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Version 1.0
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Authorized by Pedro Rozo
Document: Idempiere First Steps (core)
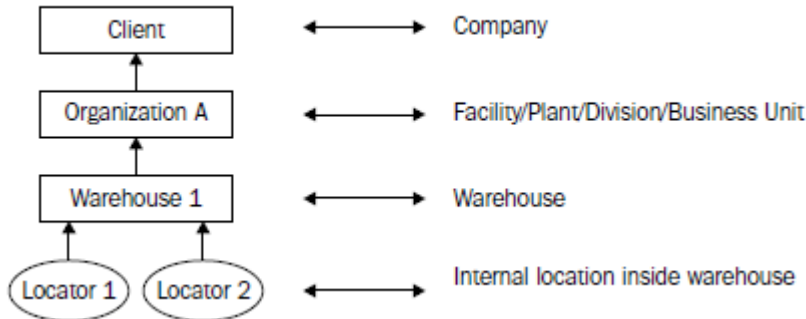**All rights reserved.**

1. Structure

Before starting on configuration it is important to understand the flexibility Idempiere permits for your company structure and the options available to configure.

1.1. Client/Tenant

The highest entity in Idempiere that can be set up as our company's legal entity. All of the data that is set up in this level can be read by all organizations belonging to this company. You may have one or more clients in the system. If you enter any information for a specific client (and not System client), no other client will be granted access to, or be allowed to share that data. When you enter information through the System client, all other clients will be granted access to this information.

1.2. Organization

An entity that can be set up as a subunit entity, company division, or business/production unit or branch. You may set this organization up as a sub-unit of product division , accounting division, and so on. One or more organizations can be linked to a specific or parent organization, which normally has a division organization type.

1.3. Warehouse

A place where you can put, get, or save the raw materials or finished goods. A warehouse will contain one or more physical locations. An organization can contain one or more warehouses.
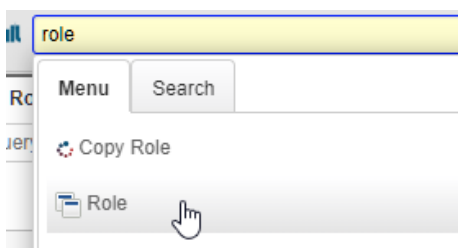
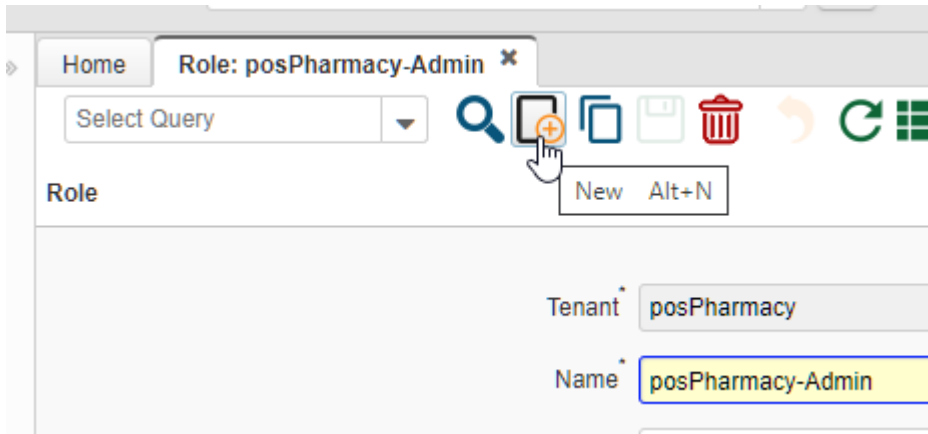# 2. Configuration

2.1. Role Creation

To start the creation process in the system, you must enter as an administrator and from the menu look for a window called "Role" in the following path:
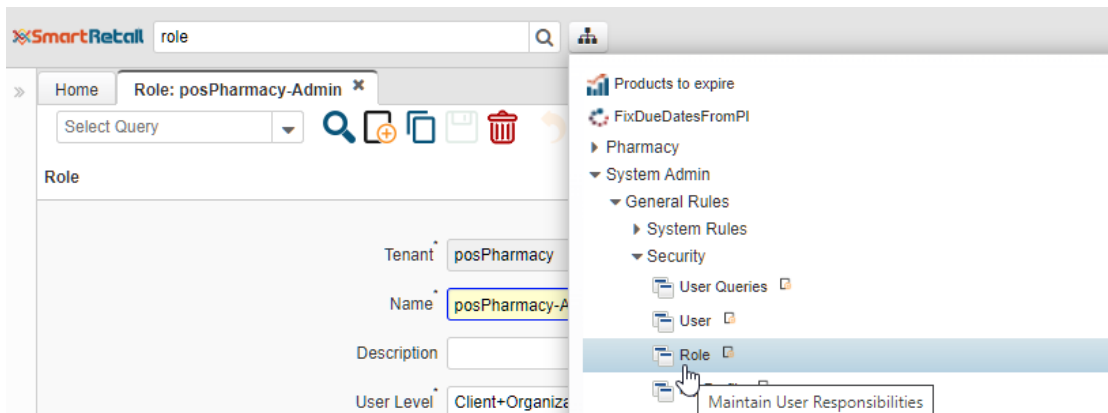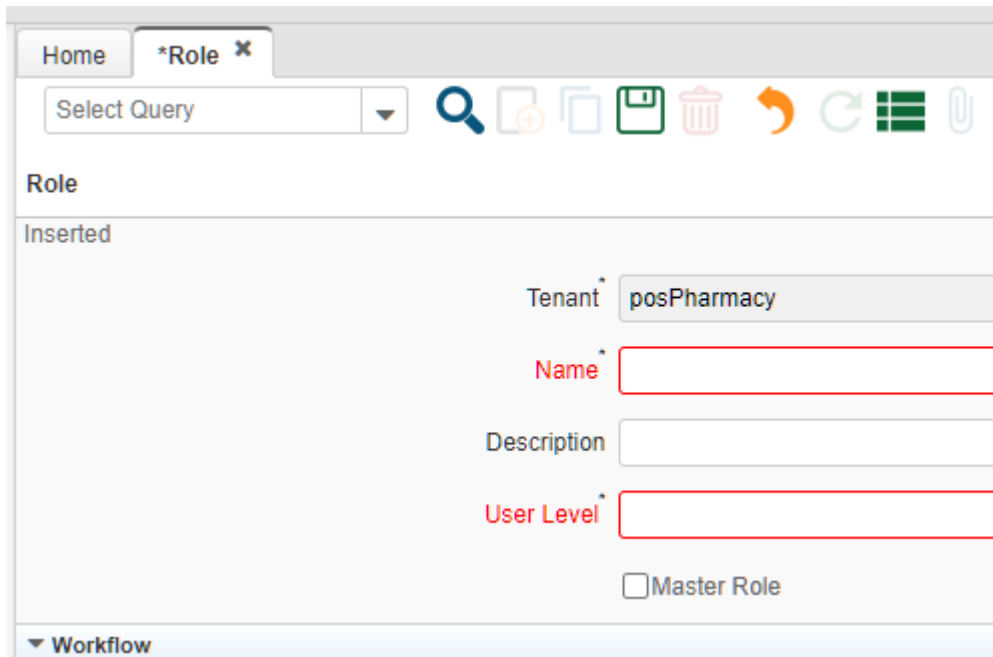

Or also from the quick search, with the keyword "Role"

Once in this window, you can use the "New record" icon or the Alt+n key combination to start creating a new Role.
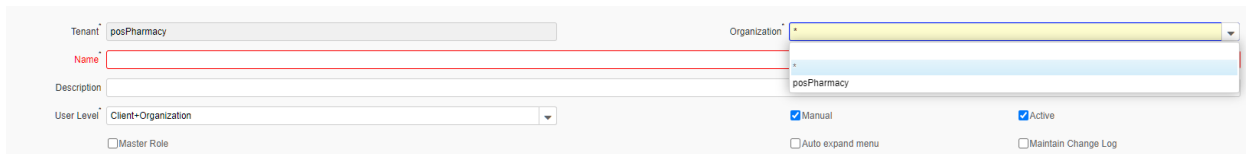
The mandatory fields for the creation of a Role are the name and the user level

The name may be of your choice. Regarding the user level, this may vary according to the activity that this new role will have in the system, it is the first access filter that is configured, among the options are:
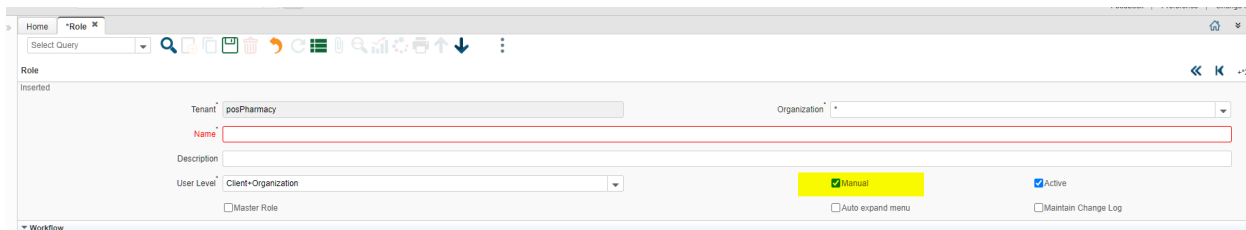
- Client
- Client + Organization
- Organization
- System

For example, Client + Organization, will enable this role to have access to all the menus managed by the company and the organization that is assigned.
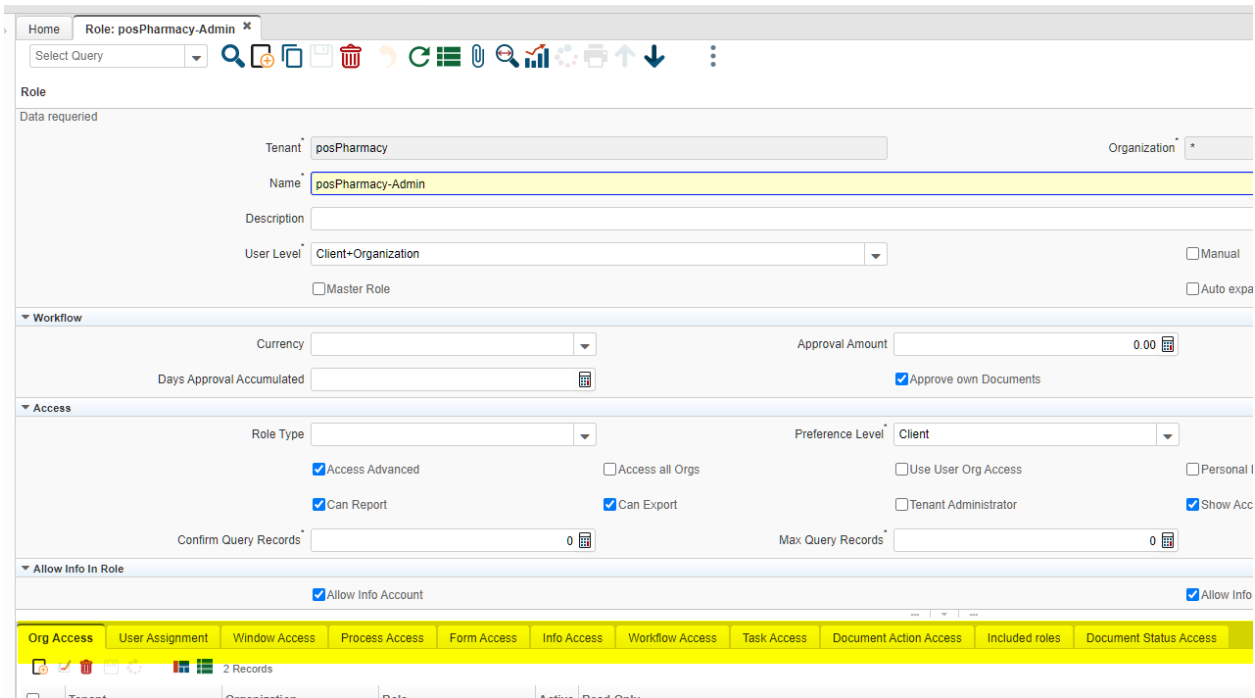

If you want the role to have access to all organizations, you must indicate the Organization "" (asterisk)*

Another parameter to take into account is the manual or automatic assignment of access to windows, processes and forms for the role.
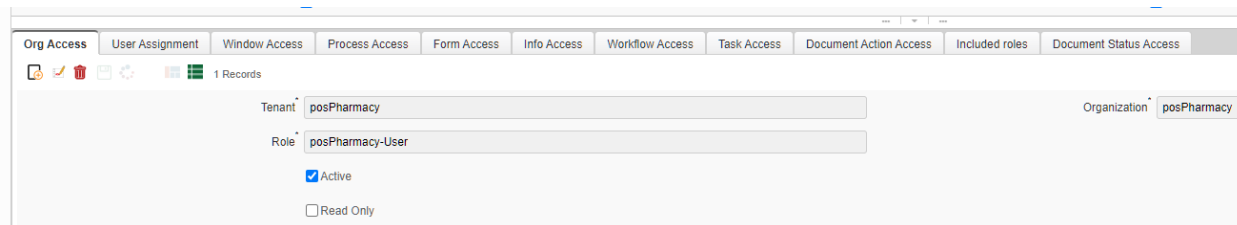

If this option (Manual=true) is left enabled, you will have to manually indicate the accesses that the new role will have. Otherwise, the system will add access to all windows, processes, and forms.

When saving, the tabs at the bottom will be enabled to modify access to the organization, user assignment, window access, process access, and form access.

2.1.1. Access to Organization

From the "Org Access" tab, you can indicate to which organizations within the company the new role will have access, if it is active and if it will only have "read-only" access. For this you must click on the new record icon and when finished save.


2.1.2. User Assignment

From the "User assignment" tab, you can indicate which users, if they are already created, will have this new role. For this you must click on the new record icon and when finished save.

Refer to 2.2. User Creation if you have not created users.

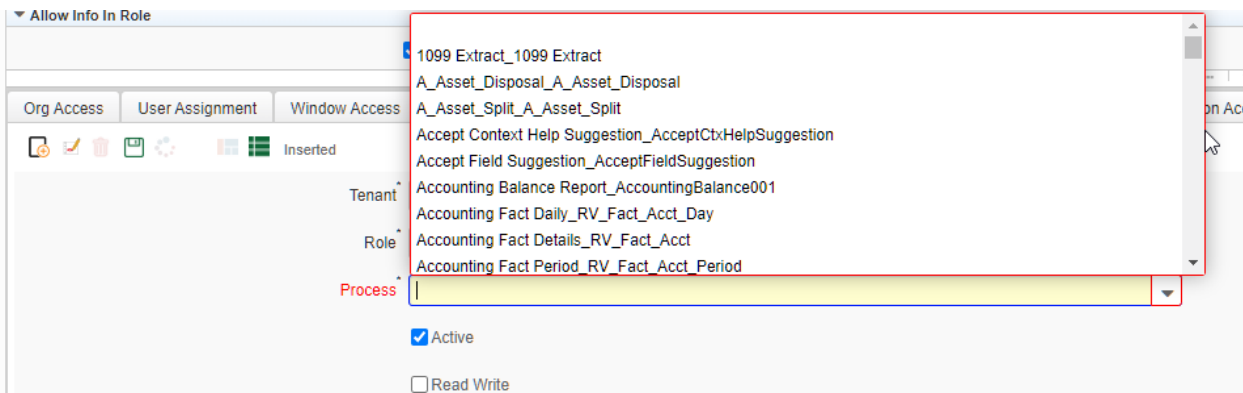## 2.1.3. Window Access

From the "Window Access" tab, you will have the option to indicate which windows this new role will have access to, you can add as many as necessary. For this you must click on the new record icon.
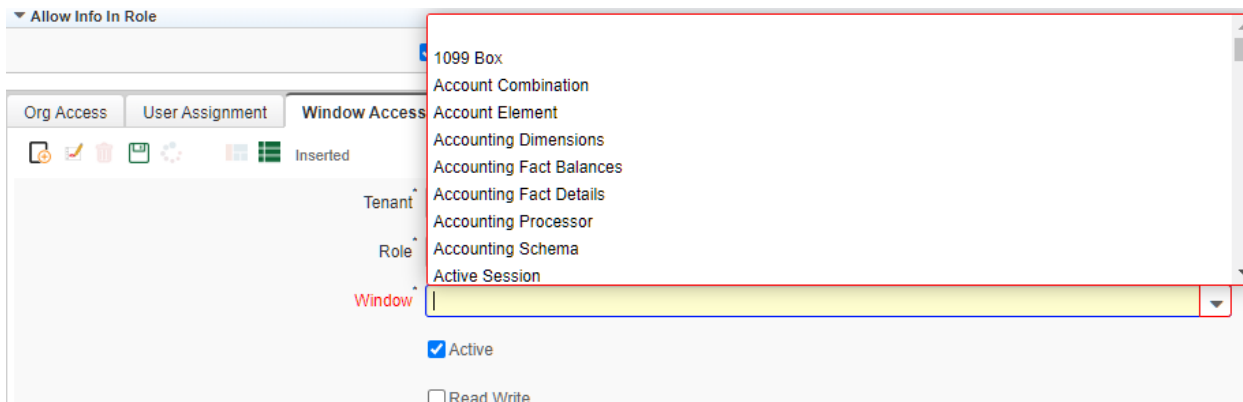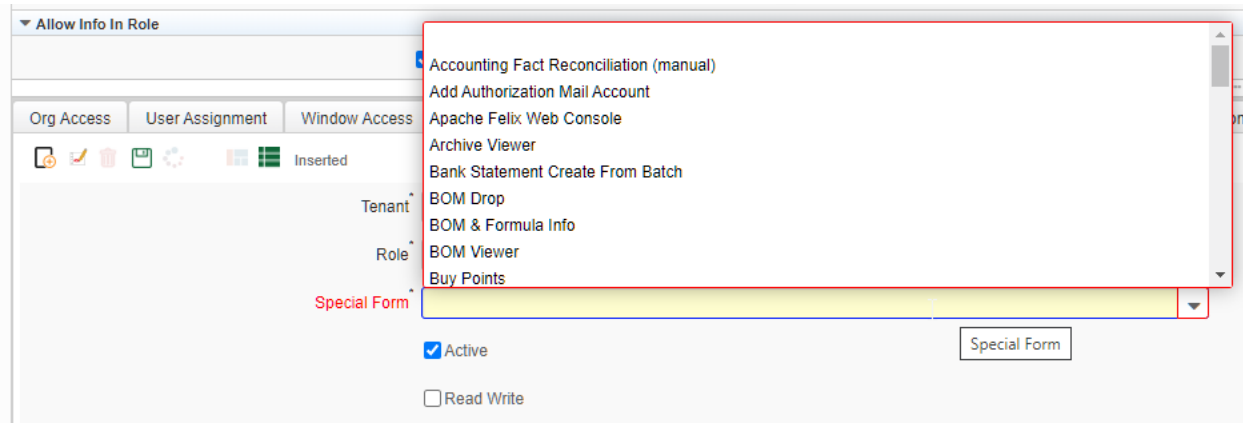

2.1.4. Process Access

From the "Process Access" tab, you will have the option to indicate which process this new role will have access to, you can add as many as necessary. For this you must click on the new record icon and when finished save.

2.1.5. Form Access

From the "Form Access" tab, you will have the option to indicate to which form this new role will have access, you can add as many as necessary. For this you must click on the new record icon and when finished save.
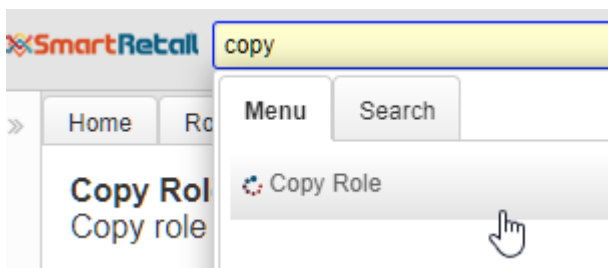

2.1.6. Copy Role

In case you have a role with personalized access and you want to create a new one from this role with some modifications, you can use the "Copy role" process, so you don't have to assign everything manually again.
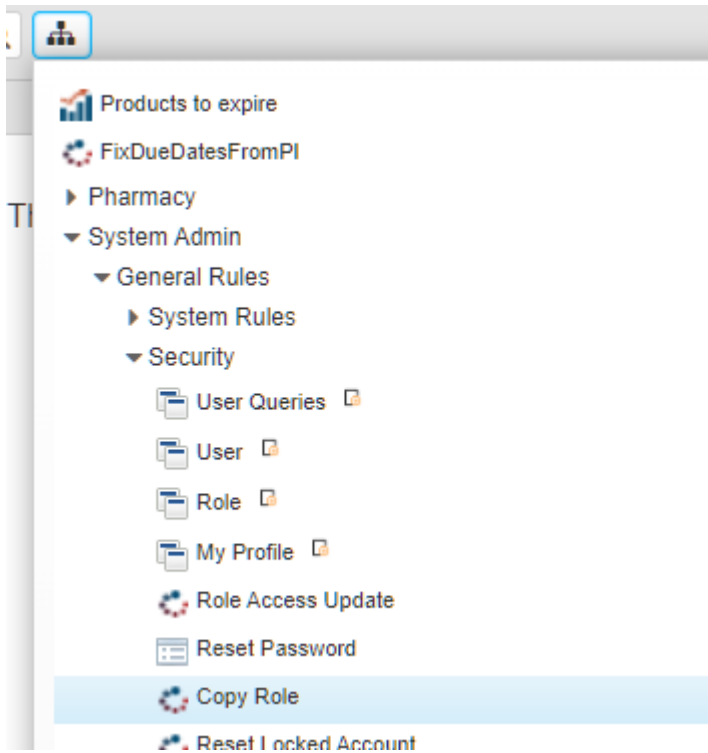
Or from the quick search with the key "Copy Role"

In this window it is important to indicate the role from which you want to copy the access permissions and to which role they will be copied taking into account the client and organization.
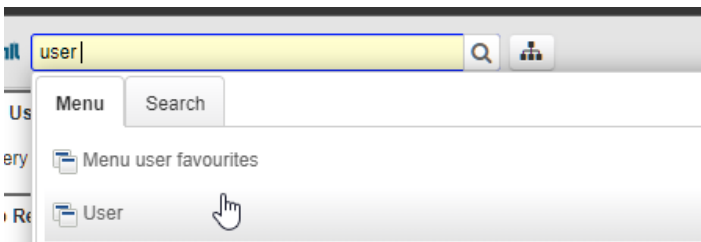
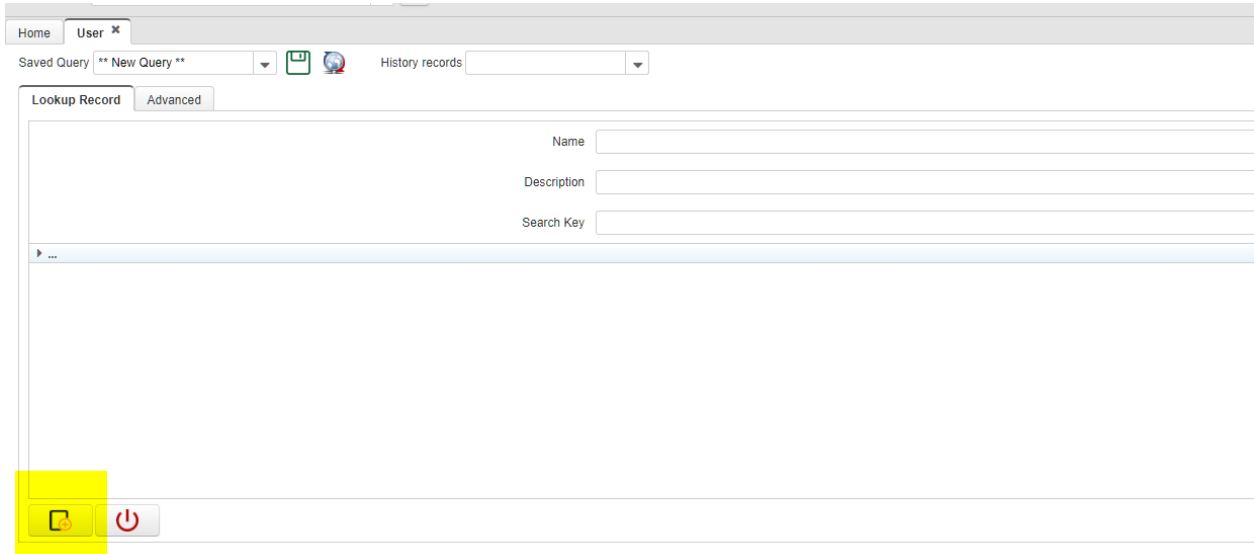To execute the process, click "OK".

2.2. User Creation

To start the creation process in the system you must enter as an administrator and from the menu look for a window called "User" in the following path
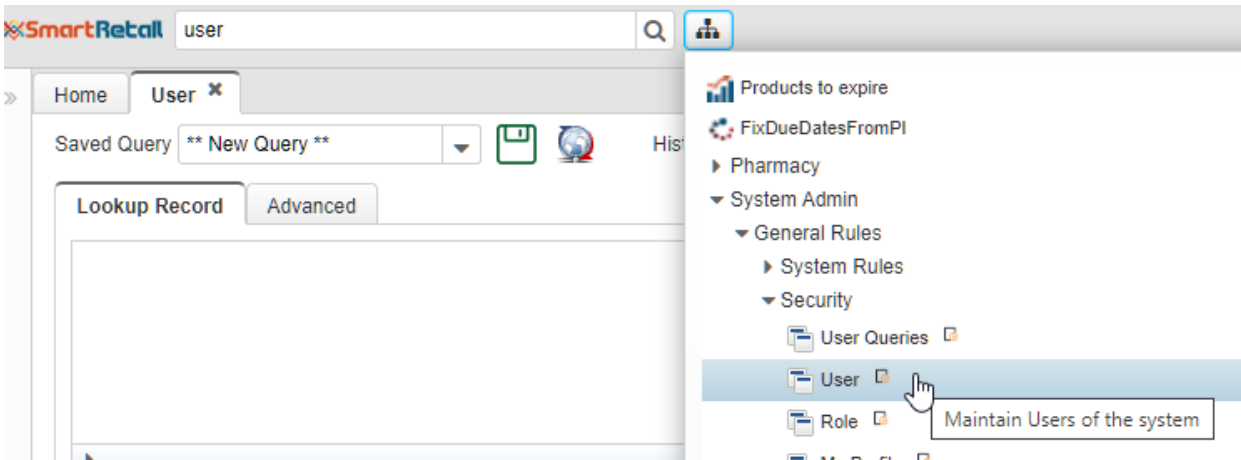
Or also from the quick search, with the keyword "User"
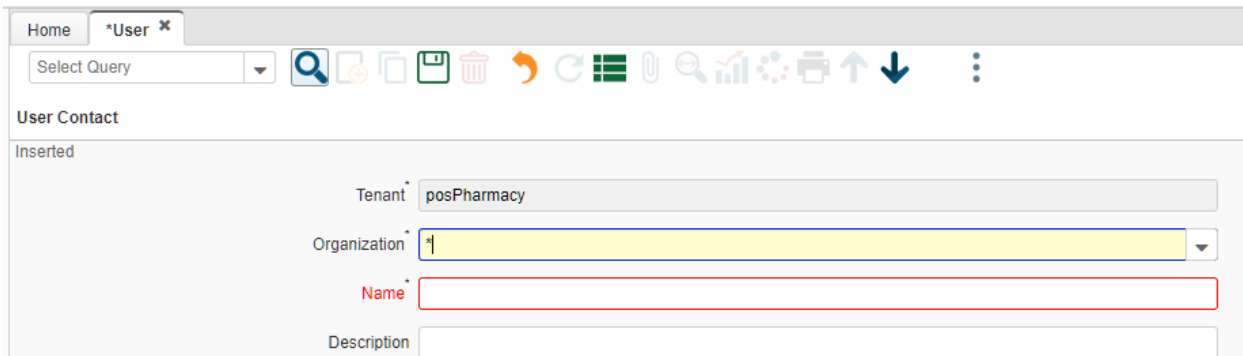
Once in this window, you can use the "New Record" icon to start the creation of a new

User.

In this opportunity you can choose to which Organization this new user will belong and it will be mandatory to indicate the name of the same.

In this window you can indicate user data such as email, telephone and most importantly the login password. When you finish filling in the necessary fields, you must click on save.

This will enable the tabs at the bottom, of which "User Role" is of interest.
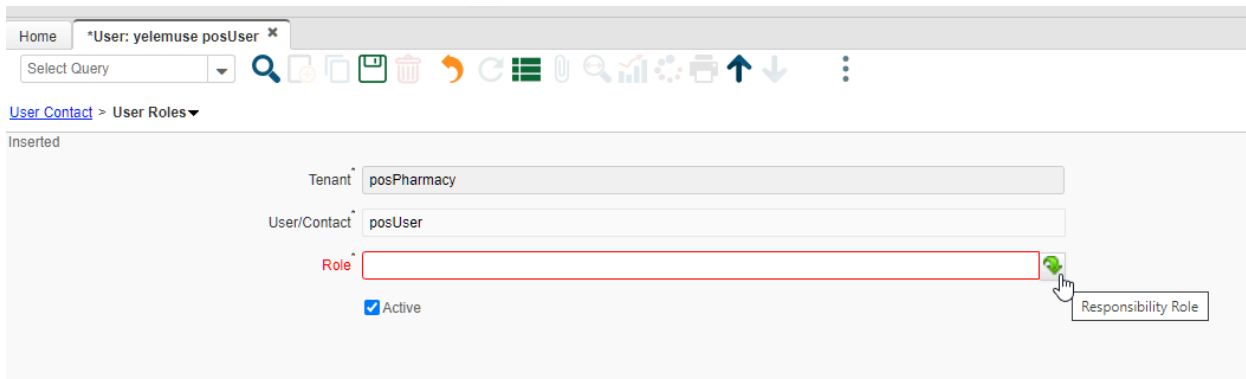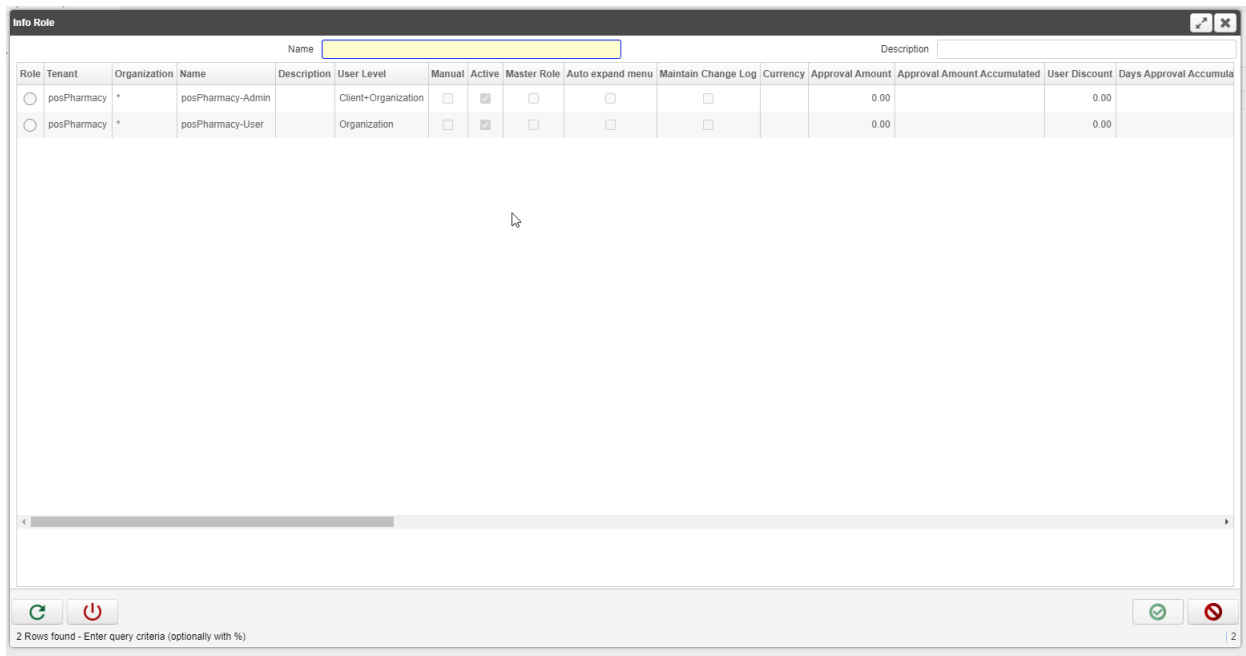
2.2.1. User Role

From the "User role" tab, you can choose the role you want to assign to this new user, if it is already created.

A user can have as many roles as are necessary to login to the system.

Users   **Roles**

Org Access

Window Access

Process Access

Form Access

Task Access

Document Access

Substitute User
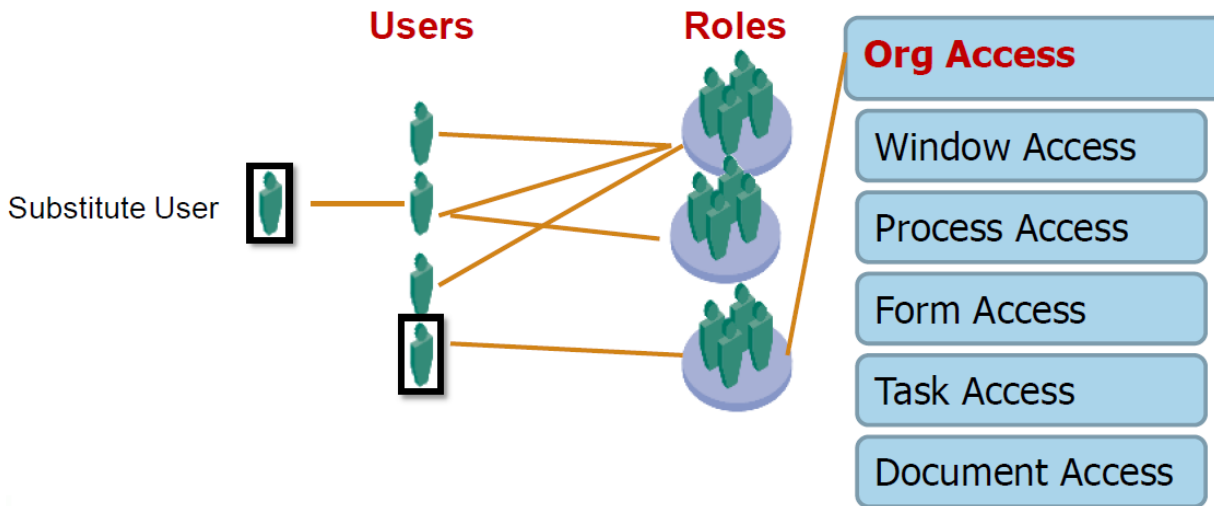
When finished, save, and in this way a new user will be created with the necessary roles.

Index: http://www.smartjsp.com/web/en/idempiereFirstSteps