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Yooz Rising training – Business Edition

Module 2:
User management

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Objective and duration of the training

- Objective of the training
  - Provide knowledge allowing mastery of User management in Yooz Rising.
- Prerequisite
  - Having completed the module 1 « Organizational units and Masterdata ».
- Targeted audience
  - This training is for administrators.
- Duration
  - 30 minutes.

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Training plan

- User access management
  - Creation and setting of User access
  - Modification of a User access
  - Deletion of a User access
- User role management
  - Permissions linked to each Role management
- User group management
  - Creation of User group
  - Permissions linked to User group management
  - User group management

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Definitions

- User access
  - User access is a set of parameters dedicated to the latter, allowing the access to the Yooz workspace.
- Role
  - The User access and the Role are two complementary notions. The Role allows to define User rights on Yooz.
- Permissions
  - Each Role holds its own Permissions that are dedicated to the User. They can be of different types (parameters, visualization) and determine rights allowed to each Role.
- User group
  - A User group is a grouping of Users. This makes it possible to assign Roles to several Users at the mean time instead of doing it individually. In particular, User groups are used to control approval circuits (e.g., to create a group of approvers).

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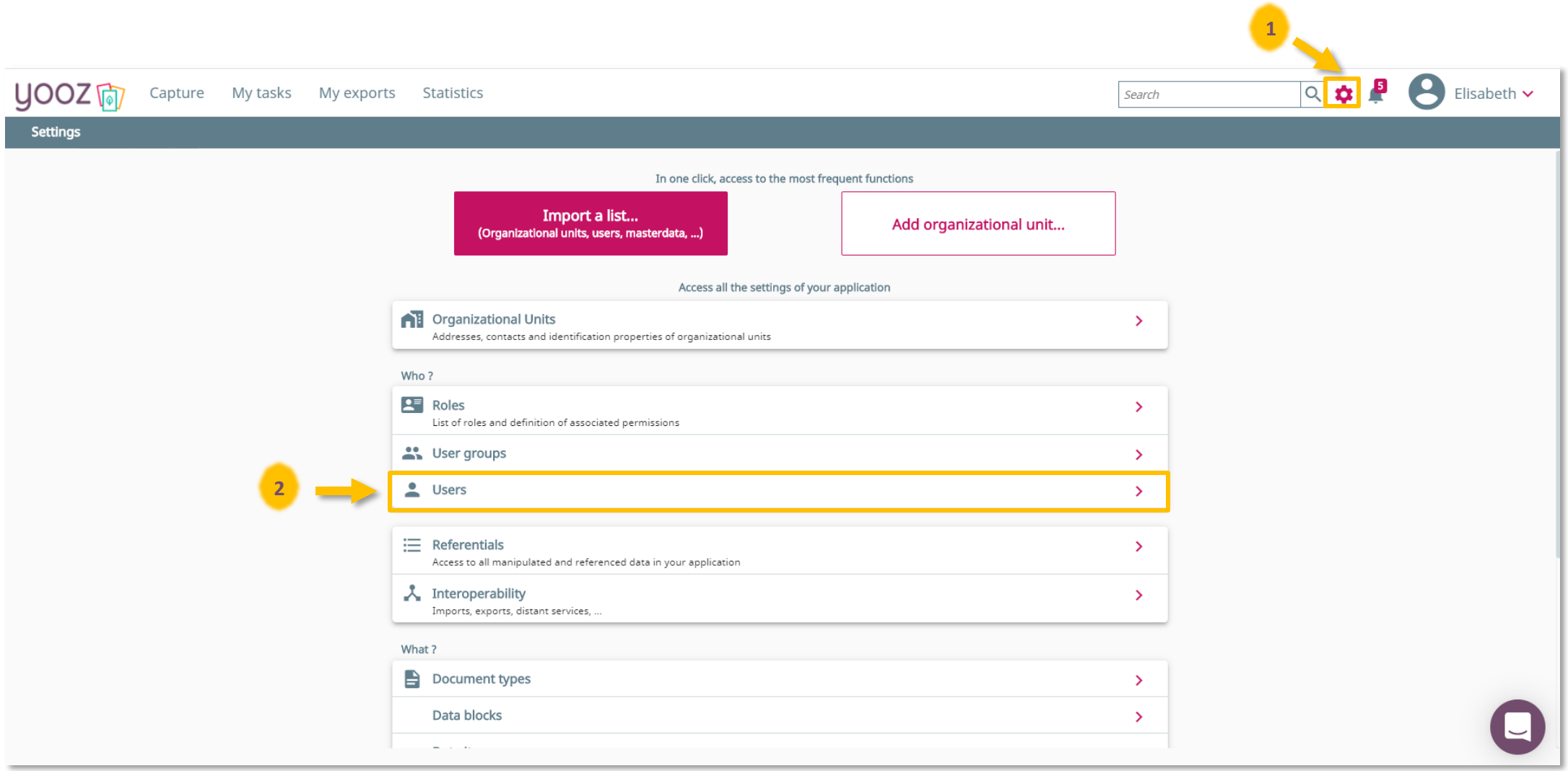
User access management

Creation of User access (1/3)



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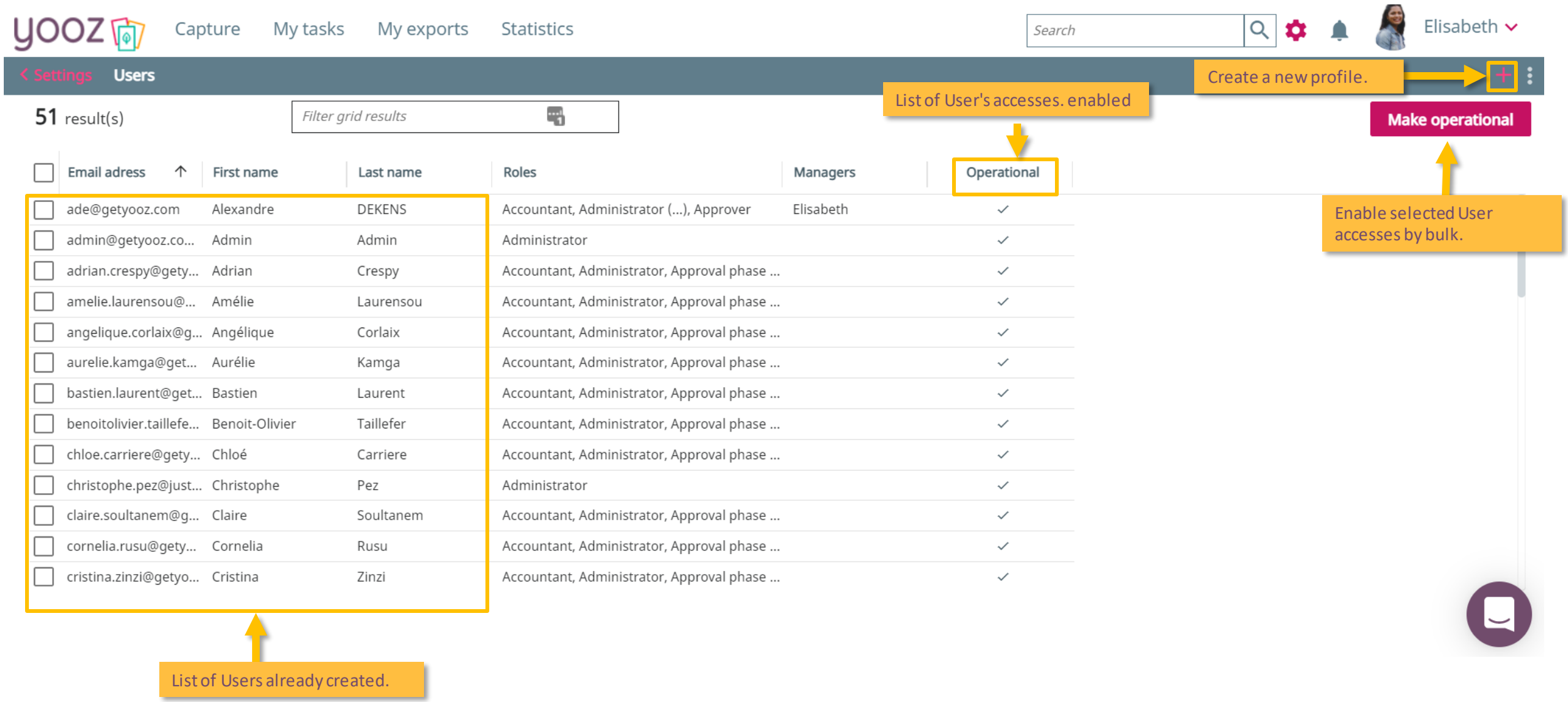
Creation of User access (2/3)



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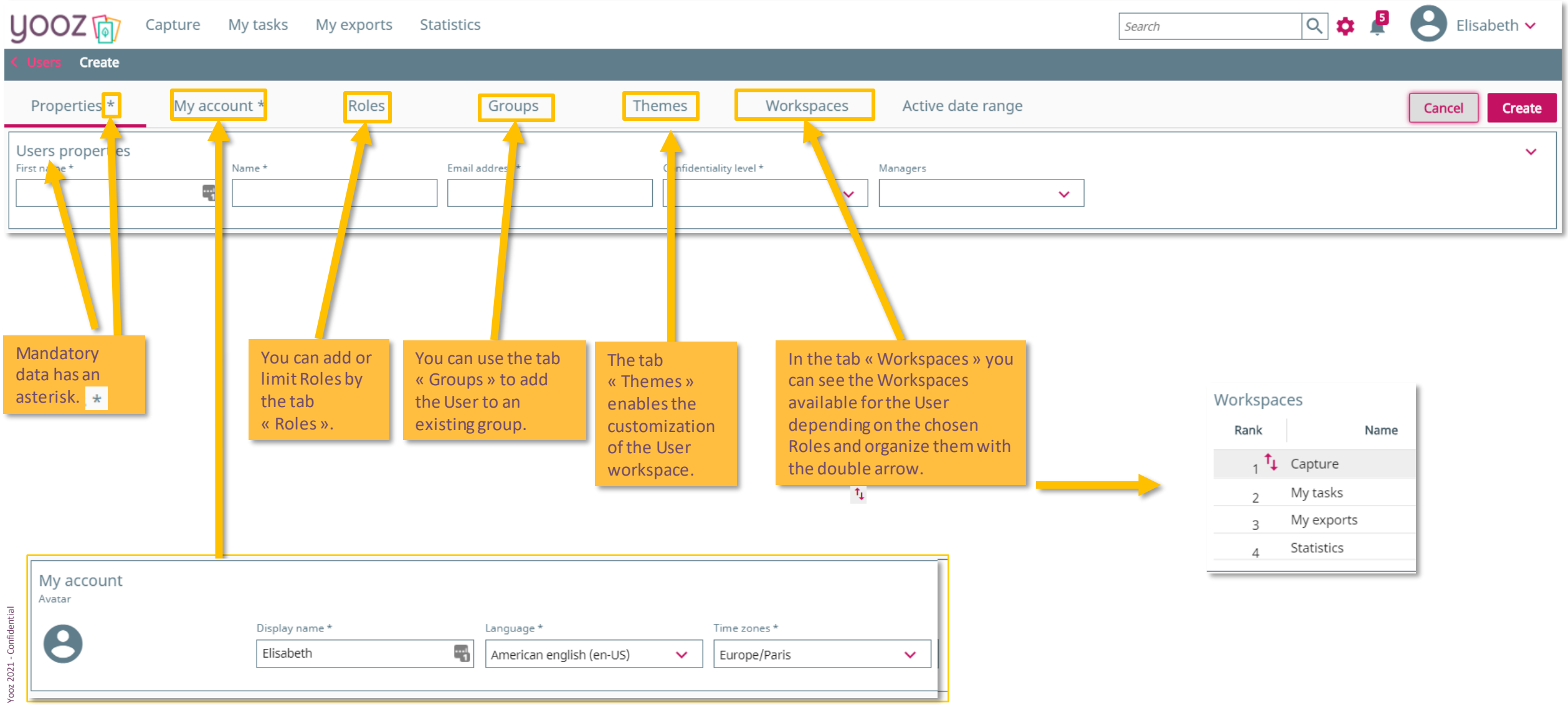
Creation of User access (3/3)



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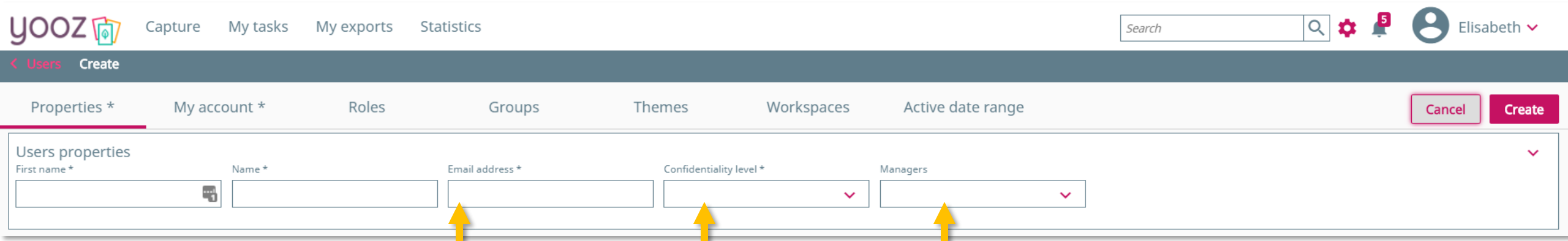
Properties



The credentials will be sent to the e-mail address of the User.

The Confidentiality level is graduated from 0 to 5. If a document is imported with level 4 and the User has level 3, they will not be able to get access to it.
A User with level 5 has access to all the confidentiality levels.

You can fill the Manager who will receive reminders.

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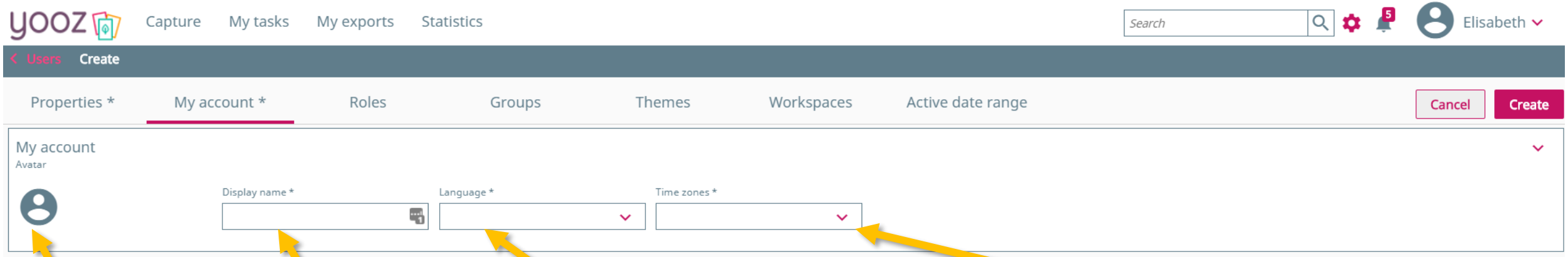
My account



By clicking on this icon, you can upload the picture of the created User. It should be a square, max 19 Mo.

The Display name could differ from the first name and the last name in the tab Properties.

You can select the Language of your User and modify it.

Set the Time zone on your User profile allows to have the User's local time on the history for each actions performed on their documents.

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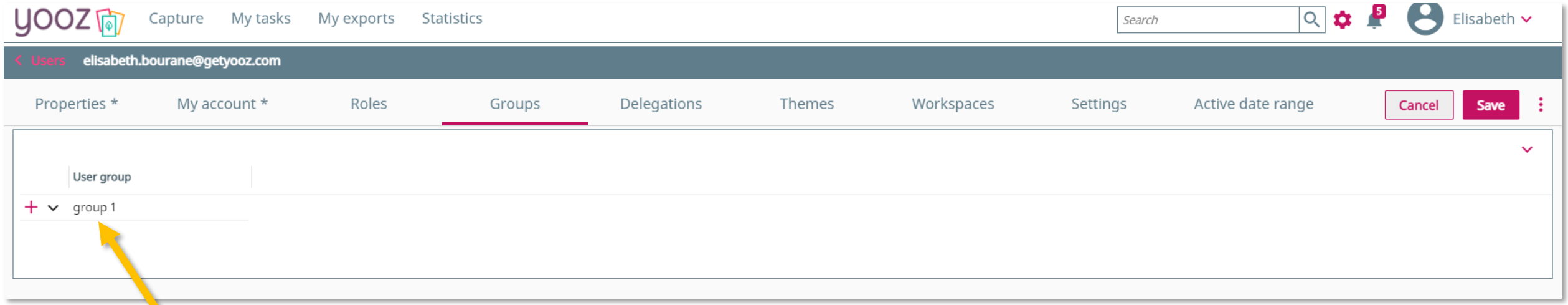
Groups



If a User group has been created, you can associate the new User to one or many groups.

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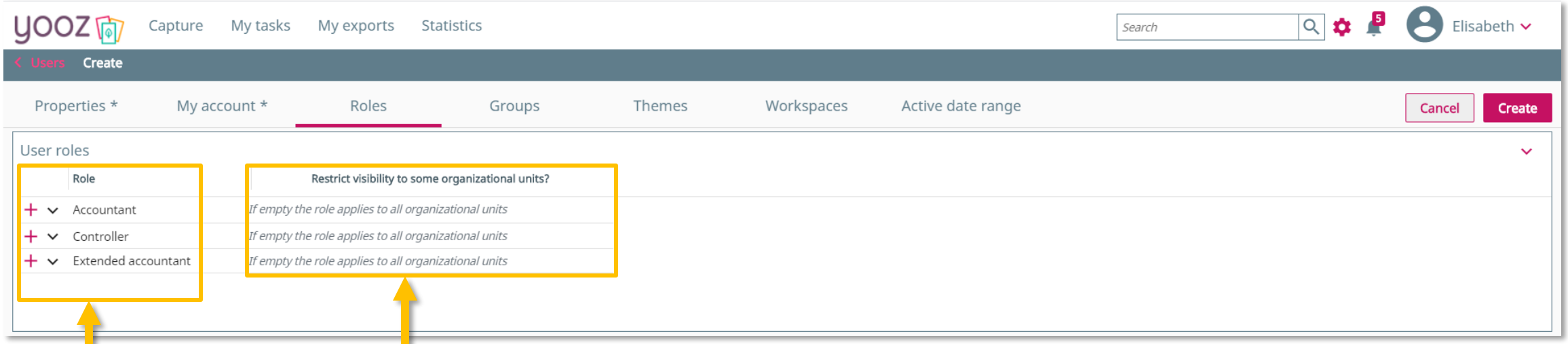
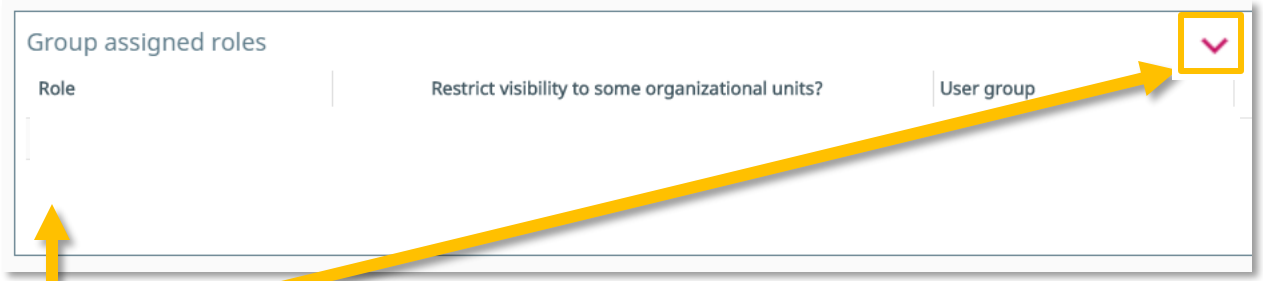
Roles



I select the Roles of my User.
Note : you can combine Roles.

You can customize Roles by Organizational unit.
For example, the User will be able to enter documents only for 3 Organizational units. On the 2 others, they will only have the controller Role.



You can add the User to one or many groups.
Here, you can see the Role depending on the Group, because the Group can provide Roles to the Users (next screen).

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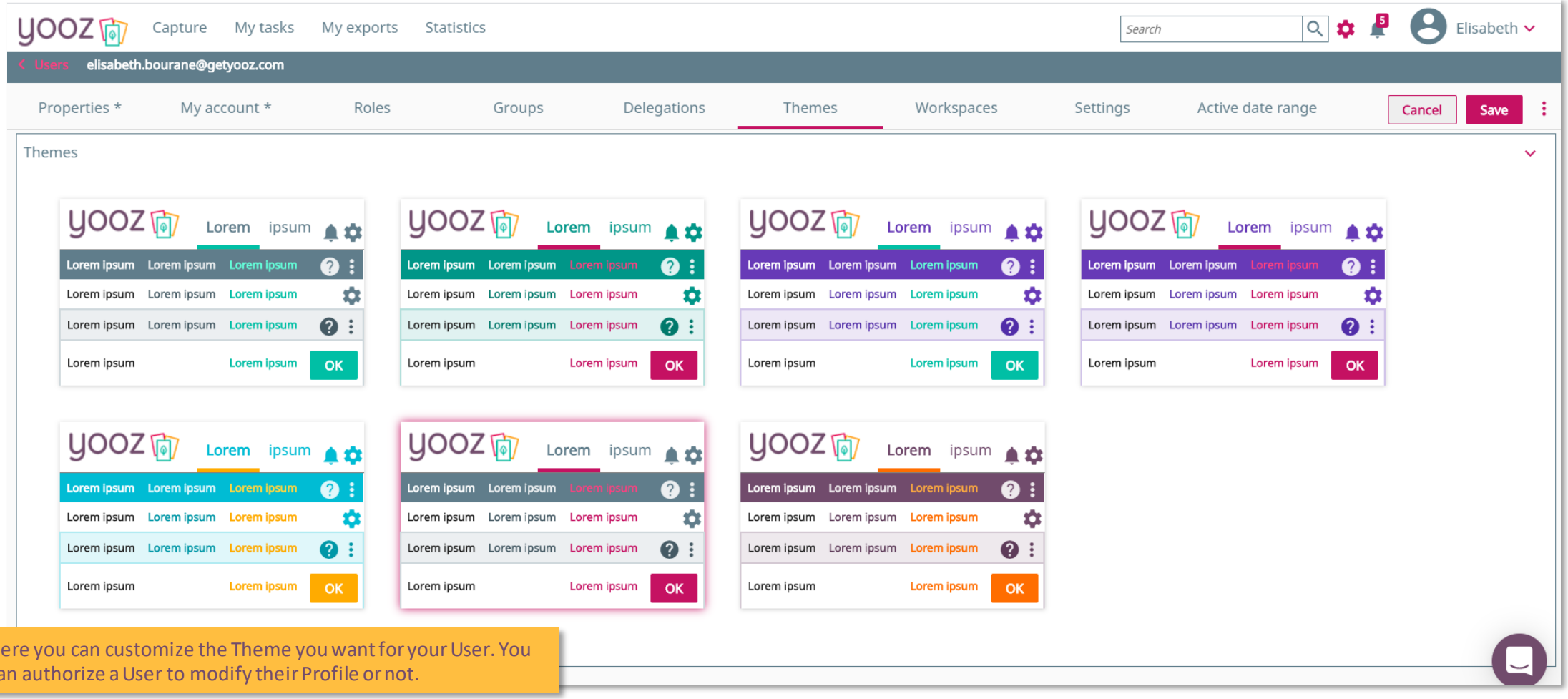
Themes



Here you can customize the Theme you want for your User. You can authorize a User to modify their Profile or not.

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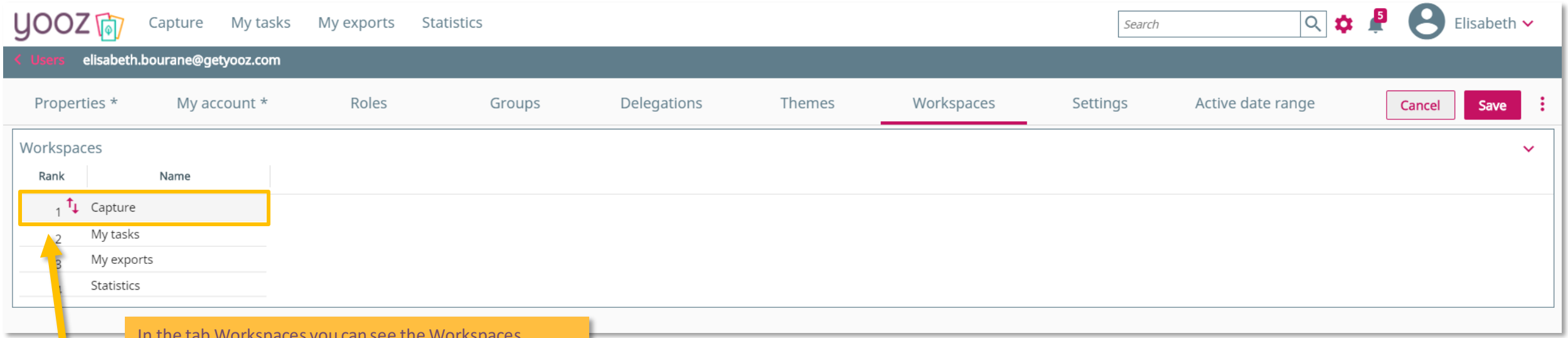
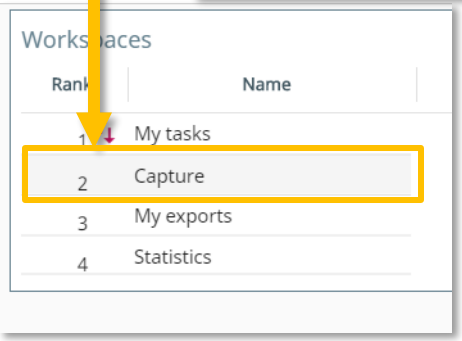
Workspaces



In the tab Workspaces you can see the Workspaces available depending on the Roles of the selected User. You can also rank them with the double arrow.



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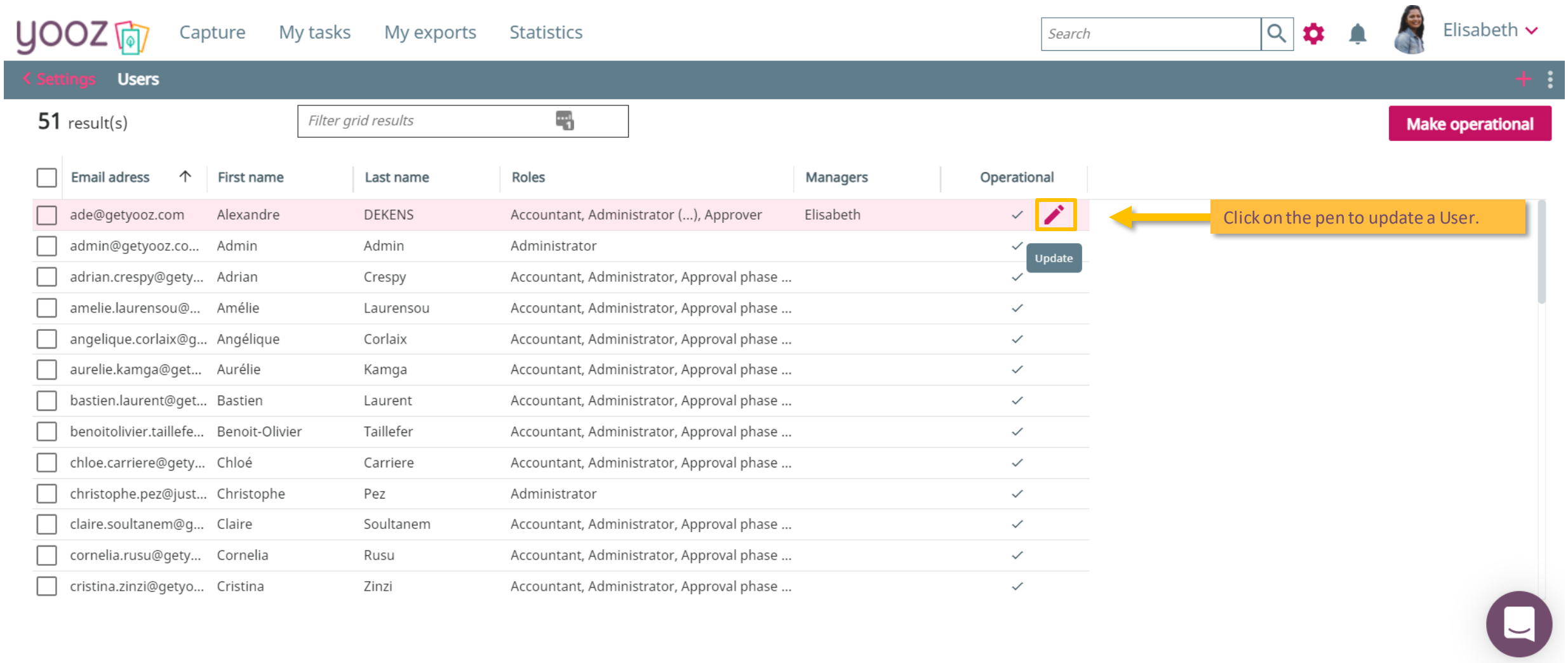
Modification of a User access



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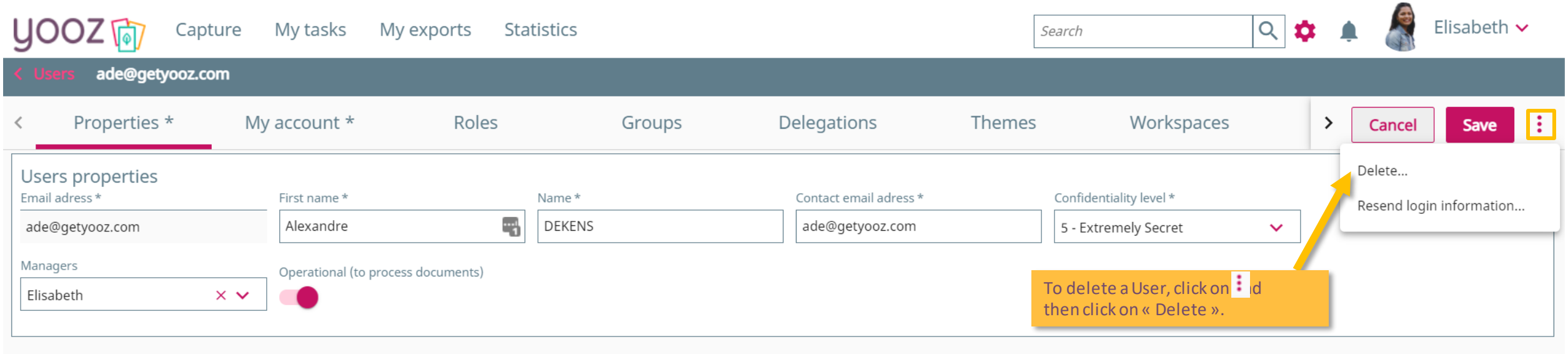
Deletion of a User access



- NB: The deletion is not final. The User will no longer be visible and will have an deactivation date. Restoration will be possible afterwards by using Yooz Support service.

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User role management

The function of User Roles

- Roles:
  - Determine which Workspaces are visible to the User (Capture, My tasks, My exports, Statistics).
  - Determine the authorized actions (e.g. capture, delete, view, save, export, ...).
  - Determine which registration actions are possible:

→ The "accountants" are the recipients of the tasks on the invoices.

→ The "operators" are the recipients of the tasks on various documents (other than invoices).

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Summary of standard Roles

Role	Assignee of tasks	Permissions allowed	Workspaces accessible
Capture agent	Split (if initiated by him)	Import, configure a YooxBox	Capture
Clerk	Entry documents	Editing informations of the documents existing in the tasks	My tasks Search
Accountant	Entry invoices and assets Split (if initiated by him)	Import, delete, export, link Editing informations of the documents existing in the tasks	Capture My tasks My exports Search
Extended accountant	No	Same as the accountant Access to the functional settings (referential databases, exports…)	Capture My tasks My exports Search Settings
Purchasing Clerk	Entry Purchase Requests		
Approver	Approve documents	View, approve documents, edit GL accounts and dimensions	My tasks Search
Controller	No	View and download documents	Search
Administrator	No	All the settings	Search Settings

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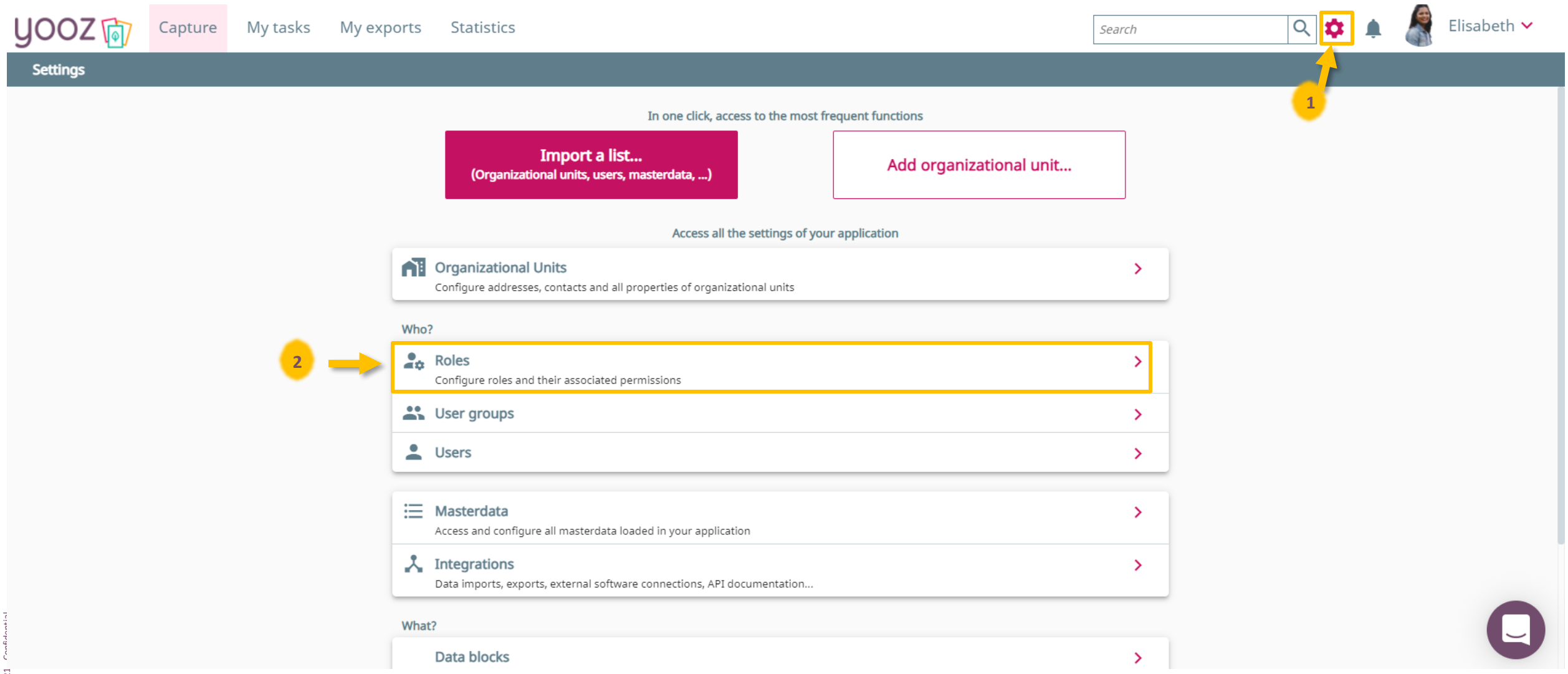
Management of existing Roles (1/2)



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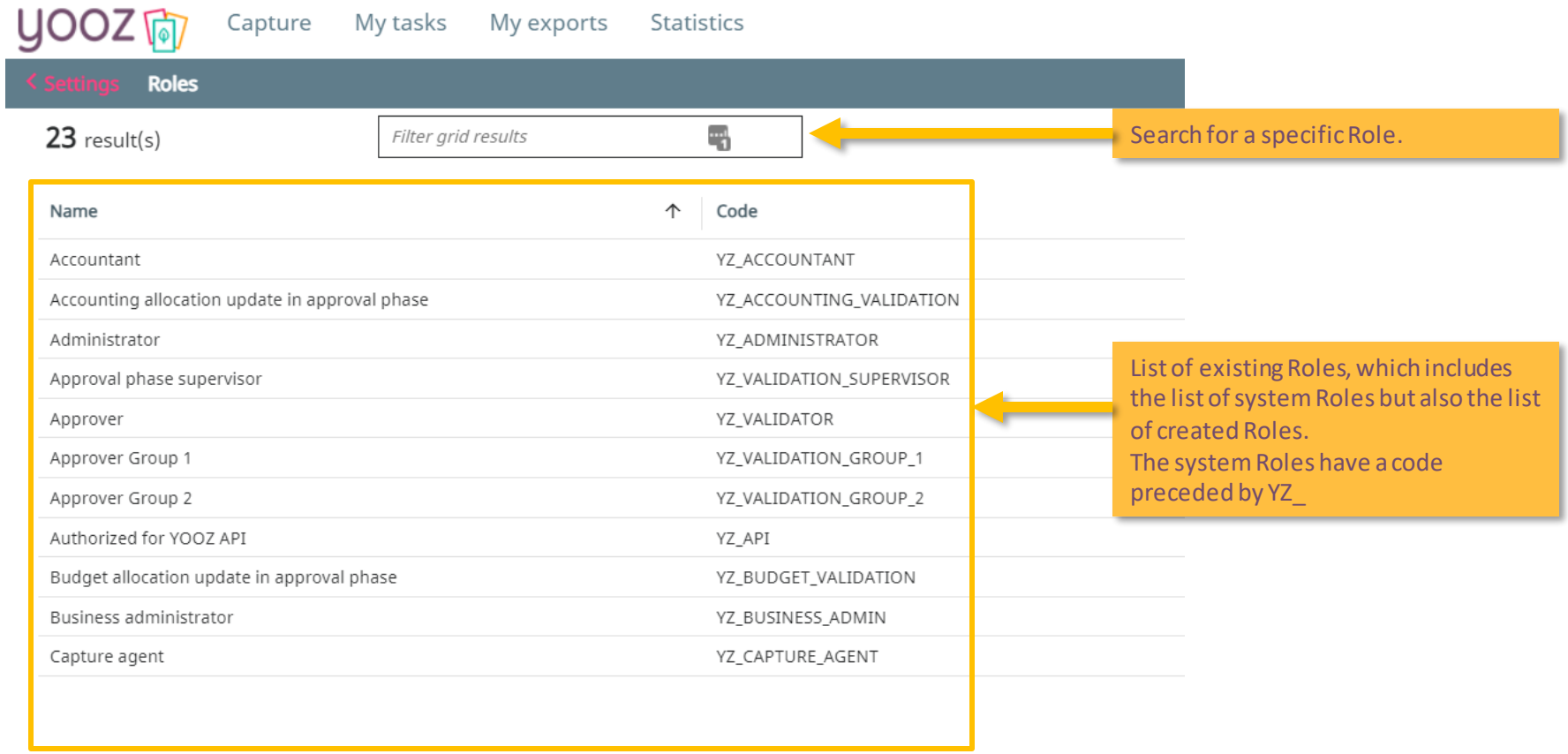
Management of existing Roles (2/2)



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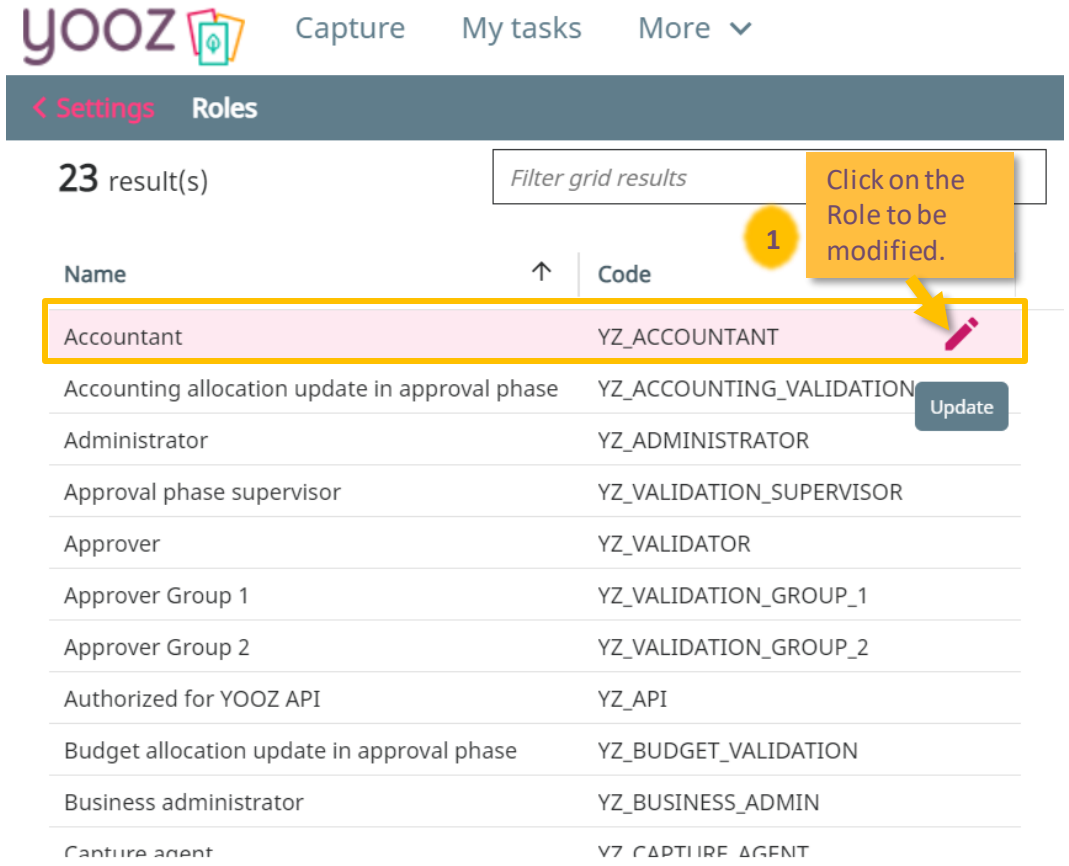
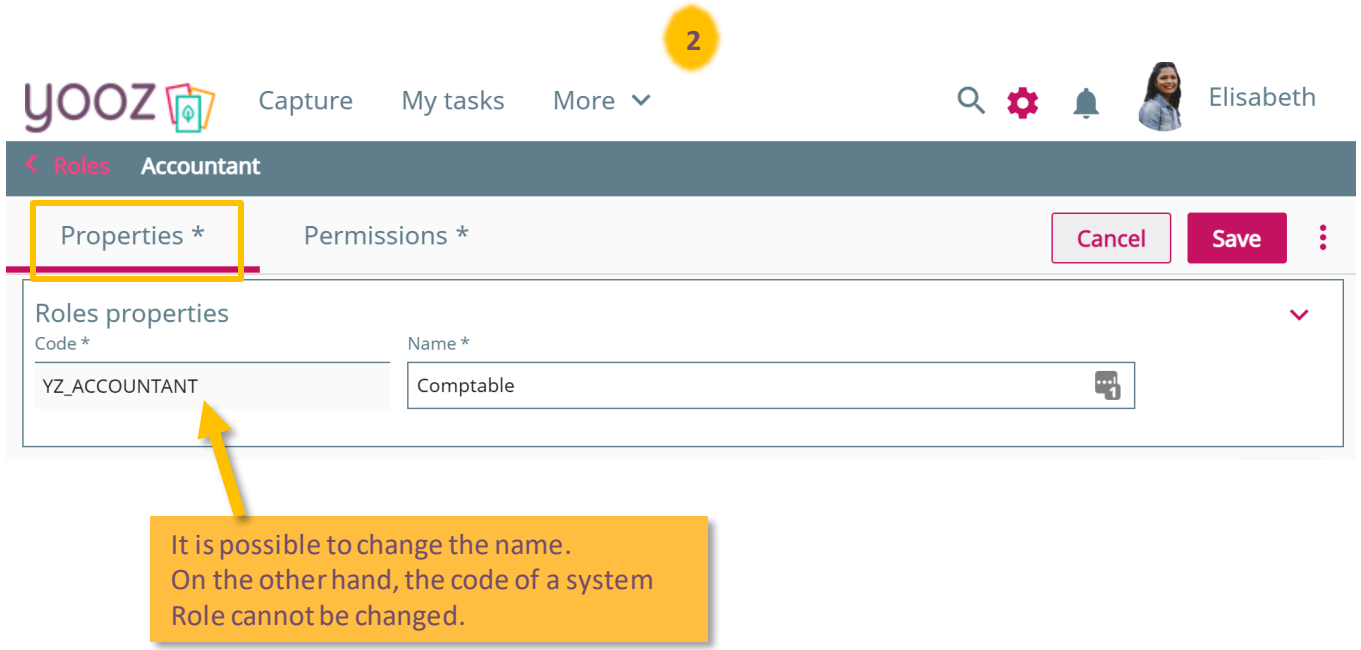
Modification of an existing Role





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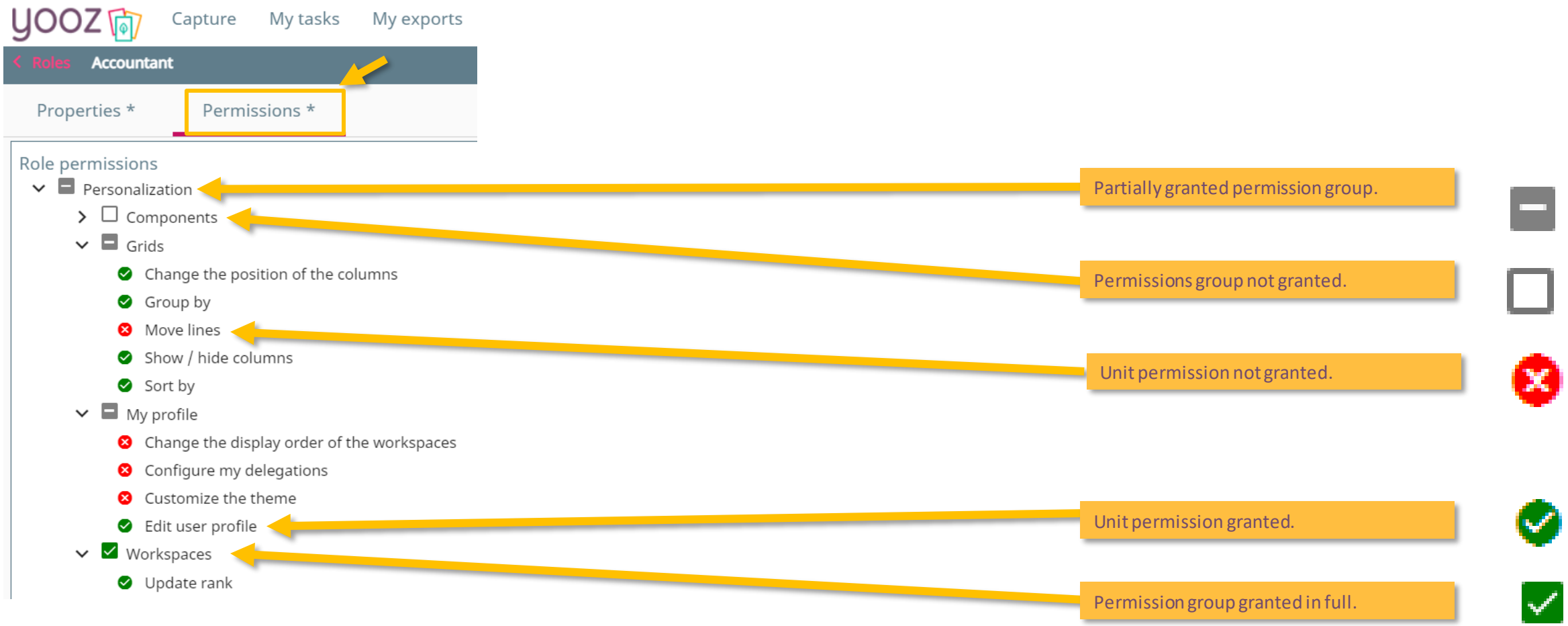
Permissions associated with a Role



- Click on the boxes to grant or deny permission and save.

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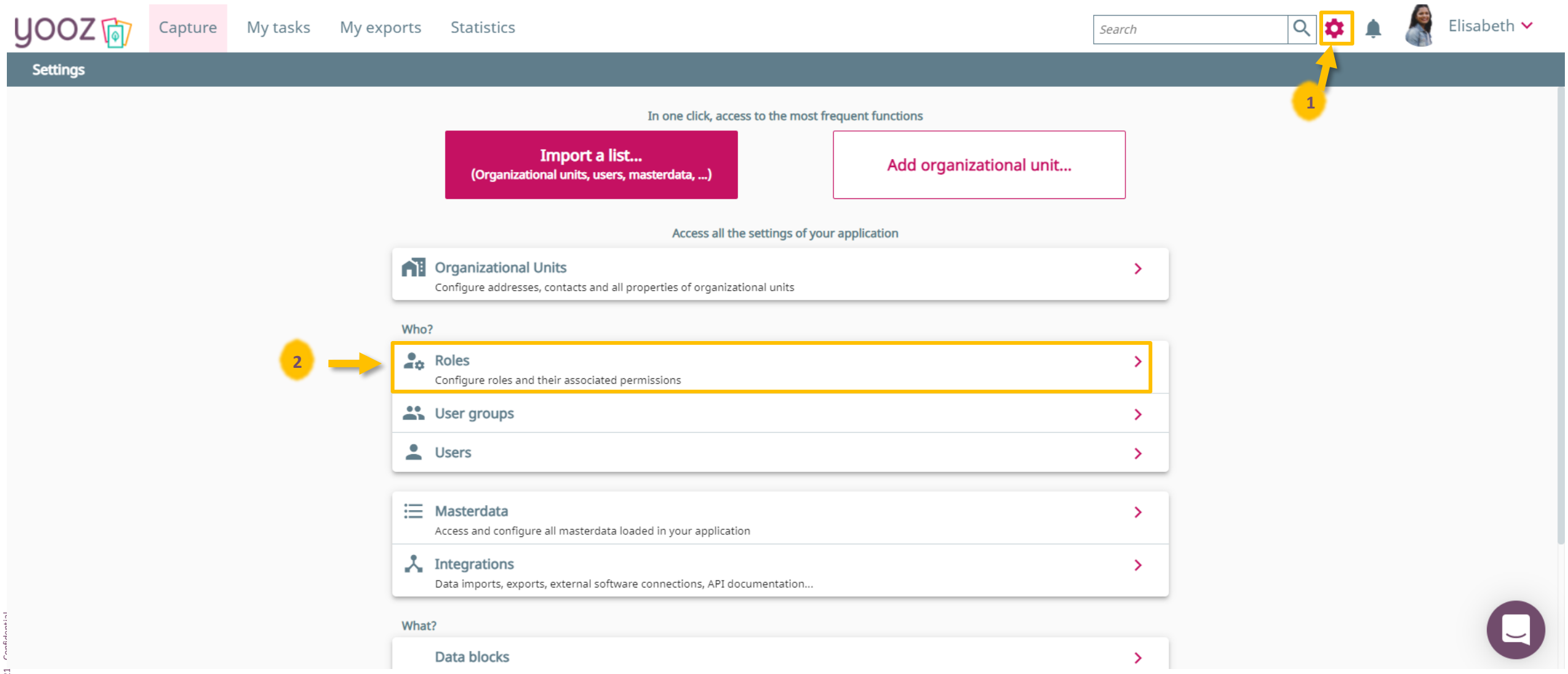
Creation of a new Role (1/2)



- It is possible to create your own Roles in addition to the standard Roles.

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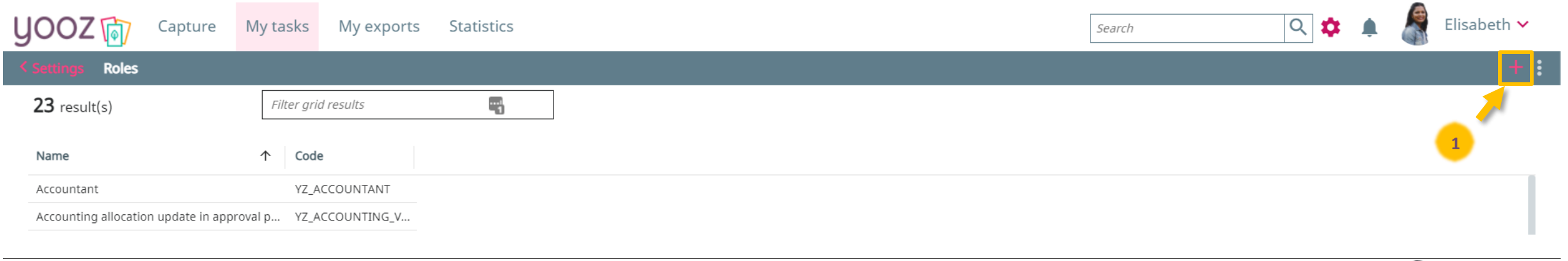
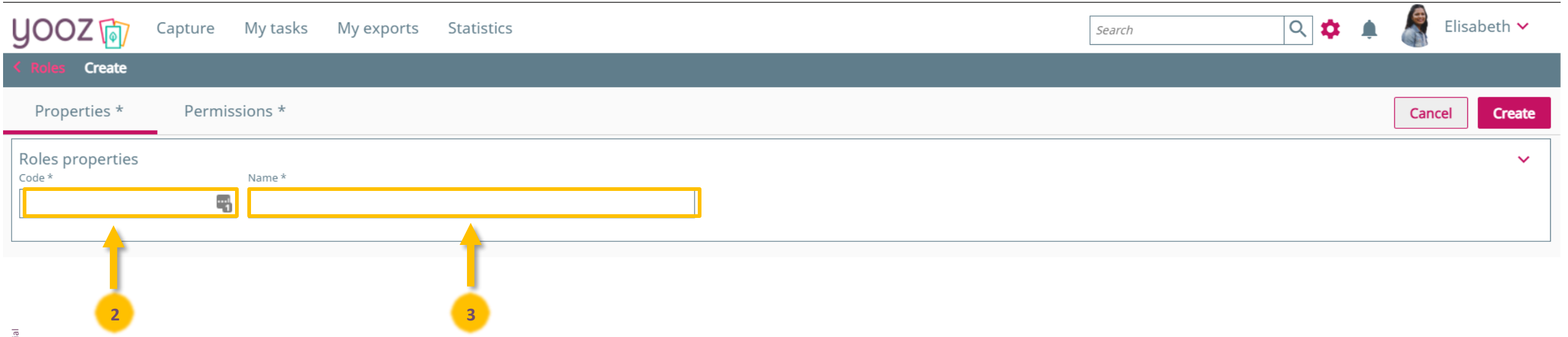
Creation of a new Role (2/2)





Indicate the desired code to make it easier to identify the Role in the list.

Give a name that will make it easy to identify the specifics of the Role being created.

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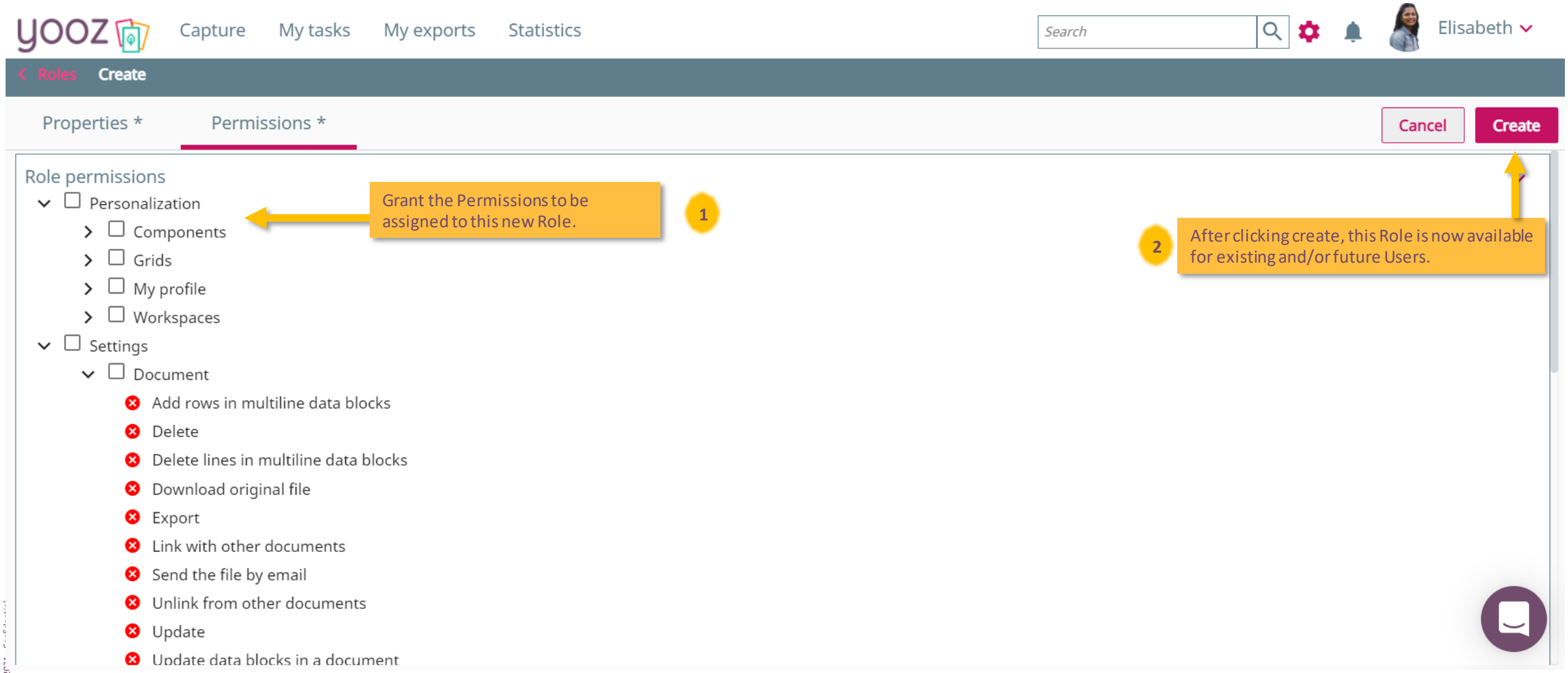
Choice of Permissions you grant to this Role



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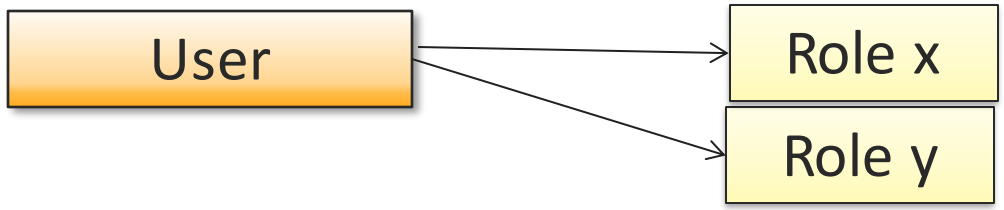
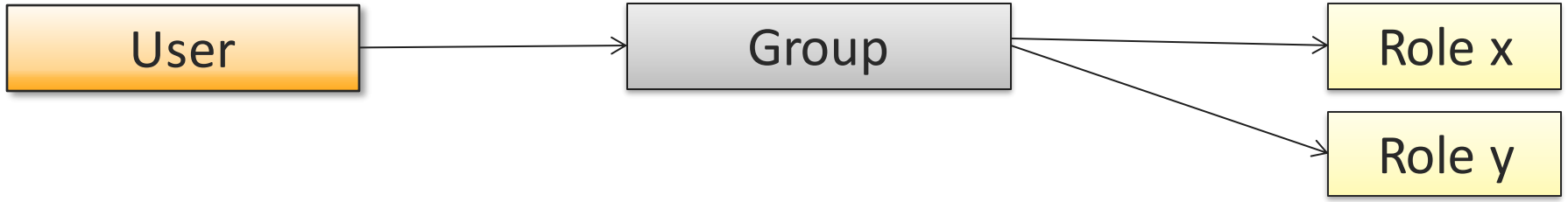
- User Roles can be managed in two ways.
  - First, it is possible to assign Roles to User access directly.



  - In a second step, it is possible to assign Roles to a User group and then attach the User to the Group. The User will inherit the Roles associated with the Group.

Example: I need to create 15 accesses to Users who must have accounting Roles on my organization "My Startup". Instead of assigning this Role individually to each user, I will create a Group "Accountants My Startup" to which I will associate the Role of accountant. All I will have to do is attach my 15 Users to this Group.



  - These two modes of operation can be combined: it is possible to assign Roles to User access and via Groups.

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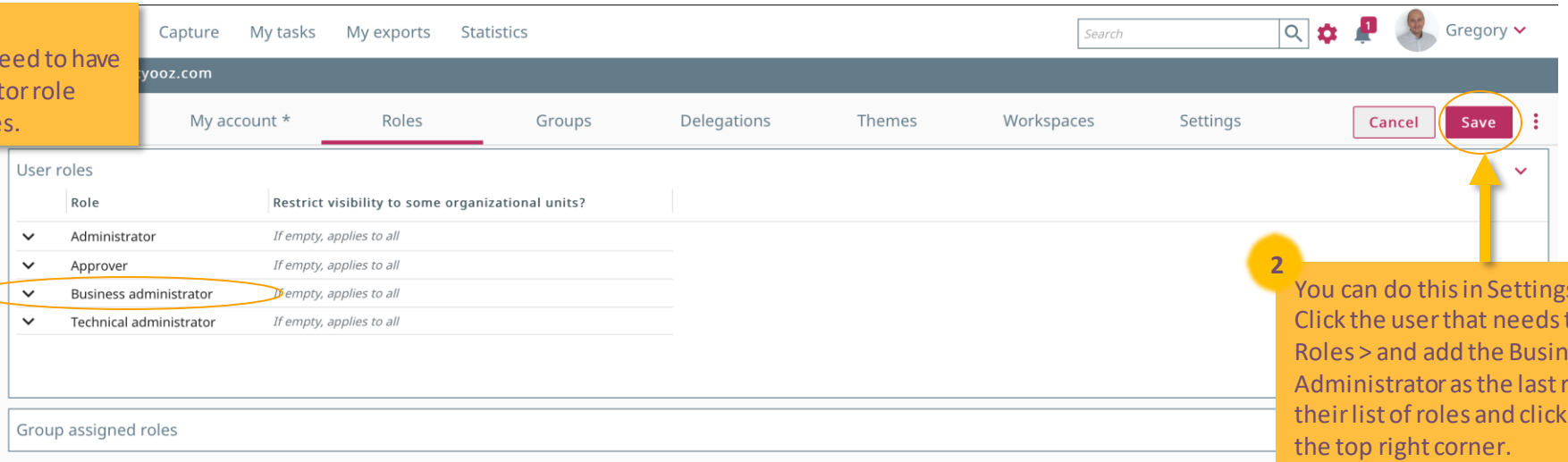
Reassign a document to another User (1/3)

- If your business needs to remove or deactivate a user who owns in progress documents, then you may need to take steps to transfer them to another user or transfer back into the main workflow.
- To do this you can use the Process Administration pane in the My Tasks tab.

1 First, someone with the Administrator role will need to have the Business Administrator role added to their list of roles.



2 You can do this in Settings > Users > Click the user that needs the role > Roles > and add the Business Administrator as the last role in their list of roles and click save in the top right corner.

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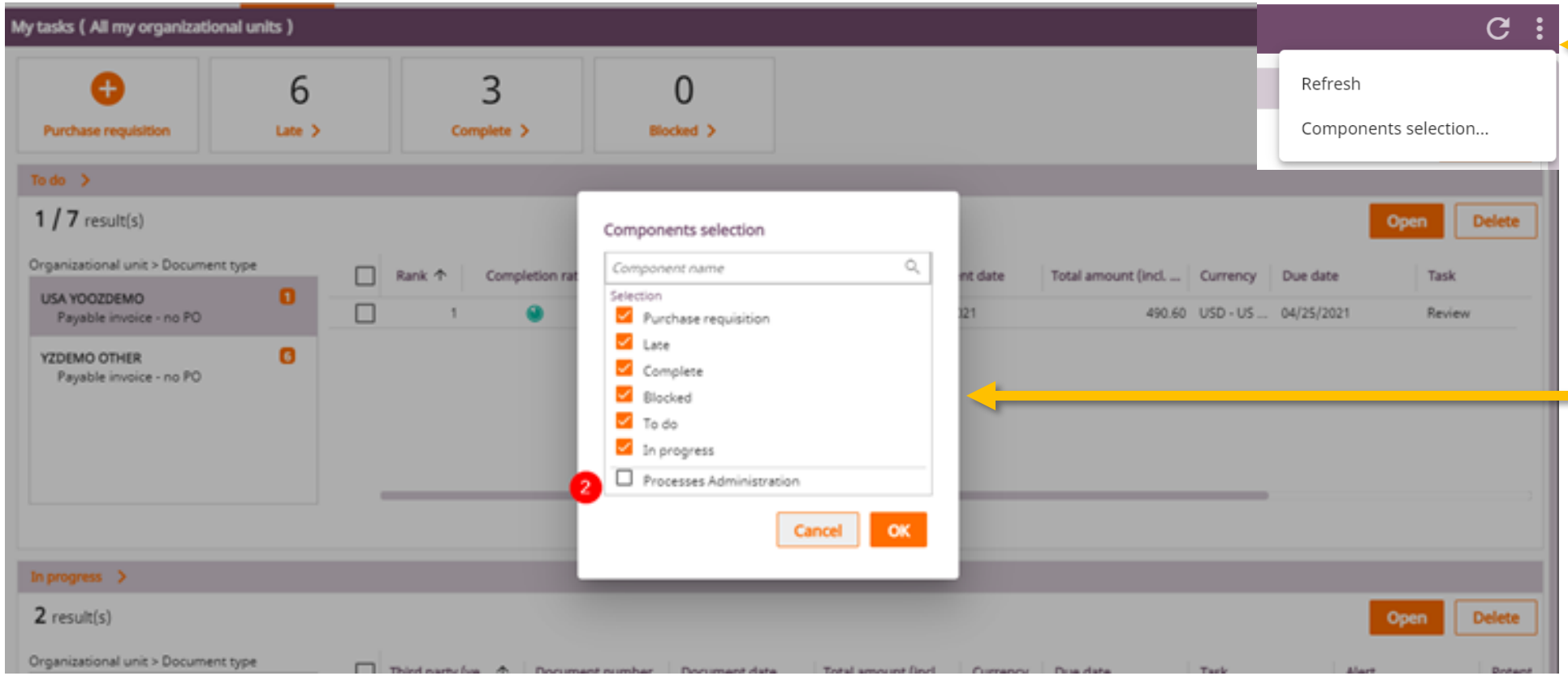
Reassign a document to another User (2/3)



3

Click the 3 dots in the top right corner and click Components selection.

4

In the dialog box check Process Administration and click OK.

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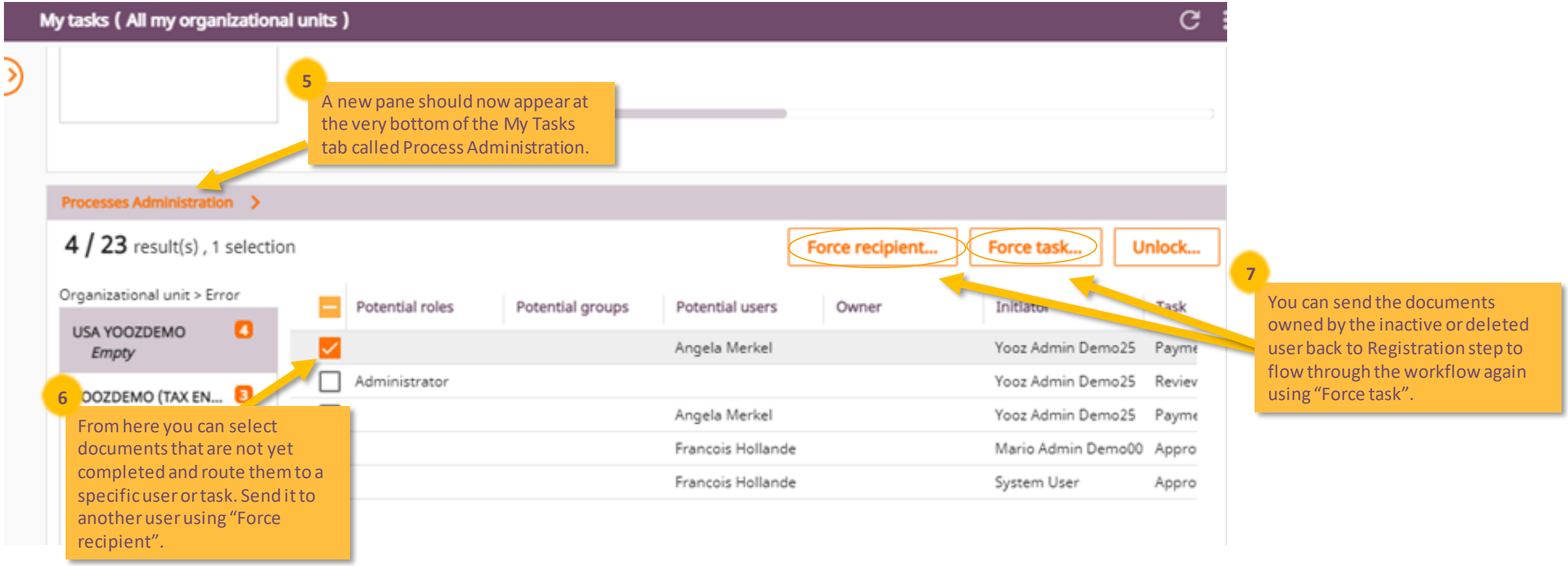
Reassign a document to another User (3/3)



- To be noted : In order to ensure that no document is lost during the process of deactivation, it is important to put in place a delegation on the inactive profile and modify the routes through which it will appear.

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Creation and management of User groups

User group basics

- A User group is a notion allowing to manage in one operation a set of Users who have the same attributions.
  - This makes it possible to carry out a "grouped" setting in a single operation.
  - Example:
    - In the application there are 9 users for pharmacy files.
    - It is possible to assign the "Accountant" Role to each User in 9 operations.
    - Or with the Group to assign the Role "Accountant" containing the 9 Users, in only 1 operation. It is a time saving.
  - The User group also allows you to assign a manager to a list of Users.
  - A manager is a User linked to a Group as such (they do not necessarily belong to the Group). This is not necessarily a hierarchical Role but a functionality: the manager can be used in escalations.

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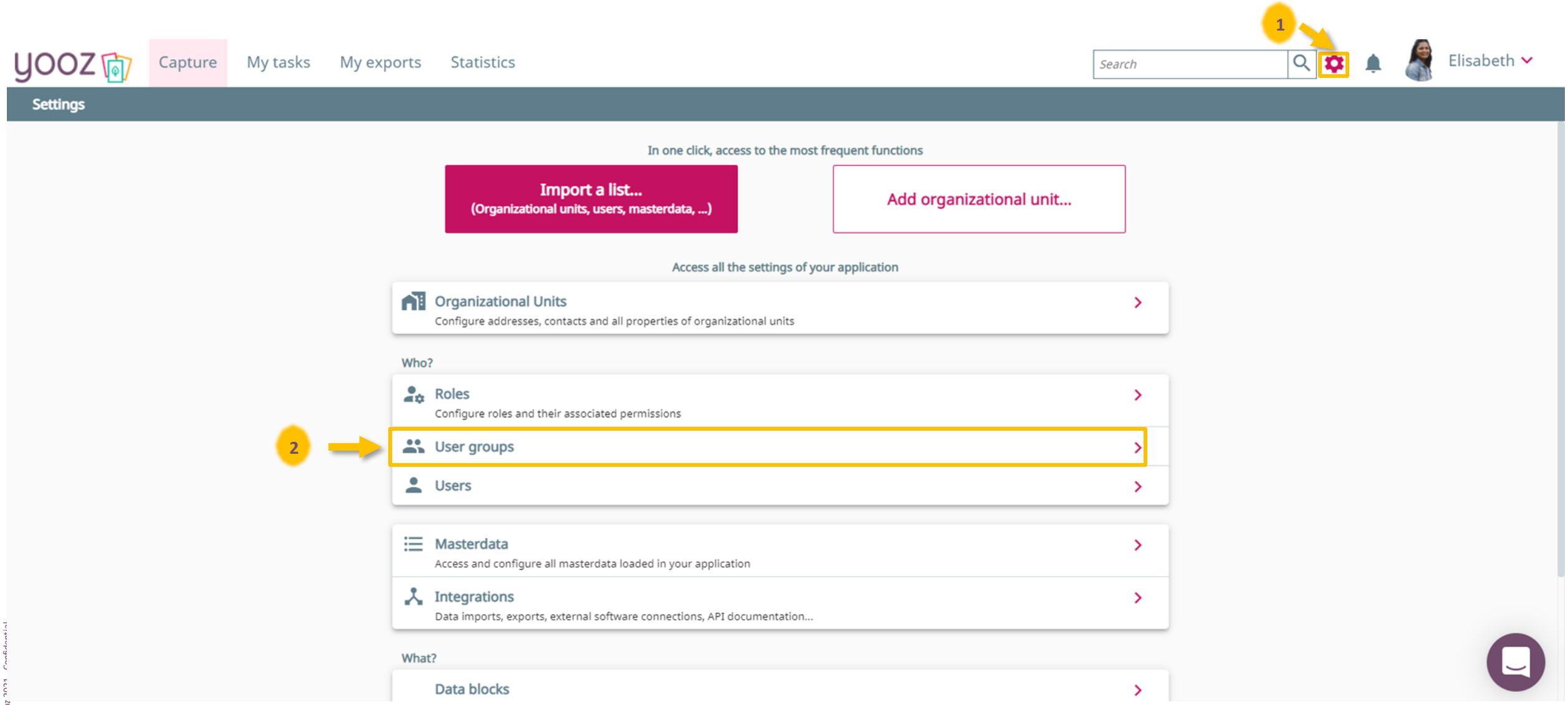
Creation of User groups (1/4)



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Creation of User groups (2/4)

Choose the User group code.
For example: CAPTURE_AGENT.

Choose the name of the User group.
Example: Capture Agent.

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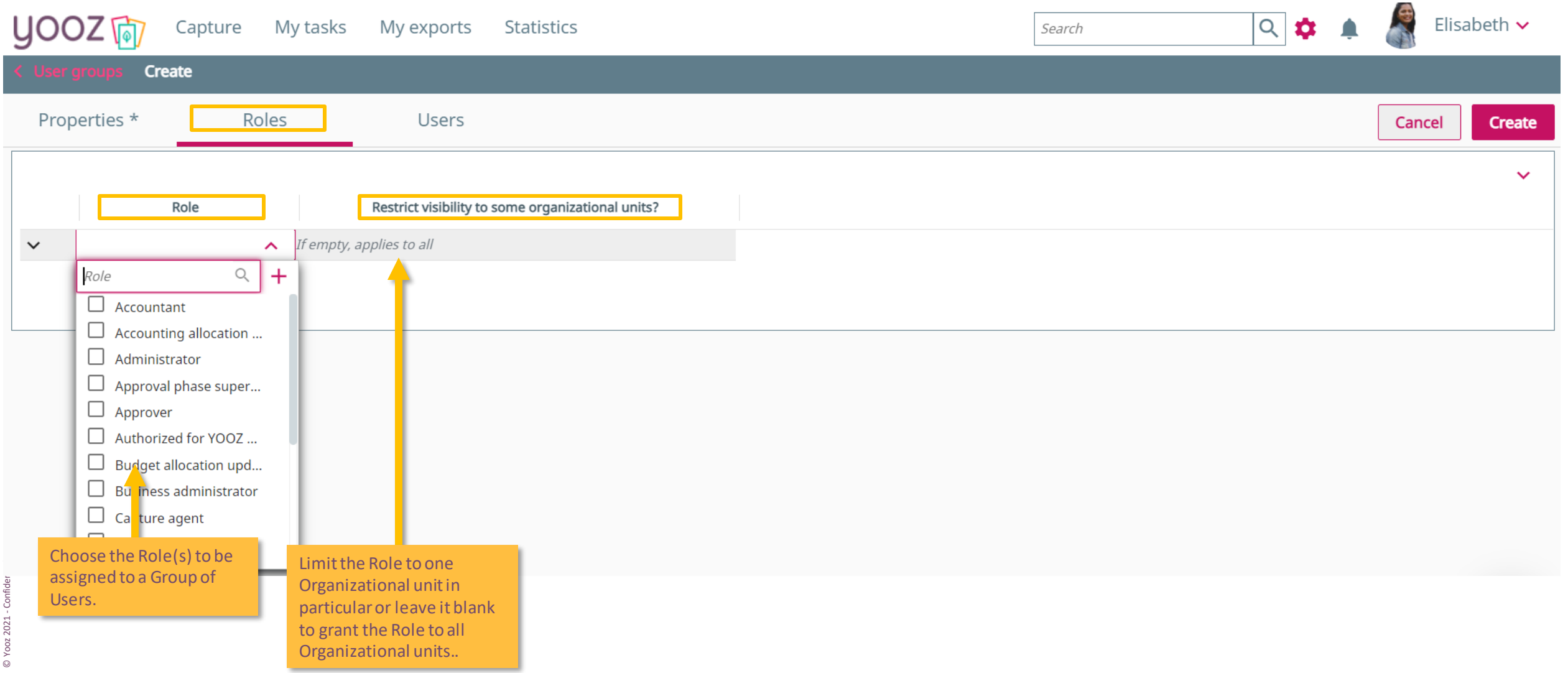
Creation of User groups (3/4)



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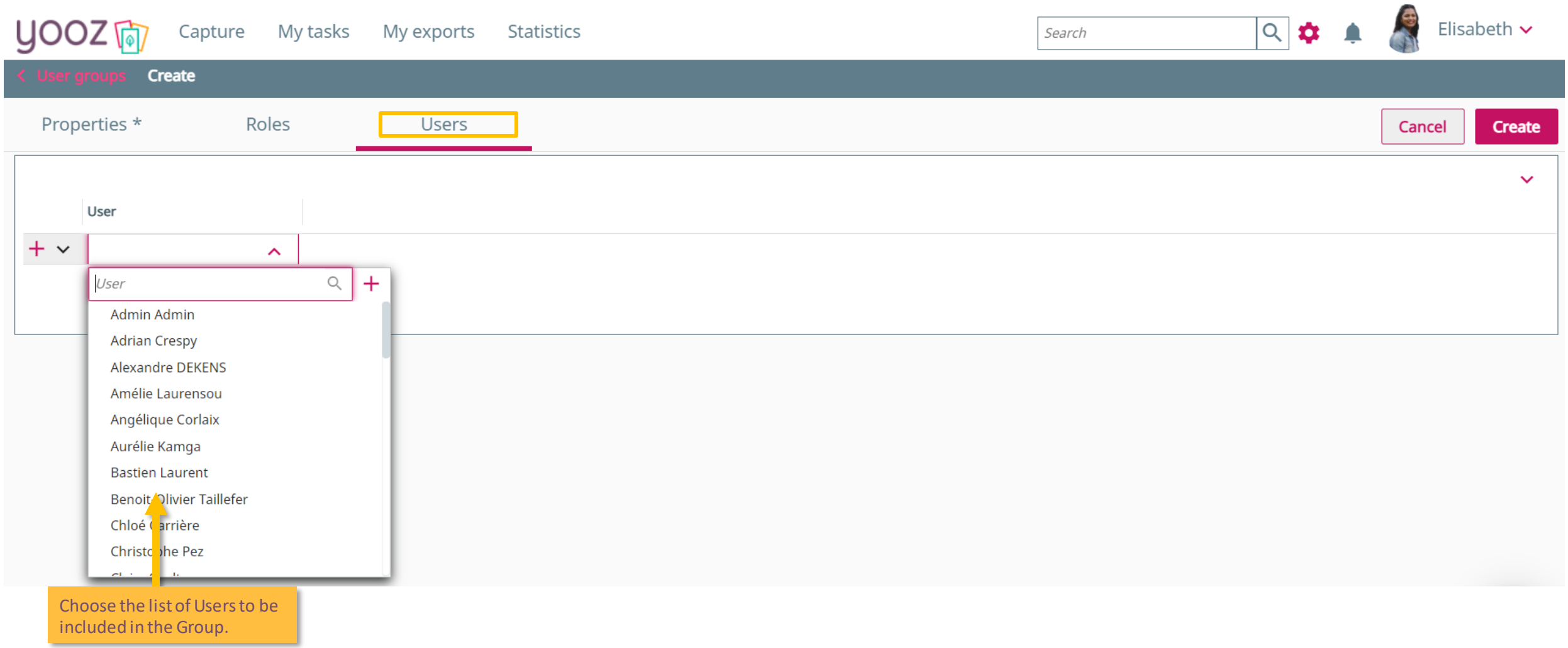
Creation of User groups (4/4)



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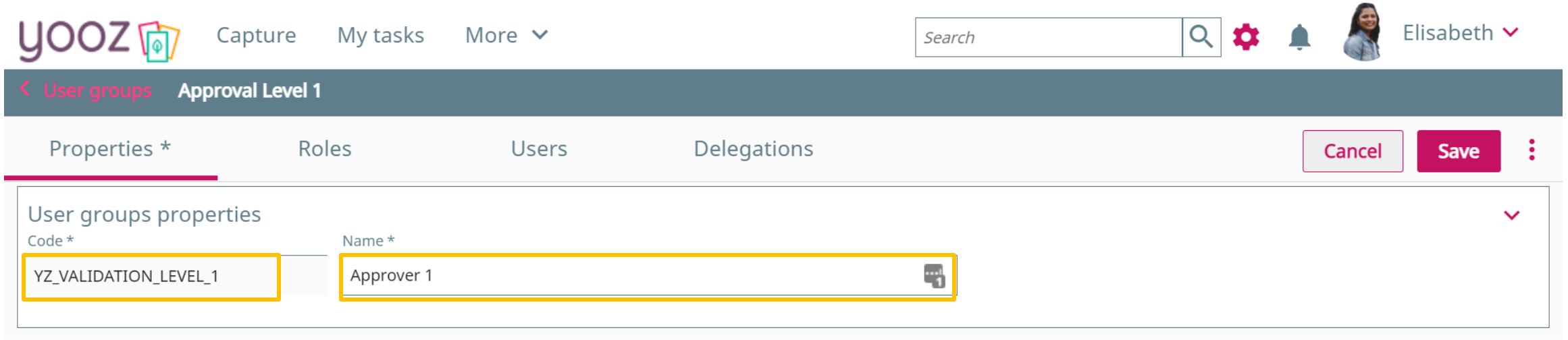
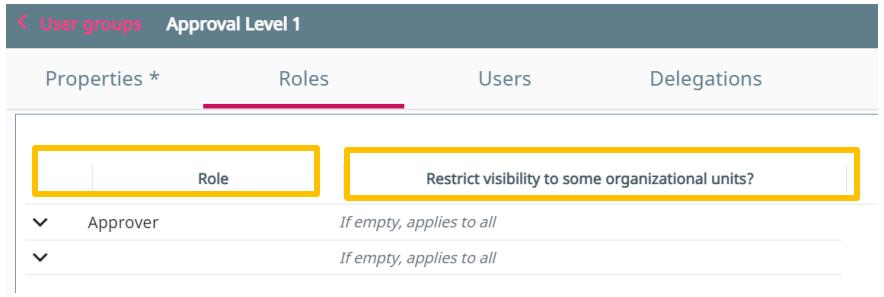
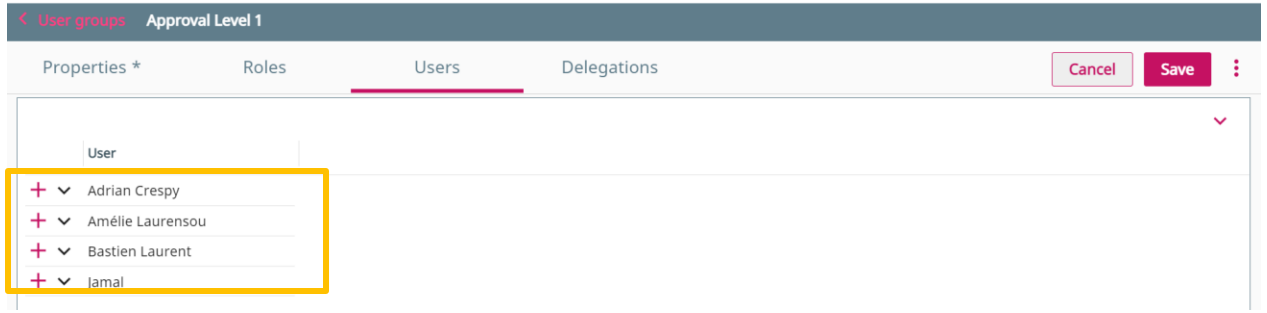
Creation of User groups *Example*







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Questions / Answers