# TRIMIT ConnectPortal User Setup

## White Paper

This Document contains information about setting up Users & User Groups in the TRIMIT Portals and TRIMIT ConnectPortal (also referred to as “CPO”).

Information shown in this document is based on:
- TRIMIT ConnectPortal 4.8 (CPO)
- TRIMIT Portals 2013 R2S (PORTALS)
- TRIMIT 2013 R2S (TRIMIT)

Date: May 2014

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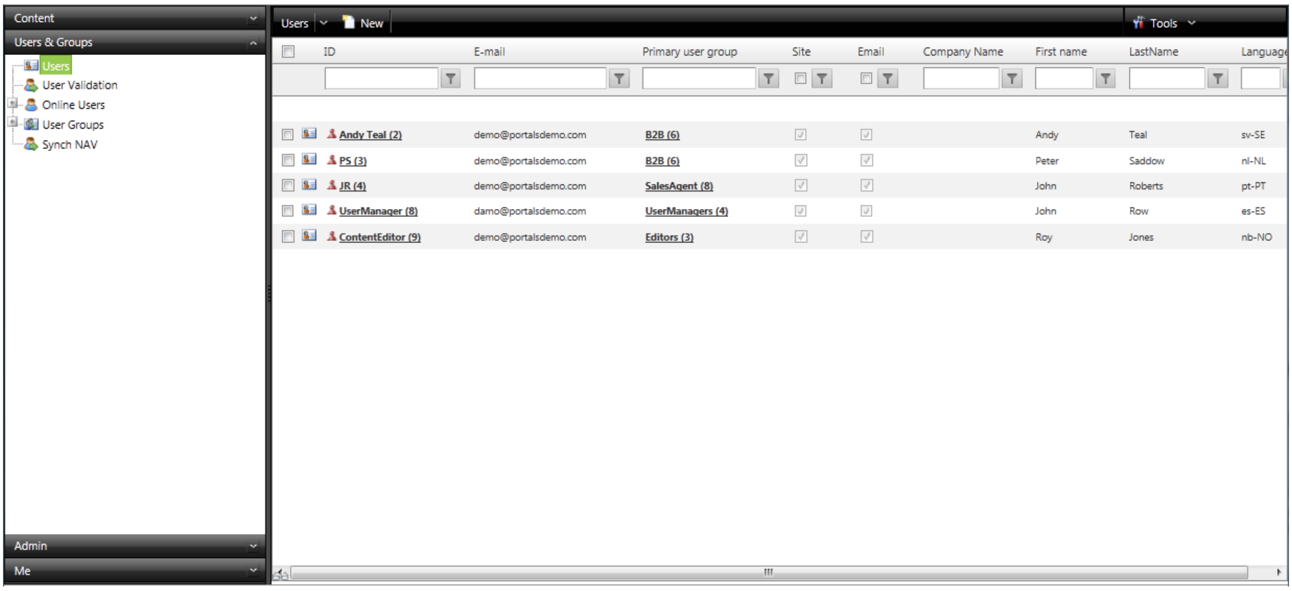
# INTRODUCTION

This document describes the user administration principals in CPO.

The pictures in this White Paper are based on an earlier version and can be different from the data in the current ConnectPortal version.

***User & Groups*** menu is the second menu from the top in the CPO navigation pane, see picture below.
This document begins with a short description of the TRIMIT ConnectPortal roles within the TRIMIT ConnectPortal and will then cover the menu items within the ***Users & Groups*** menu structure.

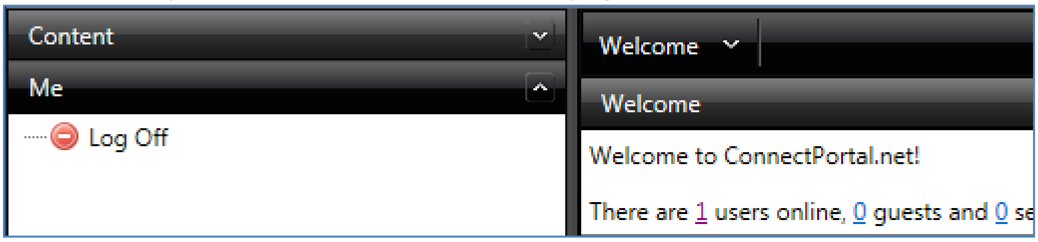
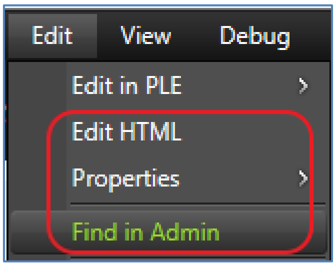


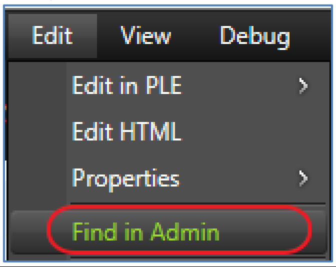


# CPO ADMIN ROLES

CPO 6.04 introduces the administrator roles. These roles are described in the table below.

| Role | Description |
|---|---|
| Administrator | The **Administrator** user is a member of an Administrators user group and has full control over the CPO admin site, including CRUD (Create/Read/Update/Delete) for all users and user groups. Below are the sections available for the CPO admin in navigation pane:<br><br> |
| Content Editor | The **Content Editor** user is a member of the Editors user group and has access to the ***Content*** section on the CPO admin (see picture below). Content editor can edit and publish the ConnectPortal webpages.<br><br><br>The list of accessible areas under ***Edit*** menu item in the admin helper menu:<br><br> |
| User Manager | The **User Manager** user is a member of the User Managers group in CPO admin and has access to the ***Content*** and ***Users and Groups section*** in the CPO admin (see picture below). The main responsibility area for User Manager is CRUD for Portals' users and groups.<br><br> |

| | |
|---|---|
| | The only area available for User Manager under ***Edit*** in the admin helper menu is ***Open Admin***:   |

# USERS

## View Users

Left click on the first node ***Users*** of the treeview. List of existing users is displayed.

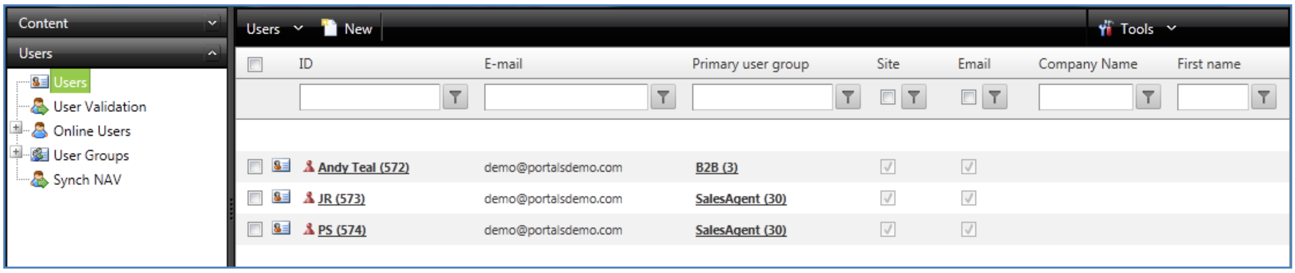



Figure 1

In the filter area, filter records by entering keywords (in corresponding filter fields) like ID, E-mail, Primary user group, Company Name and etc. Filtered records are displayed.

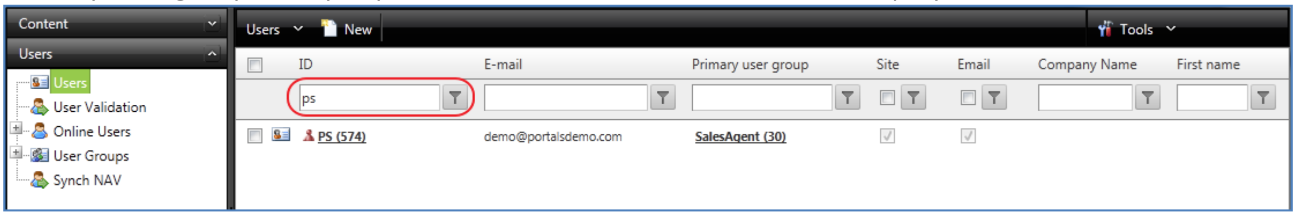



Figure 2

## Create New Users

New users can be created in three ways.

1. Click on **New** button on the toolbar.
2. Right click on **Users** node in the treeview.
3. Select a user from the list, right click on it and select ***New***.

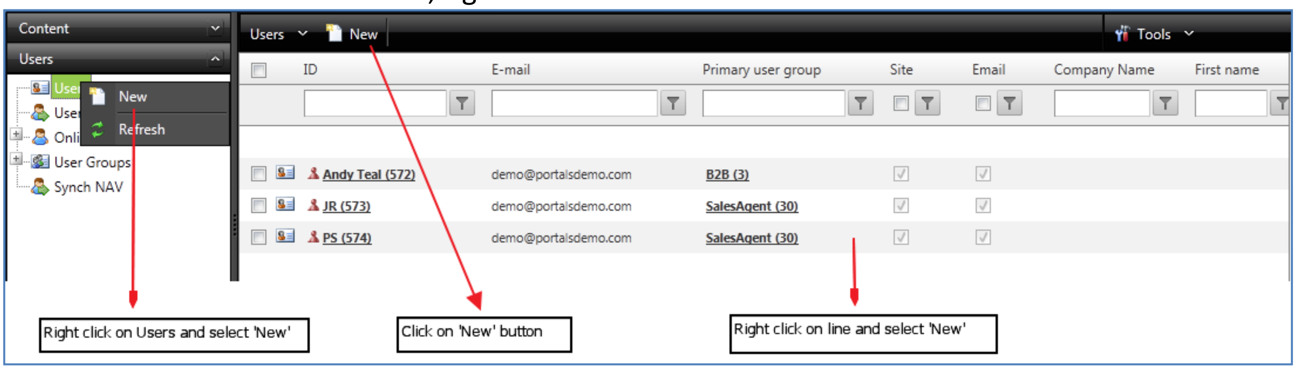



Figure 3

## New User

After this - a user creation window appears (see picture below).

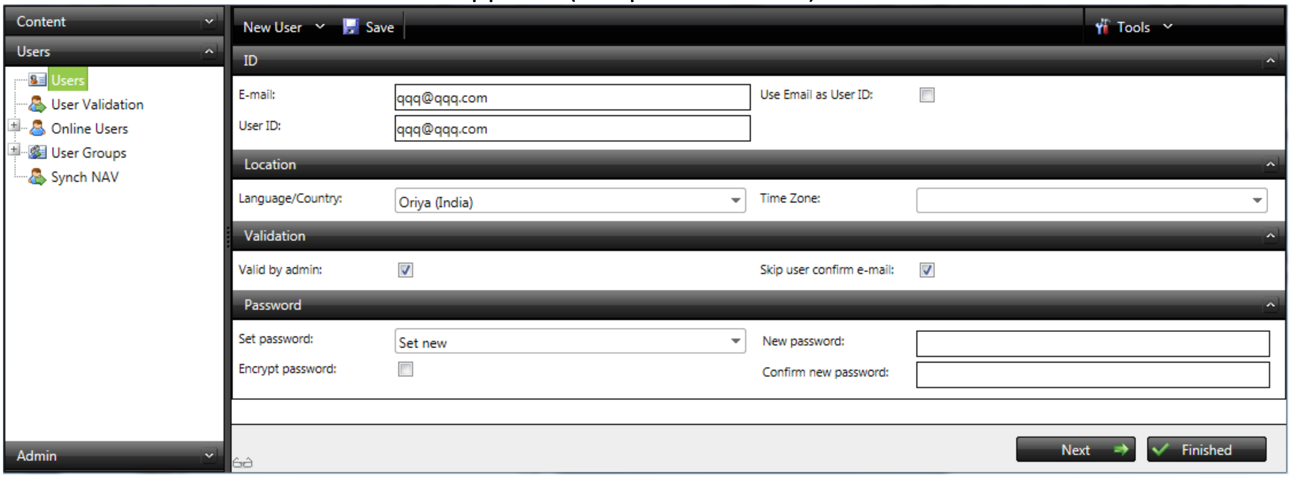



Figure 4

# Description of the Fields of New Users

## E-mail

Enter an E-mail address of a new user in this field.

## Use Email as User ID

Set a check mark in this field if the user's email and ID are the same (**User ID** field will be hidden if so).

## User ID

Enter a unique user ID here if you didn't put a check mark in **Use Email as User ID**.

## Language/Country

Select user's language/country from a dropdown list here.

## Time Zone

Select user's time zone from a dropdown list here.

## Valid by admin

Set a check mark here if the user is valid by administrator

## Skip user confirm e-mail

Set a check mark here and the user confirmation e-mail will not be sent to a user.

## Set password

This field has two options: *"Set random password"* and *"Set new".* If the first option is chosen then a random password will be assigned to a user and sent with a confirmation email; even if the **Skip user confirm e-mail** is set to *"Yes"* this mail will be send because the user needs to know his random password. If the second option is chosen then two new fields, **New password** and **Confirm new password,** will appear on the page. These fields are described below.

### New password
Enter a desired user password here. A user has to use this password when logging in to the web portal which this user is assigned to.

### Confirm new password
Retype the user's password here.

### Encrypt password
Set a check mark here if the password has to be encrypted.
Click **Next.**

### Add to User Groups
On the next page it is possible to assign a user to a user group or several groups at the same time if needed.

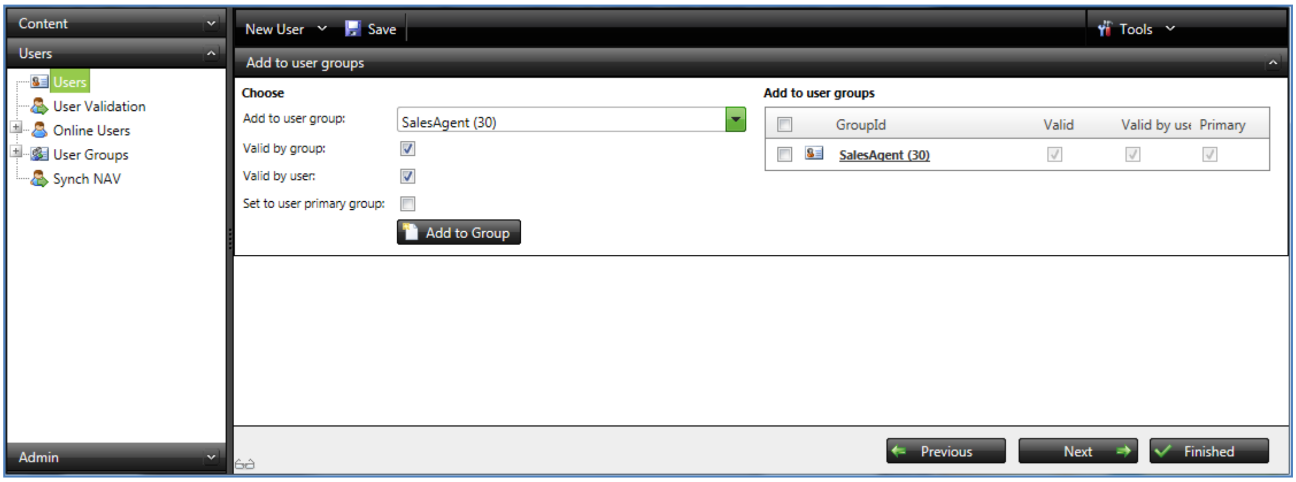



Figure 5

## Description of the Fields of Add to User Groups

### Add to user group
Select a user group here which a user has to be assigned to as a member.

### Valid by group
If this box is not checked, the group administrator must validate a new member.

### Valid by user
If this box is not checked, the user must approve joining to the group sent by email.

### Set to user primary group
Set a check mark in this field if selected user group has to be a primary group for this user.

If a user group is selected click on the **Add to Group** button. A chosen user group will appear as a line in a table ***Add to user group***, on the right side of the page. A user can be added to a multiple user groups. When finished press **Next**.

## Company - Personal

The next page is ***Company – Personal***.

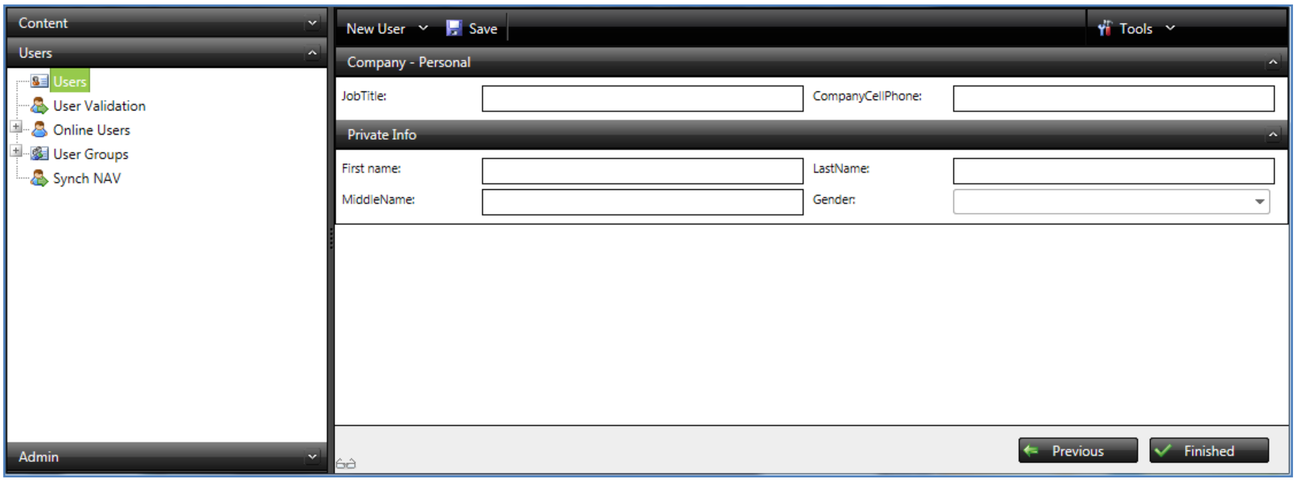



Figure 6

Here you specify the user's personal information. Fields on this page are self-descriptive.
To complete the wizard click **Finished**. The New user is created.

## Open Users

To open a user – go to ***Users***, double click on a user line in the users list. The selected user is displayed. Or it is also possible to right click on a user line and select ***Open*** as well as click directly on a user and select ***View*** *(user ID here).*

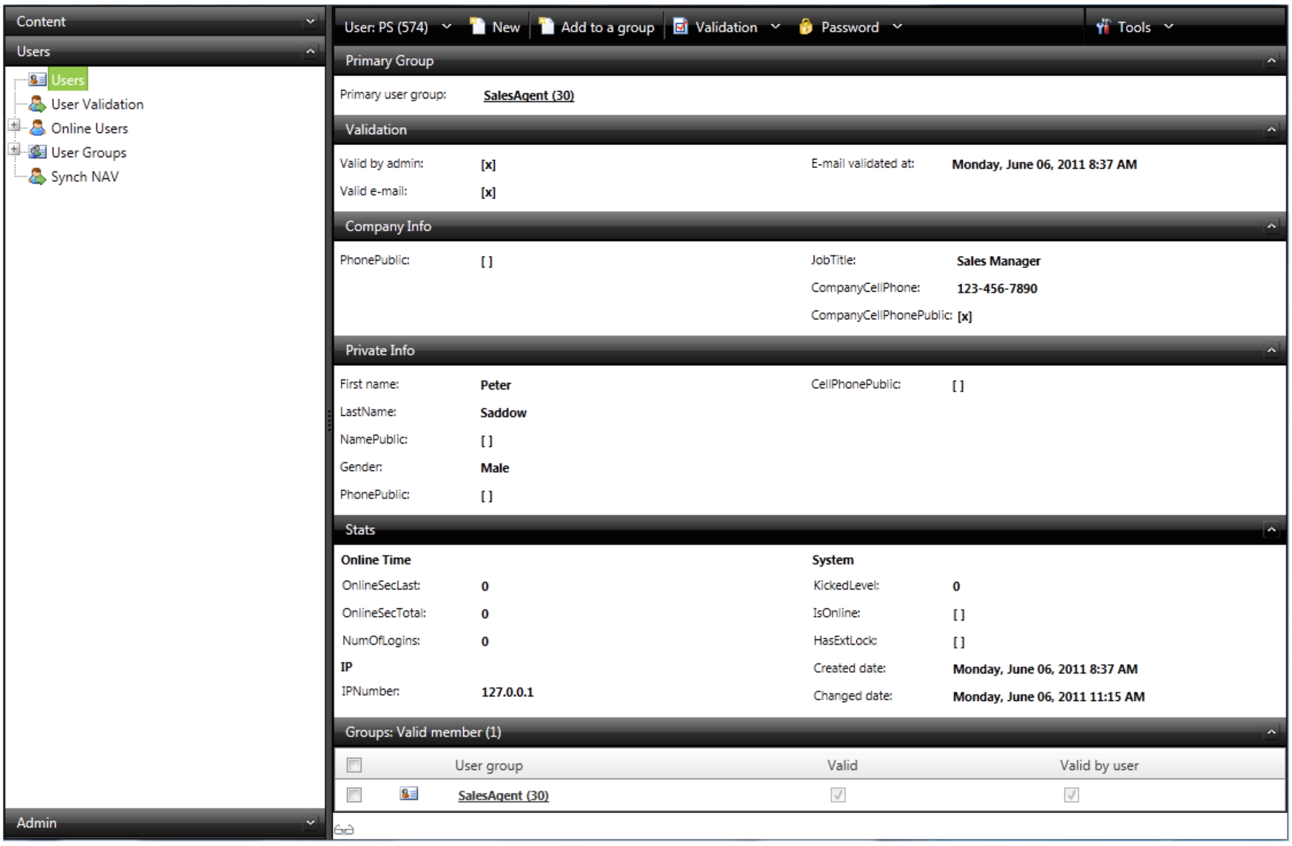



**Figure 7**

This page reflects all the parameters assigned to a user in CPO, including: Validation, Company Info, Private Info, Status (provides the internal administration information about the user and user session) and Groups Valid member, which the user is assigned to. The description of the main fields is the same as during a user creation process.

## Set Properties of Users

Click on the ***User*** node in the treeview. On the right hand side the list of users appears. Right click on the specific user and select ***Properties***.

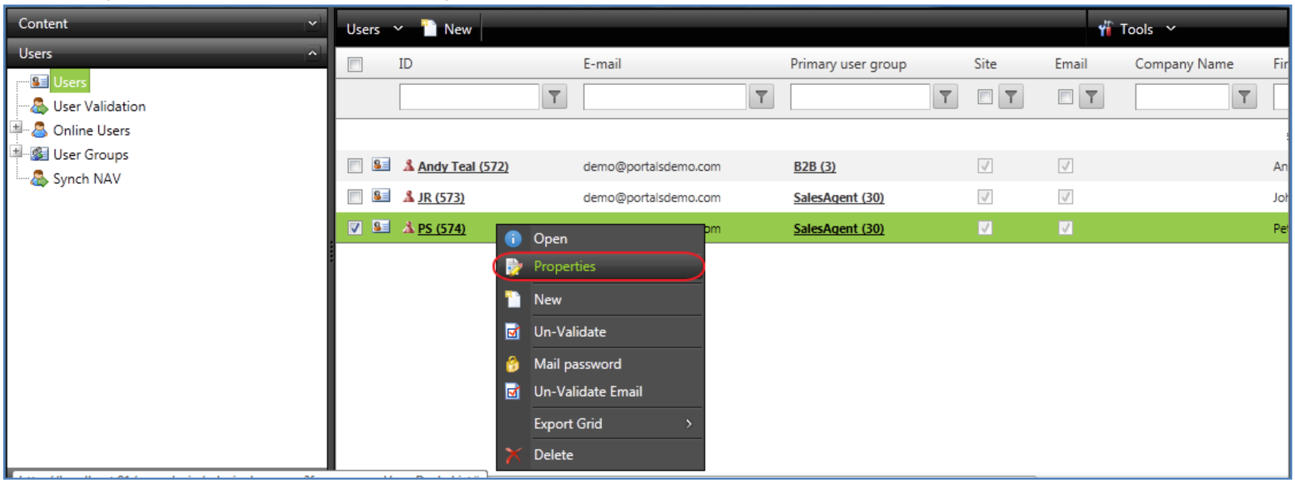



Figure 8

The property page displays the user information within the CPO. The page contains the following sections: ***Main, Email, Password, Company*** and ***Private Info***. Almost all the fields under these sections are editable, so it is possible to edit the user info if necessary.

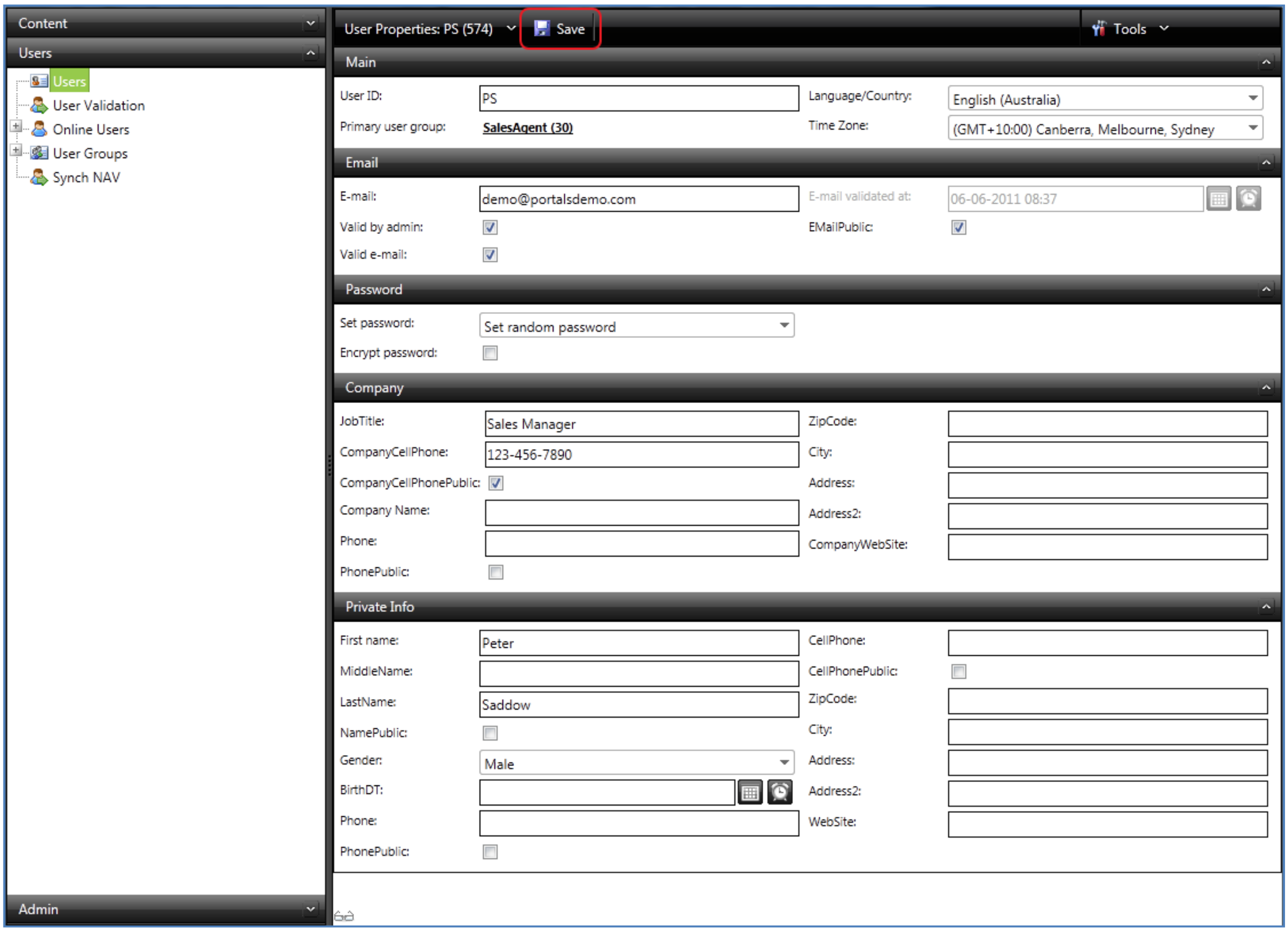



Figure 9

The description of the main fields is the same as during the user creation process.
If any changes were made to the settings – press **Save** button on the top of the page to save and exit user properties.

## Delete Users

Select **User** node of the treeview to open a list of users. Right click on the user to be deleted.

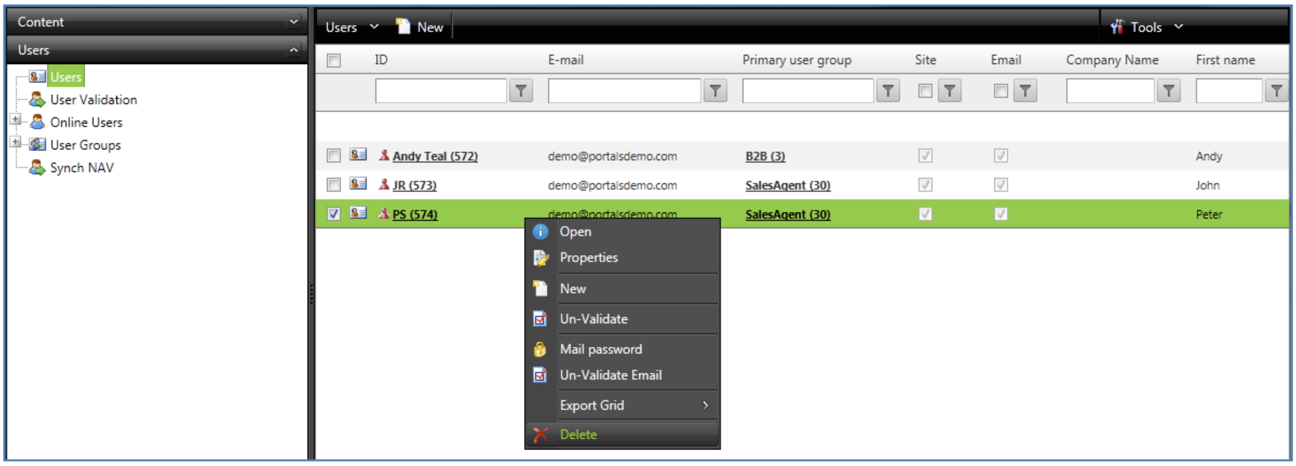



Figure 10

Click on ***Delete*** in context menu. A message box appears. Click **OK** to delete a user.

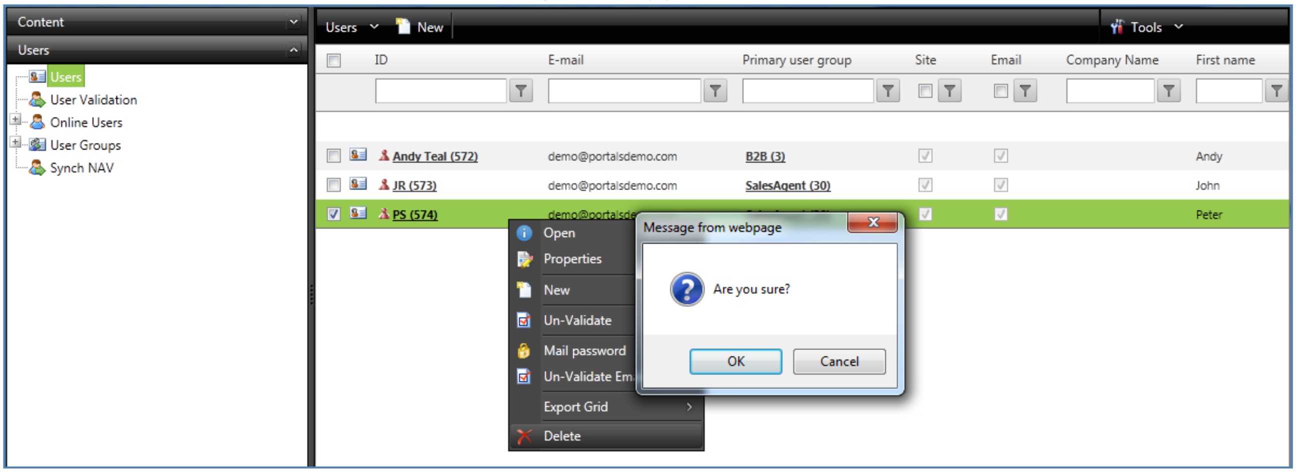
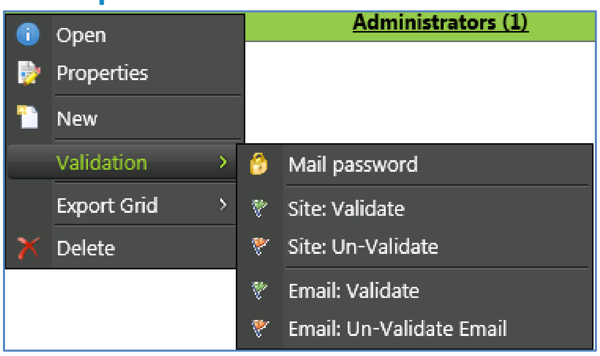
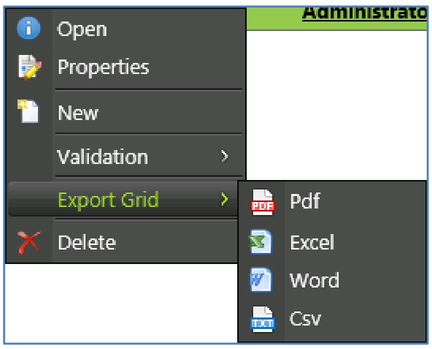



Figure 11

## Description of the Context Menu Items



## Open

This menu item opens a current user

## Properties

This menu item opens the properties for the current user

## New

This menu item starts creation of a new user

## Un-Validate

This menu item terminates the confirmation and approval of a user by User Manager/admin. After applying this menu item the value in **Site** column for the user turns to *FALSE* (see picture below) if it has been set to *TRUE*.

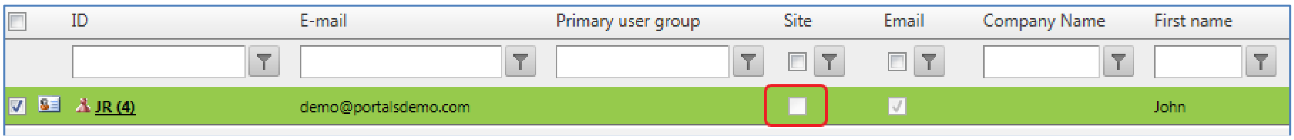
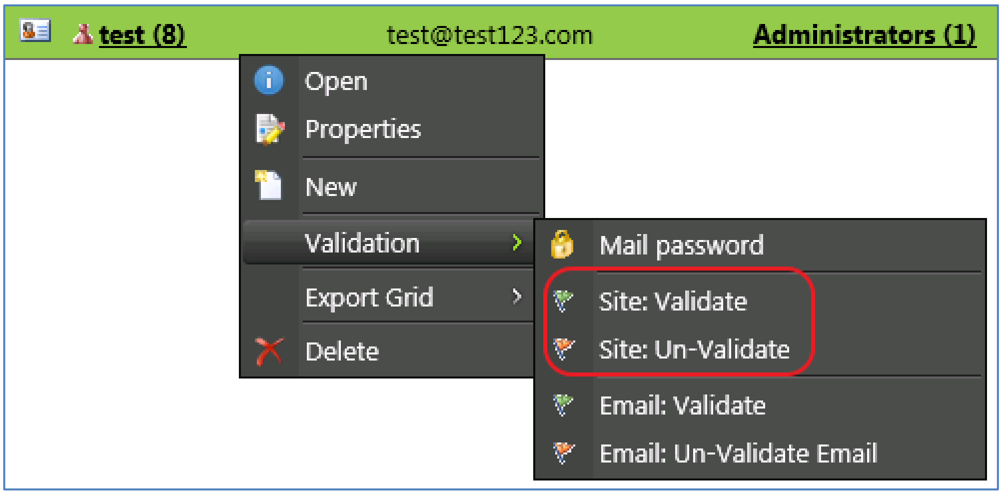



Figure 12

In the cpoadmin version 4.6 this option is moved to the user properties and looks as follows (point on the needed user and mouse right click to open user properties):




## Mail password

This menu item activates sending the password to the user's email

## Un-Validate Email

This menu item terminates the confirmation and approval of user's email. After applying this menu item the value in **Email** column for the user turns to *FALSE* (see picture below) if it has been set to *TRUE*.

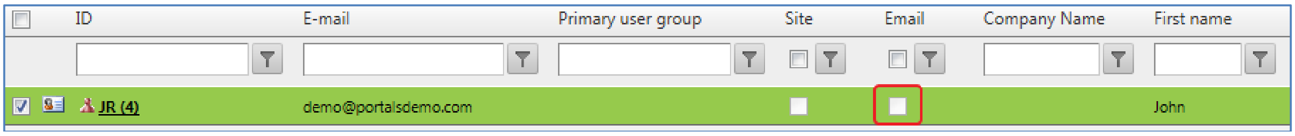
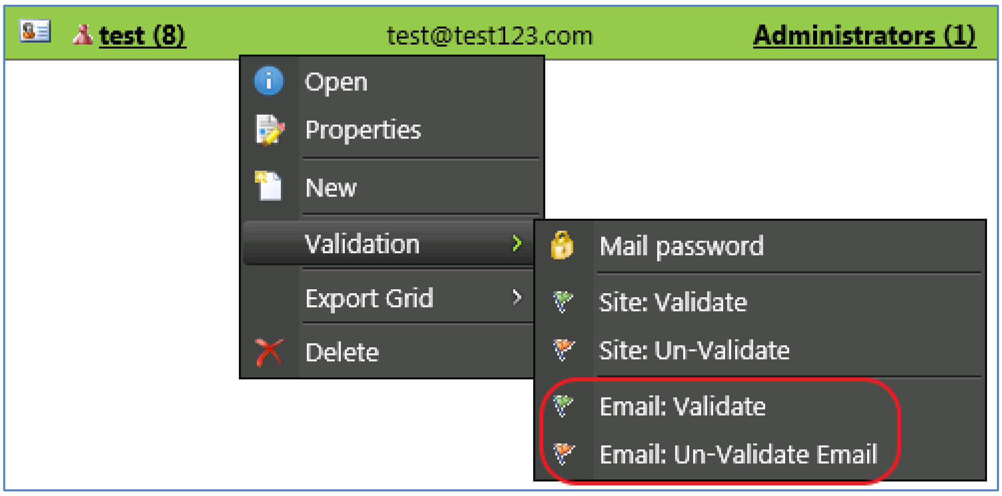



Figure 13

In the cpoadmin version 4.6 this option is moved to the user properties and looks as follows (point on the needed user and mouse right click to open user properties):




## Export Grid

This menu item allows exporting users view from the CPO admin to PDF, Excel, Word or Csv files

## Delete

This menu item deletes a user from the CPO admin

# USER VALIDATION

User validation is needed to approve the authentication of a ConnectPortal user.

Validation during user creation can be made by having Boolean values in the following fields on the first user creation page:

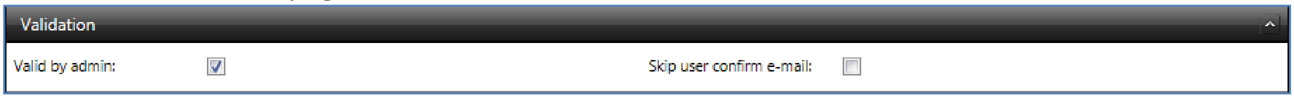



Figure 14

**Valid by admin** — *TRUE* – user confirmed and approved by User Manager/admin
*FALSE* – user is neither confirmed nor approved by User Manager/admin

**Skip user confirm e-mail** — *TRUE* – user will not receive a welcome email which contains an email confirmation link
*FALSE* - user will receive a welcome email which contains an email confirmation link

On the second user creation page there are fields that are responsible for user group validation. These fields are:

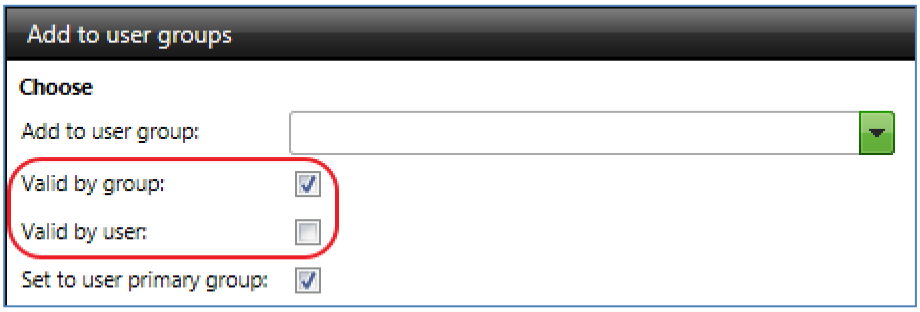



Figure 15

**Valid by group** — *TRUE* – user confirmed and approved by User Manager/admin to be a user group member
*FALSE* – user is not confirmed or approved by User Manager/admin to be a user group member *(this option is obsolete for version 4.6)*

**Valid by user** — *TRUE* – the user will not receive an email containing invitation to a user group
*FALSE* – the user will receive an email containing invitation to a user group

User validation can either be accomplished by User Manager/administrator alone (if the user is trusted) or by both a user (which has to confirm the correctness of the email address at the registration stage and accept or decline joining the group afterwards) and User Manager/administrator which creates a user.

The validation of a user can take place on the user creation as well as on assigning a user to a certain user group.

To get access to the user validation area, click on the ***User Validation*** node in the ***Users & Groups*** menu within the navigation pane:

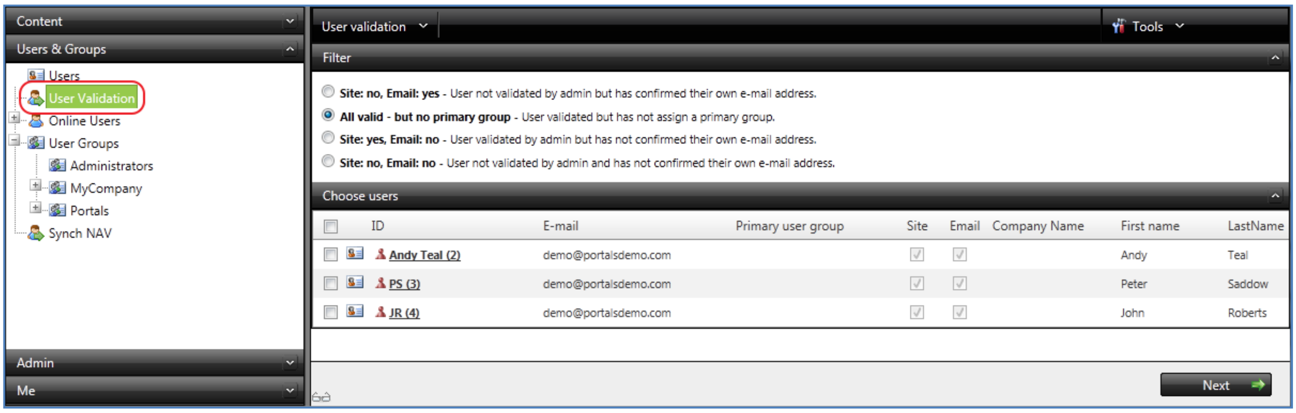


Figure 16

The page has the following options in the Filter section:

| | |
|---|---|
| *Site: no, Email: yes* | Users not validated by admin but have confirmed their own e-mail address |
| *All valid – but no primary group* | Users validated but have not been assigned to a primary group |
| *Site: yes, Email: no* | Users validated by admin but have not confirmed their own e-mail address |
| *Site: no, Email: no* | Users not validated by admin and have not confirmed their own e-mail address |

In order to validate – choose users by either clicking on combo box at the beginning of the user line (see picture below) or by clicking on user lines holding **Ctrl** key. If you right-click in the selected area, the context menu apears (see picture below).

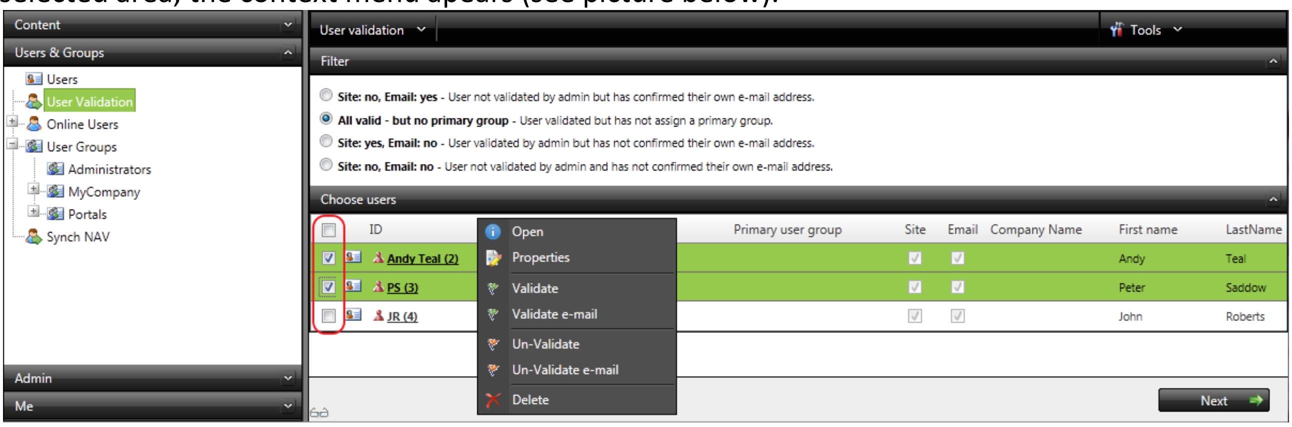


Figure 17

## Description of the Context Menu Items

### Open
This menu item opens a current user

### Properties
This menu item opens the properties for the current user

### Validate
This menu item confirms and approves a user by User Manager/admin

### Validate e-mail
This menu item confirms and approves user's email

### Un-Validate
This menu item terminates the confirmation and approval of a user

### Un-Validate e-mail
This menu item terminates the confirmation and approval of user's email

### Delete
This menu item deletes a user from the CPO admin

It is possible to assign multiple users to multiple user groups simultaneously. To accomplish this, being in the User Validation area, select users and click on **Next** button.

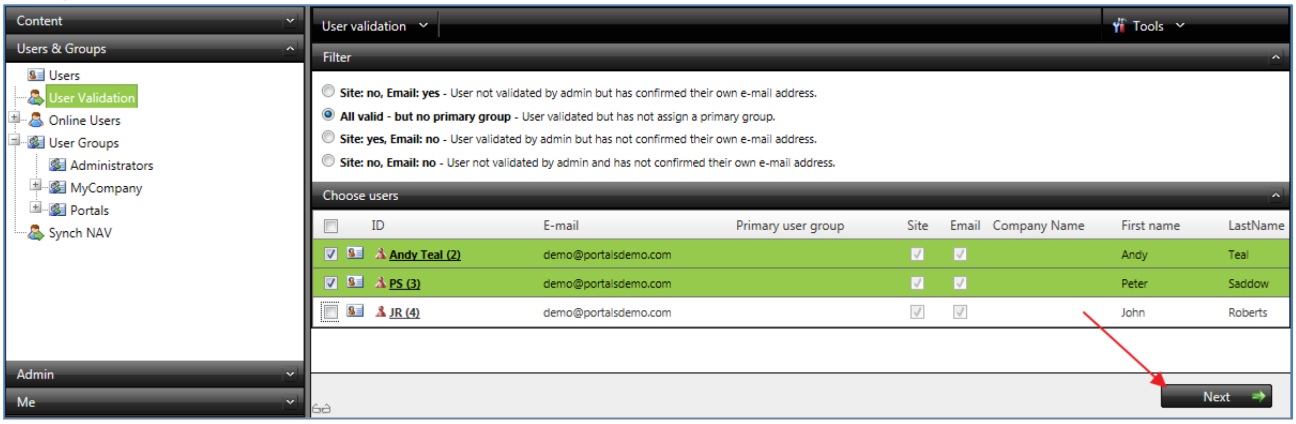


Figure 18

On the next page it is possible to assign selected users to user groups. Please note that a **User Manager** cannot assign users to the ***Administrators*** user group (for reasons of security).

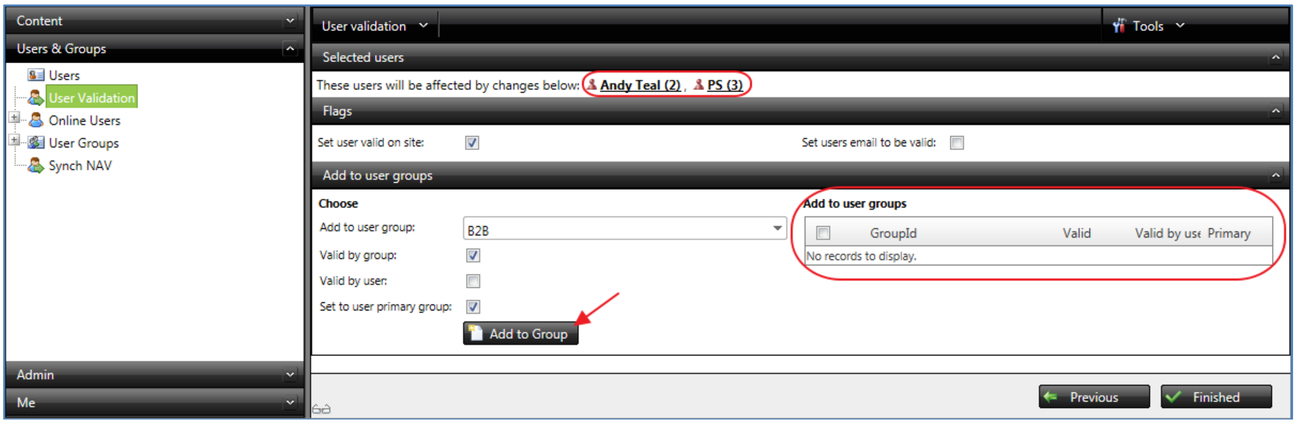
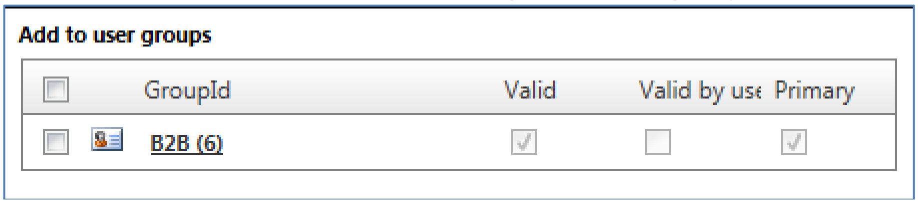


Figure 19

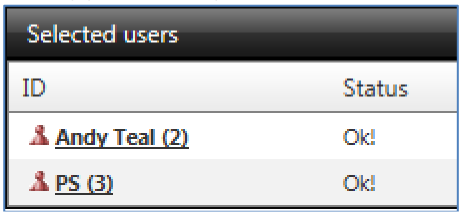
The selected users are displayed on the top of the section (see picture above). If a user group is selected then click on **Add to Group** button and the group will appear in ***Add to user groups*** table on the same page (see pictures above and below). This action can be repeated with other groups, to which selected users have to be assigned. These groups will be added to the same table.


**Add to user groups**

| | GroupId | Valid | Valid by use | Primary |
|---|---|---|---|---|
| | B2B (6) | ✓ | | ✓ |

Figure 20

If assigning users to user groups is completed, click on the **Finished** button. The confirmation page will appear (see picture below).


Selected users

| ID | Status |
|---|---|
| Andy Teal (2) | Ok! |
| PS (3) | Ok! |

Figure 21

# ONLINE USERS

This node in the CPO admin is available for Administrators and User Managers. This node contains four different pre-defined filters on the **Online Users.**

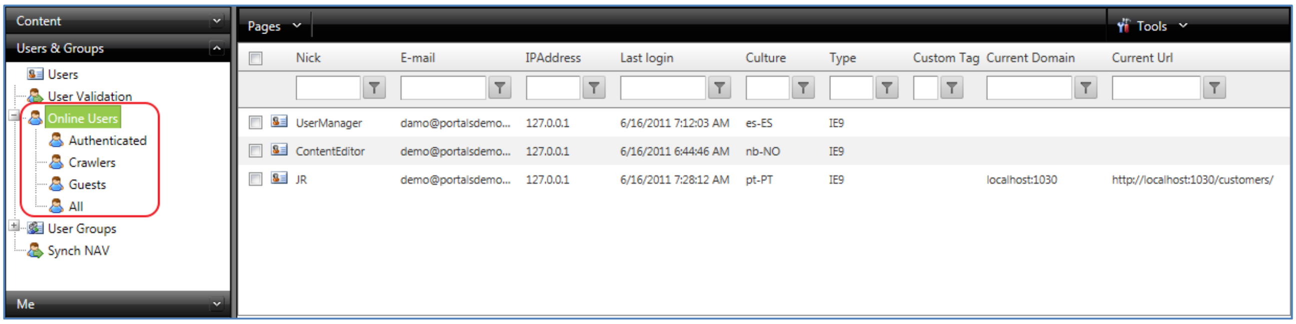



Figure 22

## Description of the Pre-defined Filters on Online Users

| | |
|---|---|
| ***Authenticated*** | This category reflects the users that are currently logged in both to CPO admin site and Portal site |
| ***Crawlers*** | This user type is typically search engines. To learn more about Crawlers visit this link [http://en.wikipedia.org/wiki/Web crawler](http://en.wikipedia.org/wiki/Web_crawler) |
| ***Guests*** | This category reflects the users that are on the site (Portals) but not authenticated |
| ***All*** | This category reflects all the users that are using web site both authenticated and not |

It is possible to filter users under each category. To do this: enter a value in one of the fields in a section header (see picture below). Filter fields are case sensitive.

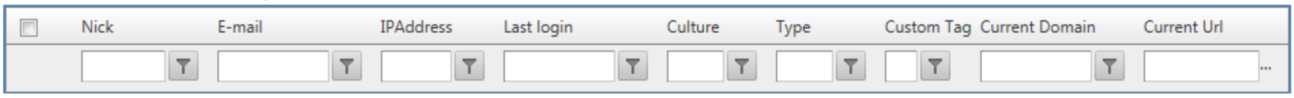



Figure 23

# USER GROUPS

User groups act as containers for users. Within the hierarchical structure, permissions are inherited from parent user groups. So in the table below, for example, the **Editors** User Group inherits permissions from the **MyCompany** User Group and the **SalesAgent** User Group inherits permissions from the **Portals** User Group.

The CPO manager by default installs the following user groups:

| User group name | Group/subgroup | Description |
|---|---|---|
| **Administrators** | Group | Contains CPO Administrators |
| **MyCompany** | Group | Contains Editors and User Managers user groups |
| **Editors** | Subgroup | Contains CPO Content Editors |
| **UserManagers** | Subgroup | Contains CPO User Managers |
| **Portals** | Group | Contains Portals User Groups |
| **SalesAgent/B2B/B2C** | Subgroup | Contain members/users of specific Portals User Groups |

Here is a screenshot with CPO user groups with preinstalled SA, B2B and B2C Portals:

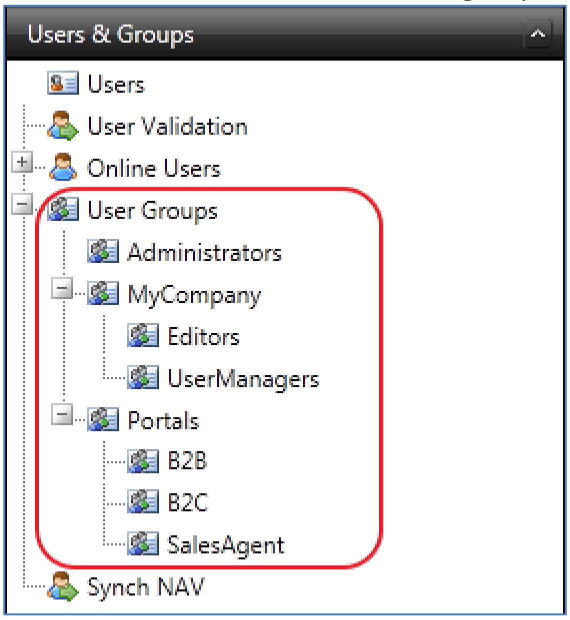


Figure 24

## Create new User Group

Select ***'User Groups'*** node and right click on it. Select ***'New'*** from the popup.

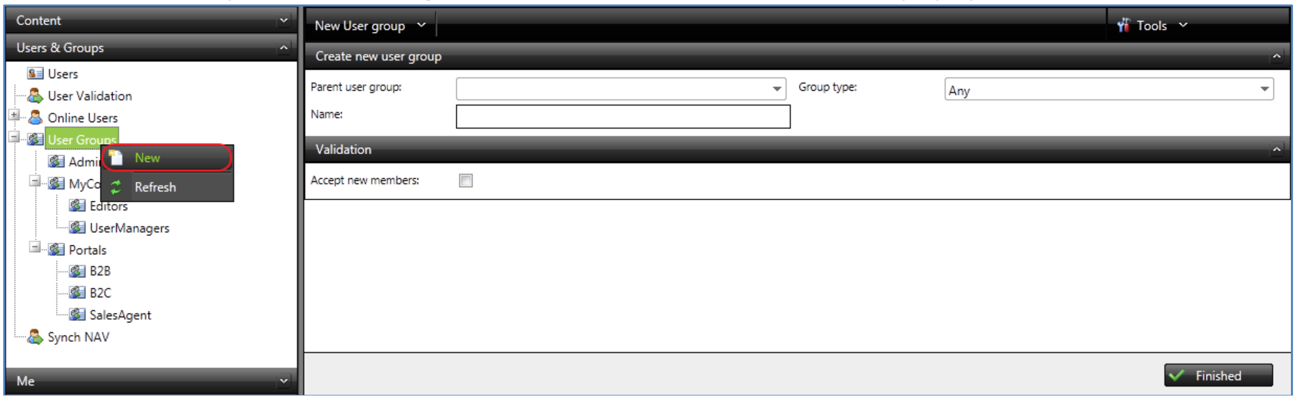



Figure 25

Click on the **Parent user group** field. A lookup with available user groups appears.
Select the parent group.
In the **Name** field, enter a new user group name which has to be unique within the CPO admin.
Select a ***'Group type'*** from the dropdown list. It defines the presentation and selection filter of groups. The options available are as follows:

| | |
|---|---|
| ***Any*** | A group for any purpose |
| ***Container (empty)*** | A group that can have sub-groups, but not members |
| ***Company*** | Representation of a company, organization etc. |
| ***Department*** | A department is typically a sub-group of a company group |
| ***Permissions/Role*** | A group used for permissions only |
| ***Group*** | A user group |

If the **Accept new members** checkbox within the Validation section is checked, the user group can accept new members.

Click **Finished** to create a new user group ("Demo" is a new user group's name; the parent user group is B2B).

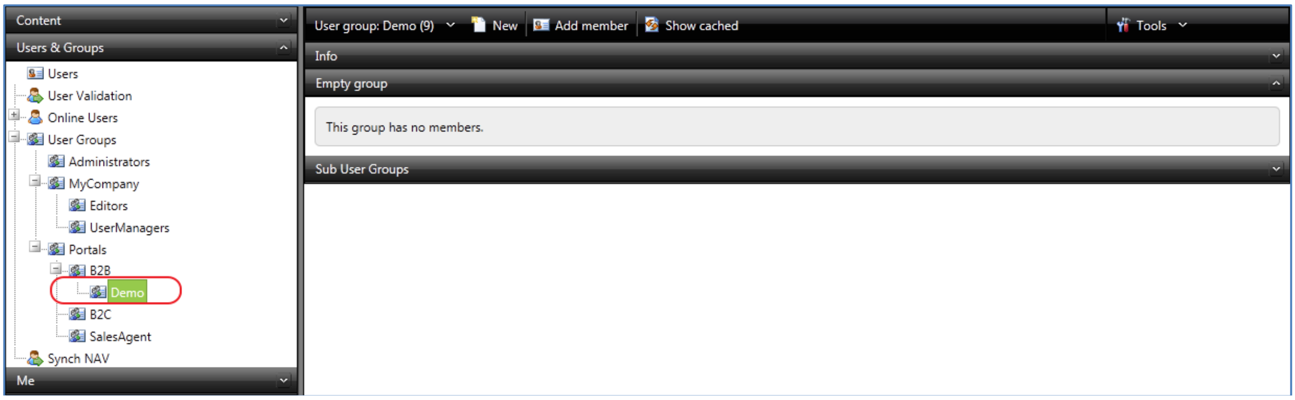



Figure 26

## Open User Group

Select a node in the treeview and click on it or right click on the node and select ***Open*** from the context menu.

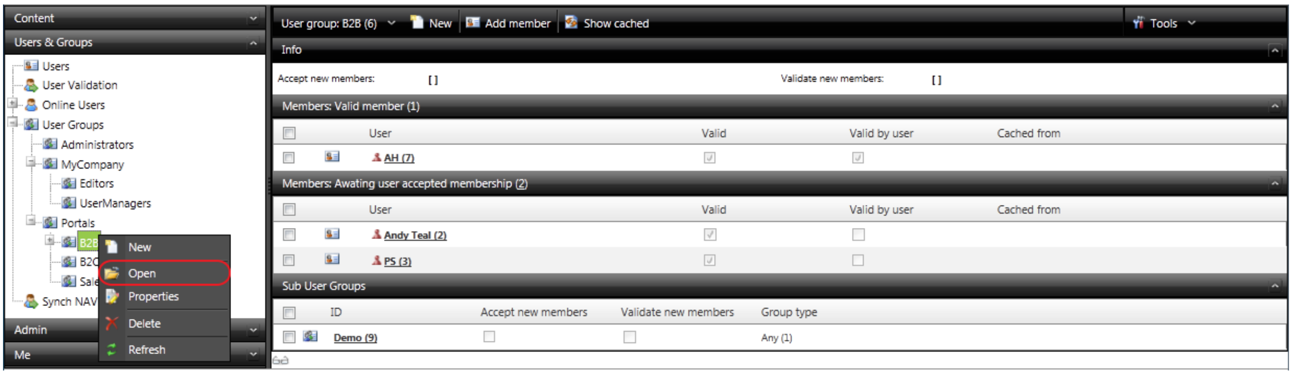



Figure 27

The user group can include the following sections (see picture above):

| | |
|---|---|
| ***Info*** | This section contains the values of the following group properties: **Accept new members** and **Validate new members** |
| ***Members: Valid member*** | This section contains valid user group members |
| ***Members: Awaiting user accepted membership*** | This section contains user group members that have not yet accepted their group membership |
| ***Sub User Groups*** | This section contains sub user groups if they exist |

## Context Menu

If a group contains members, in order to open the context menu, right click on the User line (see picture below):

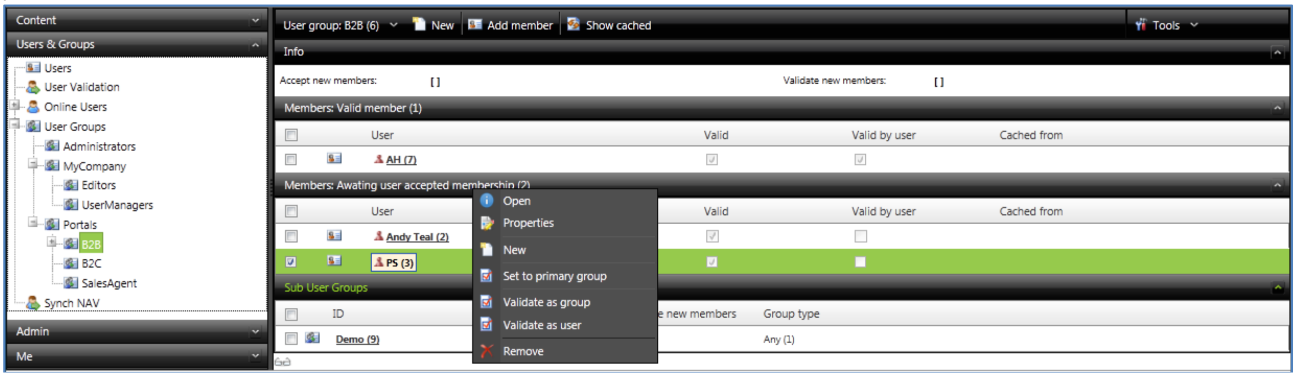



Figure 28

## Description of the Context Menu Items

### Open

This menu item opens a current user

### Properties

This menu item opens the properties for the current user

### New

This menu item starts creation of a new user

### Set to primary group

This menu item sets the current group as user’s primary group.

### Validate as group

This menu item is used by group administrator to validate a user as a member of the group

### Validate as user

This menu item is used by group administrator to confirm and approve the user

### Remove

This menu item removes the user from the user group

**Note:** Deleting all users from the Administrators user group can lead to unexpected consequences and is strongly not recommended. You will not be able to access the TRIMIT ConnectPortal Administration should you do this.

## Set Properties of User Group

Properties of user groups can be set in two ways: Select a user group and right click on the node. Select ***Properties*** from context menu (see picture below). OR Click on the **User group: (user group name here)** button on the top menu on the page (see picture below) and select ***Properties***.

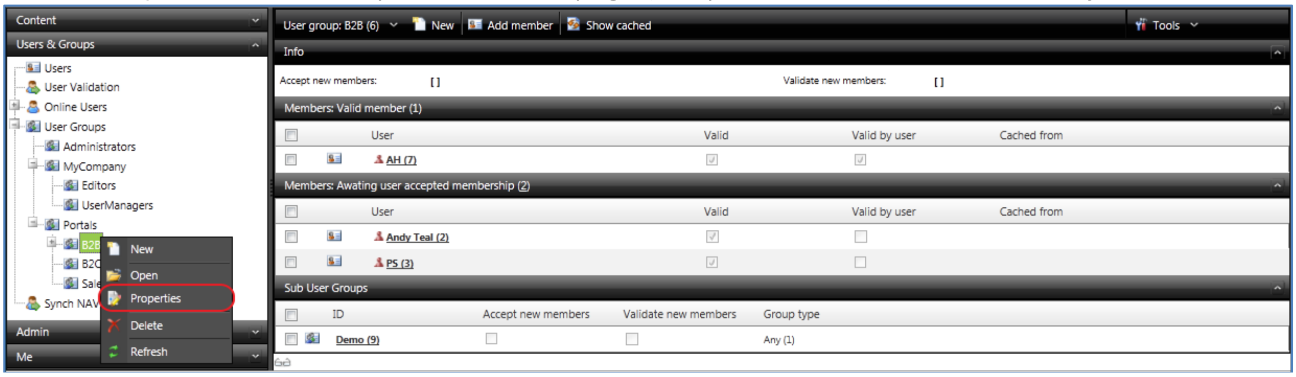


Figure 29

Edit values in fields **Name** and **Group type** in the ***General*** section if necessary. Set appropriate values in fields **Accept new members** and **Validate new members** in the ***Access*** section**.**

Figure 30

When finished, click **Save** in the upper command line.

## Delete User Group

Select a user group to be deleted and right click on it. Select ***Delete*** from the context menu.

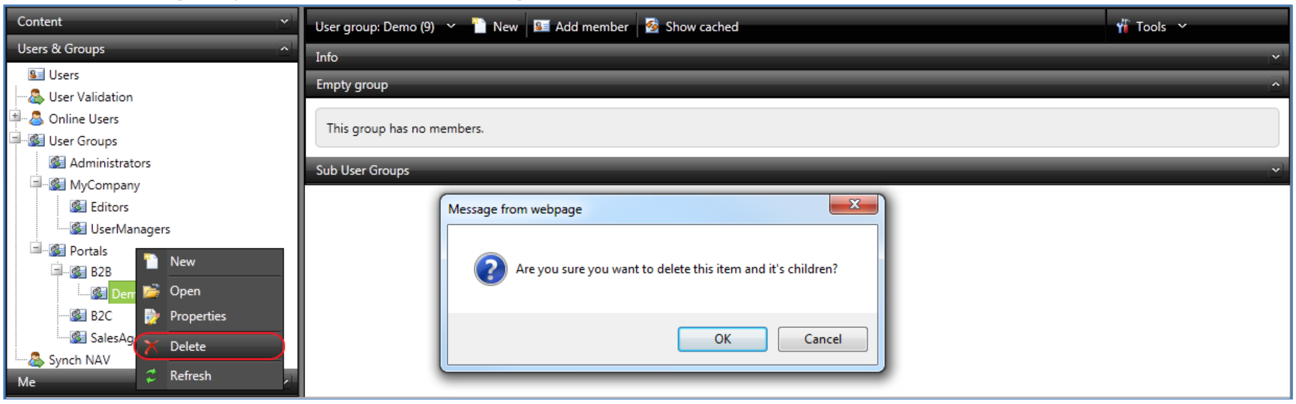



Figure 31

A message box appears confirming deletion. Click **'OK'** to delete.

The last menu item in the context menu is ***Refresh***. This menu item reloads the CPO admin navigation pane.

# SYNCH NAV

***Synch NAV*** node is the last node in the ***Users & Groups*** menu of the CPO admin navigation pane. Synch NAV refers to User Synchronization with Microsoft Dynamics NAV which is the basis of TRIMIT, which updates user binding data, both in CPO and TRIMIT.

To run a user synchronization click on ***Synch NAV*** node. This menu item contains a command line in the following sections: ***Options*** and ***Result***.
The command line contains the following menus/buttons: **User NAV Synch** menu **(**with ***Help*** menu item), **Test** menu (with ***Throw Error*** and ***Throw Exception*** menu items- these menu items are used in testing purposes) and **Synch NAV Users** button which runs the synchronization.

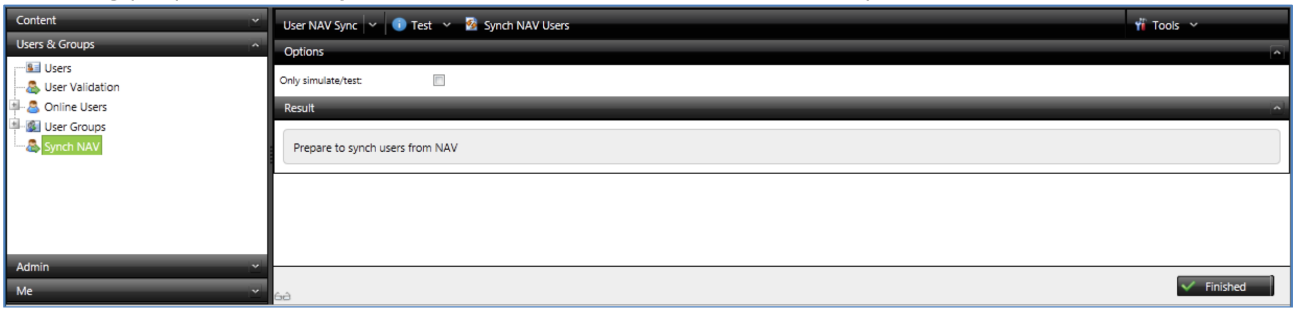



Figure 32

It is possible (and recommended) to run a preliminary synchronization to see what the results would be, before running the user synchronization. To do this put a checkmark in the **Only simulate/test** field under the ***Options*** section and click on **Synch NAV Users** button. Then click *OK* in the message window.

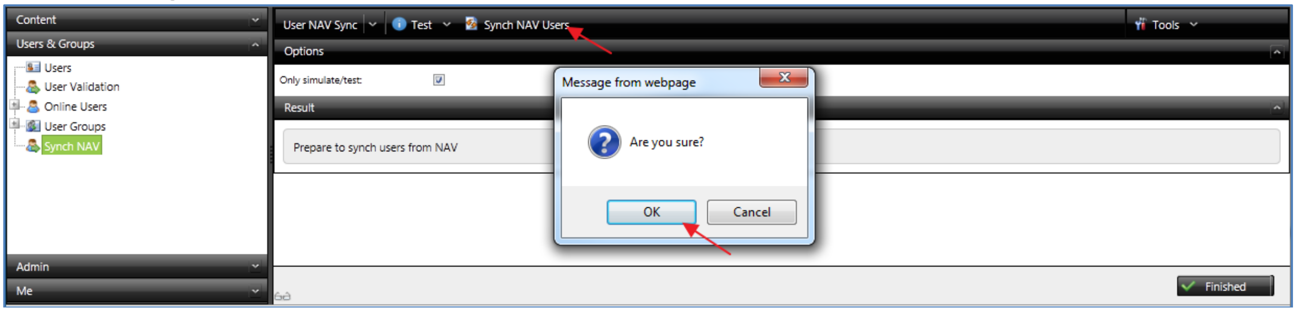



Figure 33

The result of the synchronization (only simulation) will be displayed in the ***Result*** section

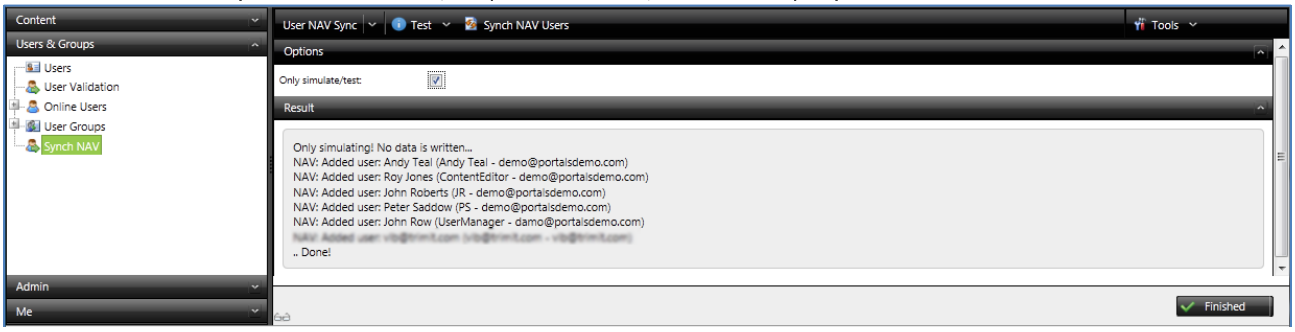



Figure 34

To make a real synch of users - uncheck the **Only simulate/test** field in ***Options*** section and click on **Synch NAV Users** button. To run the synchronization without the confirmation message box, click on **Finished** button in the lower right hand corner of the page (see picture below):

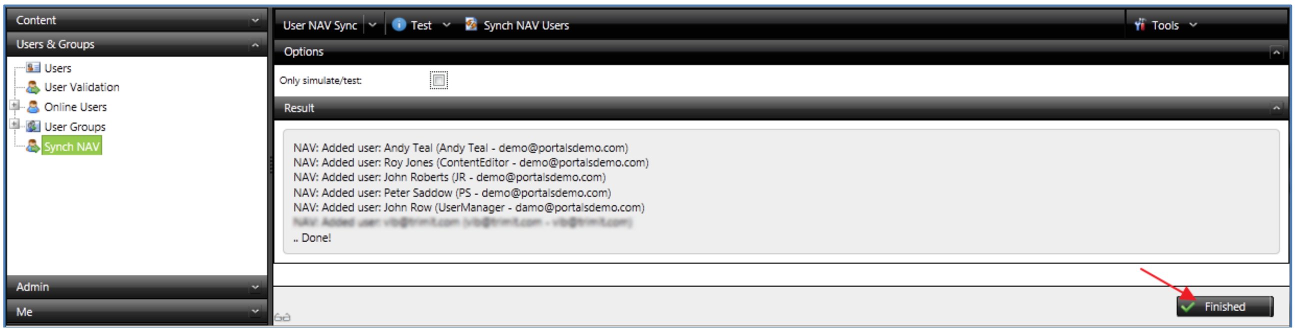


Figure 35

Synchronization is now complete. The next step for NAV administrator is to relate the users within TRIMIT. This can be done in the **User Relationship Management (*Departments/TRIMIT Portals/Administration)***. For additional information on this topic, please refer to the document called “White Paper – TRIMIT Portals NAV setup”.