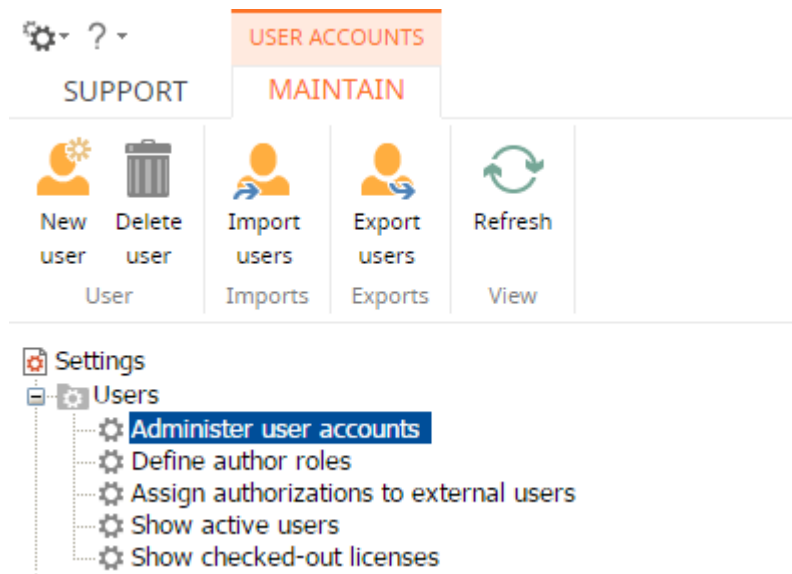


User administration

In this documentation you will learn how to create, update, and maintain user accounts.

There are three ways of creating or updating user accounts:

- Creating and changing new users via the Curator ("User" function group)
- Creating and changing users via an Excel import ("Imports" and "Exports" function groups)
- Assigning authorizations to external users



1 Creating a user account

The following needs to be considered when creating a new user account:

Add new user account

The user is - or will be - deactivated.
Please select a primary license to enable the user.

Username:

Password:

Password (repeat):

Primary license:

Allow license checkout:

Secondary license:

First name:

Last name:

E-mail:

Dialog size:





Author roles: Administrator
 User Administrator
 Author
 End user
 Key user
 Reviewer
 Template Designer

Process roles:


OK Cancel

Enter a username and password.


Define the type of license.

-  To ensure that the future user will be able to logon to the Curator, you have to at least specify a primary license for every user.
-  You can also specify a secondary license that allows the user to logon in cases where all licenses from the primary group have been allocated.
-  When dealing with users who often have to work offline, it's a good idea to allow them to checkout the license.
-  In the case of external users (such as LDAP users), you have to allocate at least a primary license via the "Assign authorizations to external users" administrative area.

Specify the first and last names of the user.

-  To ensure that the notification function works, you may also want to specify the user's e-mail address. However, please note that this can also be subsequently provided by the user.

You also need to define the maintenance language and interface language, along with the standard size of dialogs.

 The maintenance language is the language in which a new document will be created and in which the document contents will be displayed in the user interface.

Select the author roles that are to be assigned to the new user by activating the appropriate checkbox(es).

Predefined author roles:

- **Administrator**

In addition to all authoring functions, the administrator also has access to all functions for maintaining document types (Document Types view) and the *Settings* view.

- **User administrator**

The user administrator can use the *Settings* view to maintain user accounts and assign authorizations. He/she always needs an additional role that grants access to the Curator. He/she can only assign or revoke those author roles that he/she can edit personally. The user administrator cannot change the administrator and user administrator settings. The purpose of this is to prevent the user administrator from assigning or revoking the role of administrator or user administrator to themselves or others. This setting can only be made by the actual administrator.

You may also want to define process roles which are assigned to the user when logging on to the Portal.

2 Importing user accounts

Specify the Excel file and the associated configuration file.

Define the import mode. When performing an Excel user import, you can choose between the following options:

- Operations are defined in the actual list. When this is specified, it will be expected that the operation performed on the users (create, delete or update) will be saved in every master record in the Excel file (please refer to the "Option" section under the extractors).
- The list contains all users. Existing users, who are not included in the Excel table, will be deleted.
- The list contains only new users or updates for existing users. Only new users will be added or existing users updated.
- The list contains users to be deleted. All users to whom the list refers will be deleted.

Import user list from Excel

<p>1 Settings</p>	<p>You can now select the Excel file which contains the user information. Make sure that the AutoFilter option is disabled for this file.</p>
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Please select an Excel file which contains the data and an XML file which contains the configuration.

Excel file:	<input type="button" value="Datei auswählen"/>
Configuration file:	<input type="button" value="Datei auswählen"/>
Import mode:	<input type="radio"/> Operations are defined in the actual list. <input type="radio"/> The list contains all users. <input checked="" type="radio"/> The list contains only new users or updates for existing users. <input type="radio"/> The list contains users to be deleted.

Please refer to the document titled "Importing data from Excel" for more in-depth information.

3 Listing user accounts

The "Settings" tab allows you to access a list of all users (search with *) or search for individual users.

Administer user accounts

Settings

Search for users

Name:

* may be used as a wildcard

4 Deleting a user account

The deletion of a user account cannot be undone. Please pay particular attention to the fact that the deletion procedure also involves the loss of all user references to the created objects (e.g. processes or documents). However, the respective user name will still be listed in the change log for the objects.



5 How to assign authorizations to external users

The log-in module supports logging in to directory services or Single Sign-On systems. The log-in module also supports the assignment of authorizations to groups and individual users from these external systems.

To recognize external groups and users, tt knowledge force uses the log-in module-specific names of the respective objects. In the case of the LDAP log-in module, this is the Distinguished Name (DN) of the LDAP group or of the LDAP user. Other log-in modules can use other identifiers. A description of the specific group and user names can be found in the documentation for the respective log-in module.

Please refer to the document titled "Assigning authorizations to external users" for more in-depth information.