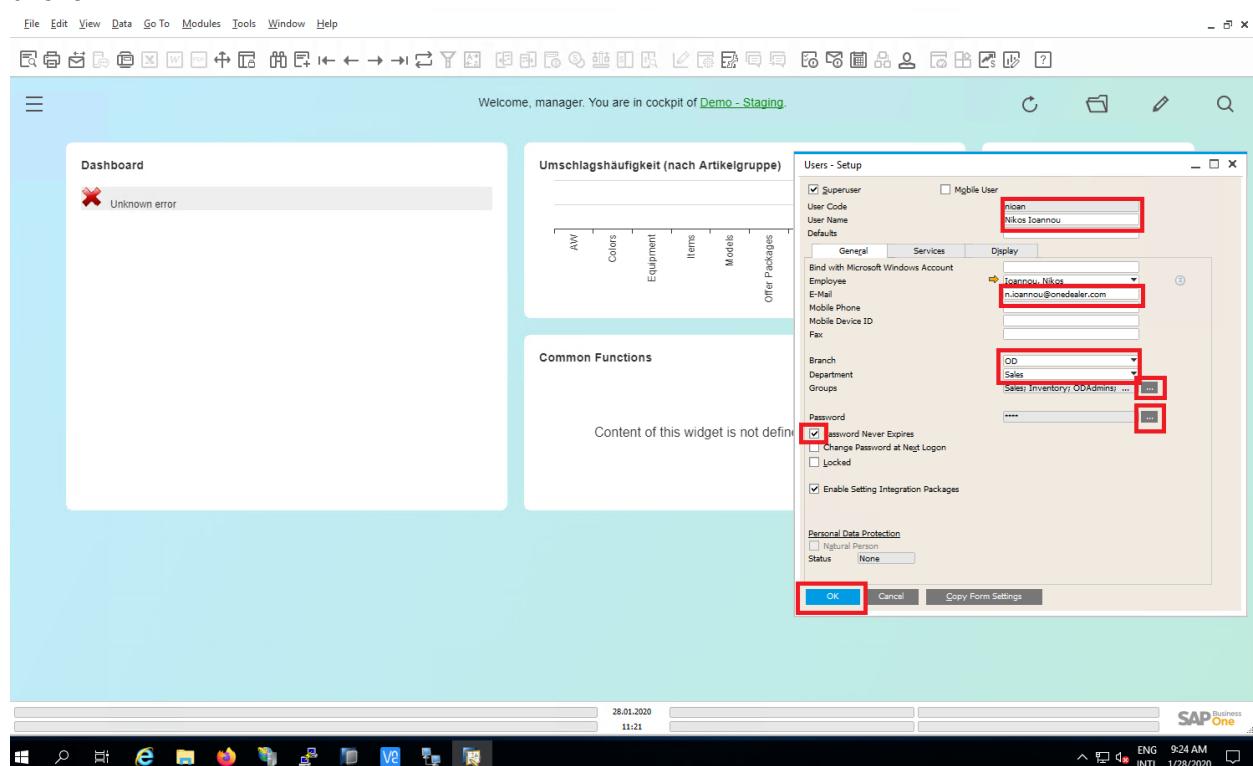


2.1 Users form

Go to User form

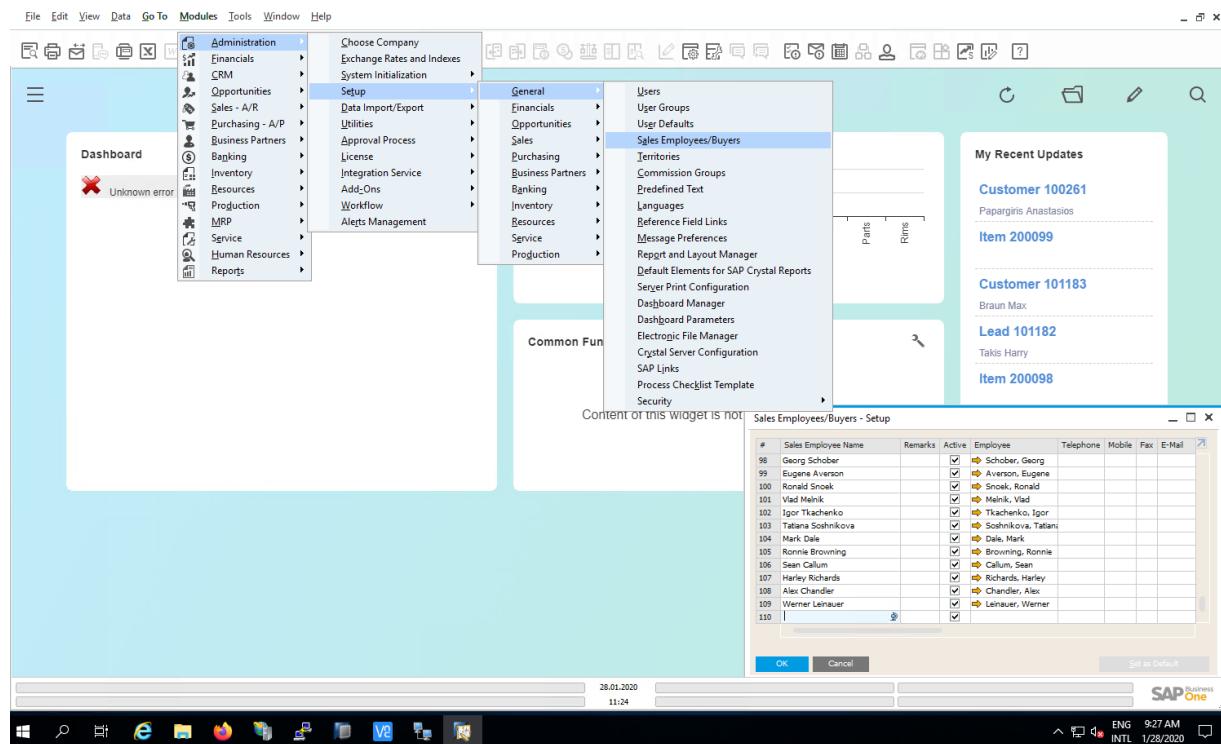


Please provide the fields as it is indicated at the screenshot below and click on **Add** to store the data of this form.

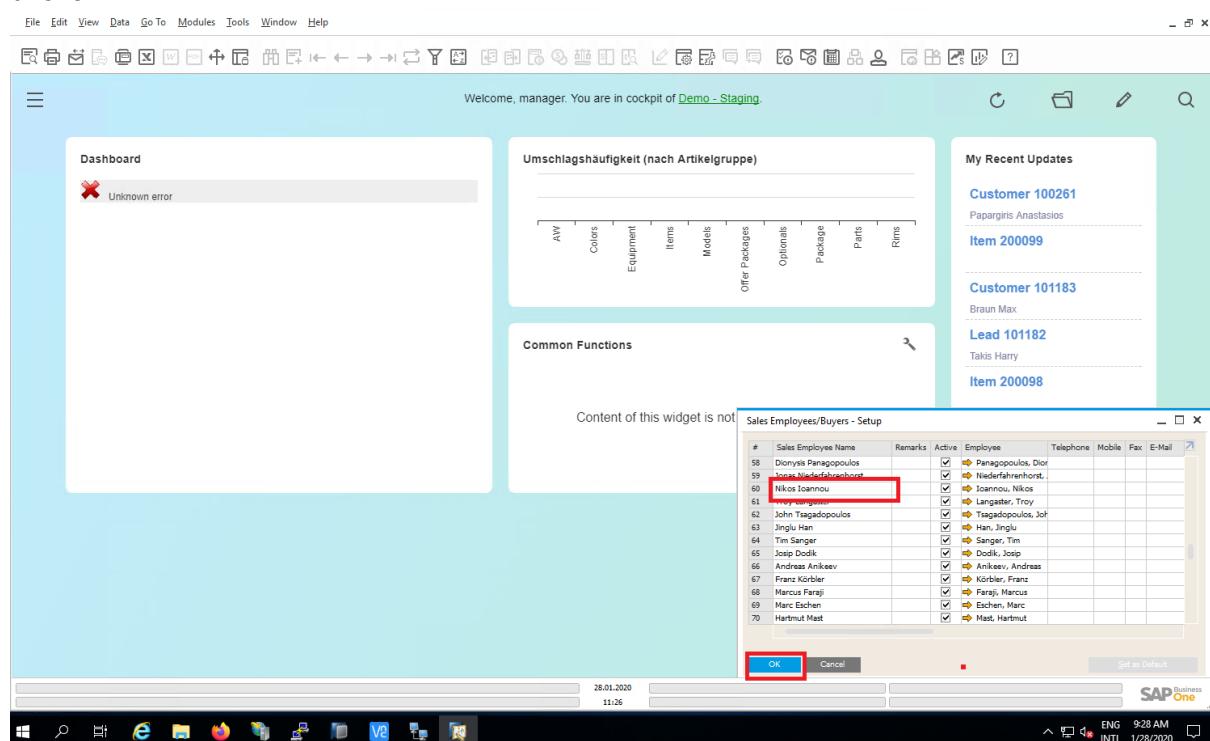


2.2 Sale Employees/Buyers – Setup form

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

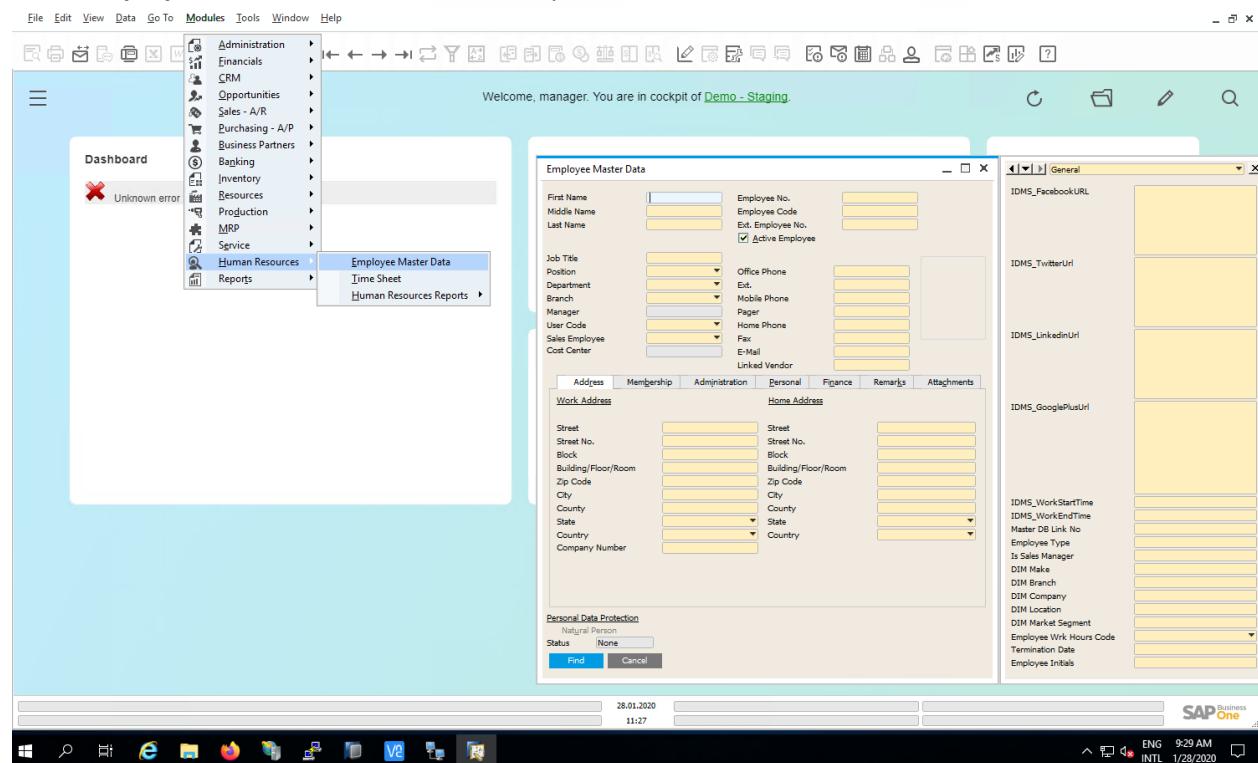


Please provide the fields as it is indicated at the screenshot below and click on **Add** to store the data of this form.



2.3 Employee Master Data form

Go to Employee Master Data selection and open the form

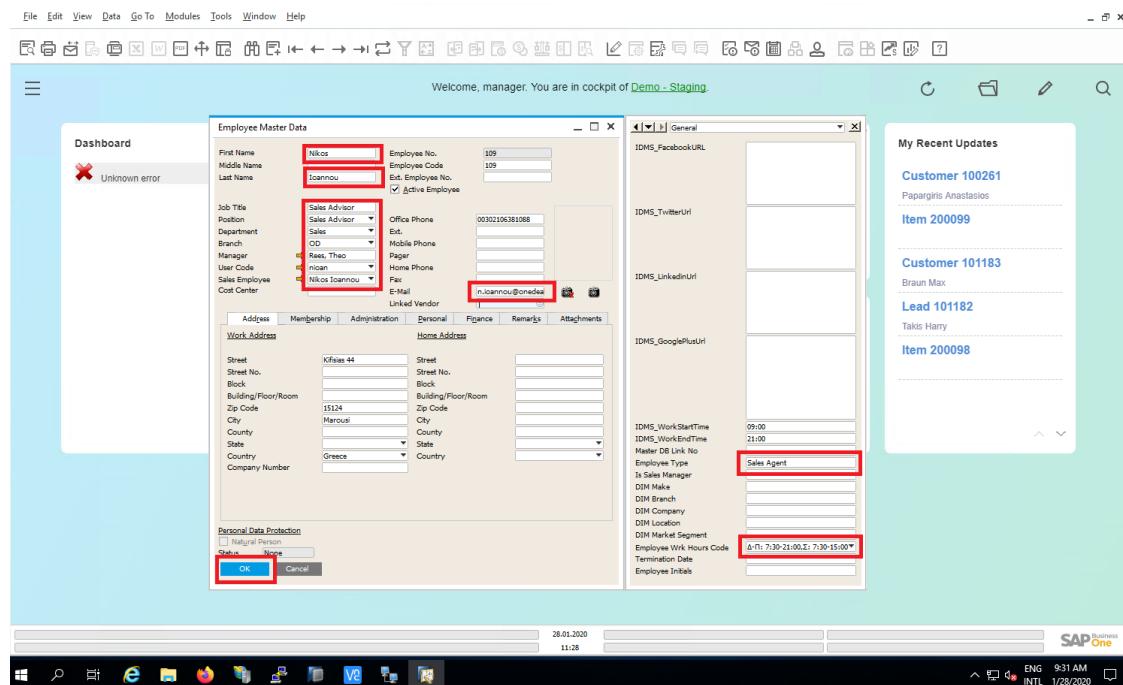


Please provide the fields as it is indicated at the screenshot below.

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).

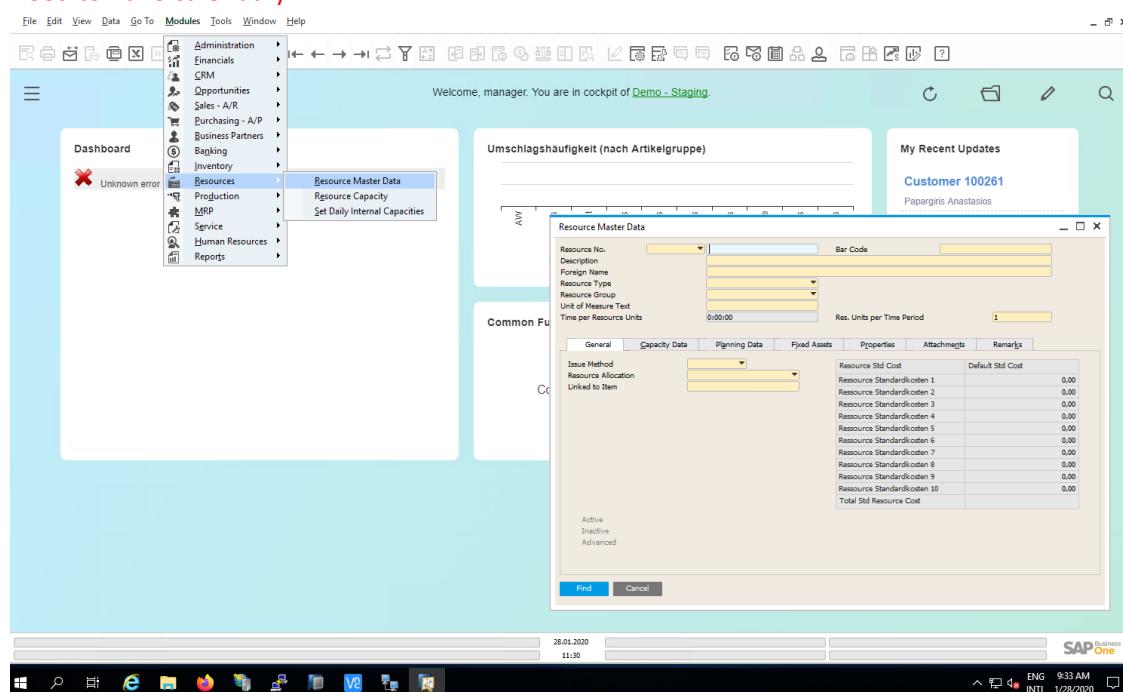
Finally, the user clicks on **Add** to store the data of this form.



The screenshot shows the SAP Business One cockpit with the Employee Master Data form open. The form contains various fields for employee information, with several fields highlighted in red: First Name (Nikos), Middle Name (Ioannou), Job Title (Sales Advisor), Office Phone (00302106381068), Email (nikos.ioannou@onedealer.com), and the OK button. To the right of the form, there is a sidebar titled "My Recent Updates" showing entries for Customer 100261 and Customer 101183. The SAP Business One interface is visible at the bottom of the screen.

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)



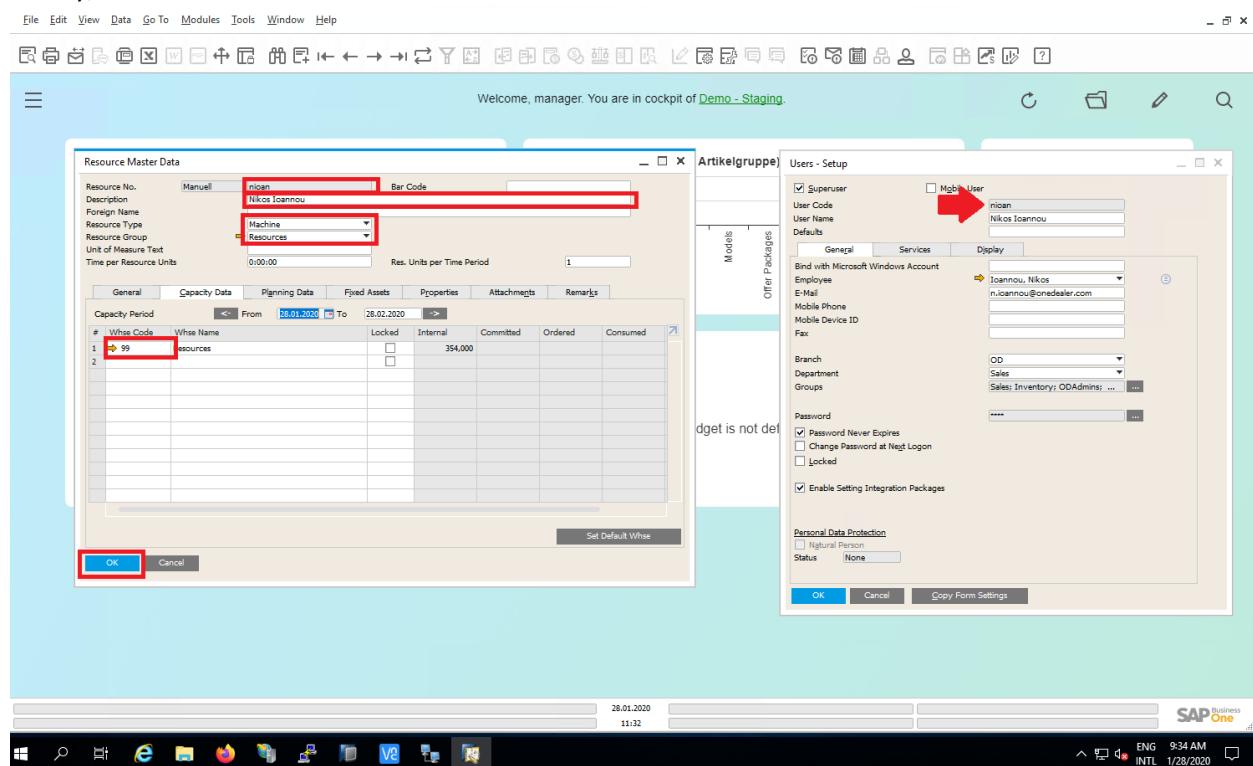
The screenshot shows the SAP Business One cockpit with the Resource Master Data form open. The form displays resource details such as Resource No., Description, Resource Type, and Resource Group. A table on the right lists Resource Standard Costs for various resources. Several fields are highlighted in red: Resource No. and the OK button. The SAP Business One interface is visible at the bottom of the screen.

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

Make sure that

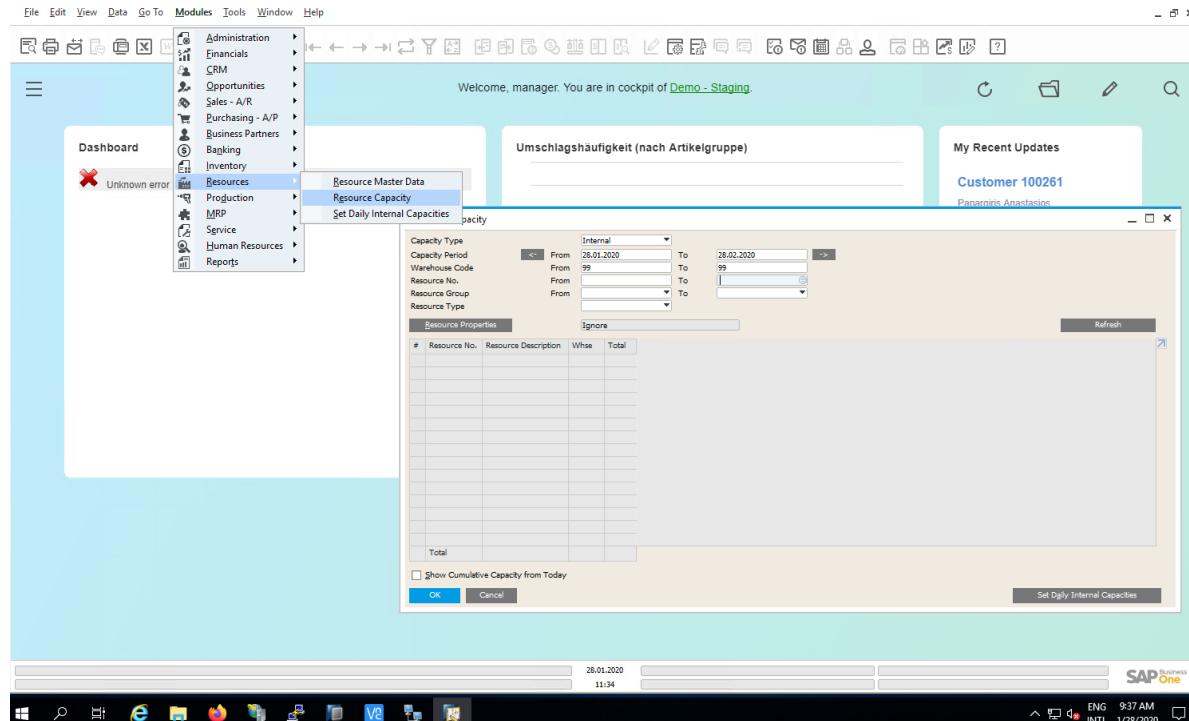
- the "Resource no" is the same as "User code" in "Users-Setup" form
- at the Capacity Data (TAB) you create only the 99 warehouse (Whse Code)

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

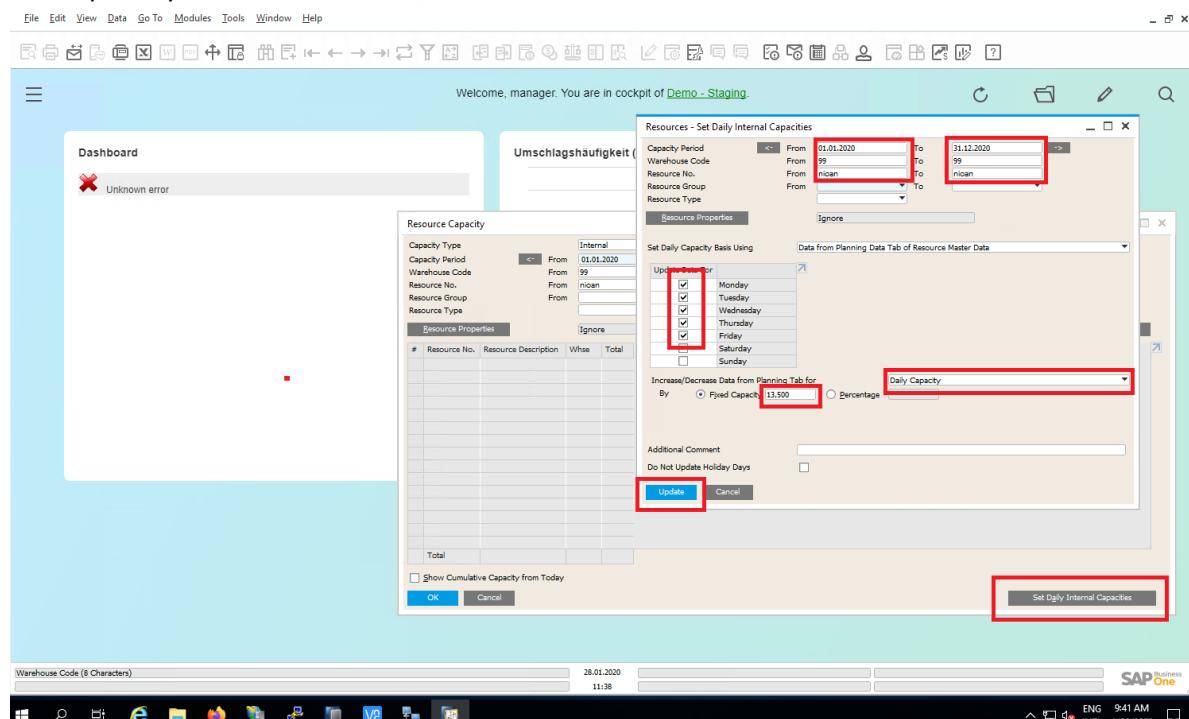


2.5 Resource Capacity form

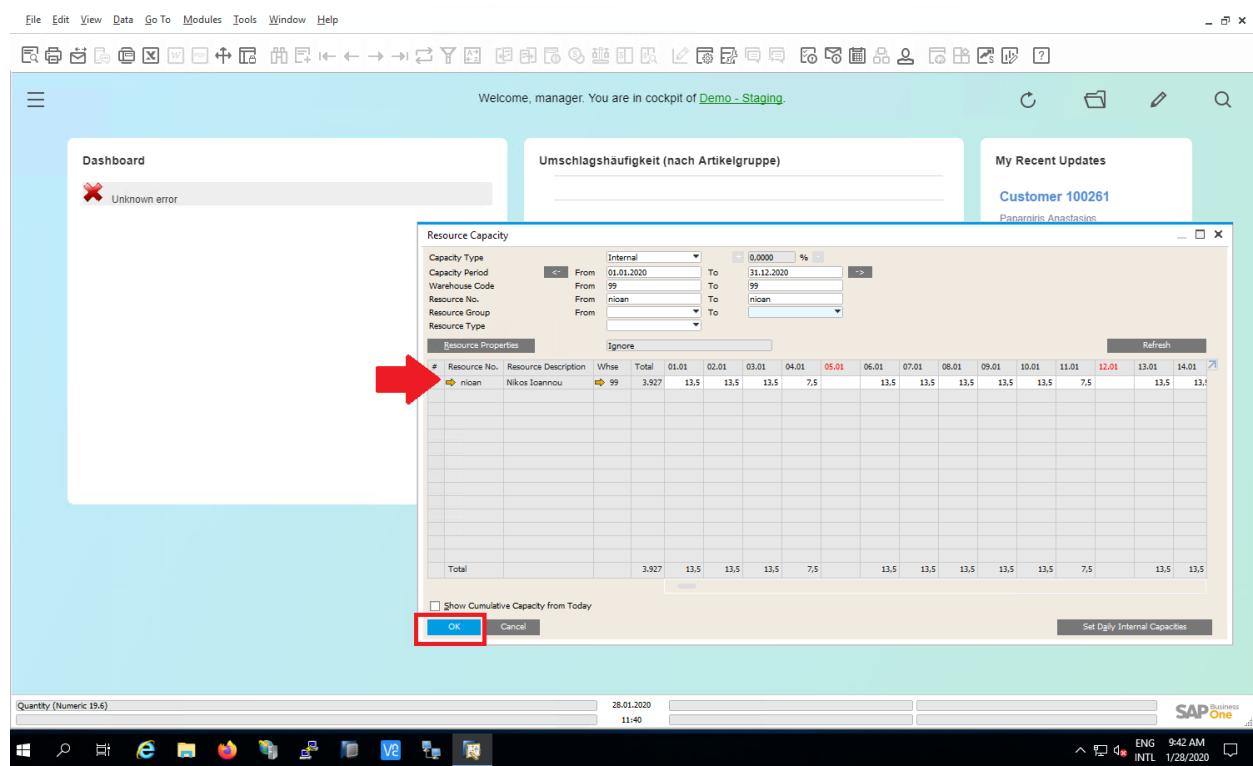
Go to Resource Capacity selection and open the form.



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



Welcome, manager. You are in cockpit of **Demo - Staging**.

Dashboard Umschlagshäufigkeit (nach Artikelgruppe) My Recent Updates

Customer 100261
Panagiotis Anastasios

Resource Capacity

Capacity Type	Internal	0,0000 %
Capacity Period	From 01.01.2020 To 31.12.2020	<input type="button" value="Ignore"/>
Warehouse Code	From 99 To 99	
Resource No.	From nican To nican	
Resource Group	From To	
Resource Type		

#	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 Iannou	99	3.927	13.5	13.5	13.5	7.5		13.5	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 7.5 13.5 13.5

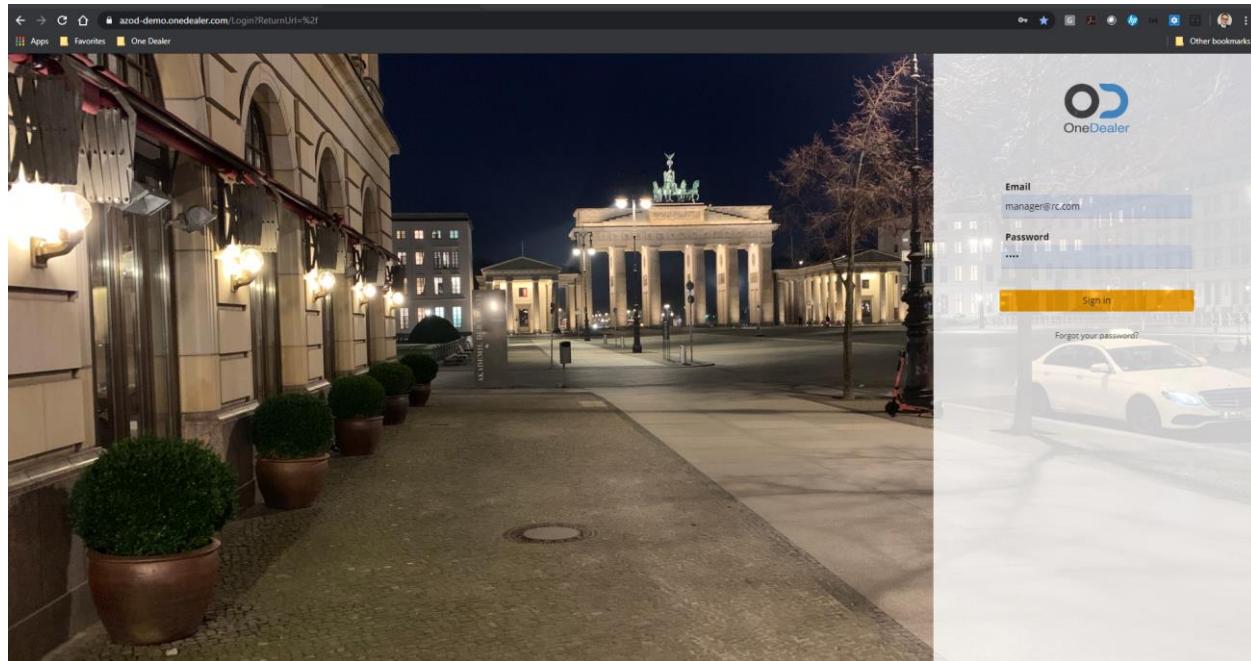
Show Cumulative Capacity from Today

3 Create users in Digital Sales Workplace

Please login to OneDealer with admin account

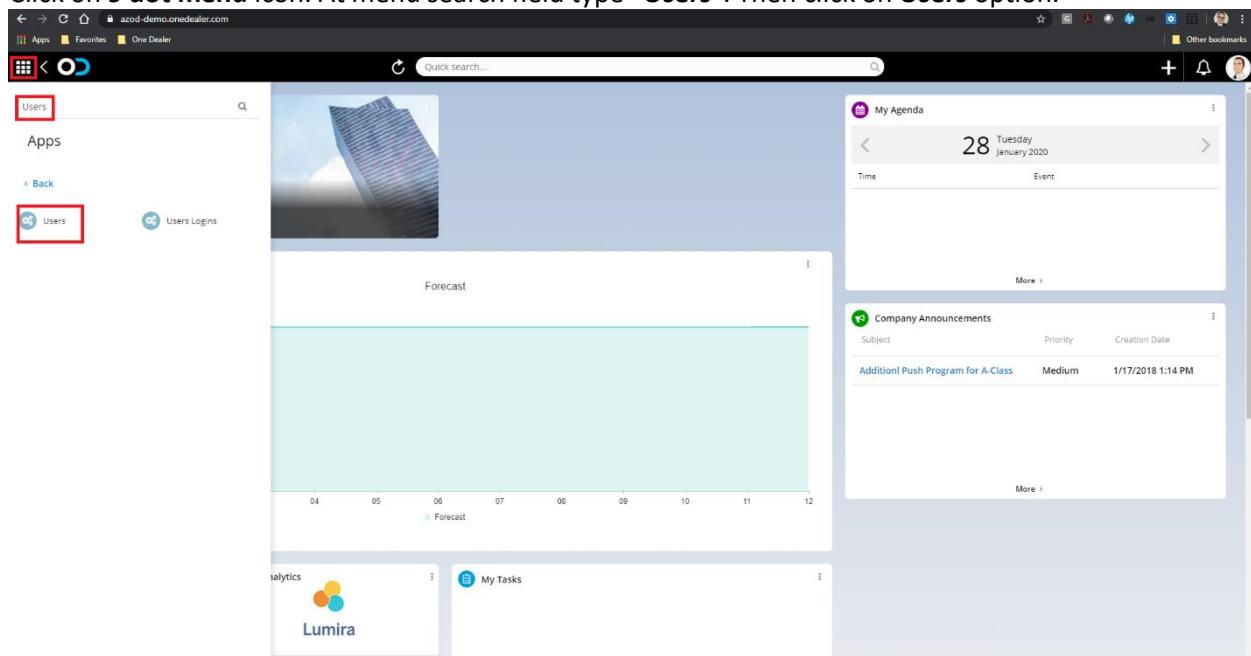
Username: manager@rc.com

Password: 123!



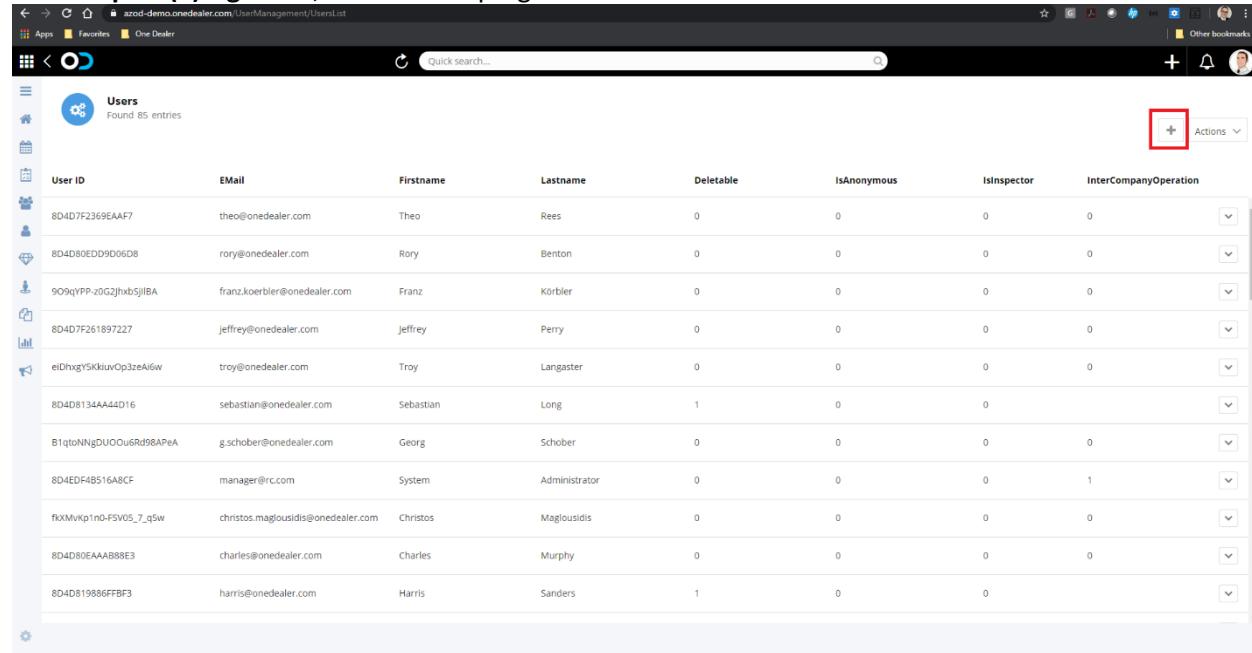
Open User's form

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



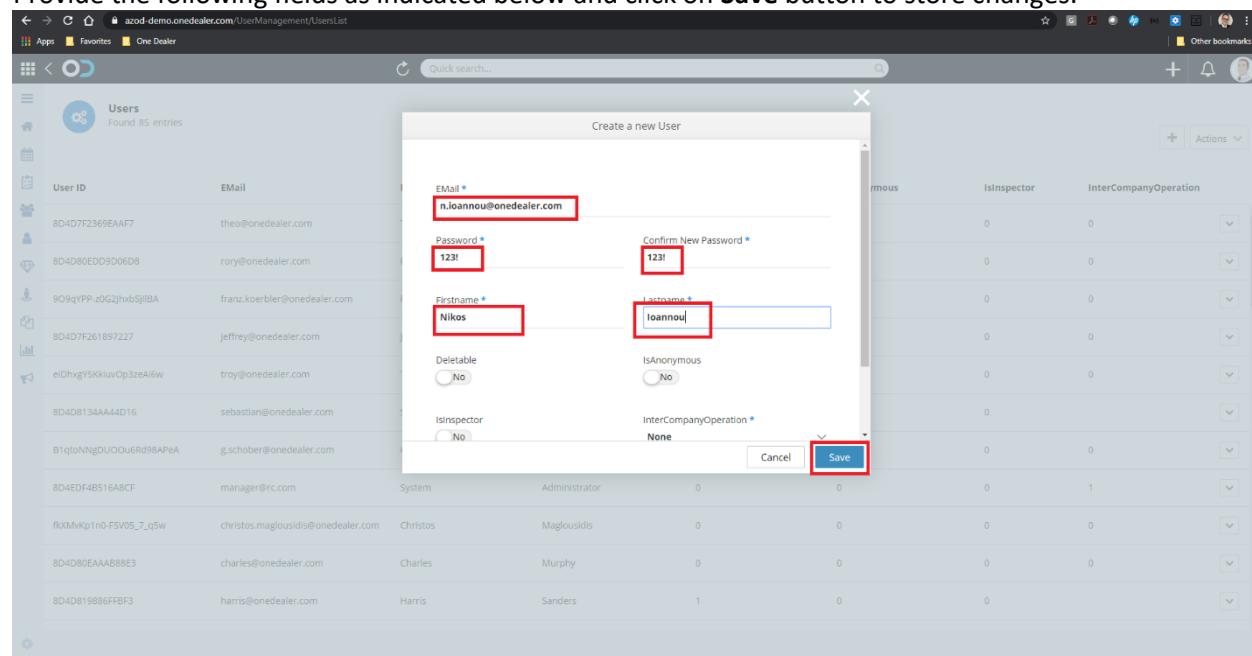
3.1 Create User

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



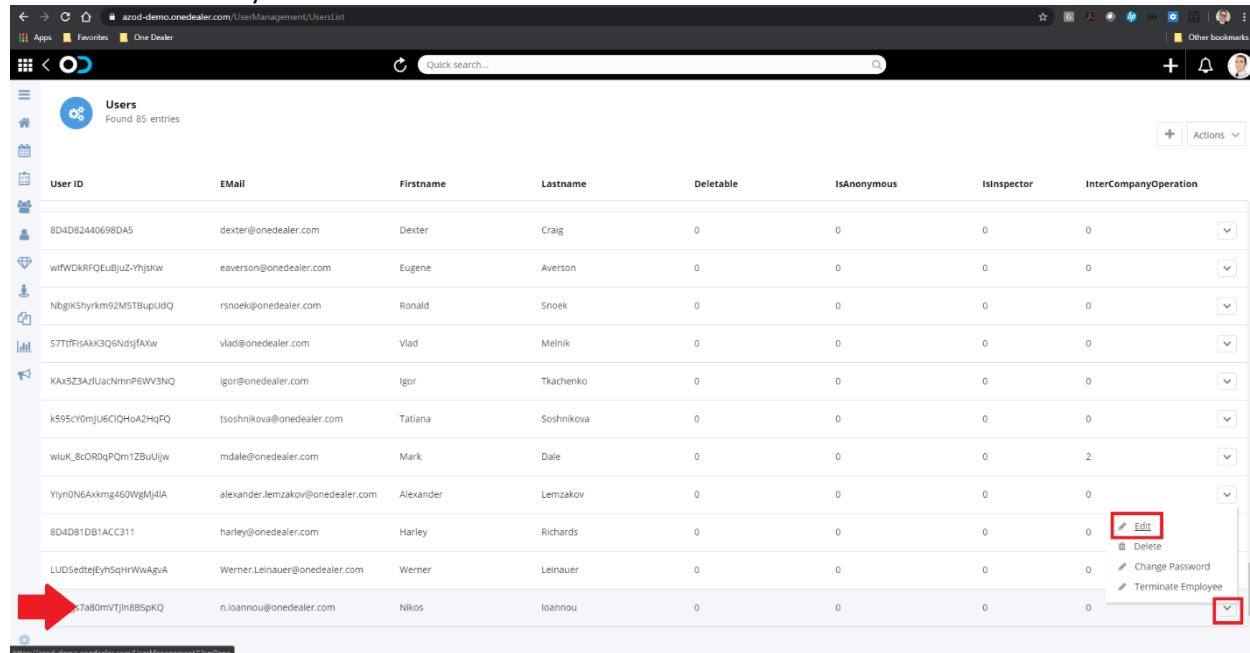
The screenshot shows a list of users in a table format. The columns include User ID, EMail, Firstname, Lastname, Deletable, IsAnonymous, IsInspector, and InterCompanyOperation. A red box highlights the '+' icon in the top right corner of the toolbar, indicating where to click to add a new user.

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



The screenshot shows the 'Create a new User' dialog box. It contains fields for EMail, Password, Confirm New Password, Firstname, Lastname, Deletable, IsAnonymous, IsInspector, and InterCompanyOperation. The EMail, Password, Confirm New Password, Firstname, and Lastname fields are highlighted with red boxes. The Save button is also highlighted with a red box.

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

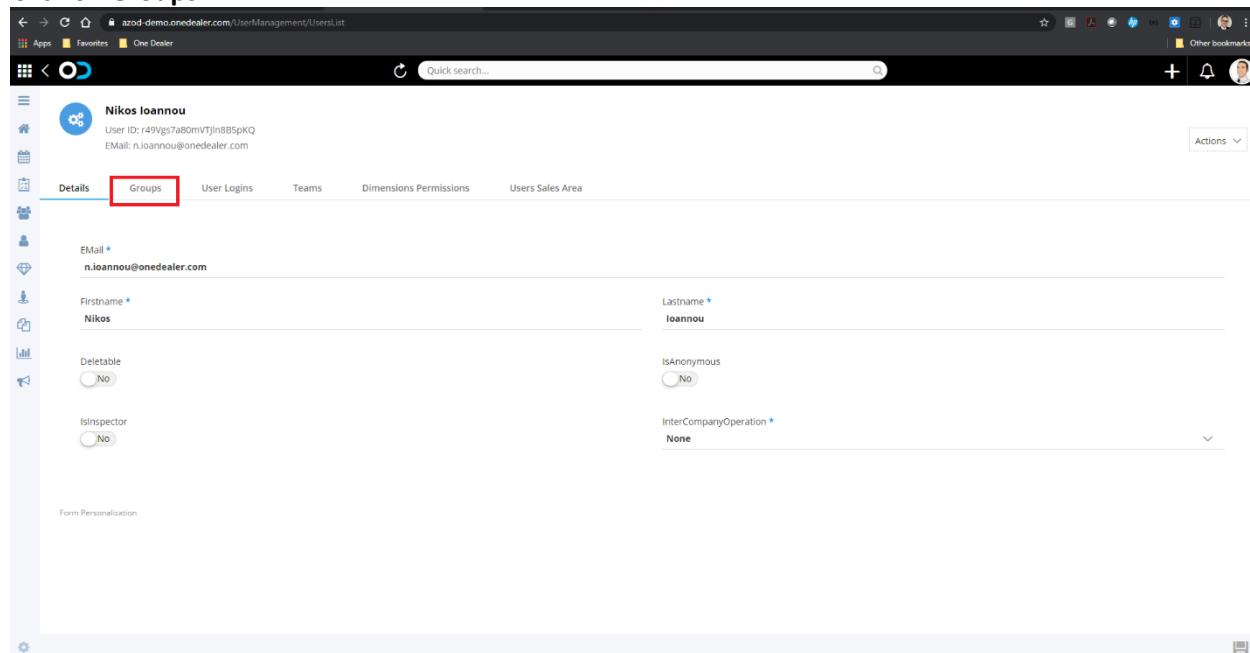


The screenshot shows a list of users with the following details:

User ID	EMail	Firstname	Lastname	Deletable	IsAnonymous	IsInspector	InterCompanyOperation
8D4D82440698DA5	dexter@onedealer.com	Dexter	Craig	0	0	0	0
wifWDkrRFQEuBjuz-Yhjskw	eaverson@onedealer.com	Eugene	Averson	0	0	0	0
NbgiKShyrm92MSTBupJdQ	rsnoek@onedealer.com	Ronald	Snoek	0	0	0	0
S7TffisAKK3QgNdsjfAxw	vlad@onedealer.com	Vlad	Melnik	0	0	0	0
KAX5Z3AjlJacNmrP6WV3NQ	igor@onedealer.com	Igor	Tkachenko	0	0	0	0
k595cY0mjU6ClQHoA2HqFQ	tsoshnikova@onedealer.com	Tatiana	Soshnikova	0	0	0	0
wiuK_8cOR0qPQm1ZBuUjw	mdale@onedealer.com	Mark	Dale	0	0	0	2
Yjlyn0N6Axkmg460WgMj4IA	alexander.lermakov@onedealer.com	Alexander	Lermakov	0	0	0	0
8D4D81DB1ACC311	harley@onedealer.com	Harley	Richards	0	0	0	0
LuID5edtejEyhSqrWwAgvA	Werner.Leinauer@onedealer.com	Werner	Leinauer	0	0	0	0
n.7a80mVTjln8B5pkQ	n.ioannou@onedealer.com	Nikos	Ioannou	0	0	0	0

3.2 Configure Group

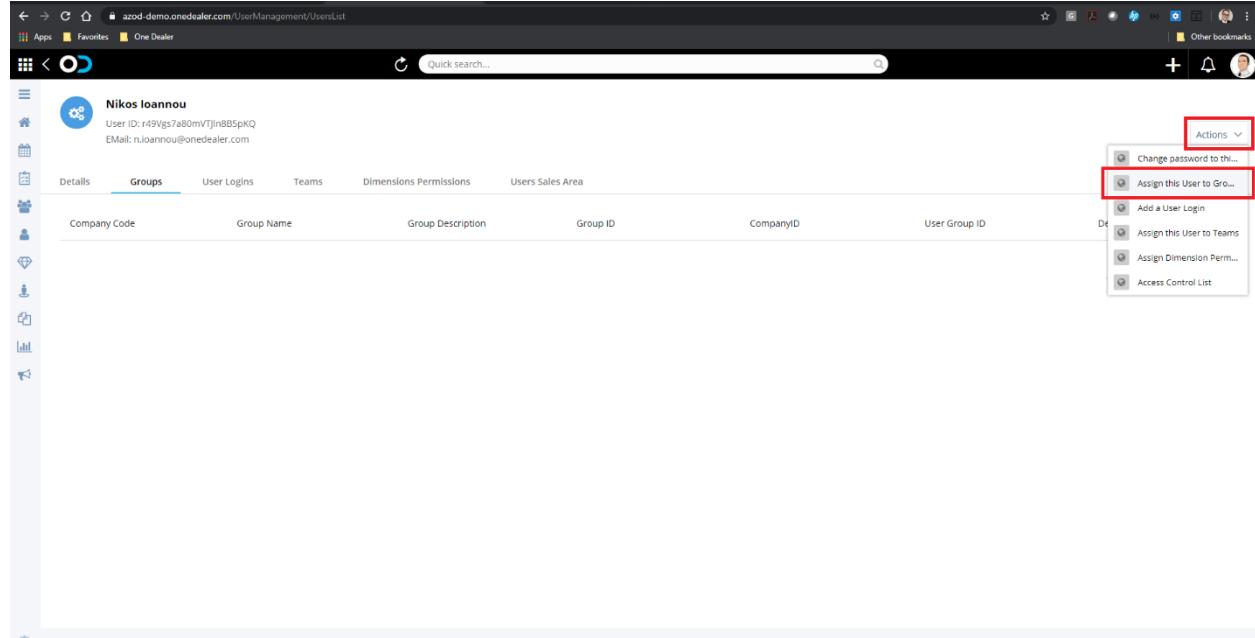
Click on **Groups TAB**.



The screenshot shows the user details for Nikos Ioannou:

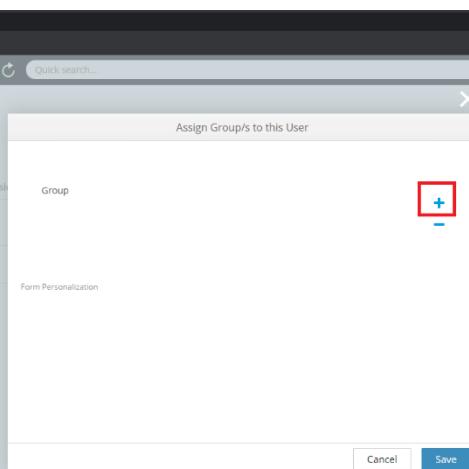
Details	Groups	User Logins	Teams	Dimensions Permissions	Users Sales Area
EMail *	n.ioannou@onedealer.com				
Firstname *	Nikos				
Deletable	<input type="radio"/> No				
IsInspector	<input type="radio"/> No				
InterCompanyOperation *	None				

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



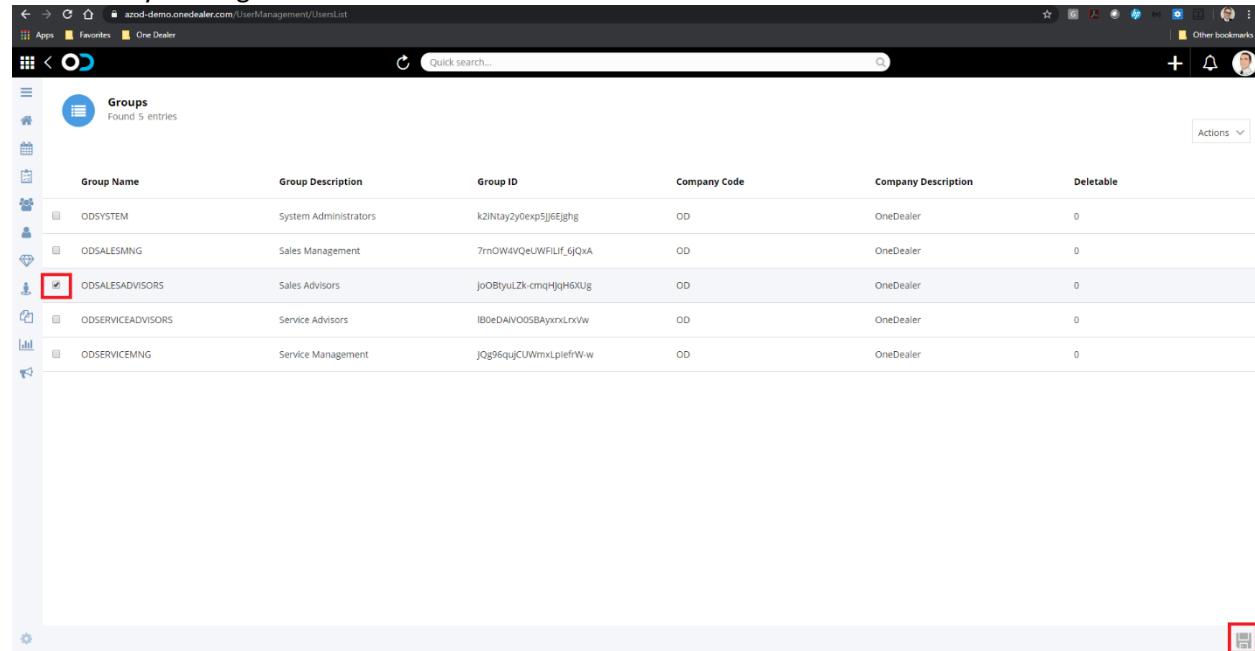
The screenshot shows the OneDealer User Management interface. On the left, there's a sidebar with various icons. The main area has tabs for 'Details', 'Groups' (which is currently selected), 'User Logins', 'Teams', 'Dimensions Permissions', and 'Users Sales Area'. On the right, there's a table with columns: 'Company Code', 'Group Name', 'Group Description', 'Group ID', 'CompanyID', and 'User Group ID'. Below the table, there's a 'Form Personalization' section. At the top right, there's a 'Actions' dropdown menu with several options: 'Change password to thi...', 'Assign this User to Gro...', 'Add a User Login', 'Assign this User to Teams', 'Assign Dimension Perm...', and 'Access Control List'. The 'Assign this User to Group...' option is highlighted with a red box.

Click on plus (+) sign icon.



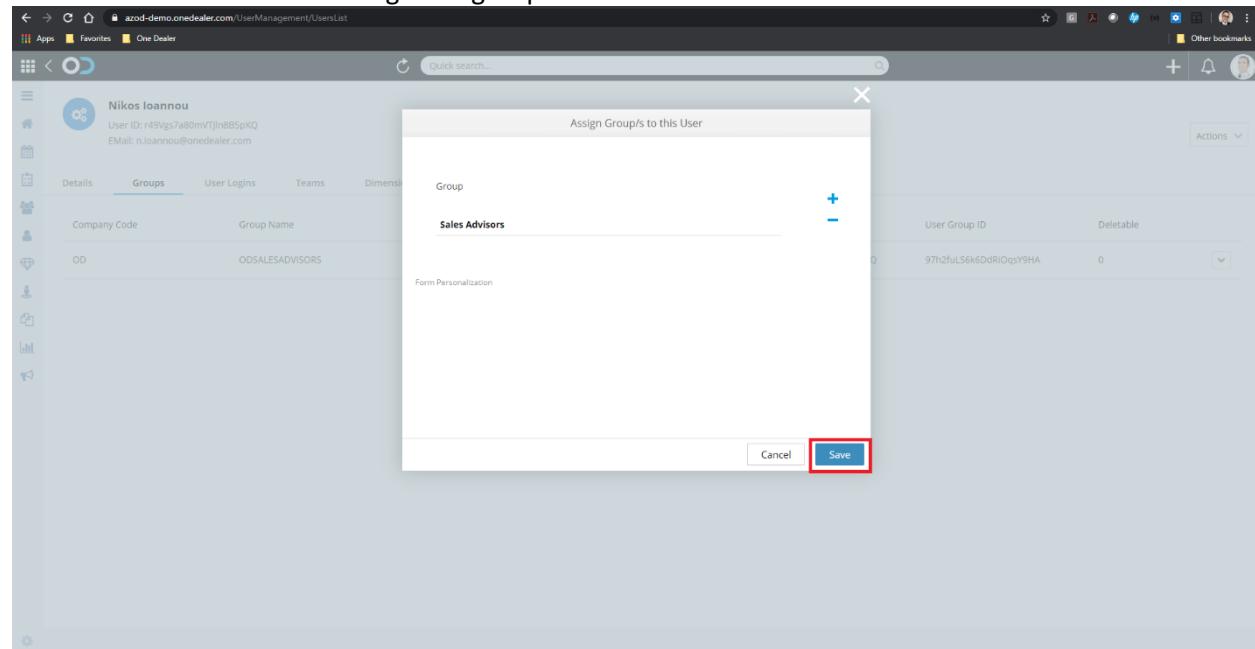
The screenshot shows a modal dialog box titled 'Assign Group/s to this User'. Inside the dialog, there's a section labeled 'Group' with a plus (+) sign icon. Below it, there's a table with columns: 'User Group ID' and 'Deletable'. A single row is shown with the ID '97h2fL56k6dRlOqsjY9HA' and a '0' in the 'Deletable' column. At the bottom of the dialog, there are 'Cancel' and 'Save' buttons. The background of the main interface is visible, showing the same user profile and 'Groups' tab selection as the previous screenshot.

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**.



Group Name	Group Description	Group ID	Company Code	Company Description	Deletable
ODSYSTEM	System Administrators	k2Htay2y0exp5j0Ejhg	OD	OneDealer	0
ODSALESMNG	Sales Management	7rnOW4VqeUWFILf_6jQxA	OD	OneDealer	0
<input checked="" type="checkbox"/> ODSALESADVISORS	Sales Advisors	joOBtyuL2k-cmqHqJH6XUg	OD	OneDealer	0
ODSERVICEADVISORS	Service Advisors	lB0eDAIV00SBAYxxLnxVw	OD	OneDealer	0
ODSERVICEMNG	Service Management	JQ896qujCUWmxLplefW-w	OD	OneDealer	0

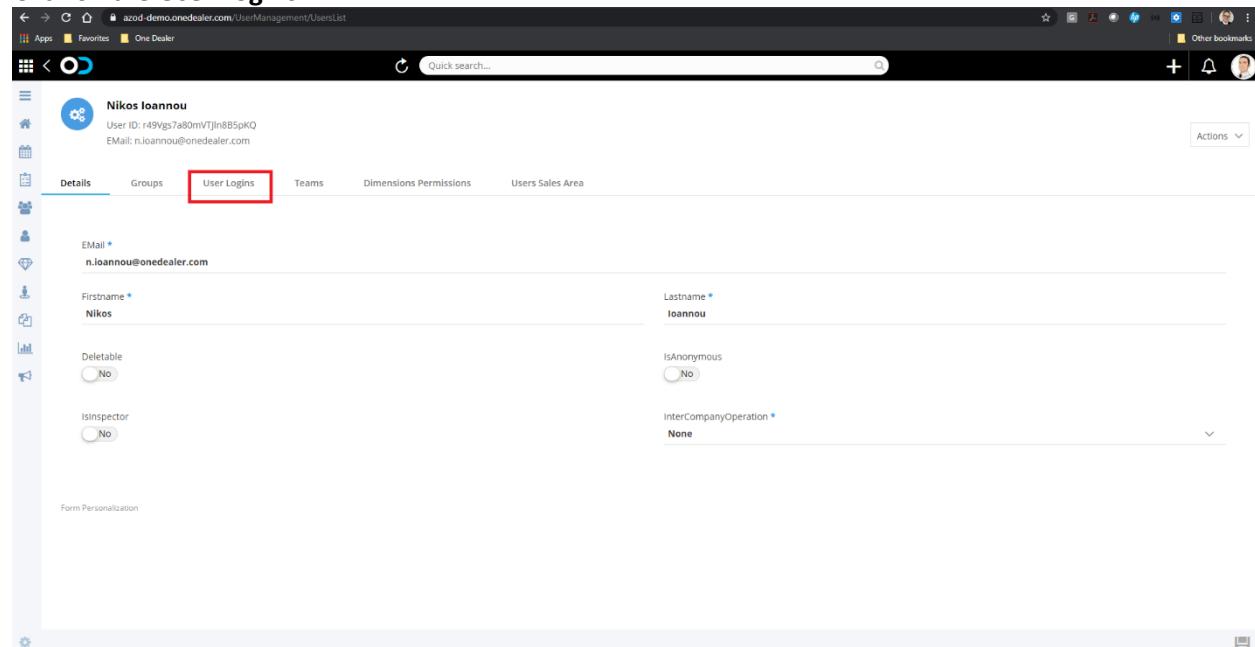
Click on the **Save** button to assign this group to the User.



User Group ID	Deletable
97h2fuLS6k6DRIoqsy9HA	0

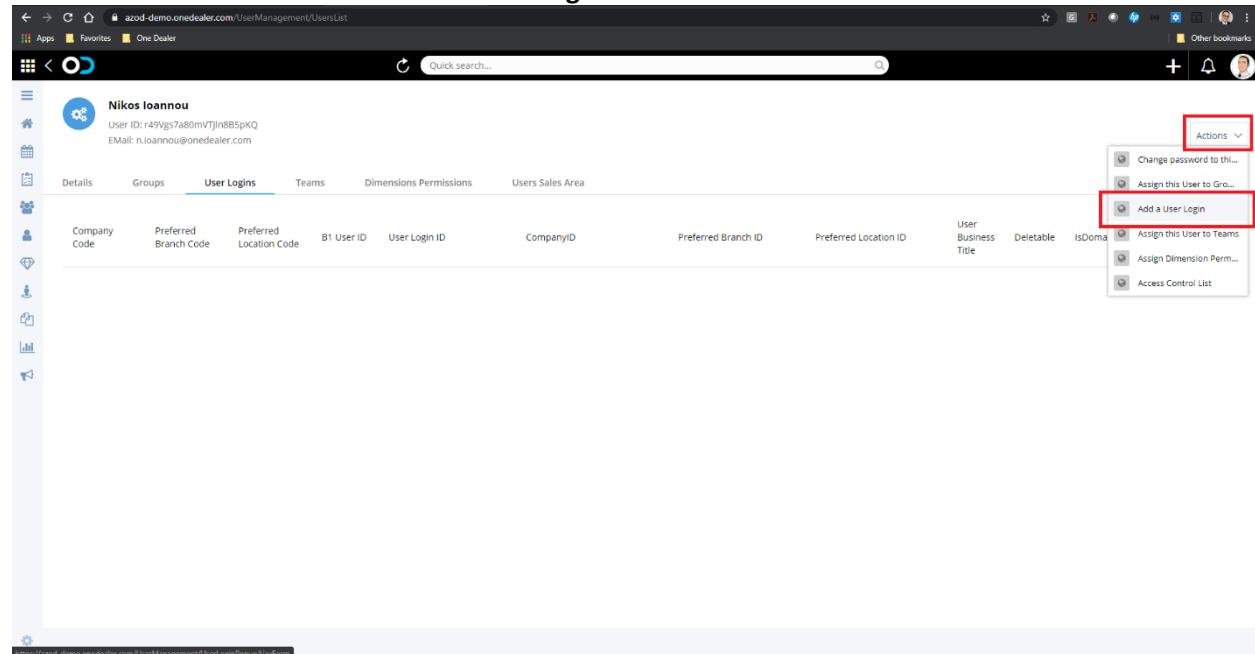
3.3 Configure User Logins

Click on the User Logins TAB.



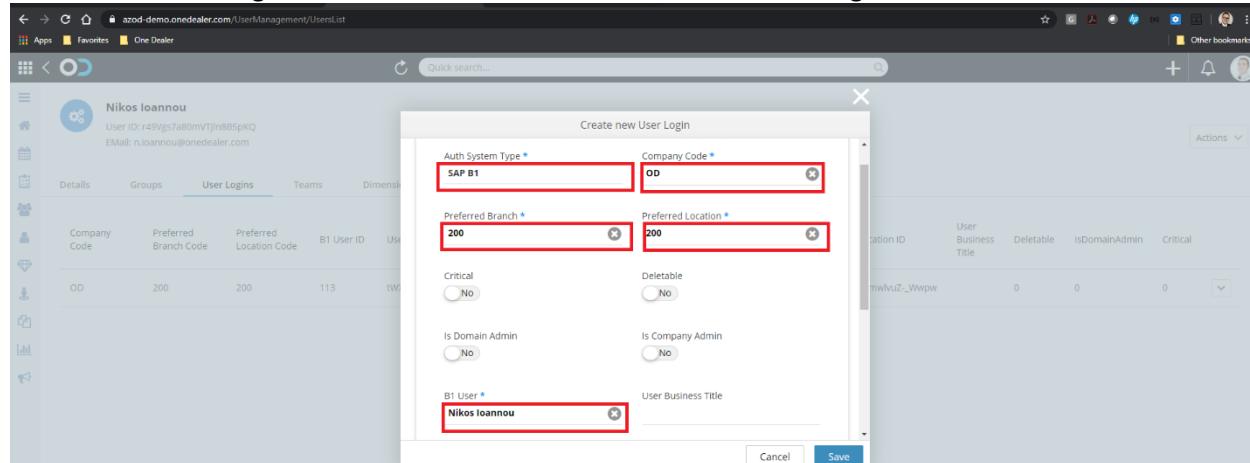
The screenshot shows the OneDealer User Management interface for a user named Nikos Ioannou. The 'User Logins' tab is highlighted with a red box. The page displays various user details and settings, including EMail, Firstname, Lastname, Deletable status, IsAnonymous status, and InterCompanyOperation. A sidebar on the left provides navigation links for Details, Groups, Teams, Dimensions Permissions, and Users Sales Area. The top right corner features a 'Actions' dropdown menu.

Click on Actions and then select Add a User Login.



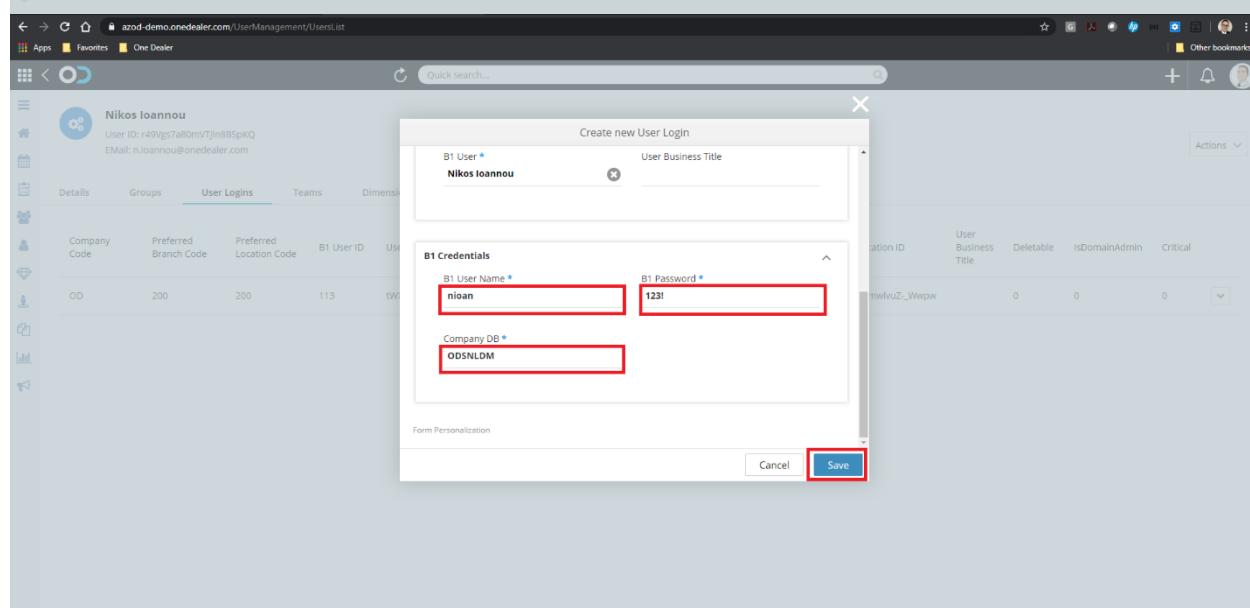
The screenshot shows the OneDealer User Management interface for the same user, Nikos Ioannou. The 'Actions' dropdown menu is open, and the 'Add a User Login' option is highlighted with a red box. The main interface shows the 'User Logins' tab selected, displaying columns for Company Code, Preferred Branch Code, Preferred Location Code, B1 User ID, User Login ID, CompanyID, Preferred Branch ID, Preferred Location ID, User Business Title, Deletable, and IsDoma. A URL at the bottom of the screen indicates the form being used: <https://azod-demo.onedealer.com/UserManagement/UserLoginPopUpAjaxForm>.

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



The screenshot shows the 'Create new User Login' dialog. The fields filled are:

- Auth System Type: SAP B1
- Company Code: OD
- Preferred Branch: 200
- Preferred Location: 200
- Critical: No
- Deletable: No
- Is Domain Admin: No
- Is Company Admin: No
- B1 User: Nikos Ioannou

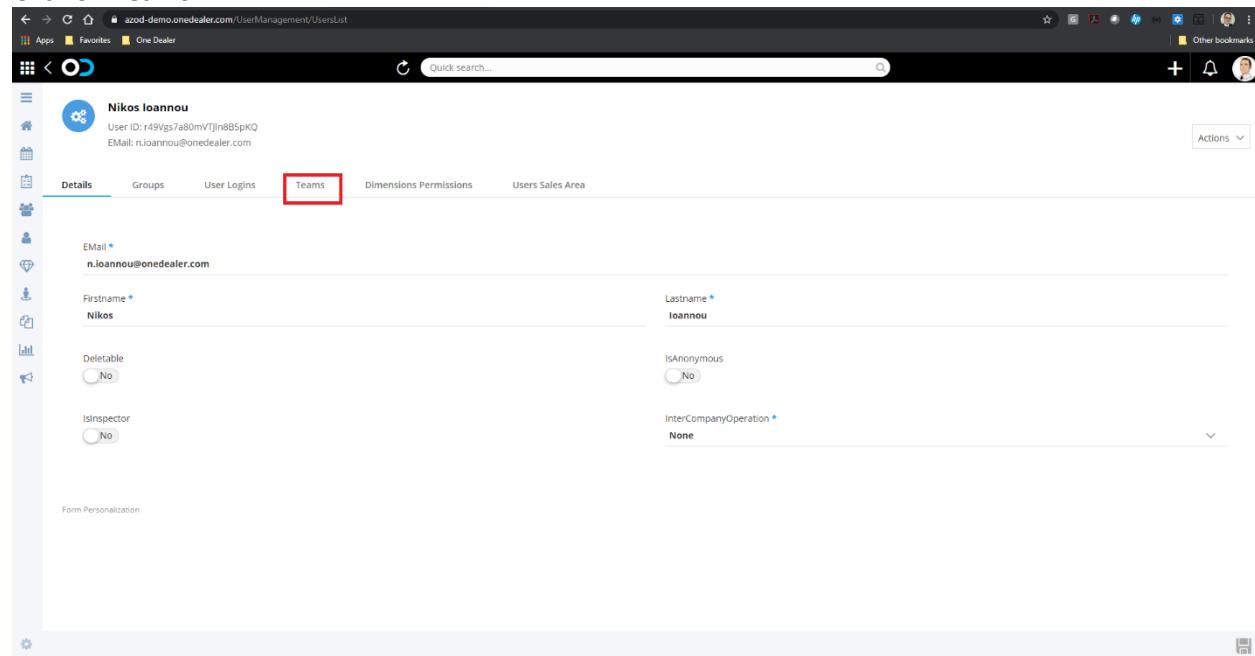


The screenshot shows the 'Create new User Login' dialog. The fields filled are:

- B1 User: Nikos Ioannou
- User Business Title: (empty)
- B1 Credentials:
 - B1 User Name: nioan
 - B1 Password: 123!
 - Company DB: ODSNLDM

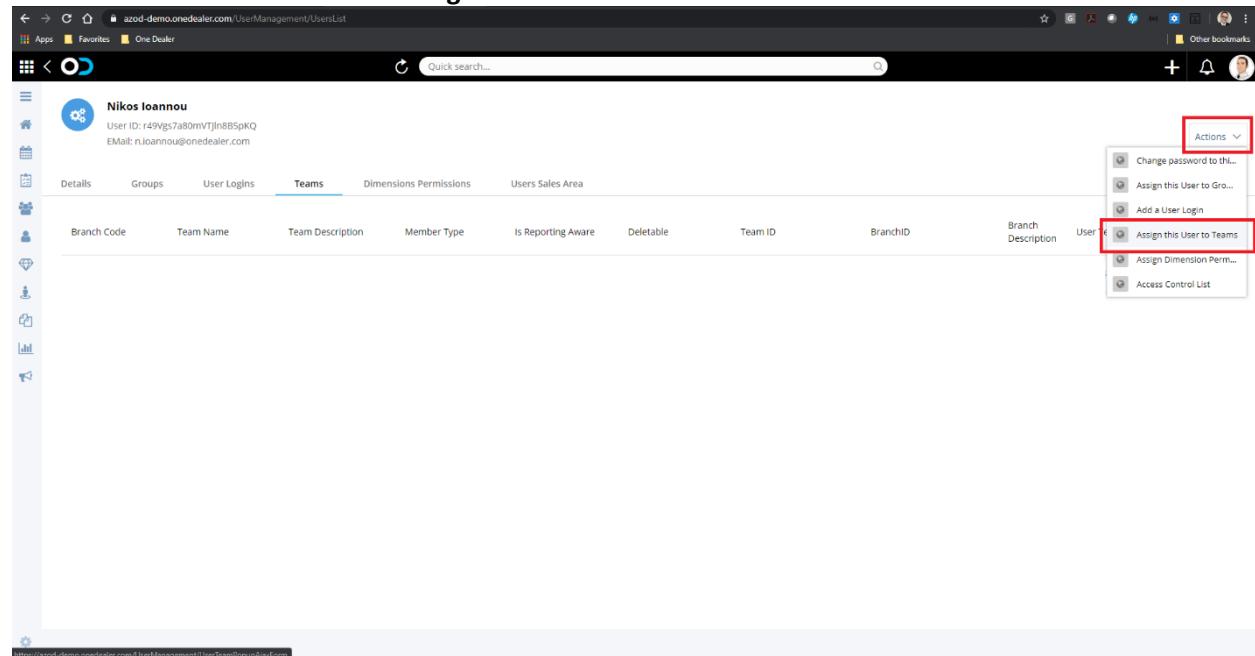
3.4 Configure Teams

Click on Teams TAB.



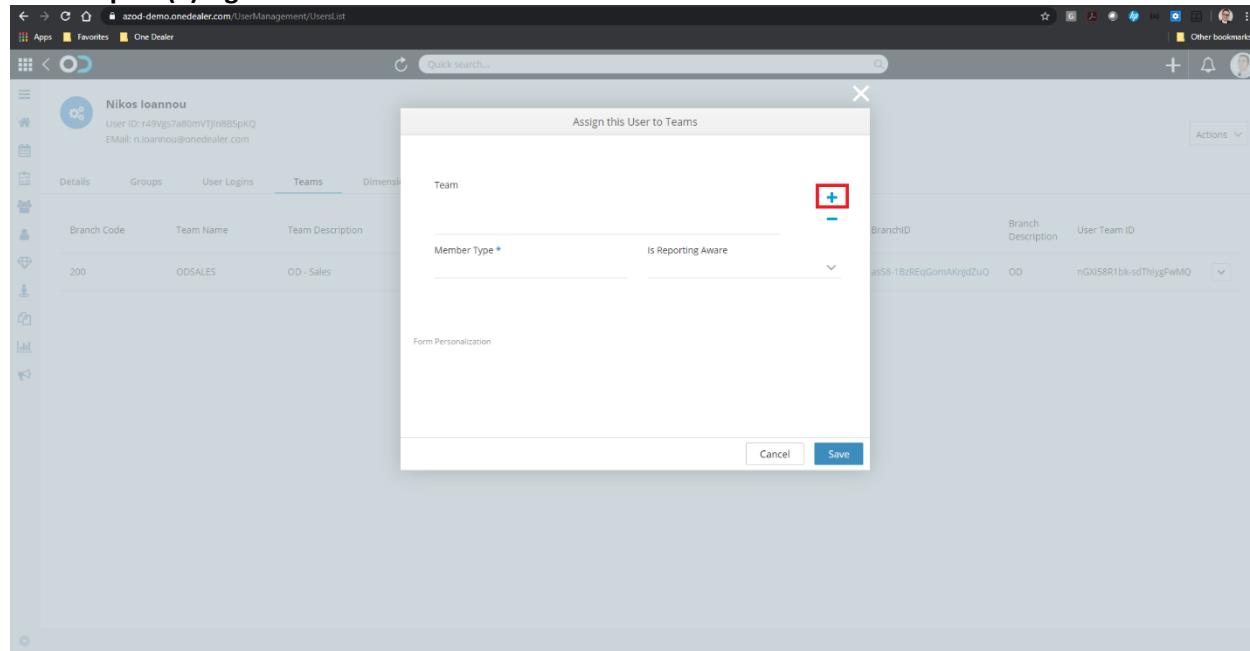
The screenshot shows the OneDealer User Management interface. A user profile for "Nikos Ioannou" is displayed. The "Details" tab is selected. The "Teams" tab is highlighted with a red box. Other tabs include "Groups", "User Logins", "Dimensions Permissions", and "Users Sales Area". The user's email is listed as "n.ioannou@onedealer.com". The "Teams" section contains fields for "Firstname" (Nikos), "Lastname" (Ioannou), "Deletable" (No), "IsAnonymous" (No), and "IsInspector" (No). The "InterCompanyOperation" field is set to "None".

Click on Actions and then select Assign this user to Teams



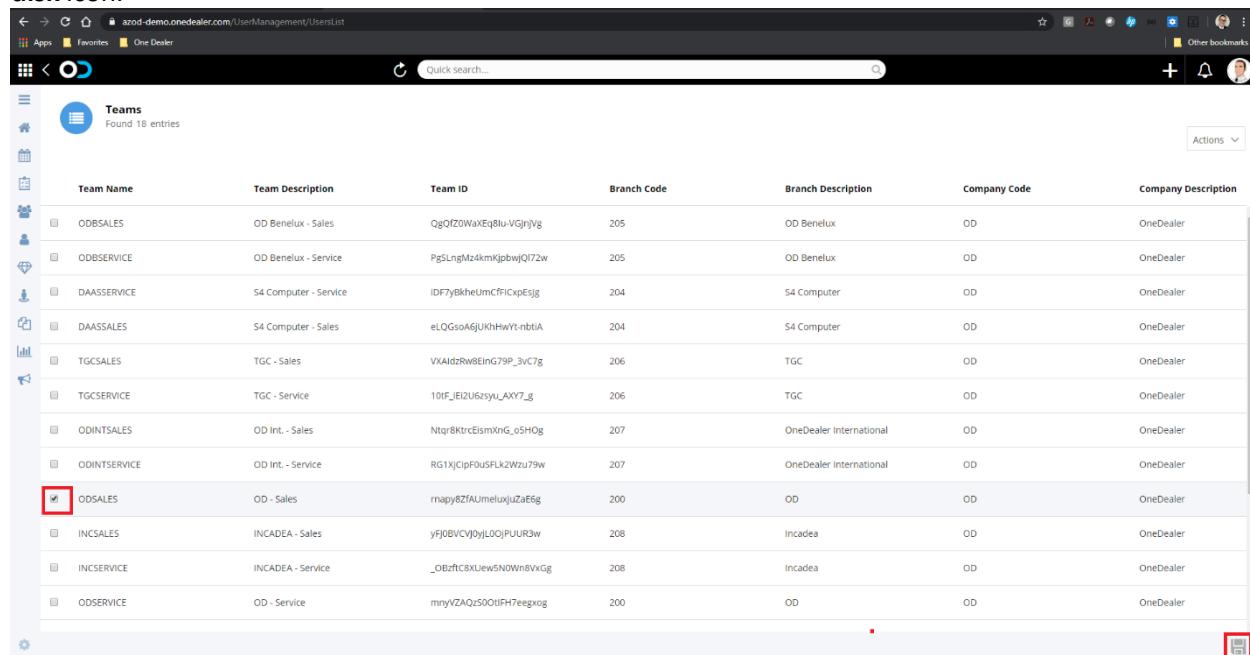
The screenshot shows the OneDealer User Management interface. A user profile for "Nikos Ioannou" is displayed. The "Teams" tab is selected. The "Actions" dropdown menu is open, showing options: "Change password to thi...", "Assign this User to Gro...", "Add a User Login", "Assign this User to Teams" (which is highlighted with a red box), "Assign Dimension Perm...", and "Access Control List".

Click on plus (+) sign icon.



The screenshot shows a user profile for 'Nikos Ioannou' with various tabs like Details, Groups, User Logins, Teams, and Dimensions. The 'Teams' tab is selected. A modal window titled 'Assign this User to Teams' is open, showing a table with columns: Team, Member Type, Is Reporting Aware, BranchID, Branch Description, and User Team ID. A red box highlights the '+' sign icon in the top right corner of this modal.

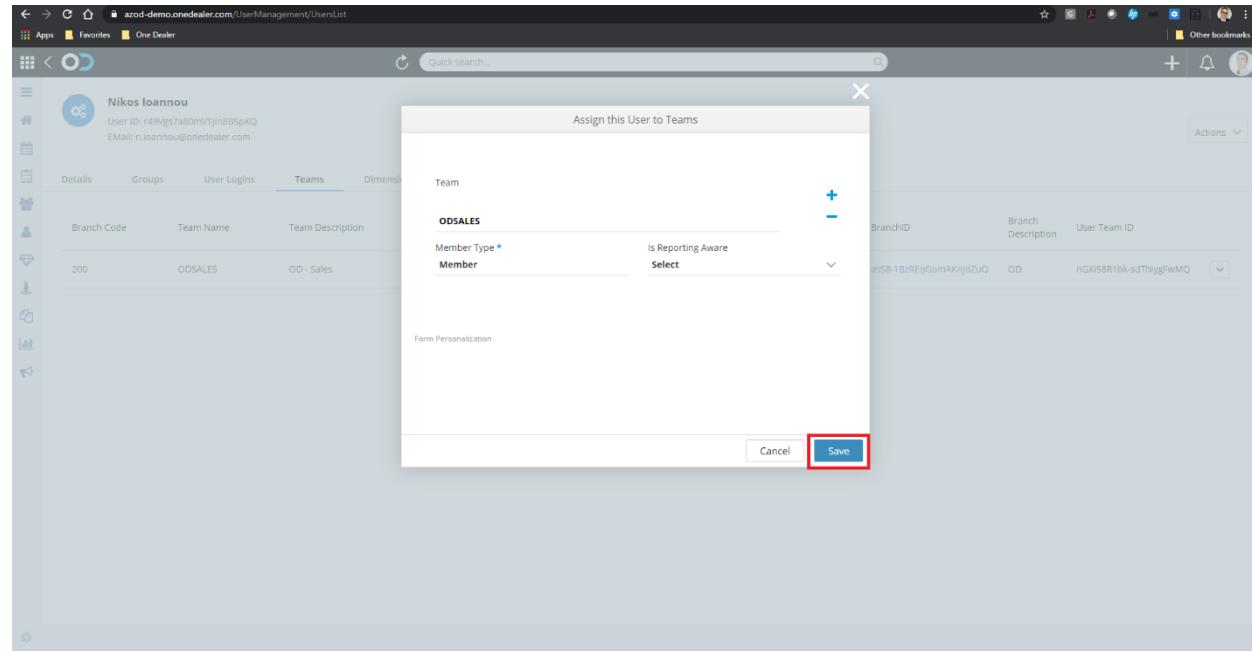
Select the appropriate Team by clicking on the **check box** and then store the Teams by clicking on the **disk icon**.



The screenshot shows a list of teams with columns: Team Name, Team Description, Team ID, Branch Code, Branch Description, Company Code, and Company Description. The 'ODSALES' team is selected, indicated by a checked checkbox. A red box highlights the checkmark icon next to 'ODSALES'. Another red box highlights the disk icon in the bottom right corner of the page.

Team Name	Team Description	Team ID	Branch Code	Branch Description	Company Code	Company Description
ODSALES	OD Benelux - Sales	QgOfZ0WaxEgBlu-VGjnjVg	205	OD Benelux	OD	OneDealer
ODSERVICE	OD Benelux - Service	PgSLngMz4kmKjbwjQl72w	205	OD Benelux	OD	OneDealer
DAASSERVICE	S4 Computer - Service	IDF7yBkheUmCfICxpE5jg	204	S4 Computer	OD	OneDealer
DAASALES	S4 Computer - Sales	eLQGsoA6jUKhHvWt-nbtIA	204	S4 Computer	OD	OneDealer
TGCSALES	TGC - Sales	VXAIdzRw8EinG79P_3vC7g	206	TGC	OD	OneDealer
TGCSERVICE	TGC - Service	10f_EI2U6zsyu_AXY7_g	206	TGC	OD	OneDealer
ODINTSALES	OD Int. - Sales	Ntqr8KtrcEsmXnG_oSH0g	207	OneDealer International	OD	OneDealer
ODINTSERVICE	OD Int. - Service	RG1XjClpFDuSFLkZWzu79w	207	OneDealer International	OD	OneDealer
<input checked="" type="checkbox"/> ODSALES	OD - Sales	mnpv82fAUmelujuzaE6g	200	OD	OD	OneDealer
INC SALES	INCADeA - Sales	yfj0BVCVjdylOojPUUR3w	208	Incadea	OD	OneDealer
INC SERVICE	INCADeA - Service	_OBzftC8XUew5N0Wn8VxGg	208	Incadea	OD	OneDealer
ODSERVICE	OD - Service	mnyvZAQz500tFH7eegxog	200	OD	OD	OneDealer

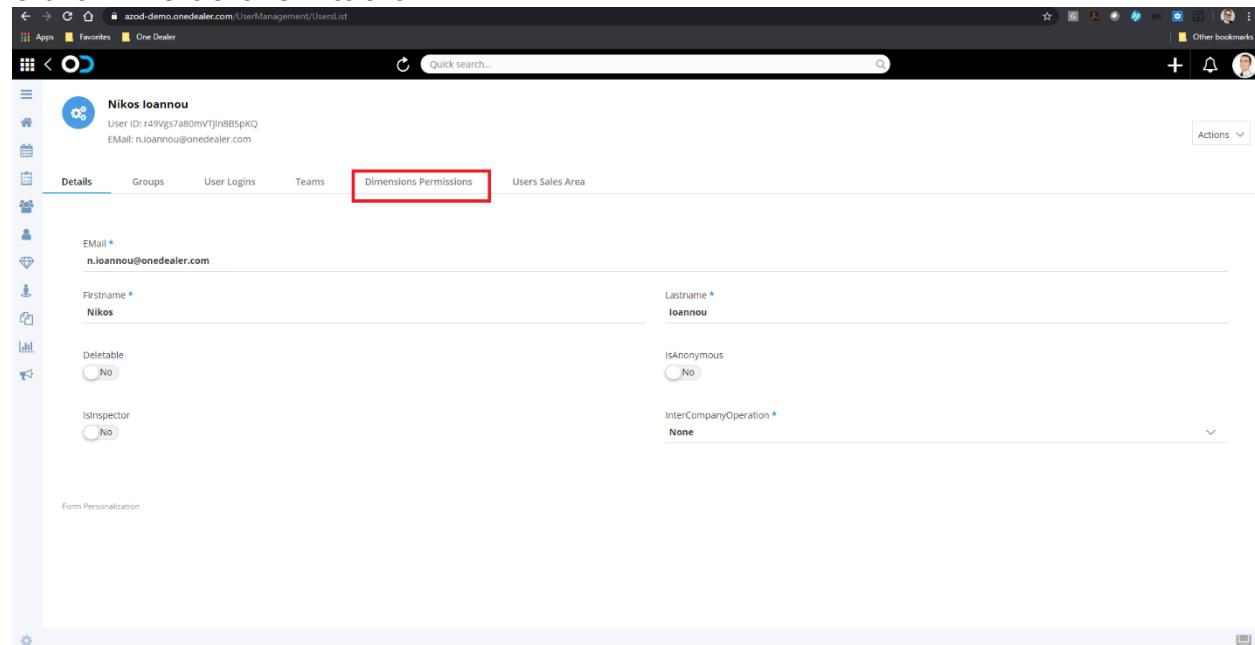
Click on the **Save** button to store the selected Teams.



The screenshot shows the OneDealer User Management interface. On the left, there's a sidebar with icons for Details, Groups, User Logins, Teams (which is selected), and Dimensions. The main area displays user information for 'Nikos Ioannou' (User ID: n49jgs7a80mV7Jnl8SpKQ, Email: n.ioannou@onedealer.com) and a table with columns: Branch Code, Team Name, and Team Description. A modal window titled 'Assign this User to Teams' is open, showing the 'ODSALES' team selected under 'Member Type'. The 'Save' button at the bottom right of the modal is highlighted with a red box.

3.5 Configure Dimensions Permissions

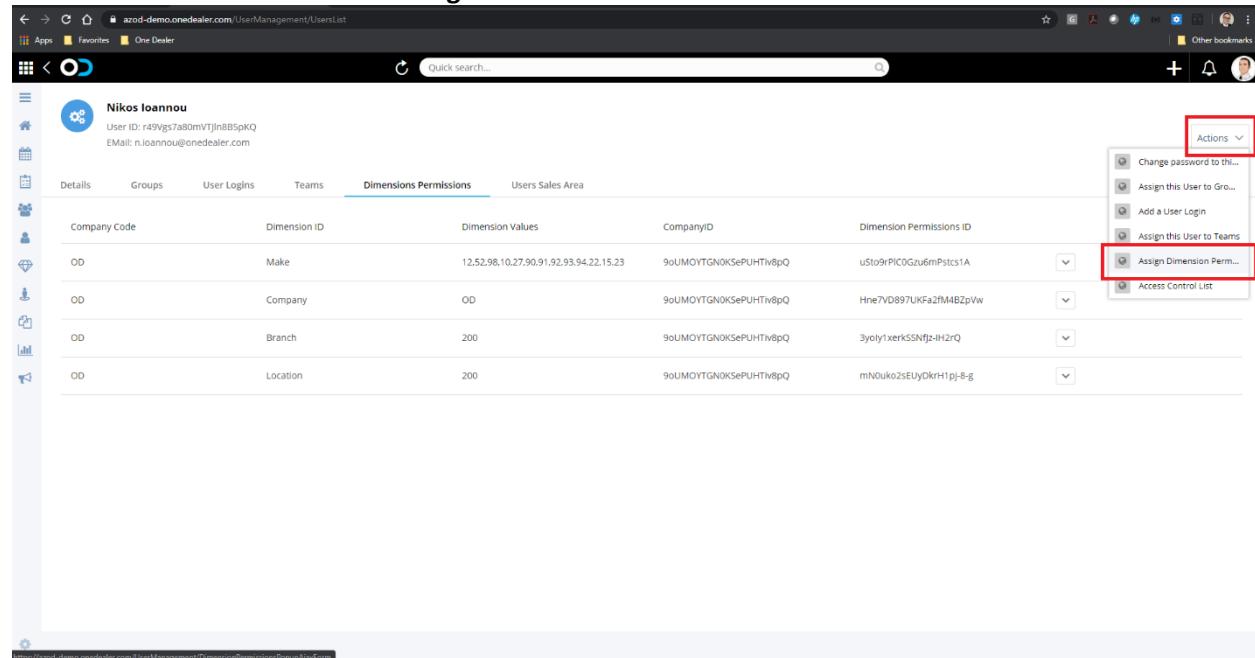
Click on Dimensions Permissions TAB.



The screenshot shows the OneDealer User Management interface for a user named Nikos Ioannou. The 'Dimensions Permissions' tab is highlighted with a red box. The page displays various user details and permission settings. The 'Actions' dropdown menu at the top right is also visible.

Field	Value
Email *	n.ioannou@onedealer.com
Firstname *	Nikos
Deletable	No
IsInspector	No
Lastname *	Ioannou
IsAnonymous	No
InterCompanyOperation *	None

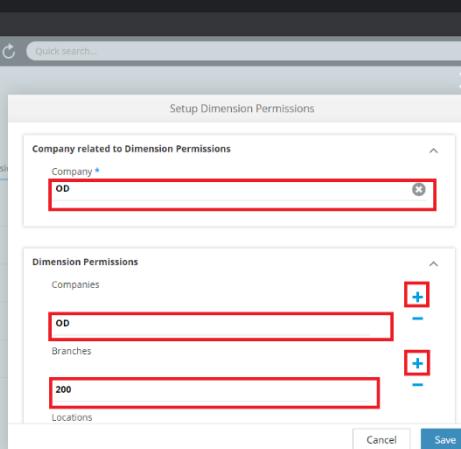
Click on Actions and then select Assign Dimension Permissions.



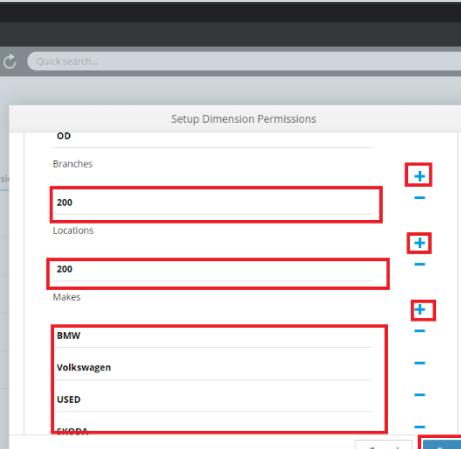
The screenshot shows the OneDealer User Management interface for the same user, Nikos Ioannou. The 'Dimensions Permissions' tab is selected. A context menu is open under the 'Actions' dropdown, with the 'Assign Dimension Perm...' option highlighted with a red box. The menu also includes other options like 'Change password to this...', 'Assign this User to Group...', 'Add a User Login', 'Assign this User to Teams', and 'Access Control List'.

Company Code	Dimension ID	Dimension Values	CompanyId	Dimension Permissions ID
OD	Make	12,52,98,10,27,90,91,92,93,94,22,15,23	90UMOYTGN0KSePUHTlv8pQ	uSto9rPiC0Gzu6mP3tcs1A
OD	Company	OD	90UMOYTGN0KSePUHTlv8pQ	Hne7vD897UKFa2fM4BZpVw
OD	Branch	200	90UMOYTGN0KSePUHTlv8pQ	3yoly1xerks5Nfj-IH2rQ
OD	Location	200	90UMOYTGN0KSePUHTlv8pQ	mN0uko2sEuYokrh1p-B-g

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



The screenshot shows the 'Setup Dimension Permissions' dialog for a user named Nikos Ioannou. The 'Company related to Dimension Permissions' section is open, showing a dropdown menu with 'OD' selected. The 'Dimension Permissions' section is also open, showing three categories: Companies, Branches, and Locations. Under Companies, there is a red box around the value 'OD'. Under Branches, there is a red box around the value '200'. Under Locations, there is a red box around the value '200'. Each category has a '+' sign icon to its right. At the bottom of the dialog are 'Cancel' and 'Save' buttons.



The screenshot shows the 'Setup Dimension Permissions' dialog for the same user. The 'Branches' section is open, showing a red box around the value '200'. The 'Locations' section is open, showing a red box around the value '200'. The 'Makes' section is open, showing a list of values: 'BMW', 'Volkswagen', 'USED', and 'SKODA'. Each value has a '+' sign icon to its right. At the bottom of the dialog are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted with a red box.