



# Manual User Rights Compano Online Software

Version 6.2

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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*<sup>1</sup> 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.

<sup>&</sup>lt;sup>1</sup> 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	

- 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 system<sup>2</sup>:

To add a user:

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

<sup>&</sup>lt;sup>2</sup> 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.



2. Under Edit, click on +Add.

Users Menu View Edit	Functions Import / Export
Filter Be aware, there is a filter active!	Search All Details Aalberts Help
Navigation 🛞	Archived A Group definitions
Mamo (0)	View and Export only
Attachments (0)	
Edit 🛞	
Add	
Modify	
Delete record(s)	Ecologierers

3. In the pop-up window:

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🗐 Add - New user					,	
User Groups Memo						
Contact (local)					- 🗙	*
Name						
Username						
Email						
Language					- *	
Security						
Change password at first login	🔾 Yes 🧿	No				
Allowed IP Addresses	(i)					
Password invalid after		month	(s)			
Password entry delay			}			
Password valid from						
Active user	⊙ Yes ◯	No				
License						
License type	Environn	ient	<b>~</b>			
Demo	🔾 Yes 🧿	No				
Read only	🔾 Yes 🧿	No				
User interface	Web		<b>~</b>			
						-
			Add next record	Save record	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.

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- 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.

Edit - MDM Beheerder				
User Security License Groups	Memo			
- Available groups-		Selected groups		
gastgebruikers Manuals	<b>^</b>	Administrators		*
New group				
	>			
	-			-
	Edit the previous o	n Edit the next one	Save record	Cancel

- 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.

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<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*.



2. In the list, click on *User Rights*.

onfiguration Menu	/iew	
		<b>2</b> .
nter	Trage overview Description	Used by
	Memos	
	Optional items	Optional items selection list
	Packaging forms	Central purchase condition, Item, Purchasing Condition
	Periodic tasks	
	Product accesso	ries Product
	Product groups	Attachment, Product, Product group, Publication
	Product list	Optional product selection list
	Standard System	ns Recipe, Calculation, Specification Part, Standard, Quotation, Product standard, Workplace
	Transfer rules	Purchasing Condition
	S Units	Accessories, item, Product accessories, Bonus specification, Bonus specification, Item, Product, Calculation line, Estimate summary line, User def field, Surchtarge, Work Type, Standard, Recipe Control, Quetation Line, Order / Workheetline, Recipe, Specification Part, Part Order, Work Order, Price Information, Product part, Sales Condition, Travel expenses, Unit
	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									
Filter	Search All Details	Screen Layout Help								
Navigation 🛞	Module	OverviewDescription	Description	MenuType	Туре	AllowedGroupNames	Users	HasRecords 🔺		
	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			
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			
U	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			
-	General	Attachment type	Have access to the overview attachment type	#ConfigurationMenu	Overview	Administrators, Manuals	5			

4. In the Edit window:

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Groups Userright (internal	)		
- Available groups		Selected groups	
ICM gastgebruikers		Administrators	
Manuals		Test group	
New group			
	-		-

- a. 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.
- 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:

Userright (internal)							
				1			
Description		start	~				
Number of users		= value	~				
HasRecords		= value	~	🔾 Yes 🔾 No 💿 All			
Allowed	i	= value	~	🔾 Yes 🔾 No 💿 All			
sViewAllAllowed		= value	~	🔾 Yes 🔾 No 💿 All			
sExportAllowed		= value	~	○ Yes ○ No    All			
Allowed to change		= value	~	○ Yes ○ No    All			
Allowed to change own		= value	~	🔿 Yes 🔿 No 🔍 All			
Allowed to change from others		= value	~	🔿 Yes 🔿 No 🔍 All			
IsBatchEditAllowed		= value	~	🔿 Yes 🔿 No 🔍 All			
General				,			
Module		start	~				
Description		start	~				
OverviewDescription		start	~				
Type		= value	~	Function	Web service		
				Overview	User-defined fields		
				Setting     Field group	Archive		
MenuType		= value	~	#ConfigurationMenu	None		
Groups		all	~	]			

#### 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:



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

	_
Quick Filter (	
Module	
	-
Description	
	-
OverviewDescription	
1	•
Туре	
Field group (4)	
Function (10)	
Overview (59)	
MenuType	
#ConfigurationMenu (27)	
🗆 #MainMenu (32)	
One (14)	

### 2.3.2 Filter users on group

Users can be filtered on group access:

- 1. Through the Menu, go to System > Users.
- 2. Click on the Filter button:

Users Menu View Edit Functions Import / Export								
Filter	Search All Details Aalberts + 100 .							
Navigation 🛞	<ul> <li>X Organization</li> </ul>	User						
Memo (0)								
Attachments (0)		ADT 115A 01						

3. In the pop-up window, go to the Group tab:

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	<u>ips.com</u>					
Filter						×
User Group	General					
Groups	= value	Adm     Apol     Broe     Elkh     Feed     Henn     IPS a     MDN     Pegla     Prod	ins / Beheerders lo administrators in administrators art admins l functionality co administrators administrators l ses administrators er Yorkshire admins uctmanagers	<ul> <li>Productmana;</li> <li>Publication us</li> <li>Seppelfricke a</li> <li>Shurjoint adn</li> <li>Simplex Admi</li> <li>Users for pub</li> <li>View and Exp</li> <li>VSH administ</li> <li>Website</li> <li>Wemefa admi</li> </ul>	gers KEY admins sers administrators ninistrators lic data sets ort only rators inistrators	
	Арр	ly	Empty	Empty and close	Save as	

- 4. Set any filter options.
- 5. Click on Apply.

### 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 <i>all</i> 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 <sup>3</sup>
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 <i>Manipulation</i> , all <i>Import</i> functions, auto-fill tables and add <i>User-specific fields (for that specific overview only)</i>
Edit layouts from a parent environment (Is edit environment layouts allowed)	Edit layouts which have been <b>defined in a 'parent' environment</b>

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*.

<sup>&</sup>lt;sup>3</sup> 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.

🔦 Userrights (internal)	Me	nu View E	Edit Functions & Gr	oup:Test group
Contacts Products Items	DAM	Classification	System ArtSelect My	details Help Logout
Navigation	$\otimes$	▲ Module	Background tasks	tion Description
🕺 Users		Contact man		Have access to overview conta
		Item manage	Configuration	Have access to overview assor
Groups		Item manage	Environments	Have access to overview assor
Group:Test group		Item manage	A Layouts	Have access to overview certif
Edit	$\otimes$	Item manage		Have access to overview item
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	Have access to overview price information
Manipulate				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
Eda 🔗	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)	Men	u View Edit Fu	unctions > Group:Test gro	up							
▶.	-	9		)_							4
Filter		Search All Details	Manage screen layouts Help	0			_				
Navigation		Module	OverviewDescription	Description	MenuType	Туре	Access	IsViewAllAllowed	IsExportAllowed	Allowed to change	Allowed to change own
2 Users		Contact management	Contacts	Have access to the overview contacts	Main menu	Overview					
Crowne Comment		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				Export records	s is NOT allowed
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	1				

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

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🔦 Userrights (internal)	Menu View Edit	Functions » Group:Test gr	oup			
Filter	Search All Details	Manage screen layouts	<b>P</b>			
Navigation	🔿 🔺 Module	OverviewDescription	Description	MenuType	Туре	Access
🙎 Users	Contact managemen	t Contacts	Have access to the overview contacts	Main menu	Overview	~
Croups	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	s.
Group:Test group	Item manager	Certificates	Have access to the overview certificates	MenuType         Type         Access           is to the sortments         Main menu         Overview         Image: Comparison of the sortment sortment           is to the sortment         Main menu         Overview         Image: Comparison of the sortment sortment           is to the sortment         Main menu         Overview         Image: Comparison of the sortment sortment           is to the em search         Main menu         Overview         Image: Comparison of the sortment sortment sortment           is to the em search         Main menu         Overview         Image: Comparison of the sortment sortment sortment sortment           is to the ems         Main menu         Overview         Image: Comparison of the sortment		
Edit	(S) Item manager	Item search	Have access to the overview item search	Main menu	Overview	1
Modify	Item manager	Items	Have access to the overview items	Main menu	Overview	1
Line edit on	Item manager	Manufacturers	Have access to the overview manufacturers	Main menu	Overview	

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

Userright (internal)				
Description	Have ac	cess to the overview it	ems	
Access to overview	🕕 🖲 Yes			
View all records	<mark>⊖ Yes</mark>	<mark>⊚ No</mark>		
Export allowed	<mark>⊖ Yes</mark>	<mark>● No</mark>		
Edit own records only	<mark>⊖ Yes</mark>			
Edit all records	<mark>⊖ Yes</mark>	<mark>● No</mark>		
Batch edit allowed	<mark>⊖ Yes</mark>	<mark>● No</mark>		
Edit layouts from a parent envir	onment OYes	<mark>● No</mark>		
General				
Module	Item m	anager		
Description	Item			
Overview	Items			
Туре	Overvie	w		
MenuType	Main m	enu		

<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*.

🔦 Userrights (internal)	Mer	nu View E	Edit Functions & Gro	up:Test group
Contacts Products Items	DAM.	Classification	System ArtSelect My d	etails Help Logout
Navigation	$\otimes$	▲ Module	Background tasks	tion Description
🕺 Users		Contact man		Have access to overview conta
Crouns		Item manage	Configuration	Have access to overview assor
		Item manage	Environments	Have access to overview assor
Group:Test group		Item manage	itact man       Have access to 1         n manage       Configuration         n manage       Environments         n manage       Have access to 1         overview assort       Have access to 1         n manage       Environments         h manage       Have access to 1         n manage       Have access to 1	
Edit	۲	Item manage		Have access to overview item
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	Have access to overview price information
Manipulate				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 ▼
	Test group
USETS .	New group
Userrights (internal)	MDM keyusers
	Manuals
Edit 🛞	ICM gastgebruikers
	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) 🛛 Mer	u View Edit Fu	unctions > Group:Test gro	up							
▶	۹ 🔲 🚺		).							
Filter	Search   All   Details	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					
M 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					
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*.

🔦 Userrights (internal)	Menu	View Edit Fu	unctions > Group:Test gro	up
Filter	-	Search All Details	Manage screen layouts Help	
Navigation		Module	OverviewDescription	Description
Users		Contact management	Contacts	Have access to the overview contacts
	Þ	Item manager	Assortments	Have access to the overview assortments
Groups		Item manager	Assortment	Have access to the overview assortment
Group:Test group		Item manager	Certificates	Have access to the overview certificates
Edit		Item manager	Item search	Have access to the overview item search
Modify		Item manager	Items	Have access to the overview items
Line edit on		Itemmanager	Manufacturers	Have access to the overview manufacturers
Functions		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						$\times$
Manipulating						
Allowed	No action	~				
IsViewAllAllowed	No action	~				
IsExportAllowed	No action	~				
Allowed to change	Grant	~	● Yes ○ No			
Allowed to change own	No action	~				
Allowed to change from others	No action	~				
IsBatchEditAllowed	Grant	~	● Yes ○ No			
Is edit environment layouts allowed	No action	~				
				Apply	Cancel	

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

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📄 Manipulat	e 6 userrights (internal)	×
Wa	ould you <mark>6</mark> userrights (internal) manipulate as follows:	
• As	ssign value 'Yes' to field 'isbatcheditallowed'. ssign 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	v 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) 🛛 M	enu	View Edit Fu	unctions > Group:Test gro	up								
▶.	•	9 🗐 🚯										4
Filter	5	Search All Details	Manage screen layouts Help									
Navigation		Module	OverviewDescription	Description	MenuType	Туре	Access	IsViewAllAllowed	IsExportAllowed	Allowed to change	Allowed to change ov	vn
🙎 Users		Contact management	Contacts	Have access to the overview contacts	Main menu	Overview						
Groups	Þ	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	1
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						
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*.

K Userrights (internal) Menu View Edit Functions » Group: Test group							
▶.							
Filter	Search All Details	Manage screen layouts Help	1				
Navigation	🔿 🔺 Module	OverviewDescription	Description	MenuType			
🙎 Users	Contact management	Contacts	Have access to the overview contacts	Main menu			
Croups	> Item manager	Assortments	Have access to the overview assortments	Main menu			
Si Gioups	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	lenu View Edit	Functions	» Group:Test group						
▶.	- 🔍 📃 🚺		2 0.						
Filter	Search All Details	Manage scre	en layouts Help						
Navigation	pê	Access	IsViewAllAllowed	IsExportAllowed	Allowed to change	Allowed to change own	Allowed to change from others	IsBatchEditAllowed	Is edit environment laye
2 Users	erview	<b>~</b>							
Croups	erview								
	erview		<ul> <li>✓</li> </ul>						
Group:Test group	erview								
Edit 🛞	erview	<b>Z</b>							
Modify	erview								
Line edit off	erview	<b>~</b>							

6. Once you have applied all the changes, make sure to click on *Line edit off*.

🔦 Userrights (internal)	Menu View	Edit Functions »	G <b>roup:</b> Test group
▶.	- 🤍 📄		2.
Filter	Search All	Details Manage screer	a layouts Help
Navigation	p <del>e</del>	Access I	sViewAllAllowed
Users	erview	<	
Groups	erview	2	
	erview	<b>~</b>	
Group:Test group	erview	<	
Edit	erview	<	
Modify	erview	<	
Line edit off	erview	<ul> <li>✓</li> </ul>	
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.

### Fix on user rights (L06 and higher)

An error has been fixed on the overviews Users and User Groups.

- - On the Users view, the User Group Descriptions (Group Definitions) field can be added again. This field clarifies which groups the user has been added to.
- - On the User Groups overview, the Users column has been fixed so that the entered Friendly Name is shown.

## 3.1 Check user license settings

To check the user license settings:

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

	Edit	Functions In	
Contacts Products Items	DAM	Classification	System ArtSelect My details
Navigation	۲	<ul> <li>Archived</li> </ul>	Background tasks
Memo			Configuration
Attachments			Environments
Edit	۲		A Layouts
Add			Logs
Delete record(s)			🕺 User groups
Functions			2 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	t Functions	Import / Export *	• Group:Test group » Userright (internal):
Filter	here is a filter	Search All	Details Screen Lavout	- 🕜 -
Navigation	۲	<ul> <li>Archived</li> </ul>	User	Name
Edit		•	all shall be set of	Test User
Add				
Add user (s)				
Modify				
Dalata Usar(a)				

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

💅 🚠 🏵 🏪

User Groups Memo		
Environment		Ŧ
Contact (local)	-	\$
Name	Test User	
Username	470-00-0.00	
Email	and the second s	
Language	en-GB Engels (Verenigd Koninkrijk)	\$
Security		
Change password at first login	○ Yes ● No	
		li
Password invalid after	month(s)	
Password entry delay		
Password valid from		
Password valid from Active user	● Yes ○ No	
Password valid from Active user License	® Yes ○ No	
Password valid from Active user License License type	Yes ○ No     Environment	
Password valid from Active user License License type Demo	® ves ○ No Environment ○ ves ® No	
Password valid from Active user License License type Demo Read only	® Yes ○ No Environment	

g 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		

### 3.2 Check user group assignments

To check to which groups the user has been assigned:

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

🥂 , 🔄 , 🗞	. 0.		💽 衫 🤱 I (
Contacts Products Item	s DAM	Classification	System ArtSelect My details
Navigation	۲	<ul> <li>Archived</li> </ul>	Background tasks
Memo			Configuration
Attachments			Environments
Edit	۲		A Layouts
Modify			Logs
Delete record(s)			🕺 User groups
• •			1

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

🔦 Users 🛛 Menu	View Edit	Functions	Import / Expo	t » Group:Test grou	up » Userright (internal):
Filter	+ there is a filter	Search All	Details Screen La	yout Help	
Navigation	8	Archived	User		Name
Edit Add			a localities of		Test User
Add user (s)					

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

📄 Edit - Test User			•
User Groups Memo		elected groups	
Administrators ICM gastgebruikers Manuals MDM keyusers New group		est group	*
Edit the previous on	Edit the next one	Save record	Cancel

Groups tab

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

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<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)	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:

•	Search All Details	Manage screen layouts Help	•			_				
tion	🔕 🔺 Module	OverviewDescription	Description	MenuType	Туре	Access	IsViewAllAllowed	IsExportAllowed	Allowed to change	Allowed to ch
ers	Contact management	Contacts	Have access to the overview contacts	Main menu	Overview					
2005	Item manager	Assortments	Have access to the overview assortments	Main menu	Overview					
oopa	Item manager	Assortment	Have access to the overview assortment	Main menu	Overview				Export record	s is NOT all
oup:Test group	Item manager	Certificates	Have access to the overview certificates	Main menu	Overview					
	Item manager	Item search	Have access to the overview item search	Main menu	Overview			View all	records is allow	red
odify	Item manager	Items	Have access to the overview items	Main menu	Overview					
e edit on	Item manager	Manufacturers	Have access to the overview manufacturers	Main menu	Overview					
ons	Item manager	Price Information	Have access to the overview price information	Main menu	Overview					
anipulate	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 Filter & Search users

Users can be filtered on:

- User settins
- Group settings

### 4.1 User settings

Filter users on settings such as Is administrator, From Active Directory, Language, etc.

User General General					
Application serial number	= value	•			
From Active Directory (AD)	= value	✓ ○ Yes ○ No ○ All			
Is administrator	= value	✓ Yes ○ No ● All			
Date of last login	= value	•	<b>=</b>		
Language	= value	◄			
Contact details					
Contact	= value	◄			
Organization	= value	•			
License					
User interface	= value	Web Mobile FTPS FTPS Art-Connect		Feed Art-Connect Art-Select #0Auth	
License type	= value	✓ □Environment		Guest	
Login environment	= value	✓ □Test □ Prerelease		Release	
Demo	= value	✓ ○ Yes ○ No ● All			
Read only	= value	✓ Yes ○ No ● All			
		Apply	Empty	Empty and close	Save as

## 4.2 Group settings

Filter users on assigned group(s):

(	ins com		10-10-2023	10:20 22/03/2024	en-GB	Produc	tmar
Filter							3
User Group	General						
F Groups	= value 🗸	Admins / Beheerders administrators administrators Feed functionality administrators MDN Productmanagers	s	Productmanagers Publication users adminis S Administ Users for public d View and Export d Website Website	KEY admins inistrators itrators ators ata sets only rs rators		ni titu titu titu titu titu titu titu ti
		Apply	Empty	Empty and close	Save	as	
(		×	16-08-2021	09:52 17/08/2021	en-GB	5 1	-

## 5 Print user rights

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

### 5.1 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*.

💙 🚠 🌮 🔡

🔦 Userrights (internal)	Men	u View E	dit Functions » Grou	p:Test group
Contacts Products Items	DAM.	Classification	System	tails Help Logout
Navigation	$\otimes$	▲ Module	Background tasks	tion Description
🕺 Users		Contact man		Have access to overview conta
		Item manage	Configuration	Have access to overview assor
Groups		Item manage	Environments	Have access to overview assor
Group:Test group		Item manage	A	Have access to overview certif
Edit	۲	Item manage		Have access to overview item
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	Have access to overview price information
Manipulate				Have access to

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

User groups Menu View	V Edit Functions Print
▶.	· 🔍 🕵 🕺 🖉 🗸
Filter	Search Printing options Managing User rights layouts Help
Navigation 🛞	▲ Group
	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			
Full name				
Description	IsViewAllAllowed	IsExportAllowed	Allowed to change	Allowed to change from others
Have access to the overview contacts		No	No	
Have access to the overview assortments	Yes	Yes		No
Have access to the	Yes	No		No

## 6 Appendix A – Examples

Some examples of how to set user rights.

### 6.1 User rights per Assortment

When only *one* user should be able to edit (items) in an Assortment, user rights can be set as follows:

- 1. Create a User Group, for instance Local Assortment responsible.
- 2. Set the rights for this group for: **Have access to the overview assortment**:

Edit - Have access to the overview assort	nent
User right (internal)	
Description	Have access to the overview assortment
Access to overview	🔋 🔍 Yes 🔿 No
View all records	I • Yes O No
Export allowed	🔋 🔍 Yes 🔿 No
Edit own records only	🔋 🔍 Yes 🔿 No
Edit all records	I O Yes I No
Batch edit allowed	I • Yes O No
Environment layouts allowed to be changed	I • Yes O No
General	
Module	Item manager
Description	Assortments
OverviewDescription	Assortment
Туре	Overview
Menu	Main menu
	Δ

- a. Edit all records: Set to **No**, as the users in this group should only be allowed to edit the assortment to which they are assigned as *Data Manager*.
- b. Other rights: Set to Yes.
- 3. Set the rights for this group for: Have access to the overview items:

Edit - Have access to the overview items	
User right (internal)	
Description	Have access to the overview items
Access to overview	I • Yes O No
View all records	I • Yes O No
Export allowed	Yes O No
Edit own records only	I • Yes O No
Edit all records	Yes No
Batch edit allowed	I O Yes O No
Environment layouts allowed to be changed	③ Yes ○ No

- a. Edit all records: Set to **No**, as the users in this group should only be allowed to edit the items in the assortment to which they are assigned as *Data manager*.
- b. Other rights: Set to **Yes**.
- 4. Add a user to the group.



7 🛃 🏵 🔡

5. Modify the Assortment and set the same user as the *Data manager* of that Assortment:

Assortments Item manage	er Countries Memo User-defined fields Translations	
Supplier		¥
Туре	Sales	
Item type	🚯 Buy 🗸	
Code		
Description		
Contact code		
Renumber Code		
	/Data/Environments/000001/Images/	¢
Data manager		• <b>X</b> +/
Item number		
Item number Ranking		
Item number Ranking Data	U	
Item number Ranking <b>Data</b> Update frequency	Month V	
Item number Ranking <b>Data</b> Update frequency Next update	Month 15/11/2023	
Item number Ranking Data Update frequency Next update Publication date	Month       Is/11/2023	

### 6.2 User rights per Manufacturer

When only *one* user should be able to edit (products of an Manufacturer, user rights can be set as follows:

- 1. Create a User Group, for instance Local Manufacturer responsible.
- 2. Set the rights for this group for: **Have access to the overview manufacturer**:

Edit - Have access to the overview amanuf	facturer
User right (internal)	
Description	Have access to the overview manufacturer
Access to overview	1 • Yes O No
View all records	I • Yes O No
Export allowed	I • Yes O No
Edit own records only	🕄 🔍 Yes 🔿 No
Edit all records	(1) O Yes (1) No
Batch edit allowed	③ Yes ○ No
Environment layouts allowed to be changed	I Second Seco
lanet.	
	in the second seco

🕭 Compano Online Software

- a. Edit all records: Set to **No**, as the users in this group should only be allowed to edit the manufacturer to which they are assigned as *Data Manager*.
- b. Other rights: Set to **Yes**.
- 3. Set the rights for this group for: Have access to the overview products:

Edit - Have access to the overview produce	ts
User right (internal)	
Description	Have access to the overview products
Access to overview	③ Yes ○ No
View all records	Yes O No
Export allowed	I • Yes O No
Edit own records only	I • Yes O No
Edit all records	Yes No
Batch edit allowed	I • Yes O No
Environment layouts allowed to be changed	I es O No

- a. Edit all records: Set to **No**, as the users in this group should only be allowed to edit the items in the assortment to which they are assigned as *Data manager*.
- b. Other rights: Set to **Yes**.
- 4. Add a user to the group.
- 5. Modify the Manufacturer and set the same user as the *Data manager* of that Manufacturer:

Edit -				1
Manufacturer Organizatio	n Item manager Translations			
ode (GLN)	1			
anufacturer	1			
ogo	<b>i</b>			
anufacturer type	(1) Manufacturer		~	
ata manager	in the second			- 💥
oduct number template				
	Edit previous	Edit next	Save record	Cancel