Defining new operator group

To create a new operator group, it is necessary to select the button [**Add**] from *Groups* button group, placed in ergonomic panel above the list of operators. A newly opened form of an operator group contains the menu with standard buttons of saving changes and closing without saving changes.

New group form — tab General

Tab *General*

In the upper part of the tab *General,* there is a mandatory field *Name,* where it is necessary to specify the name of the newly created operator group. In Description field it is also possible to provide additional information which will be presented on operator form, in section *Operator Groups/Other Groups.*

*Group Composition* section is divided into two windows:

- *Accounts Unassigned to Group* — list of all operators defined in the system

- *Accounts Assigned to Group* – list to which selected operators, making part of a defined group, are added

By selecting the buttons [**Add To Group**] and [**Remove From Group**], it is possible to decide which operators will be assigned to the newly created group.

Tab *Structure Centers*

Here it is necessary to add centers of the company structure the newly added operator group will be attached to. Owing to that, operators from that group will be able to login to the attached center.
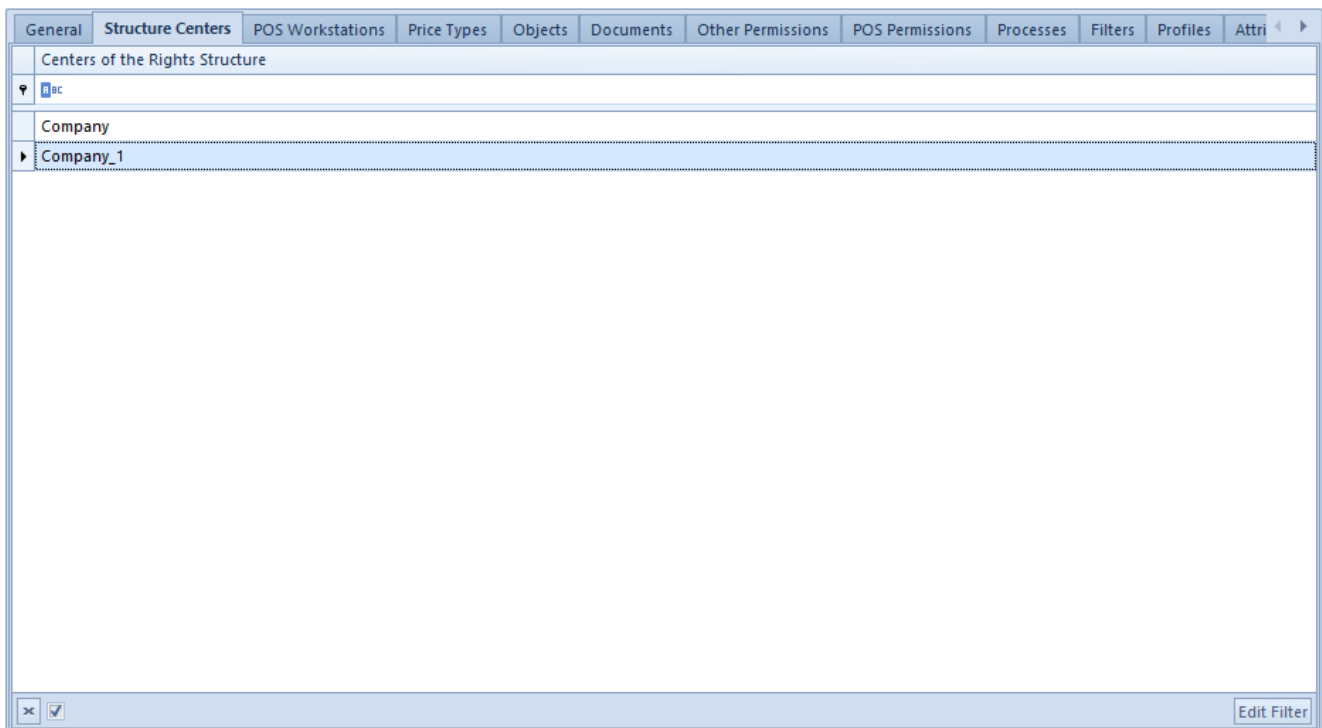
New group form – tab Structure Centers

Tab *POS Workstations*

To the newly created group can be added POS Workstations to which operators of that group will be able to log in. To do so, it is necessary to click on [**Attach**] button and select from the list of workstations the workstations to be attached to the group. To detach workstations from the group, it is necessary to highlight it and select [**Detach**] button.

Tab *Price Types*

Thanks to the possibility of assigning a price type to an operator group, operators from that group can have access to price lists defined on the basis of the attached price type.

Name	Sort	Assigned Customers/Vendors	Active
Retail	For released items	☐	✔
Wholesale	For released items	☐	✔
Purchase	For received items	☐	✔

New group form – tab Price Types

The list of attached price types displays information about name and sort of price type, assigned customers/vendors and activity status of a given type.

Tab *Objects*

Here the operator assigned to group *B2_admin* may manage permissions of an operator group to objects defined in the system.

Area	Object Type	Read	Add	Modify	Delete
		☐	☑	☐	☑
▶ General	Item Groups	☐	☐	☐	☐
General	Warehouses	☐	☐	☐	☐
Finances	Payment Forms	☐	☐	☐	☐
Finances	Cash-Bank Accounts	☐	☐	☐	☐
Finances	Payments	☐	☐	☐	☐
Accounting	Ledgers	☐	☐	☐	☐
Accounting	Accounting Period	☐	☐	☐	☐
Accounting	VAT Accounts	☐	☐	☐	☐
General	Customer/Vendor	☐	☐	☐	☐
Accounting	Subsidiary Account	☐	☐	☐	☐
Accounting	Financial Statements	☐	☐	☐	☐
Accounting	Posting Schemes	☐	☐	☐	☐
Accounting	Recurring Posting Schemes	☐	☐	☐	☐
General	BPM Process Editor	☐	☐	☐	☐
General	Rights Structure Center	☐	☐	☐	☐
General	Attachment	☐	☐	☐	☐
General	Item	☐	☐	☐	☐

New group form — tab Objects

The list of objects provides information referring to *Area* in which a given object is included as well as its *Type* (name). To each object the following rights can be granted:

- **Read** — the right to accessing the basic list of objects of a given type and previewing its details
- **Add** — the right to adding a given object type in the system
- **Modify** — the right to editing (modifying) saved documents (objects) of given type
- **Delete** — the right to removing objects of given type

In the menu there are buttons used for managing permissions. A user can select option *All Permissions* or select particular permissions to any object from the list.
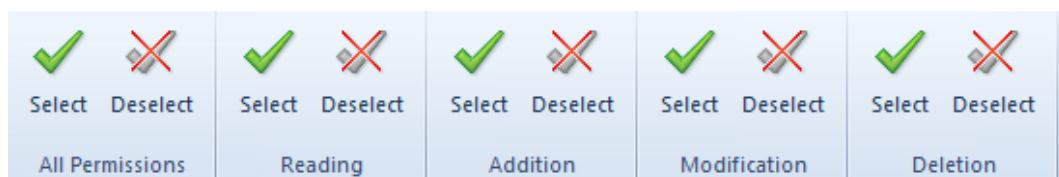
Buttons of managing permissions

With the use of the key combination **Ctrl + A**, it is possible to highlight all rows of the list and select/deselect a given

permission for all the objects at the same time.

It is also possible to select/deselect permissions directly from the list level by checking/unchecking parameter in a column with given permission.

Example
A user has all permissions to a given object granted, but cannot edit it. This can be connected with the fact that this object may   be using other objects to which the logged in operator is not entitled to.
For instance, if the user does not have the right to read payments and is attempting to edit a registered sales invoice, he will not be able to preview that invoice (despite having all the rights to the object of *sales invoice* type).

Note
During database conversion to the recent version of Comarch ERP Standard, permissions to *Report* object, that is *Cash-Bank Report*, will be granted automatically to all operators in all groups.

Tab *Documents*

Detailed description of the tab can be found in article [Document types](#).

Tab *Other Permissions*

From the level of this tab, it is possible to assign permissions to operator groups, which concern performing of specific actions in particular areas of the system.

New group form — tab Other Permissions

Assigning of permissions is performed with the use of [**Select**]/[**Deselect**] buttons in the menu or directly on the list, in *Active* column.

List of permissions from *General* area:

- **Batch addition of items**
- **Update of item codes/names** — defines the right to updating codes/names of items in *Batch Operations* section
- **Creation of many sessions** — possibility of logging in many times to the system
- **Batch operations on attachments**
- **Management of object availability in the rights structure**
- **Access to the system configuration** — permissions to the system configuration available from the level of *System → Configuration*
- **Using of free document number** ▯ possibility of using free numbers from a pool of numbers available in the numerator on accounting and trade documents

- **Creation of SAF-T files**
- **Creation of SAF-T files**
- **Modification of interface** — if this parameter is checked, for an operator there will be option *Customize Layout* available under the right mouse button
- **Configuration of object change history** ⬜ provides permissions to configure the history of object change available from the level of *History → Configuration*
- **Access to the history of personal data modifications** — permission to previewing detailed history of changes applied on a customer, contact person or employee form

Descriptions of the other permissions can be found in articles dedicated to corresponding functional areas of the system. [Trade/Warehouse, Finances, Accounting, CRM, BI]

Tab *POS Permissions*

In this tab, permissions to POS workstations are granted for a given group of operators.

New group form – tab POS Permissions

Detailed description of permissions can be found in article

[Operator permissions](#).

Tab *Processes*

In this tab, it is possible to add and remove [selected BPM processes](#) by clicking on the buttons [**Attach**] and [**Detach**].

Tab *Filters*

This tab includes all filters created with the use of [filter builder](#) and attached to an operator group.

By means of clicking on [**List**] button, which redirects an operator to the list of filters, it is possible to define a new filter and attach an operator group to it. Owing to that, operators from that group can use the attached filters.

Tab *Profiles*

In this tab, by means of clicking on the buttons [**Attach**] and [**Detach**] it is possible to associate profiles created with the use of [Profile Editor](#) with operator groups. Owing to that, operators from a given group, upon logging in to the system, will have access to functionalities shared within the attached profile.
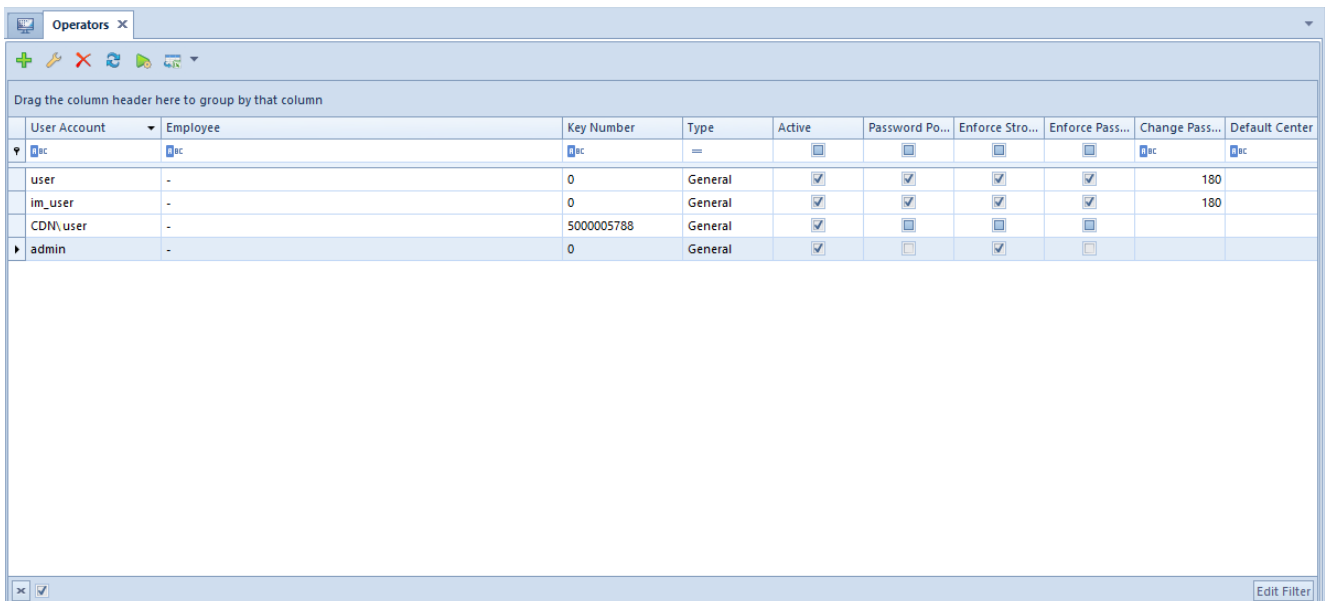
Tab *Attributes*

In this tab, it is possible to attach attributes to an operator group.

Operator's account

List of operators' accounts

Only an operator assigned to group *B2_admin* can manage accounts of operators. For other users, option *Operators,* available from the level of the menu *Configuration → Company Structure,* is inactive.

User Account	Employee	Key Number	Type	Active	Password Po...	Enforce Stro...	Enforce Pass...	Change Pass...	Default Center
⬚abc	⬚abc	⬚abc	=	☐	☐	☐	☐	⬚abc	⬚abc
user	-	0	General	☑	☑	☑	☑	180	
im_user	-	0	General	☑	☑	☑	☑	180	
CDN\user	-	5000005788	General	☑	☐	☐	☐		
admin	-	0	General	☑	☐	☑	☐		

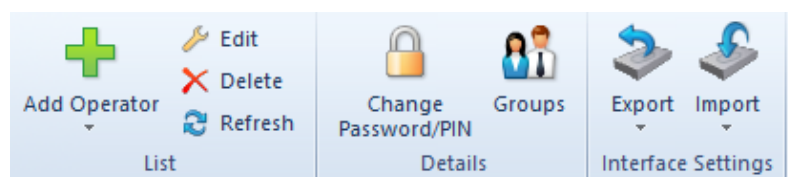List of operators

In the menu of the list of operators defined in the system, the following button groups are available:

- **List** — standard buttons allowing for managing the list
- **Details** — buttons used for defining passwords and managing associations with the group
  - *Change Password/PIN* — change of operator's password
  - *Groups*
- **Interface Settings** — allows for managing interface

settings for a highlighted operator

- *Export* – button active upon marking one operator, it allows for saving the settings of forms and lists to a file. It is possible to select one of the following options: *Export Forms Only* or *Export Lists Only*
- *Import* – button active upon marking one or more operators, it allows for importing interface settings of forms and lists from file for the marked operator(s). It is possible to select one of the following options: *Export Forms Only* or *Export Lists Only* The import is carried out upon confirming message: *"Interface settings for all selected operator groups will be overwritten with settings from the file. Do you want to import?"*. In case of selecting file with invalid format, an appropriate message is displayed.

Menu of the list of operators

In the system, the following operator types are available:

- **Internal** – operator who has login on SQL server and can log on to Comarch ERP Standard system
- **External** – operator who is not associated with login on SQL server and cannot log on to Comarch ERP Standard system. Such operator can log on to other applications, e.g., Comarch POS.
- **General** – operator with two login passwords: SQL and internal password, who can log on to both Comarch ERP Standard and other applications.

Note
In case of converting a database from previous system

versions, the following types will be assigned to operators:

- *General* — if operator's account has not been associated with an employee or has been associated with one employee only
- *Internal* — if operator's account has been associated with an employee who has also been associated with other operators

Adding a new operator

In menu *List,* it is necessary to select button [**Add**] and select an appropriate operator type — *Internal, External* or *General.* Depending on selected type, a form for adding a new operator oopens.

Form of new operator of General type

Fields and parameters common for all operator types:

- **Type** — not editable field, indicates type of operator being defined
- **Active** — parameter selected by default. Unchecking the parameter makes it impossible for an operator to log on to the system.
- **Name** — field used to insert a unique operator name

- **Receipt Printer Symbol** – allows for entering the name of the operator which will be printed on documents printed on receipt printer. By default, the option of copying operator's name is checked and it can be changed or remain empty.
- **Password** – the user can insert a login password manually or use [**Generate Random Password**] button
- **Confirm Password** – field for verification of the password entered in the field above
- **PIN** – number composed of 6 digits maximum for the purpose of logging in to external applications
- **Card Number** – electronic card number (up to 50 characters) used for the purpose of logging in to external applications
- **Employee** – this field allows for selecting an employee in order to associate it with operator's account. The field contains […] button, clicking on which opens the list of employees defined in the system. In the system, it is possible to associate the same employee with many internal operators but only with one external or general operator. When attempting to attach such employee to an operator, an appropriate message is displayed.
- **License Key Number** – number of license key, used while registering Comarch ERP Standard system
- **Password policy determined in system configuration** – once this parameter is deselected, the user can separately define the following parameters for a specific operator:
    - *Enforce a strong password* – if this parameter is selected, the operator's password should be composed of minimum 8 characters, and contain at least one upper- and one lower-case letter, at least one digit, and at least one of the following special characters: (!@#$%^&*(){}[]\|:";'<>?,./).
    - *Enforce recurring password change* – checking the parameter allows for specifying password expiration date.
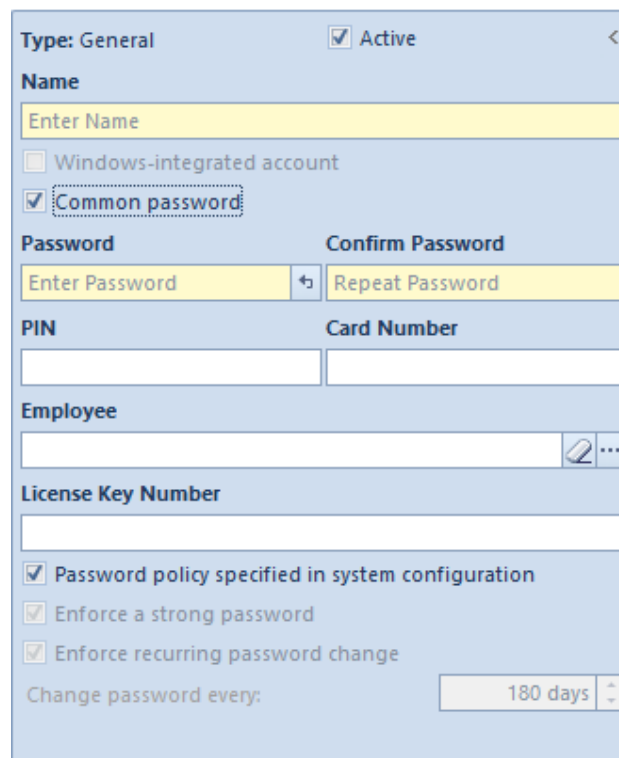
Note
The operator WMSadmin is not subject to password policy. It is
not possible to edit the abovementioned parameters on the form
of such an operator.
For Internal and General operators, the following option is
available:

- **Windows-integrated account** — if name is specified in
  domain/user scheme for an operator, this parameter is
  automatically checked and the operator's account will be
  tantamount to his Windows-integrated account.
  Additionally, option *<password from Windows>* will be
  available. in fields with password

The following option is available for General operator only:

- **Common Password** — this parameter is checked, by default,
  which means that password specified for an operator is
  the same both for login to Comarch ERP Standard system
  and other external applications, e.g., Comarch POS. If
  the parameter is unchecked, field *External Password* is
  displayed along with password confirmation option.

Operator form — parameter

In the middle part of the form, in sections *Operator Groups* and *Other Groups,* the user can assign an operator to appropriate groups, with the use of [**Add To Group**]/[**Remove From Group**] buttons. In this place, it is also possible to define a new operator group — menu *Groups.*

On the right side of the form, in an information window, operator's *Centers of Structure* are presented in accordance with the group to which the operator is assigned.

After entering all necessary data and confirming them with the [**Save**] button, the newly added operator appears on the list.

Changing operator's password

Operator's password/PIN can be changed both from the level of operator list as well as operator form, in menu *Details.* Upon clicking on the button [**Change Password/PIN**] a windows for changing credentials opens. After selecting an appropriate option it is possible to edit relevant fields.

To change a password/PIN, it is necessary to enter current password/pin, new password/PIN and confirm it.

Window for changing password for
Internal operator

For a *General* operator, instead of the possibility of changing
one password, the following options are available: *Internal
Password* and *External Password*

Window for changing password for
General operator

An operator with administrator permissions is able to change
passwords of other operators without necessity to   enter
their current data.

Note
It is not possible to change password for currently logged-in
operator whose account is   defined as Windows-integrated
account. The button [**Change Password/PIN**] opens the window for
changing internal password and PIN. A Windows-integrated
account password must be changed in Windows.

Operator groups — General information

The list of operator groups is available in the menu *Configuration → Company Structure → Operator Groups.*

There, the user can also add or edit groups and assign new operators to them. Also, all permissions to objects in the company structure are defined from the level of operator groups.

Note
Each modification of permissions for an operator group requires logging out and then logging in to the system again.
To be able to manage *Operator groups* the user must belong to the group *B2_admin,* otherwise buttons [**Operator Groups**] and [**Operators**] are grayed-out.

The window of operator groups is composed of tabs *Groups* and *Operators.*

Tab *Groups*

Tab *Groups* is divided into two sections. On the right side, in the section *Groups,* the tree of operator groups defined in the system is presented. By default, there are two groups available in the system: *B2_admin* and *B2_default. The* user can add new groups. Section *Operators* contains the list of all operators added to a given groups. On the list, there are columns *Name*, *First Name* and *Last Name*, which presents information about employee, provided that an employee is associated with an operator account.
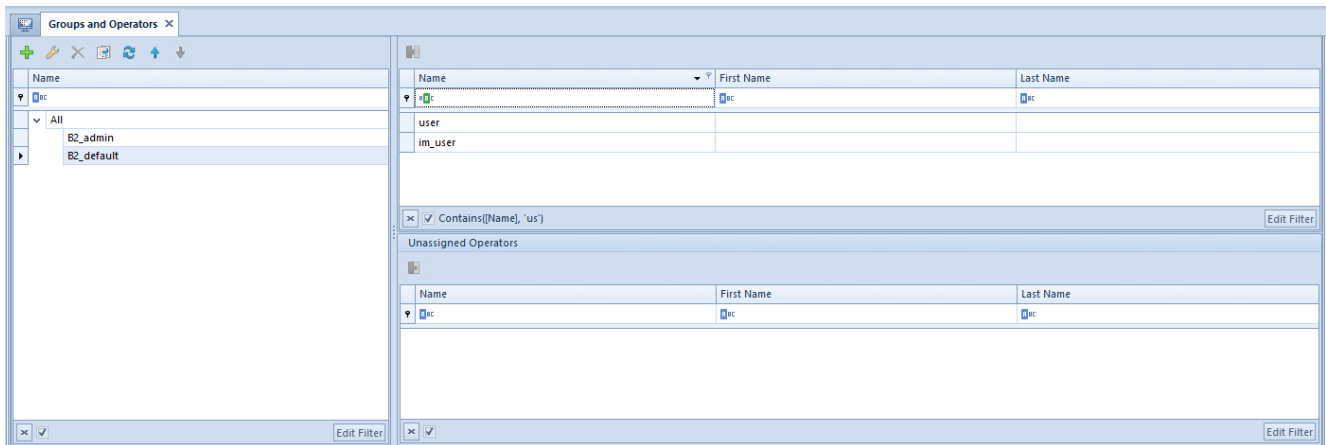
List of operator groups

- The group *B2_admin* is created by the system when generating a database. It cannot be deleted from the system, but it is possible to attach or detach operators' accounts from it. Operators assigned to the group by default — *admin*, *CDNwww*, *SearchAdmin* and the operator creating the database have rights do manage all the permissions, to apply changes in the centers of the company structure and to assign operators to the groups.
- Group *B2_default* includes all the operators defined in the system. Each new operator is assigned automatically to that group; therefore, it is important that the group has the least permissions to objects in the system.

Upon marking a given operator group in the section *Groups*, in the lower part, on the right side, additional section *Unassigned Operators* appears. An operator can be assigned to the selected group upon indicating an operator and then selecting the button [**Attach To Group**] which is available directly above the list or in the button group *Assignments*. To

To remove an operator from a group, it is necessary to indicate the operator attached to a group in the *Assigned Operators* group and select the button [**Detach From Group**].

For the tab *Groups,* standard buttons allowing for adding/editing/deleting object from the list and for refreshing the list, are available. Button [**Copy**] creates

analogical group with the name of the copied group and a subsequent number in brackets, for example, if an operator copies group called *Sales Representatives*, group *Sales Representatives (1)* is created.

Tab *Operators*

Tab *Operators* is divided into three sections:

- **Operators** – list of all operators available in the system
- **Groups** – presents a group/groups to which an indicated operator is assigned
- **Other groups** – list of other groups defined in the system

In the tab *Operators,* it is possible to <<add new operators>> to the system and to assign them to existing groups.

Additionally, in the ribbon menu, there are buttons for exporting and importing interface settings for indicated operator group:
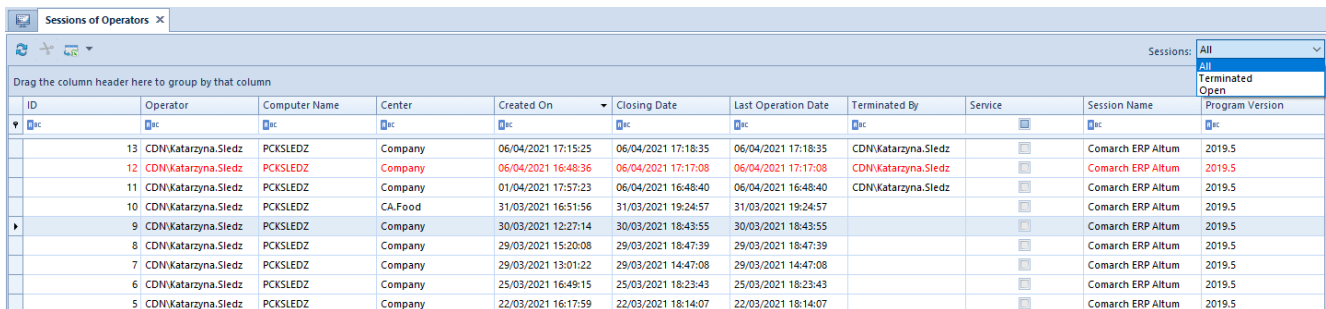
- **[Export]** – this button is active upon selecting one operator group and it enables saving interface setting to file for the selected group. The file takes on default name in form *la* with possibility to change it
- [**Import**] – this button is active upon selecting one or several operator groups and it enables importing interface settings from file for the selected group(s). The import is carried out upon confirming the following message: *"Interface settings for all selected operator groups will be overwritten with settings from the file. Do you want to import?"*. If a file in improper format is selected, relevant message is displayed: *"Invalid file format or the file is damaged. Cannot import the settings."*

Hint
It is possible to import any file in appropriate format, both
one created in result of export of settings for operator
groups as well as for an operator.

Operator sessions

In menu *Configuration → Company Structure, Operator Sessions*
functionality is available, which is used for handling
sessions of operators and previewing the history of logging of
all operators to the system. Only an operator assigned to
group B2_admin has access to the functionality.

List of operator sessions

Current operator session is marked in red. In the upper right
corner of the window, there is a filter for the list of
sessions, containing the following options: *All, Terminated,
Open.*

The list of operator sessions presents the following data:

- **ID** □ session ID
- **Operator** □ operator who started a session
- **Center** □ unit of the company structure where a session
  was started
- **Created On** □ date in which a session was started
- **Closing date** □ date on which a session was closed
- **Last Operation Date** □ date of the last action initiated

in a given session

- **Terminated by** — operator who terminated a session
- **Service** — parameter indicating whether a session originates from an external service, e.g., Mobile
- **Session name** — name of a system or application on which a session was started
- **Company database version**
- **Program version**

Next to the standard buttons for updating, importing and exporting list to an excel sheet, there is a button with scissors symbol which allows for interrupting an active session of a specific operator, e.g., in order to unblock the documents which were blocked after the system had been closed abnormally.

Note
An operator cannot terminate his or her current session.
The operator whose session was terminated will receive the following message:

Program session was stopped. The program will be closed.

OK
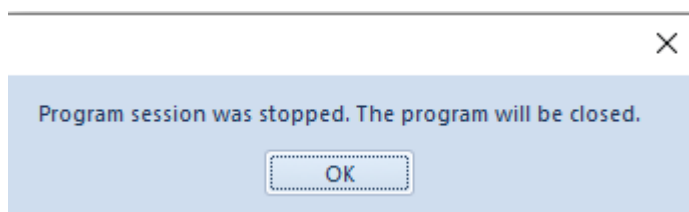
Whereas, if an open session of a given operator already exists, the following message is displayed after that operator logs in to the system:

Information

Operator CDN\Katarzyna.Sledz has the following sessions open:
(12) at the workstation PCKSLEDZ

OK