

# **Table of Content**

1. Structure	2
1.1. Client/Tenant	2
1.2. Organization	2
1.3. Warehouse	3
2. Configuration	3
2.1. Role Creation	3
2.1.1. Access to Organization	6
2.1.2. User Assignment	7
2.1.3. Window Access	7
2.1.4. Process Access	8
2.1.5. Form Access	8
2.1.6. Copy Role	9
2.2. User Creation	10
2.2.1. User Role	13

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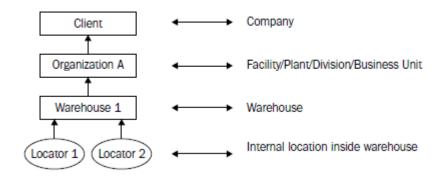
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#### Made in Colombia



## 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

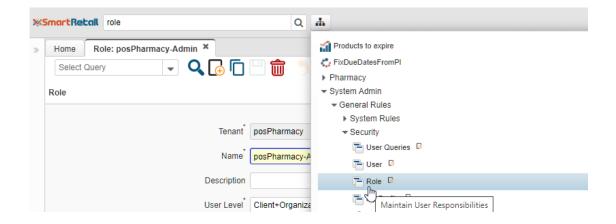
A place where you can put, get, or save the raw materials or finished goods. A warehouse will contain one or more physical locations. An organization can contain one or more warehouses.



# 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.



8	Home Rol	e: posPharmacy-Admin 🗶
	Select Query	
	Role	New Alt+N
		Tenant posPharmacy
		Name posPharmacy-Admin

The mandatory fields for the creation of a Role are the name and the user level

Home *Role *	
Select Query	🕞 🔍 🔓 🗖 💾 前 为 C 🧮 🛛
Role	
nserted	
	Tenant posPharmacy
	Name
	Description
	User Level
	Master Role

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.

Tenant	posPharmacy	Organization	<b>X</b>	•
Name			x	
Description			posPharmacy	
User Level	Client+Organization .	-	✓ Manual	Active
	Master Role		Auto expand menu	Maintain Change Log

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.

» Home *Role *						A × 1
Select Query	] 🔍 🔂 🗖	😬 🍵 为 C 🔳 🛛 🔍 ííi 🗇 🖶 🔶	:			
Role						≪ ₭ +*2/4
Inserted						
	Tenant	posPharmacy		Organization		•
	Name					
	Description					
	User Level	Client+Organization	•	Manual 🗹	✓ Active	
- West Sam		Master Role		Auto expa	ind menu Maintain Change Log	

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.



Home Role: posPha	ırmacy-Admin ×								
Select Query		j 🗌 🂼 为 C	🔳 🛛 🔍 🏠 🗇	∍↑↓ :					
Role									
Data requeried									
	Tenar	nt <sup>*</sup> posPharmacy						Organization	*
	Nam	e posPharmacy-Admin							
	Descriptio	on							
	User Leve	Client+Organization				•			Manual
		Master Role							Auto expa
▼ Workflow									
	Curren	cy	-		Approval Amo	unt		0.00 🔢	
	Days Approval Accumulate	be	Ξ			Approve ow	n Documents		
▼ Access									
	Role Typ	De			Preference Lev	Client		-	
		Access Advanced		Access all Orgs		Use User O	rg Access		Personal
		Can Report		🗹 Can Export		Tenant Adm	iinistrator		Show Acc
	Confirm Query Record	s	0 🖩		Max Query Recor	ds		0 📰	
▼ Allow Info In Role									
		Allow Info Account							Allow Info
Org Access User As	signment Window Acc	ess Process Access	Form Access Info Acce	ess Workflow Access	Task Access Docum	ent Action Access	Included roles	Document Status	Access
G 🗹 🏛 🖂 🖒	2 Records								
Tonant	Organization	Polo	Activo E	and Only					

### 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.

								··· ▼ ·		_
Org Access	User Assignment	Window Access	Process Access	Form Access	Info Access	Workflow Access	Task Access	Document Action Access	Included roles	Document Status Access
ا 🖬 🖂 🔕	" 🗘 🛛 🖬 🖿	1 Records								
		Tenant	posPharmacy							Organization posPl
		Role	oosPharmacy-User							
		C	Active							
			Read Only							

#### 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.



Org Ac	cess User Assignment	Window Access	Process	Access	Form Access	Info Access	Workflow Access	
6	/ 🍿 💾 👶 🛛 🖬 🗮	7 Records						
	Tenant	Organization	R	tole		User/Contact	Activ	/e
	posPharmacy	*	р	osPharma	cy-User	System		
	posPharmacy	*	р	osPharma	cy-User	SuperUser		
	posPharmacy	*	р	osPharma	cy-User	posAdmin	<b></b>	
	posPharmacy	*	р	osPharma	cy-User	posUser		
	posPharmacy	*	p	osPharma	cy-User	DIALLO	v	

Refer to <u>2.2. User Creation</u> 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.

<ul> <li>Allow Info In Role</li> </ul>			
	6	1099 Box Account Combination	
Org Access User Assignment	Window Access	Account Element	
👩 🗹 🏦 💾 👶 📖 🔚	lange de d	Accounting Dimensions	
	Inserted	Accounting Fact Balances	
	Tenant	Accounting Fact Details	
		Accounting Processor	
	Role	Accounting Schema	
		Active Session	*
	Window		-
		Active	
		Read Write	

#### 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.

Large-scale open source software integration		05-16-2023
▼ Allow Info In Role	1099 Extract_1099 Extract	
Org Access User Assignment Window Acces	Accept Context Help Suggestion_AcceptCtxHelpSuggestion	on Act
Tenar Rol Proces	Accounting Fact Daily_RV_Fact_Acct_Day Accounting Fact Details_RV_Fact_Acct Accounting Fact Period_RV_Fact_Acct_Period	<b>▼</b>
	✓ Active ☐ Read Write	

#### 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.

<ul> <li>Allow Info In</li> </ul>	Role				7
			Accounting Fact Reconciliation (manual) Add Authorization Mail Account		
Org Access	User Assignment	Window Access	Apache Felix Web Console		
6 🗹 📋	😬 🖒 🛛 🖬 🖿	Inserted	Archive Viewer Bank Statement Create From Batch		
		Tenant	BOM Drop BOM & Formula Info		
		Role	BOM Viewer Buy Points		
		Special Form	Ţ	-	
			✓ Active Special Form		
			Read Write		

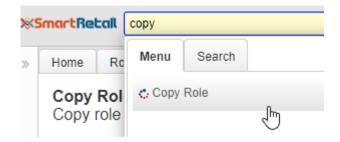
### 2.1.6. Copy Role

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.



1	<b>Å</b>
1	Products to expire
	FixDueDatesFromPI
Т	Pharmacy
	<ul> <li>System Admin</li> </ul>
	✓ General Rules
	System Rules
	- Security
	To User Queries 🛛
	🔁 User 🖟
	Role G
	T My Profile
	Role Access Update
	Reset Password
	Copy Role
	2. Reset Locked Account

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.

Large-scale open source software integration	Organizations & Roles	05-16-2023
Home Role: posPharmacy-User * Copy Role * Copy Role Copy Role Copy role access records from one role to another. The existing access	ss records for the destination role will be deleted. This process can be ex	recuted just by advanced roles.
Role From (		
Role To		•
Tenant		•
Organization		•
(	Run as Job	
To execute the process, click "(	ЭΚ".	



## 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

SmartRetail user	Q	<b></b>
Home User X Saved Query ** New Query ** Lookup Record Advanced	His	Products to expire

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

nt [	user		Q #
Us	Menu	Search	
ery	📑 Meni	u user favou	iites
Re	📑 User	4	5



Once in this window, you can use the "New Record" icon to start the creation of a new

Home User *	
Saved Query ** New Query ** 👻 🖳 🎑 History records	•
Lookup Record Advanced	
Name	
Description	
Search Key	
▶	

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.

Home *User *		
Select Query	- Q 🕞 🗋	🖽 💼 为 C 📰 🛛 🔍 ᡝ 🔅 🖶 🛧 🔶 🛛 🗄
User Contact		
Inserted		
	Tenant	posPharmacy
	Organization	4
	Name	
	Description	

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.



Home User: yelemuse posUser ×				
Select Query - 🔍 🕞 🗍	🕒 🂼 为 C 📰 🛛 🔍 🏠 🔅 🖷	i <b>↑↓</b> :		
User Contact				
Tenant	posPharmacy			
Organization	posPharmacy			
Name	posUser			
Description	posUser			
Comments				
Commonia				
Search Key	yelemuse	Active		
Business Partner	posUser			
Partner Location		<b>v</b>		Ship Contact
EMail Address			Password	
Title			Birthday	<b>*</b>
Phone		2nd Phone		
Notification Type	EMail 👻	Position	<b>•</b>	
▼ Internal				
EMail Lloos ID			EMail Lloop Decouverd	

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

Home User: yelemuse posUser *						
Select Query 🗸 🕞 [	j 🖂 🏛	) C	i 🛛 🔍 🗎	íl 🗘 🖶 ↑ 🔶 🗍	•	
User Contact						
Tenai	nt posPharm	асу				
Organizatio	posPharm	асу				
Nam	ne posUser					
Descripti	on posUser					
Commer	nts					
Search K	ey yelemuse			Active		
Business Partn	er posUser					
Partner Locati	on					
EMail Addre	ss					
Ti	tle					
Pho	ne				N	21
Notification Typ	EMail			-	Z	
▼ Internal						
EMaillear						
User Roles User Substitute Org Access	User Mail	Queries	LDAP Access	Document Status Access		
💽 🗹 🍿 🖳 👶 🖬 🔚 1 Records						

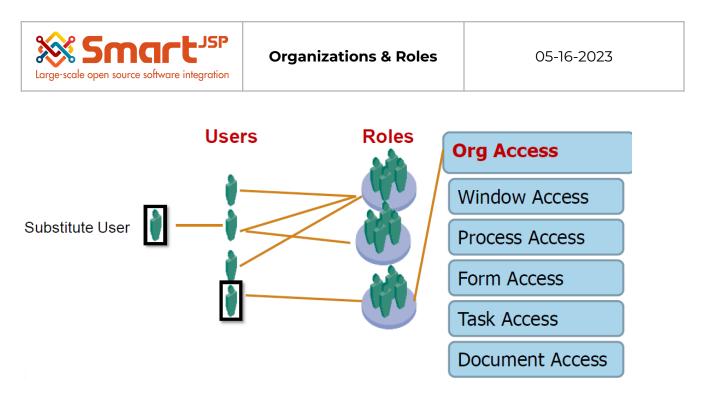


#### 2.2.1. User Role

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

Hom	ne *Us	er: yelem	use posUser '									
Se	lect Query		- Q	Œ		)	C	0 🔍 11	ਾਰੈ↑		•	
User (	<u>Contact</u> >	User Role	es▼									
Insert	ed											
				Ten	ant <sup>°</sup> posPharr	macy						
				Iser/Cont	act posUser							
				R	ole							
					Active							Responsibility Role
info Ro	de											Z×
				Name							Description	
	Tenant posPharmacy	Organization	Name posPharmacy-Admin	Description	User Level Client+Organization		Active Master		Maintain Change Log	Currency	Approval Amount Approval Amount Accum 0.00	ulated User Discount Days Approval Accumula 0.00
	posPharmacy		posPharmacy-User		Organization						0.00	0.00
1 I I												
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#### A user can have as many roles as are necessary to login to the system.



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

Index: <a href="http://www.smartjsp.com/web/en/idempiereFirstSteps">http://www.smartjsp.com/web/en/idempiereFirstSteps</a>