

# Yooz Rising training – Business Edition

## Module 2: User management

## ■ 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.

## ■ 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

## ■ 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.

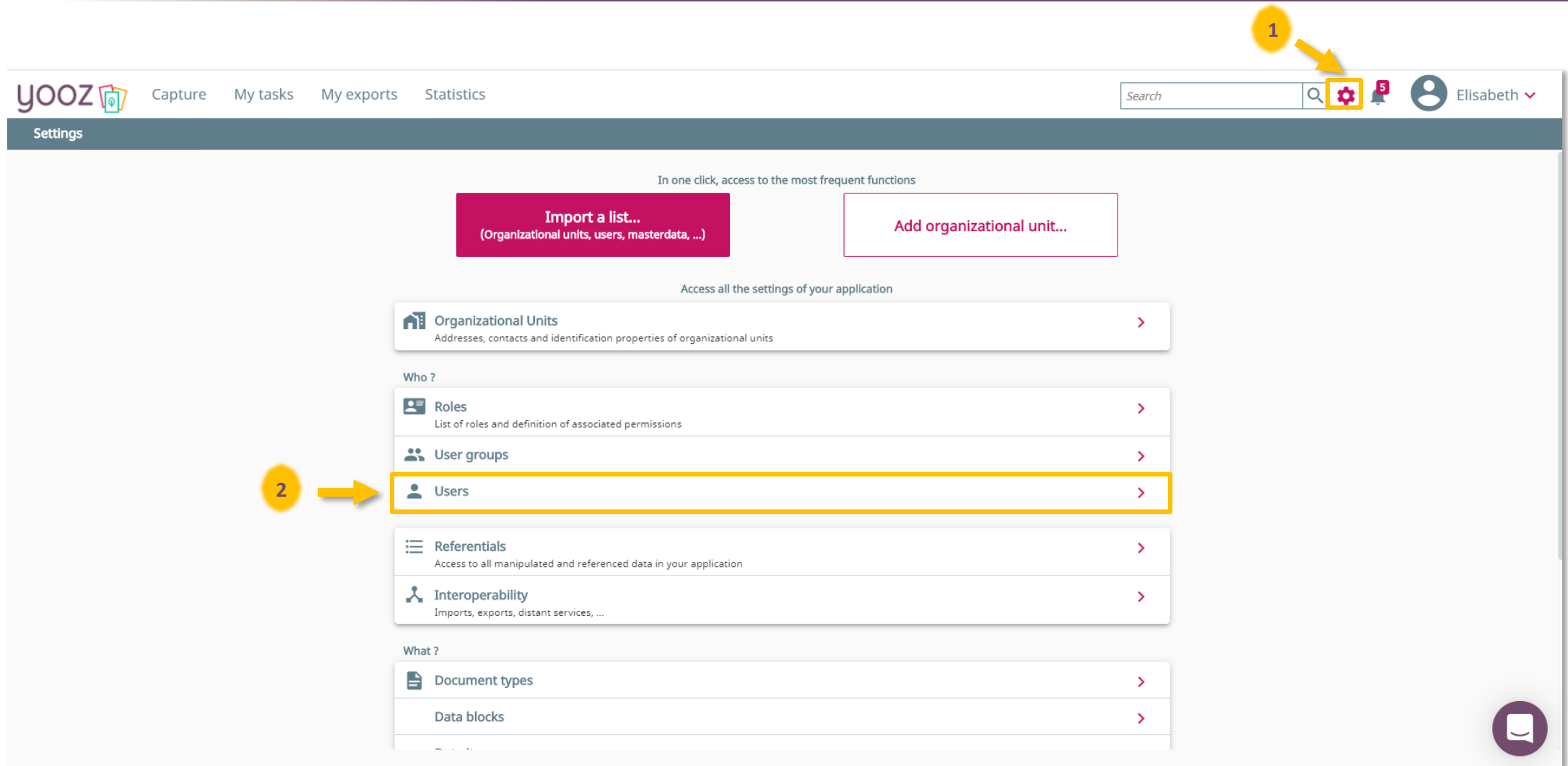
## ■ Permissions

- 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).




# User access management



The screenshot shows the yooz application interface. At the top, there is a navigation bar with the yooz logo, tabs for 'Capture', 'My tasks', 'My exports', and 'Statistics', a search bar, and a user profile for 'Elisabeth'. A yellow circle with the number '1' and an arrow points to the settings gear icon in the top right corner. Below the navigation bar is a 'Settings' section header. The main content area is titled 'In one click, access to the most frequent functions' and contains two buttons: 'Import a list... (Organizational units, users, masterdata, ...)' and 'Add organizational unit...'. Below this is a section titled 'Access all the settings of your application' which lists various settings categories. A yellow circle with the number '2' and an arrow points to the 'Users' category, which is highlighted with a yellow border. The 'Users' category is listed under the 'Who ?' section, along with 'Organizational Units', 'Roles', 'User groups', 'Referentials', and 'Interoperability'. The 'What ?' section includes 'Document types' and 'Data blocks'. A chat icon is visible in the bottom right corner.

1

yooz  Capture My tasks My exports Statistics

Search    Elisabeth ▾


Settings

In one click, access to the most frequent functions


**Import a list...**  
(Organizational units, users, masterdata, ...)


Add organizational unit...


Access all the settings of your application


 **Organizational Units** >  
Addresses, contacts and identification properties of organizational units


Who ?

 **Roles** >  
List of roles and definition of associated permissions


 **User groups** >

 **Users** >


 **Referentials** >  
Access to all manipulated and referenced data in your application

 **Interoperability** >  
Imports, exports, distant services, ...

What ?

 **Document types** >

**Data blocks** >



51 result(s)

Filter grid results

<input type="checkbox"/>	Email address	↑	First name	Last name	Roles	Managers	Operational
<input type="checkbox"/>	ade@getyooz.com		Alexandre	DEKENS	Accountant, Administrator (...), Approver	Elisabeth	✓
<input type="checkbox"/>	admin@getyooz.co...		Admin	Admin	Administrator		✓
<input type="checkbox"/>	adrian.crespy@gety...		Adrian	Crespy	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	amelie.laurensou@...		Amélie	Laurensou	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	angelique.corlaix@g...		Angélique	Corlaix	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	aurelie.kamga@get...		Aurélié	Kamga	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	bastien.laurent@get...		Bastien	Laurent	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	benoitolivier.taillefe...		Benoit-Olivier	Taillefer	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	chloe.carriere@gety...		Chloé	Carriere	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	christophe.pez@just...		Christophe	Pez	Administrator		✓
<input type="checkbox"/>	claire.soultanem@g...		Claire	Soultanem	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	cornelia.rusu@gety...		Cornelia	Rusu	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	cristina.zinzi@getyo...		Cristina	Zinzi	Accountant, Administrator, Approval phase ...		✓

List of User's accesses. enabled


Create a new profile.

Make operational

Enable selected User accesses by bulk.


List of Users already created.



Rank	Name
1 	Capture
2	My tasks
3	My exports
4	Statistics




Users properties 

First name \* 

Name \*

Email address \*

Confidentiality level \* 

Managers 


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.

My account ▾

Avatar



Display name \* 

Language \* ▾


Time zones \* ▾

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.

yooz 


CaptureMy tasksMy exportsStatistics

Search    5  Elisabeth 


< Users elisabeth.bourane@getyooz.com





Properties \*My account \*RolesGroupsDelegationsThemesWorkspacesSettingsActive date rangeCancelSave

User group

+  group 1

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

yooz  Capture My tasks My exports Statistics

Search    5  Elisabeth ▾

< Users Create

Properties \* My account \* **Roles** Groups Themes Workspaces Active date range Cancel Create

User roles ▾

Role	Restrict visibility to some organizational units?
+ ▾ Accountant	If empty the role applies to all organizational units
+ ▾ Controller	If empty the role applies to all organizational units
+ ▾ Extended accountant	If empty the role applies to all organizational units


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.

Group assigned roles





Role	Restrict visibility to some organizational units?	User group
		▾

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).

yooz 

CaptureMy tasksMy exportsStatistics

Search


 Elisabeth

< Userselisabeth.bourane@getyooz.com

Properties \*My account \*RolesGroupsDelegationsThemesWorkspacesSettingsActive date range

CancelSave

Themes

yooz 

Lorem ipsum


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OK

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Lorem ipsumLorem ipsum

OK

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




yooz  Capture My tasks My exports Statistics

Search    5  Elisabeth ▾

< Users elisabeth.bourane@getyooz.com


Properties \* My account \* Roles Groups Delegations Themes Workspaces Settings Active date range Cancel Save ⋮

Workspaces ▾

Rank	Name
1 	Capture
2	My tasks
3	My exports
4	Statistics

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.

Workspaces

Rank	Name
1 	My tasks
2	Capture
3	My exports
4	Statistics

51 result(s)

Filter grid results








Make operational

<input type="checkbox"/>	Email address	First name	Last name	Roles	Managers	Operational
<input type="checkbox"/>	ade@getyooz.com	Alexandre	DEKENS	Accountant, Administrator (...), Approver	Elisabeth	✓ 
<input type="checkbox"/>	admin@getyooz.co...	Admin	Admin	Administrator		✓ 
<input type="checkbox"/>	adrian.crespy@gety...	Adrian	Crespy	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	amelie.laurenson@...	Amélie	Laurenson	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	angelique.corlaix@g...	Angélique	Corlaix	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	aurelie.kamga@get...	Aurélié	Kamga	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	bastien.laurent@get...	Bastien	Laurent	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	benoitolivier.taillefe...	Benoit-Olivier	Taillefer	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	chloe.carriere@gety...	Chloé	Carriere	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	christophe.pez@just...	Christophe	Pez	Administrator		✓
<input type="checkbox"/>	claire.soultanem@g...	Claire	Soultanem	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	cornelia.rusu@gety...	Cornelia	Rusu	Accountant, Administrator, Approval phase ...		✓
<input type="checkbox"/>	cristina.zinzi@getyo...	Cristina	Zinzi	Accountant, Administrator, Approval phase ...		✓

Click on the pen to update a User.



yooz  Capture My tasks My exports Statistics

Search     Elisabeth ▾

< Users ade@getyooz.com

< Properties \* My account \* Roles Groups Delegations Themes Workspaces >


Users properties


Email address \* First name \* Name \* Contact email adress \* Confidentiality level \*

ade@getyooz.com Alexandre DEKENS ade@getyooz.com 5 - Extremely Secret ▾

Managers Operational (to process documents)

Elisabeth × ▾ ☒

To delete a User, click on  and then click on « Delete ».

Cancel Save 

Delete...  
Resend login information...

- 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.




# User role management






## ■ 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).

# 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 database s, 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

 Capture My tasks My exports Statistics

Search     Elisabeth 

Settings



In one click, access to the most frequent functions

Import a list...  
(Organizational units, users, masterdata, ...)



Add organizational unit...

Access all the settings of your application



Who?



 **Organizational Units** 



Configure addresses, contacts and all properties of organizational units

 **Roles** 



Configure roles and their associated permissions

 **User groups** 

 **Users** 


 **Masterdata** 

Access and configure all masterdata loaded in your application

 **Integrations** 


Data imports, exports, external software connections, API documentation...

What?

**Data blocks** 

1

2



23 result(s)

Filter grid results



Search for a specific Role.

Name	↑	Code
Accountant		YZ_ACCOUNTANT
Accounting allocation update in approval phase		YZ_ACCOUNTING_VALIDATION
Administrator		YZ_ADMINISTRATOR
Approval phase supervisor		YZ_VALIDATION_SUPERVISOR
Approver		YZ_VALIDATOR
Approver Group 1		YZ_VALIDATION_GROUP_1
Approver Group 2		YZ_VALIDATION_GROUP_2
Authorized for YOOZ API		YZ_API
Budget allocation update in approval phase		YZ_BUDGET_VALIDATION
Business administrator		YZ_BUSINESS_ADMIN
Capture agent		YZ_CAPTURE_AGENT

List of existing Roles, which includes the list of system Roles but also the list of created Roles.  
The system Roles have a code preceded by YZ\_

# Modification of an existing Role

23 result(s)

Filter grid results

Click on the Role to be modified.

1

Name	Code
Accountant	YZ_ACCOUNTANT
Accounting allocation update in approval phase	YZ_ACCOUNTING_VALIDATION
Administrator	YZ_ADMINISTRATOR
Approval phase supervisor	YZ_VALIDATION_SUPERVISOR
Approver	YZ_VALIDATOR
Approver Group 1	YZ_VALIDATION_GROUP_1
Approver Group 2	YZ_VALIDATION_GROUP_2
Authorized for YOOZ API	YZ_API
Budget allocation update in approval phase	YZ_BUDGET_VALIDATION
Business administrator	YZ_BUSINESS_ADMIN
Capture agent	YZ_CAPTURE_AGENT

Update

Properties \*

Permissions \*

Cancel

Save

⋮

Roles properties


Code \*

Name \*

YZ\_ACCOUNTANT

Comptable

It is possible to change the name.  
On the other hand, the code of a system Role cannot be changed.

yooz  Capture My tasks My exports

< Roles Accountant

Properties \* Permissions \*

Role permissions

- Personalization
  - Components
  - Grids
    - Change the position of the columns
    - Group by
    - Move lines
    - Show / hide columns
    - Sort by
  - My profile
    - Change the display order of the workspaces
    - Configure my delegations
    - Customize the theme
    - Edit user profile
  - Workspaces
    - Update rank

Partially granted permission group.



Permissions group not granted.



Unit permission not granted.




Unit permission granted.







Permission group granted in full.



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

yooz  Capture My tasks My exports Statistics

Search     Elisabeth ▾


Settings

In one click, access to the most frequent functions


**Import a list...**  
(Organizational units, users, masterdata, ...)


Add organizational unit...


Access all the settings of your application


 **Organizational Units** >  
Configure addresses, contacts and all properties of organizational units


Who?

 **Roles** >  
Configure roles and their associated permissions

 User groups >


 Users >

 **Masterdata** >  
Access and configure all masterdata loaded in your application

 **Integrations** >  
Data imports, exports, external software connections, API documentation...


What?





Data blocks >




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



yooz  Capture My tasks My exports Statistics


Search    Elisabeth 




< Settings Roles

23 result(s)  

Name	↑	Code
Accountant		YZ_ACCOUNTANT
Accounting allocation update in approval p...		YZ_ACCOUNTING_V...

1


yooz  Capture My tasks My exports Statistics

Search    Elisabeth 

< Roles Create

Properties \* Permissions \*

Roles properties

Code \*   Name \*

2


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

3

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

# Choice of Permissions you grant to this Role

yooz




Capture


My tasks


My exports



Statistics

Search







 Elisabeth 

< Roles

Create

Properties \*

Permissions \*

Role permissions

Personalization

> Components

> Grids

> My profile

> Workspaces

Settings

Document

Add rows in multiline data blocks

Delete

Delete lines in multiline data blocks

Download original file

Export

Link with other documents

Send the file by email

Unlink from other documents

Update

Update data blocks in a document

Grant the Permissions to be assigned to this new Role.


1

2

After clicking create, this Role is now available for existing and/or future Users.

Cancel

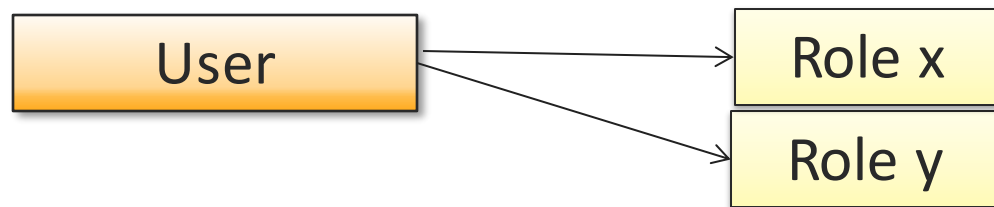
Create



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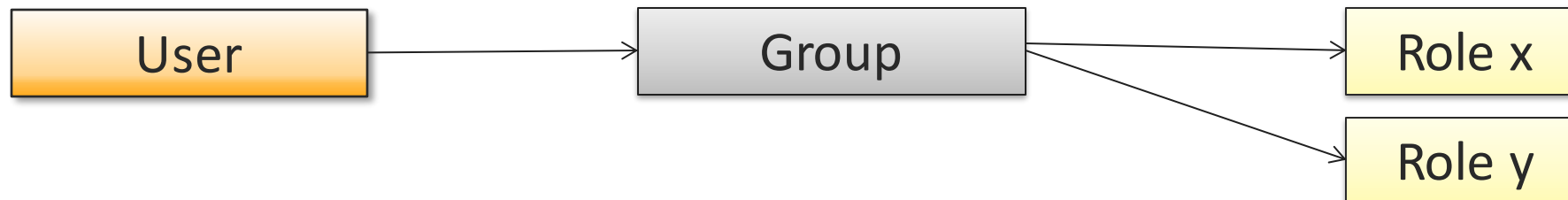
## ■ User Roles can be managed in two ways.

- 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.



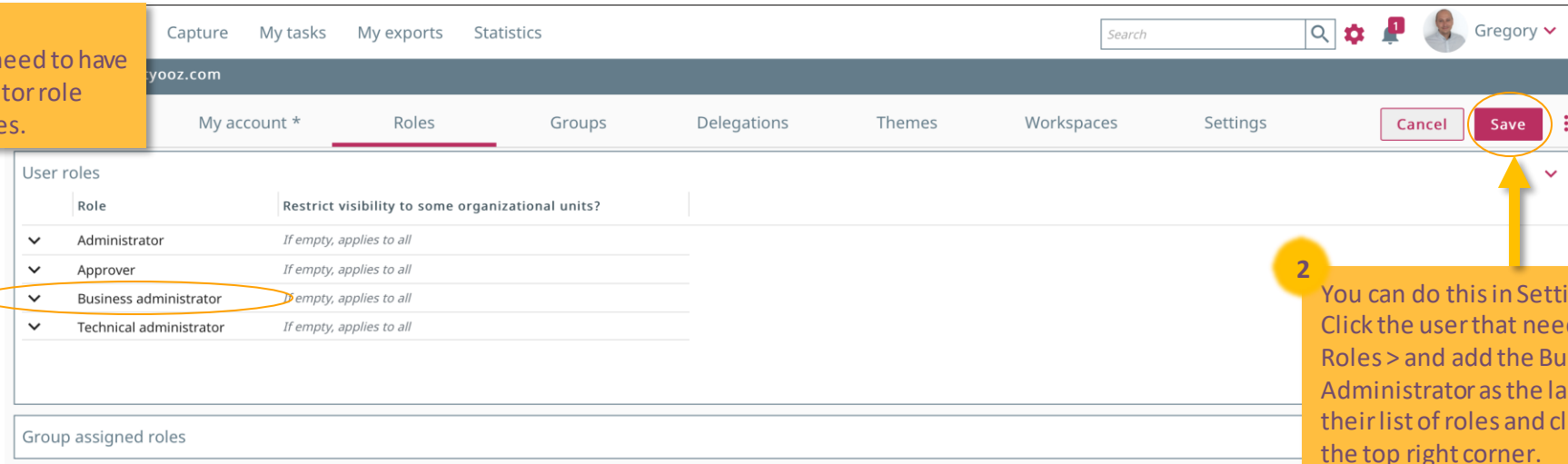
- These two modes of operation can be combined: it is possible to assign Roles to User access and via Groups.

# 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.



The screenshot shows the Yooz web interface. At the top, there are tabs for 'Capture', 'My tasks', 'My exports', and 'Statistics'. Below these is a search bar and a user profile for 'Gregory'. The main navigation bar includes 'My account \*', 'Roles', 'Groups', 'Delegations', 'Themes', 'Workspaces', and 'Settings'. The 'Roles' tab is active. In the 'User roles' section, there is a table with the following roles: Administrator, Approver, Business administrator (highlighted with a yellow circle), and Technical administrator. Each role has a checkbox and a description. The 'Business administrator' role is the one to be added. In the top right corner of the 'Roles' tab, there are 'Cancel' and 'Save' buttons. The 'Save' button is circled with a yellow circle.

Role	Restrict visibility to some organizational units?
✓ Administrator	If empty, applies to all
✓ Approver	If empty, applies to all
✓ Business administrator	If empty, applies to all
✓ Technical administrator	If empty, applies to all

Group assigned 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.

# Reassign a document to another User (2/3)

My tasks ( All my organizational units )

Purchase requisition 6 Late > 3 Complete > 0 Blocked >

To do >

1 / 7 result(s)

Organizational unit > Document type

USA YOOZDEMO	Payable invoice - no PO	1
YZDEMO OTHER	Payable invoice - no PO	6

Rank ↑ Completion rate

Components selection

Component name

Selection

- ☒ Purchase requisition
- ☒ Late
- ☒ Complete
- ☒ Blocked
- ☒ To do
- ☒ In progress
- ☐ Processes Administration

Cancel OK

Open Delete

Document date	Total amount (Incl. ...)	Currency	Due date	Task
121	490.60	USD - US ...	04/25/2021	Review

In progress >

2 result(s)

Organizational unit > Document type

Third party for	Document number	Document date	Total amount (Incl. ...)	Currency	Due date	Task	Alert	Document
-----------------	-----------------	---------------	--------------------------	----------	----------	------	-------	----------

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.

# Reassign a document to another User (3/3)

My tasks ( All my organizational units )

5

A new pane should now appear at the very bottom of the My Tasks tab called Process Administration.

Processes Administration >

4 / 23 result(s) , 1 selection

Organizational unit > Error

4

USA YOOZDEMO  
Empty

6

OOZDEMO (TAX EN...

3

Administrator

Potential roles	Potential groups	Potential users	Owner	Initiator	Task
<input checked="" type="checkbox"/>		Angela Merkel		Yooz Admin Demo25	Payme
<input type="checkbox"/>				Yooz Admin Demo25	Reviev
		Angela Merkel		Yooz Admin Demo25	Payme
		Francois Hollande		Mario Admin Demo00	Appro
		Francois Hollande		System User	Appro

Force recipient...

Force task...

Unlock...

7

You can send the documents owned by the inactive or deleted user back to Registration step to flow through the workflow again using "Force task".

6


From here you can select documents that are not yet completed and route them to a specific user or task. Send it to another user using "Force recipient".





- 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.

# Creation and management of User groups

- 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.



 Capture My tasks My exports Statistics

Search     Elisabeth ▾


Settings

In one click, access to the most frequent functions


**Import a list...**  
(Organizational units, users, masterdata, ...)


Add organizational unit...


Access all the settings of your application


 **Organizational Units** >  
Configure addresses, contacts and all properties of organizational units


Who?

 **Roles** >  
Configure roles and their associated permissions

 **User groups** >


 **Users** >

 **Masterdata** >  
Access and configure all masterdata loaded in your application

 **Integrations** >  
Data imports, exports, external software connections, API documentation...

What?

**Data blocks** >



1

2

yooz 

[Capture](#) [My tasks](#) [My exports](#) [Statistics](#)

Search 

   Elisabeth 


[< Settings](#) **User groups**

1








yooz 

[Capture](#) [My tasks](#) [My exports](#) [Statistics](#)

Search 

   Elisabeth 

[< User groups](#) **Create**

Properties \*

Roles


Users

Cancel

Create

User groups properties


Code \*








Name \*

Choose the User group code.  
For example:  
CAPTURE\_AGENT.

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



yooz  Capture My tasks My exports Statistics



Search     Elisabeth 

< User groups Create

Properties \* Roles Users

Cancel Create

Role	Restrict visibility to some organizational units?
  <i>If empty, applies to all</i>	

Role  

- ☐ Accountant
- ☐ Accounting allocation ...
- ☐ Administrator
- ☐ Approval phase super...
- ☐ Approver
- ☐ Authorized for YOOZ ...
- ☐ Budget allocation upd...
- ☐ Business administrator
- ☐ Capture agent

Choose the Role(s) to be assigned to a Group of Users.

Limit the Role to one Organizational unit in particular or leave it blank to grant the Role to all Organizational units..

[Capture](#)[My tasks](#)[My exports](#)[Statistics](#)[Elisabeth](#) [< User groups](#) [Create](#)[Properties \\*](#)[Roles](#)[Users](#)[Cancel](#)[Create](#)


User







- Admin Admin
- Adrian Crespy
- Alexandre DEKENS
- Amélie Laurensou
- Angélique Corlaix
- Aurélie Kamga
- Bastien Laurent
- Benoit Olivier Taillefer
- Chloé Carrière
- Christophe Pez

Choose the list of Users to be included in the Group.



yooz  Capture My tasks More ▾


Search     Elisabeth ▾

< User groups Approval Level 1

Properties \* Roles Users Delegations Cancel Save ⋮

User groups properties

Code \* Name \*

YZ\_VALIDATION\_LEVEL\_1 Approver 1 



< User groups Approval Level 1

Properties \* Roles Users Delegations

Role Restrict visibility to some organizational units?

▼ Approver *If empty, applies to all*

▼ *If empty, applies to all*

< User groups Approval Level 1

Properties \* Roles Users Delegations Cancel Save ⋮

User

+ ▼ Adrian Crespy

+ ▼ Amélie Laurensou

+ ▼ Bastien Laurent

+ ▼ Jamal

# Questions / Answers