



Manual User Rights Compano Online Software

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1 Introduction

This manual describes how to manage User Rights in Compano Online Software, version L03. User rights determine which activities a user may perform within the Compano application.

User rights in COS are set on the User Group level, with users added to groups inheriting the group rights. To further ease management of users and groups, *Active Directory Provisioning*¹ has been implemented. This way users and groups can be synced with the clients Active Directory.

The main user of the application (Admin, Beheerder) always has all rights

1.1 Concepts

COS Compano Online Software.

User

A user has access to the Compano application with a user account, which includes a login name, password, license type and user interface access rights.

User group

A user group contains one or more users. Access rights to the COS user interface are handled at the group level; any users in the group will inherit the access rights of the group.

User rights

A 'user' rights reflects the type of access a user has to view, edit (including import) or export information in COS.

Single Sign-on

Single sign-on (SSO) is an authentication scheme that allows a user to log in with a single ID and password to any of several related, yet independent, software systems. True single sign-on allows the user to log in once and access services, including COS, without re-entering authentication credentials.

Azure Active Directory (Azure AD)

Azure Active Directory is Microsoft's enterprise cloud-based identity and access management (IAM) solution. Azure AD is the backbone of the Office 365 system, and it can sync with on-premise Active Directory and provide authentication to other cloud-based systems via OAuth.

Provisioning

Provisioning is the processes of creating an identity in a target system based on certain conditions. *De-provisioning* is the process of removing the identity from the target system when conditions are no longer met. *Synchronization* is the process of keeping the provisioned object, up to date, so that the source object and target object are similar. Azure can provide all three mentioned services.

¹ For further details, see the <u>Technical Documentation Azure Authentication And Provisioning</u>.

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2 Manage user rights

In COS, user rights are *always* managed through Group rights and are *never* set or changed for individual users. *Detailed View, Edit* and *Export* rights can be set for each user group. These rights can be set for:

- Overviews: Overview of data of a single entity
- Functions: Functions which will effect data in Compano
- Field groups: Certain fields groups, e.g. that only certain users are allowed to see that you still get a 2% bonus; or that they are not allowed to see the purchase price.

Users and user rights in Compano are managed through the following procedure:

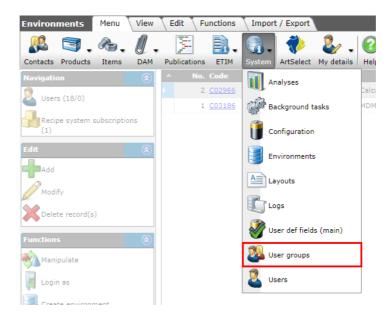
- 1. Add user group(s), either manually or through AD provisioning
- 2. Add user(s), either manually or through AD provisioning
- 3. Assign user(s) to group(s), either manually or through AD provisioning
- 4. Set group rights, per user group

2.1 Add user groups

Important: To set User Rights, even for a single user, a User Group needs to be created first.

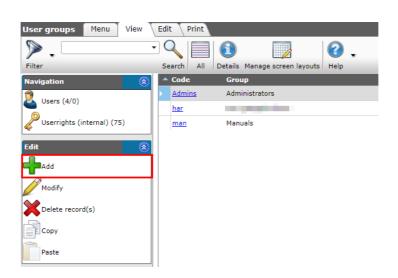
To add a User Group:

1. Through the Menu, go to System > User Groups.



2. Under Edit, click on +Add.

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3. In the pop-up window:

📄 Add - New group			•
Group			
Group Name	Test group		
-			
	Add next record	Save record	Cancel

- a. Group name: Type a name for the group.
- 4. Click on *Save record* to save the new group.

2.1.1 Add groups through AD provisioning

User groups (and Users) can also be added through synchronisation with a clients *Active Directory* (Microsoft Azure), through *Authorisation* and *Provisioning*. Please contact your Compano consultant, should you wish to set-up synchronisation with your Active Directory.

2.2 Add users

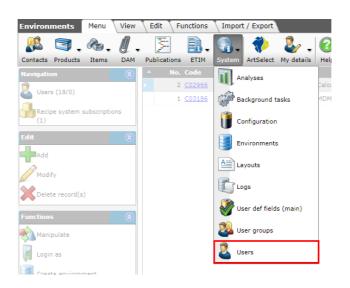
Next, individual user accounts can be added to the system²:

To add a user:

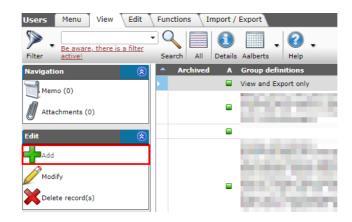
1. Through the Menu, go to System > Users.

² Individual user accounts can always be added to COS to allow access to the application, however *only* through User Groups can detailed user rights be set.

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2. Under Edit, click on +Add.



3. In the pop-up window:

🚍 Add - New user		
User Groups Memo		
Contact (local)		- X ^
Name		
Username		
Email		
Language		- ×
Security		
Change password at first login	○ Yes ● No	
Allowed IP Addresses		
Password invalid after	month(s)	
Password entry delay	(C)	
Password valid from		
Active user	● Yes ○ No	
License		
License type	Environment Y	
Demo	🔾 Yes 🖲 No	
Read only	🔾 Yes 🖲 No	
User interface	Web 🗸	
		•
	Add next record Save record	d Cancel

User tab

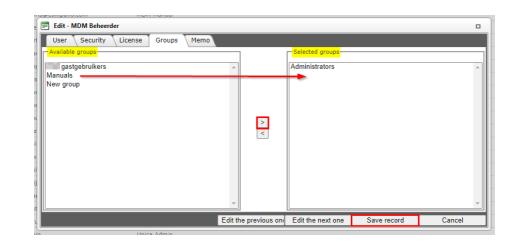
- a. Contact (optional): Select a pre-existing contact (from Relations) to promote them to User.
- b. Name: Enter the name of the user.
- c. Username: Enter the username of the user.
- d. Email: Enter the e-mail address of the user.
- e. Language: Select the language for the user interface; the COS-application UI is available in Dutch, English or German.
- f. Change password at first login: Set to *Yes*, to force the user to change his/her password on first login.
- g. Allowed IP Addresses: Access to the user interface can be restricted based on IPaddress. <u>Note</u>: Multiple IP-addresses can be entered, separated by a semi-colon.
- h. Password invalid after: This setting can be used to grant temporary access for a user. Enter the number of month(s) after which the current password will become invalid.
- i. Password entry delay: Set the duration (in minutes) for which to block login after [NUMBER] failed attempts.
- j. Password valid from: Set the date from which the password is valid; the user cannot login before this date.
- k. Active user: Set to *No* to de-active this user; this user will then no longer have access to the application.
- I. License type: Options are *Guest* and *Environment*.
- m. Demo: Set to *Yes* if the environment is meant as a demo only. Any changes to the data or settings will rolled back during the nightly server recycle action.
- n. Read only: Set to *Yes* if the user should have read-only access. Records can be viewed and exported, but not added or edited.
- o. User interface: Set the type of user interface for the user:
 - i. Web: User has access to the full COS web interface.
 - ii. *Mobile*: User has access to the COS mobile interface for smartphones and tablets.
 - iii. FTP: Not a real user. Used for (automated) FTP-tasks
 - iv. Feed: Not a real user. Used for (automated) JSON- and XML-feeds in combination with an API-key. User credentials for this type can no longer be used to login to the User Interface. Furthermore, the APIkey associated with the 'feed user' account will only be visible to the Admin user of the system.
 - v. *OData*: Not a real user. Used for (automated) OData-feeds in combination with an API-key. User credentials for this type can no longer be used to login to the User Interface. Furthermore, the API-key associated with the 'feed user' account will only be visible to the Admin user of the system.
 - vi. *ArtConnect*: Not a real user. Used for connecting to ArtConnect.
 - vii. *ArtSelect*: Not a real user. Used for connecting to ArtSelect.

Groups tab

Use the *Group tab* to assign users to one or more groups. <u>Note</u>: Remember that user rights are set group level (!)

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- a. Available groups: Select a group and use the > arrow to assign the user to this group.
- b. Selected groups: Lists the groups to which the user has been assigned.
- 4. Now, save the record; the user account has been created and added to one or more user groups.

2.2.1 Add users through AD provisioning

User groups can also be added through synchronisation with a clients *Active Directory*. This way users and groups can be managed through *Microsoft Azure*. Please contact your Compano consultant, should you wish to set-up synchronisation with your Active Directory.

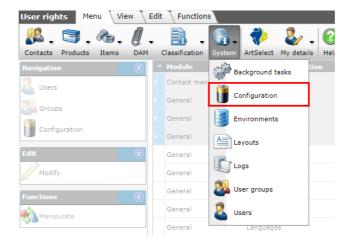
2.3 Group access

Once the user groups have been created, *access rights* for the different groups can be set. Group access is set *per Overview*, and allows users in that group access to that Overview.

<u>Note</u>: *Access* allows users to navigate to that Overview through the main menu, however to be able to actually see records of that Overview, detailed access rights need to be set; see paragraph <u>2.4 Detailed group rights</u>.

Group access can be set manually per Overview:

1. Through the Menu, go to System > Configuration:





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2. In the list, click on User Rights.

Configuration Menu View				
▶.	- 🔍 📃 🚯	2 .		
Filter	Search All Details	Manage screen layouts Help		
	Image overview	Description	Used by	
		Memos		
	≝ ≝	Optional items	Optional items selection list	
	Ű	Packaging forms	Central purchase condition, Item, Purchasing Condition	
	**	Periodic tasks		
		Product accessories	Product	
	. 🌡	Product groups	Attachment, Product, Product group, Publication	
		Product list	Optional product selection list	
	۲	Standard Systems	Recipe, Calculation, Specification Part, Standard, Quotation, Product standard, Workplace	
	1	Transfer rules	Purchasing Condition	
	S	Units	Accessories item, Product accessories, Bonus specification, Bonus specification, Item, Product, Calculation line, Estimate summary line, User def field, Surcharge, Work Type, Standard, Recipe Control, Quotation Line, Order / WorkSheetline, Recipe, Specification Part, Part, Order, Work Order, Price Information, Product part, Sales Condition, Travel expenses, Unit	
	e de la companya de l	User rights	Group, User	

3. On the next screen, you will see a list of *Overviews*. To set access for a Group, select an Overview and, under Edit, click on *Modify*.

User rights Menu View	Edit							
▶.	- 🔍 📃 🚺	. 0.	5					
Filter	Search All Details	Screen Layout Help						
Navigation	A Module	OverviewDescription	Description	MenuType	Туре	AllowedGroupNames	Users	HasRecords
🕺 Users	Contact management	Delivery addresses	Have access to the overview delivery addresses	#ConfigurationMenu	Overview	Administrators	4	
-	Contact management	Customer groups	Have access to the overview customer groups	#ConfigurationMenu	Overview	Administrators	4	
Sroups Groups	Contact management	Contacts	Have access to the overview contacts	#MainMenu	Overview	Administrators	4	
Configuration	Contact management	Files	Have access to the overview files	#ConfigurationMenu	Overview	Administrators	4	
	General	Logs	Have access to the overview logs	#MainMenu	Overview	Administrators, Keyusers Calculatie, Standaard Calculatie gebruikers	20	
Edit 🤅	General	Analyses	Have access to the overview analyses	#MainMenu	Overview	Administrators	4	
Modify	General	Attachments	Have access to the overview attachments	#MainMenu	Overview	Administrators	4	1
	General	Attachment type	Have access to the overview attachment type	#ConfigurationMenu	Overview	Administrators, Manuals	5	1

4. In the Edit window:

Edit - Have access to the overview contacts			•
Groups Userright (internal)			Ĩ
Available groups		cted groups	
ICM gastgebruikers		nistrators	▲
Manuals New group	> lest	group	hi
	<		i.
			ii
			1
<u> </u>			i
Edit the previous one	Edit the next one	Save record	Cancel i

- Available groups: Select any available group and use the > arrow to assign this group to the overview Note: Double-clicking the group will also move it to the Selected groups.
- b. Selected groups: Selected groups have access to overview.
- c. Edit previous/next: Use the *Edit previous* and *Edit next buttons* to quickly set group access for the next Overview in the list. <u>Note</u>: Group settings for the current overview will be saved when switching to the next (or previous) record.

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d. Save record (optional): Use the *Save record* button to save the access settings for the current overview.

2.3.1 Filtering overviews

To facilitate setting group access, overviews can be filtered on several parameters. Either use the *Comprehensive Filter* or the *Quick Filter* to select types of Overviews.

Comprehensive Filter

The comprehensive filter offers multiple options for filtering Overviews. For instance, you could filter on only Overviews that actually have records, or Overviews that belong to a certain menu type:

overview customer #Configura	tionMenu Overvi	ew				×
Userright (internal)						
Description	start 🗸					
Number of users	= value V]			
HasRecords	= value 🗸 🗸	⊖ Yes ⊖ No				
Allowed	= value 🗸 🗸	🔾 Yes 🔾 No 🖲 All				
IsViewAllAllowed	= value 🗸	🔾 Yes 🔿 No 💿 All				
IsExportAllowed	= value 🗸 🗸	○ Yes ○ No ● All				
Allowed to change Allowed to change own	= value V	○ Yes ○ No ● All ○ Yes ○ No ● All				
Allowed to change from others	= value V					
IsBatchEditAllowed	= value V					
General						
Module	start 🗸					
Description	start 🗸					
OverviewDescription	start 🗸					
Туре	= value 🗸	Function Overview Setting		Web service User-defined fields		
		Field group		Archive		
MenuType	= value 🗸 🗸	#ConfigurationMen #MainMenu	u	None		
Groups	all 🗸					
		Apply	Empty	Empty and close	Save as	

Quick Filter

The quick filter offers a quick selection of Overviews that already have rights set. For example, rights that have been set for the *Product classification* overview:

Quick Filter	٢
Module	
	-
Contact management (4)	
General (15)	
Human resources (1)	
ltem manager (32)	
Product classification (7)	
Recipe management (3)	
User management (11)	

Also, there is an option to filter out all overviews for which *no rights* have been set:

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Quick Filter 🛞
Module
Description
-
OverviewDescription
Туре
Field group (4)
Function (10)
Overview (59)
MenuType
#ConfigurationMenu (27)
🗌 #MainMenu (32)
None (14)

2.4 Detailed group rights

Now that a group has been assigned to each of the Overviews, *detailed group rights for each Overview* can be set.

For each of the groups, the following rights can be set:

Access to overview (Allowed)	User has access to this overview (through the main menu)
View all records (IsViewAllAllowed)	User can view all records
View own records (IsViewOwnAllowed)	User can only view records which he has added himself (only
	available on certain overviews)
Export allowed (IsExportAllowed)	User can export records ³
Edit own records (Allowed to change own)	User can only edit records which he has added himself
Edit all records (Allowed to change from others)	User can also edit records which have been added by others
Batch edit allowed (IsBatchEditAllowed)	User can edit multiple records; this includes Manipulation, all
	Import functions, auto-fill tables and add User-specific fields (for
	that specific overview only)
Edit layouts from a parent environment (Is edit	Edit layouts which have been defined in a 'parent' environment
environment layouts allowed)	

Important: By omitting certain permissions, function buttons might be missing from the interface.

Note: Edit rights include: Modify, Copy/Paste, Remove, Line Edit.

2.4.1 Set group rights for a single overview (Edit)

To set group rights for a single overview:

1. Through the menu, go to *System > User groups*.

³ This includes export of attachments and images, export of classification data, export to 2BA, Artikelbeheer, ARGE, Fesah, export of conditions (ICC), CUE, GAEB, UGL, IGM, VGH, Magento and export of publications.

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🔦 Userrights (internal)	Men	u View E	dit Functions » Grou	ıp:Test group
Contacts Products Items	DAM -	Classification	System ArtSelect My de	e a logout
Navigation	\otimes	Module	Background tasks	tion Description
🙎 Users		Contact man		Have access to overview contac
Groups		Item manage	Configuration	Have access to overview assort
		Item manage	Environments	Have access to overview assort
Group:Test group		Item manage	A Layouts	Have access to overview certifi
Edit	\otimes	Item manage		Have access to overview item s
Modify		Item manage	Logs	Have access to overview items
Line edit on		Item manage	User groups	Have access to overview manufacturers
Functions	۲	Item manage	Users Users	Have access to overview price information
Maninulate				Have access to

2. In the Overview select a group and, under Navigation, click on User rights (internal):

User groups Menu View	Edit Functions Print
⋟.	- 🤇 🗐 🚺 🗾 🕗 -
Filter	Search All Details Manage screen layouts Help
Navigation 🛞	▲ Group ▼
Users	Test group
Userrights (internal)	MDM keyusers
	Manuals
Edit 🛞	ICM gastgebruikers
Add	Administrators
Modify	

3. On the next screen a list of all Overviews to which the group has access is presented. For each Overview, checkmarks indicate which group rights have been set:

🔦 Userrights (internal) 🛛 Me	nu View Edit Fu	unctions > Group:Test gro	up							
▶.).							4
Filter	Search All Details	Manage screen layouts Help	,							
Navigation 🛞	^ Module	OverviewDescription	Description	МепиТуре	Туре	Access	IsViewAllAllowed	IsExportAllowed	Allowed to change	Allowed to change own
🙎 Users	Contact management	Contacts	Have access to the overview contacts	Main menu	Overview					
Groups	Item manager	Assortments	Have access to the overview assortments	Main menu	Overview					
	Item manager	Assortment	Have access to the overview assortment	Main menu	Overview				Export record	ls is NOT allowed
Group:Test group	Item manager	Certificates	Have access to the overview certificates	Main menu	Overview					
Edit 🛞	Item manager	Item search	Have access to the overview item search	Main menu	Overview			View all	records is allow	ved
Modify	Item manager	Items	Have access to the overview items	Main menu	Overview					
Line edit on	Item manager	Manufacturers	Have access to the overview manufacturers	Main menu	Overview					
Functions	Item manager	Price Information	Have access to the overview price information	Main menu	Overview					
Manipulate	Item manager	Product search	Have access to the overview product	Main menu	Overview					

4. To set (or change) a group right, select the Overview and, under Edit, click on *Modify*.

Navigation All Details Manage screen layouts Help Navigation Image: Contact OverviewDescription Description MenuType Type Source Contact Contacts Have access to the overview contacts Main menu Overview Source Item manager Assortments Have access to the overview assortments Main menu Overview Item manager Assortment Have access to the overview assortment Main menu Overview Item manager Certificates Have access to the overview contacts Main menu Overview	
Navigation	
Contact management Contacts Have access to the overview contacts Main menu Overview Contact management Contacts Have access to the overview contacts Main menu Overview Contact management Assortments Have access to the overview assortments Main menu Overview Contact manager Assortment Have access to the overview assortment Main menu Overview Contact manager Assortment Have access to the overview assortment Main menu Overview	Access
Item manager Assortments Have access to the overview assortments Main menu Overview Groups Item manager Assortment Have access to the overview assortment Main menu Overview Group:Test group Item manager Assortment Have access to the overview assortment Main menu Overview	
Item manager Assortment Have access to the overview assortment Main menu Overview Group:Test group Them manager Entificates Have access to the Main menu Overview	
Item manager Continentes Have access to the Main manu	~
	~
Edit (S) Item manager Item search Have access to the overview item search Main menu Overview	~
Modify Item manager Items Have access to the Main menu Overview	~
Line edit on Have access to the Manufacturers Overview Main menu Overview manufacturers	1

5. Next, set the user rights by selecting **Yes/No** options in the pop-up window:

Edit - Have access to the overvi	ew items			
Userright (internal)				
Description	Have ac	cess to the overview it	ems	
Access to overview	💽 🖲 Yes			
/iew all records	<mark>O Yes</mark>	🖲 No		
export allowed	<mark>O Yes</mark>	🖲 No		
dit own records only	<mark>O Yes</mark>	<mark>● No</mark>		
dit all records	<mark>O Yes</mark>	🖲 No		
Batch edit allowed	<mark>O Yes</mark>	🖲 No		
dit layouts from a parent environ	ment <mark>O Yes</mark>	🖲 No		
General				
1odule	Item ma	anager		
Description	Item			
Overview	Items			
уре	Overvie	w		
1enuType	Main me	enu		
	Edit the previous on	Edit the next one	Save record	Cancel

<u>Note</u>: Setting some rights, such as *Batch edit allowed*, will trigger the setting of other rights, such as *Allowed to change own records*.

6. Save the record.

To speed up the process of setting group rights, you can make use of either the Edit the next one option or use the Manipulate or Line edit functions.

2.4.2 Set group rights for multiple overviews (Manipulate)

To set group rights for multiple overviews:

1. Through the menu, go to *System > User groups*.

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🔦 Userrights (internal)	Mer	u View E	dit Functions » Grou	ı p: Test group
Contacts Products Items	DAM.	Classification	System ArtSelect My de	tails Help Logout
Navigation	\otimes	Module	Background tasks	tion Description
🕺 Users		Contact man	and the second s	Have access to overview contac
Groups		Item manage	Configuration	Have access to overview assort
Groups		Item manage	Environments	Have access to overview assort
Group:Test group		Item manage	Layouts	Have access to overview certific
Edit	۲	Item manage		Have access to overview item s
Modify		Item manage	Logs	Have access to overview items
Line edit on		Item manage	User groups	Have access to overview manufacturers
Functions	۲	Item manage	Users Users	Have access to overview price information
Maninulate				Have access to

2. In the Overview select a group and, under Navigation, click on User rights (internal).

User groups Menu View	Edit Functions Print
⋟.	
Filter	Search All Details Manage screen layouts Help
Navigation 🛞	▲ Group ▼
🙎 Users	Test group
Userrights (internal)	MDM keyusers
	Manuals
Edit 🛞	ICM gastgebruikers
Add	Administrators
Modify	

3. On the next screen a list of all Overviews to which the group has access is presented. For each Overview, checkmarks indicate which group rights have been set:

× -	• < 🗌 🚺	unctions > Group:Test gro).							
Filter	Search All Details	Manage screen layouts Help OverviewDescription	Description	МепиТуре	Туре	Access	IsViewAllAllowed	IsExportAllowed	Allowed to change	Allowed to change own
Users	Contact management	-	Have access to the overview contacts	Main menu	Overview					chunge own
-	Item manager	Assortments	Have access to the overview assortments	Main menu	Overview					
Groups	Item manager	Assortment	Have access to the overview assortment	Main menu	Overview		1		Export record	s is NOT allowed
Group:Test group	Item manager	Certificates	Have access to the overview certificates	Main menu	Overview					
Edit 🛞	Item manager	Item search	Have access to the overview item search	Main menu	Overview			View all	records is allow	/ed
Modify	Item manager	Items	Have access to the overview items	Main menu	Overview					
Line edit on	Item manager	Manufacturers	Have access to the overview manufacturers	Main menu	Overview					
Functions	Item manager	Price Information	Have access to the overview price information	Main menu	Overview	1				
Manipulate	Item manager	Product search	Have access to the overview product	Main menu	Overview					

4. To set (or change) the group rights for multiple overviews, select two or more Overviews and, under Functions, click on *Manipulate*.

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🔦 Userrights (internal)	Menu	View Edit Fu	unctions > Group:Test gro	oup
⋟.	•	۹ 🔲 🗊).
Filter	:	Search All Details I	Manage screen layouts Help	0
Navigation		Module	OverviewDescription	Description
🙎 Users		Contact management	Contacts	Have access to the overview contacts
Groups	Þ	Item manager	Assortments	Have access to the overview assortments
	Þ	Item manager	Assortment	Have access to the overview assortment
Group:Test group	Þ	Item manager	Certificates	Have access to the overview certificates
Edit	۲	Item manager	Item search	Have access to the overview item search
Modify	Þ	Item manager	Items	Have access to the overview items
Line edit on		Item manager	Manufacturers	Have access to the overview manufacturers
Functions	8	Item manager	Price Information	Have access to the overview price information
Manipulate		Item manager	Product search	Have access to the overview product

5. Next, set the user rights by selecting **Grant** and setting the **Yes/No** options in the popup window:

	🚍 Manipuleren	W BECOTTMENTS			
	Manipulating				
	Allowed	No action	~		
C	IsViewAllAllowed	No action	v	- 1	
t	IsExportAllowed	No action	v	- 1	
1	Allowed to change	Grant	✓ ● Yes ○ No	- 1	
	Allowed to change own	No action	▼	- 1	
'n	Allowed to change from others	No action	v	- 1	
	IsBatchEditAllowed	Grant	✓ ● Yes ○ No	- 1	
'n	Is edit environment layouts allowed	No action	~		
'n					-
			Apply Cano	el	

6. Click on *Apply* and in the next pop-up window, confirm by clicking *OK*:

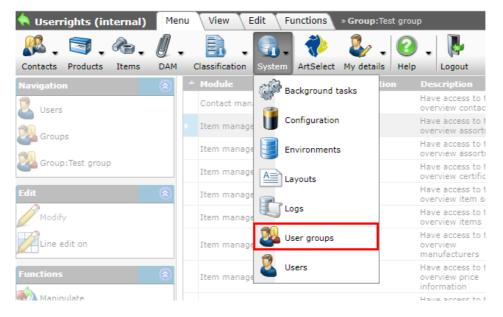
💅 🚠 🏵 🔡

	Manipulate δ userrights (internal)	×
ŀ	Would you 6 userrights (internal) manipulate as follows:	
2	 Assign value 'Yes' to field 'isbatcheditallowed'. Assign value 'Yes' to field 'allowed to change'. OK Cancel 	

2.4.3 Set group rights (Line edit)

Alternatively, group rights can be set by using the *Line edit* function:

1. Through the menu, go to *System > User groups*.



2. In the Overview select a group and, under Navigation, click on User rights (internal):

User groups Menu View	Edit Functions Print
≫.	
Filter	Search All Details Manage screen layouts Help
Navigation 🛞	▲ Group ▼
Users	Test group
Q	New group
Userrights (internal)	MDM keyusers
	Manuals
Edit 🛞	ICM gastgebruikers
Add	Administrators
Modify	

3. On the next screen a list of all Overviews to which the group has access is presented. For each Overview, checkmarks indicate which group rights have been set:

🔦 Userrights (internal) 🛛 Me	nu View Edit F	unctions » Group:Test gro	sup							
» .	• 🔍 🔲 🚯).							4
Filter		Manage screen layouts Help								
Navigation 🛞	Module	OverviewDescription	Description	MenuType	Туре	Access	IsViewAllAllowed	IsExportAllowed	Allowed to change	Allowed to change own
👤 Users	Contact management	Contacts	Have access to the overview contacts	Main menu	Overview					
Groups	Item manager	Assortments	Have access to the overview assortments	Main menu	Overview			-		
	Item manager	Assortment	Have access to the overview assortment	Main menu	Overview				Export record	s is NOT allowed
Group:Test group	Item manager	Certificates	Have access to the overview certificates	Main menu	Overview					
Edit 🛞	Item manager	Item search	Have access to the overview item search	Main menu	Overview			🔪 View all	records is allow	red
Modify	Item manager	Items	Have access to the overview items	Main menu	Overview					
Line edit on	Item manager	Manufacturers	Have access to the overview manufacturers	Main menu	Overview					
Functions 🛞	Item manager	Price Information	Have access to the overview price information	Main menu	Overview	2				
Manipulate	Item manager	Product search	Have access to the overview product	Main menu	Overview					

4. To set (or change) the group rights, under Edit, first click on *Line edit on*.

🔦 Userrights (internal) 📗	Menu	View Edit Fu	nctions » Group: Test grou	qu	
Filter	• (5	earch All Details M	Manage screen layouts Help	-	
Navigation 🔗		Module	OverviewDescription	Description	MenuType
👤 Users		Contact management	Contacts	Have access to the overview contacts	Main menu
Groups	•	Item manager	Assortments	Have access to the overview assortments	Main menu
		Item manager	Assortment	Have access to the overview assortment	Main menu
Group:Test group		Item manager	Certificates	Have access to the overview certificates	Main menu
Edit 🤇		Item manager	Item search	Have access to the overview item search	Main menu
Modify		Item manager	Items	Have access to the overview items	Main menu
Line edit on		Item manager	Manufacturers	Have access to the overview manufacturers	Main menu

5. Next, in the list, click on any of the checkboxes to add or remove group rights of one or more Overviews:

🔦 Userrights (internal) 🏾 M	enu View Edit	Functions	Group:Test group						
⋟.	• 🔍 🔲 🤅		. (2)						
Filter	Search All Deta	ails Manage scree	en layouts Help						
Navigation 🛞	pê	Access	IsViewAllAllowed	IsExportAllowed	Allowed to change	Allowed to change own	Allowed to change from others	IsBatchEditAllowed	Is edit environment layo
🙎 Users	erview	 ✓ 							
Groups	erview								
	erview	✓	Z						
Group:Test group	erview	~							
Edit 🛞	erview	~							
Modify	erview	~							
Line edit off	erview								

💅 🚠 🏵 🏪

🔦 Userrights (internal) 🛛	enu View	Edit Functions »	Group:Test group
▶.	- 🔍 📃	1	2.
Filter	Search All	Details Manage screer	layouts Help
Navigation 🛞	р е	Access I	sViewAllAllowed
🙎 Users	erview		
Groups	erview		
	erview	<	
Group:Test group	erview	 ✓ 	
Edit 🛞	erview		
Modify	erview		
Line edit off	erview	~	
Functions		_	

3 Check user rights

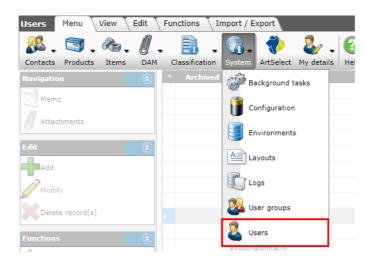
To check which rights a user has or which rights might be missing:

- First, check the user license settings;
- Next, check user group assignment;
- Next, check the group rights.

3.1 Check user license settings

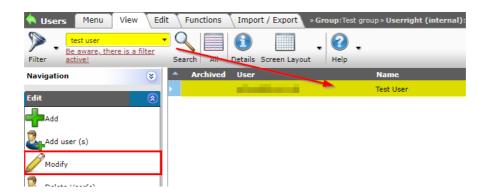
To check the user license settings:

1. Through the menu, go to *System > Users*.



2. Optionally, use the Filter or Search box to find and select the user and, under Edit, click on *Modify.*

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3. In the pop-up window, check the following settings and make any adjustment where necessary:

Contact (local)	- 20	
Name	Test User	
Username		
Email		
Language	en-GB Engels (Verenigd Koninkrijk) 👻 🗱	
Security		
Change password at first login	🔿 Yes 🖲 No	
Password invalid after	month(s)	
Password invalid after Password entry delay		
Password entry delay Password valid from		
Password valid from Active user	■ (● Yes ○ No	
License	Environment 🗸	
License License type Demo	<mark>⊖ Yes ● No</mark>	
License type	О үез ® № О үез ® №	

User tab

- a. Active user: Set to **Yes**. When set to **No**, the user no longer has access to the COS application.
- b. License type: Commonly set to Environment
- c. Demo: Set to **No**. When set to **Yes**, the user has full access to the application however any changes to the data or settings will be rolled back during the nightly recycle action. Note that only an Admin user can change this setting.
- d. Read only: Set to No. When set to Yes, the user can only view data.
- e. User interface: Commonly set to Web. Other options are:

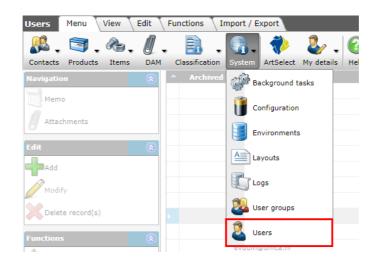
User interface setting	Access to User interface	Other access
Web	Web and mobile	-
Mobile	Mobile only	-
SFTP	No	SFTP locations on Compano server
Feed	No	Request XML or JSON feed
Odata	No	Request Odata feed
Art Connect		
Art Select		

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3.2 Check user group assignments

To check to which groups the user has been assigned:

1. Through the menu, go to *System > Users*.



2. Optionally, use the Filter or Search box to find and select the user and, under Edit, click on *Modify*.

🔦 Users 🛛 Menu 🗍 View	Edit Fur	nctions 🔪 Impo	rt / Export > Gro	oup:Test group » Userright (internal):
Filter Eest user <u>Be aware, there is a fil</u> <u>active!</u>	ter Search	Ali Details	Screen Layout	🕜 🖌
Navigation	🛞 🔶 A	rchived User		Name
Edit				Test User
Modify				

3. In the pop-up window, check the following settings and make any adjustment where necessary:

📄 Edit - Test User			
User Groups Memo Available groups Administrators ICM gastgebruikers		-Selected groups	
Manuals MDM keyusers New group	> <		
			-
Edit the previous on E	dit the next one	e Save record	Cancel

Groups tab

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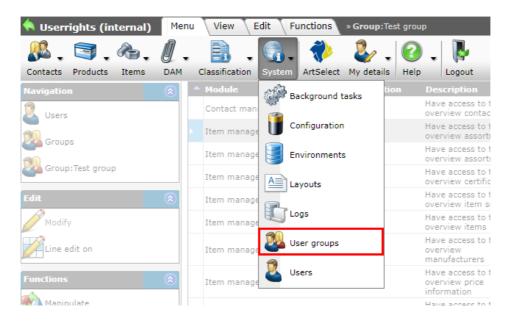
- a. Available groups: Groups to which the user currently has no access.
- b. Selected groups: Groups to which the user currently has access.

<u>Note</u>: These general user settings are in addition to any detailed group rights, thus for example a **user which has 'read only' rights** AND has no access to the Products overview, will not be able to view any products.

3.3 Check group rights

Now that has been established to which groups a user has been assigned, the group rights can be checked:

1. Through the menu, go to System > User groups.



2. In the Overview select a relevant user group and, under Navigation, click on *User rights (internal)*.

User groups Menu View	Edit Functions Print
Filter	Search All Details Manage screen layouts Help
Navigation 🛞 🔺	Group 🔻
Users	Test group
Userrights (internal)	New group
	MDM keyusers
Edit	Manuals
	ICM gastgebruikers
Add	Administrators
Modify	

3. On the next screen a list of all Overviews to which the group has access is presented. For each Overview, checkmarks indicate which group rights have been set:

Userrights (internal)	Menu		Inctions > Group:Test gro								
Filter	÷ (iearch All Details I	Manage screen layouts Hel								
Navigation		Module	OverviewDescription	Description	MenuType	Туре	Access	IsViewAllAllowed	IsExportAllowed	Allowed to change	Allowed to change ov
🙎 Users		Contact management	Contacts	Have access to the overview contacts	Main menu	Overview					
Groups	•	Item manager	Assortments	Have access to the overview assortments	Main menu	Overview					
-		Item manager	Assortment	Have access to the overview assortment	Main menu	Overview				Export record	s is NOT allowe
Group:Test group		Item manager	Certificates	Have access to the overview certificates	Main menu	Overview					
Edit	۲	Item manager	Item search	Have access to the overview item search	Main menu	Overview			View all	records is allow	/ed
Modify		Item manager	Items	Have access to the overview items	Main menu	Overview					
Line edit on		Item manager	Manufacturers	Have access to the overview manufacturers	Main menu	Overview					
Functions	۲	Item manager	Price Information	Have access to the overview price information	Main menu	Overview					
Manipulate		Item manager	Product search	Have access to the overview product	Main menu	Overview	V				

4. Make any adjustments where necessary; see 2.4 Detailed group rights.

4 Print user rights

For a convenient overview of user rights, these can be printed.

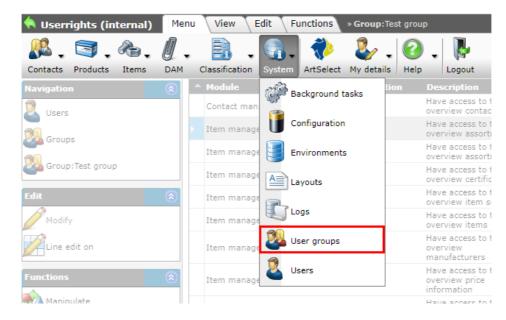
4.1 Print group rights

User rights are tied to group rights, thus to get an overview of a user's rights, the detailed group rights need to be printed.

<u>Note</u>: Should a user have access to multiple groups, then the group rights of all groups should be printed .

To print the detailed group rights:

1. Through the menu, go to *System > User groups*.



2. In the Overview select a group and, on the Print tab, click on *Printing options*.

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User groups Menu	/iew Clait Functions Print
⋟.	- · Q 🕺 🕺 🕢 .
Filter	Search Printing options Managing User rights layouts Help
Navigation	Group
🙎 Users	Administrators
Users Users	ICM gastgebruikers
Userrights (internal)	Manuals
	MDM keyusers
Edit	Test group
Add	

3. In the pop-up windows, click on *Print*.

Group Name	Test group
Oroup Name	reat group

Full name

Description	IsViewAllAllowed	IsExportAllowed	Allowed to change	Allowed to change from others
Have access		No	No	
to the				
overview				
contacts				
Have access	Yes	Yes		No
to the				
overview				
assortments				
Have access	Yes	No		No
to the				
overview				