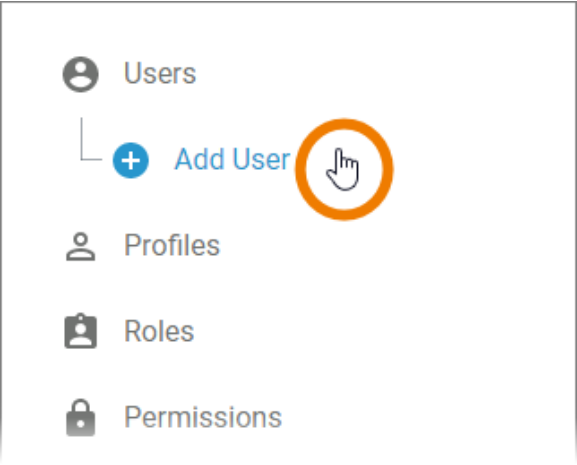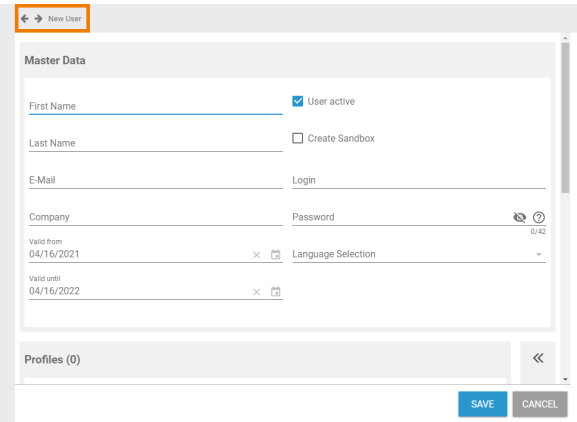# Adding a User

To create a new user account, you need at least the following data:

- **first name, last name**
- **e-mail address**

Creating a User

	Select **Add User** in **Users** menu in the sidebar.
	An empty user data sheet opens.

Entering Personal User Data

On the left side of the **Master Data** section, you have to insert the personal data of the new user.

- **First Name**, **Last Name** and **E-Mail** are mandatory.
- The e-mail address provided in field **E-Mail** is used when the platform needs to send e-mails to the user.
- The content of field **Company** is displayed in the portal header along with the user name:

Irene Adler
ACME Corp.

By default, the validity of a user account is one year.

You can edit the default settings in the fields **Valid from** and **Valid until**:

- Manually by inserting a date in format **mm/dd/yyyy**.
- Additionally, a calendar opens. You can also click a date in the calendar to adopt it.

ⓘ If the date set for **Valid until** has expired, the user can no longer log in to the system, even if his account is still activated.

Entering Account Data

On the right side of the **Master Data** section, the account specific data of the user can be filled in:

☑ User active

☐ Create Sandbox

Login

Password 👁⃠ ⑦
0/42

Language Selection ▾

- **User active:**

  This checkbox allows you to manage, if the user account is activated and usable, or deactivated, so that the user cannot log in to the business system any more.

  ⓘ If the date set for **Valid until** has expired, the user can no lon

ger login to the system, even if his account is still activated.

- **Create Sandbox:** A sandbox is a personal profile. If you activate this checkbox, a sandbox is created along with the user account and directly assigned to the user's account. The notation for automatically created sandboxes follows the scheme: **sandbox_Login**.

Login irene.adler ✓	Insert the users **Login**. This is the ID for the user to log in to the business system. ⚠️ Please note: Once set up, the **Login** cannot be changed any more.
Login irene.adler This user name is already in use. ❗	Every login has to be unique. Your entry in the **Login** field is checked automatically. If it is already in use, you will have to change the login name.

Login Allowed characters are 0-9, a-z and . - _ ! or a valid e-mail address	The **Login** must not be empty. Allowed characters are: • numbers 0-9 • letters a-z and A-Z • special characters **. - _** and **!** The use of a valid e-mail address is also allowed.
Password ••••••••••••••••••• ⌀ ⑦ 21/42	In the next field, assign a password.

irene adler   ✅
Password has to be from 8 to 42 characters long and
    • must begin with a character.
    • must be alphanumeric.
    • must contain at least one number.
    • can contain the following special characters: '!' , '@' , '#' , '$' , '%', '_' .
   ⑦
	Make sure that the password ...
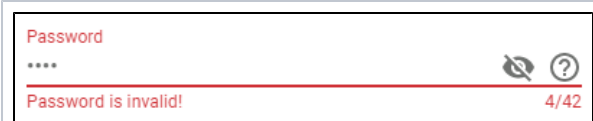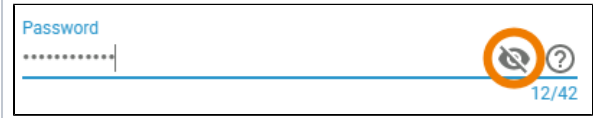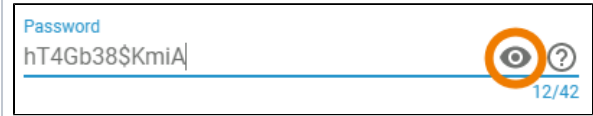	
	• is 8 to 42 characters long.
	• starts with a character.
	• is alphanumeric.
	• contains at least one number.
	• contains only the allowed special characters (!, @, #, $, %).
	
	You can display the password criteria by hovering over the ⑦ icon.

Password •••• Password is invalid! 4/42	If your chosen password is not matching the password criteria, the error message **Password is invalid!** is displayed. Enter a password that matches the password criteria.
Password ••••••••••• 12/42	The password is not visible when icon is displayed. Click the icon to display the password.
Password hT4Gb38$KmiA 12/42	The visible password is indicated by icon .
German election English	The content of field **Language Selection** determines the language of the user interface of the platform components. Expand the selection list to choose one of the available languages (English, German).

When you have inserted all personal data, you must assign a profile before saving the user data sheet. Otherwise the error message **At least one profile must be assigned to a user!** will appear when you click the **Save** button.

Assigning a Profile

Every user needs at least one profile, otherwise he will not be able to work on the platform. The necessary standard profiles for the corresponding platform components are provided in the user management. An overview on the standard profiles can be found in menu Profiles.

In a user data sheet, the profiles assigned to the user are listed in the **Profiles** window. If you create a new user, you start with an empty **Profiles** window.

Click button **Assign** to add a profile.

The list of all available profiles opens.

Use the corresponding checkboxes to choose the roles you want to assign.

The profile **pas_base** is mandatory as it grants access to the **Scheer PAS** *Portal*, the entry into the platform.

All selected profiles are displayed in the footer of the list.

Click **Apply** to assign the profiles to the user.

Your selection is transferred to the **Profiles** window of the user data sheet.

When all necessary profiles have been assigned, you can save the user data sheet.

Individual write permissions can be granted or denied for

profiles with namespace. Refer to [Editing a User](#) for information on how to grant write permissions on profile
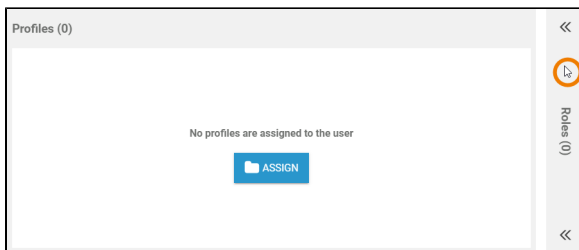
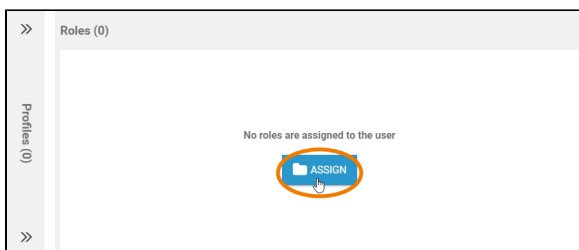The data sheet closes and the new user is displayed in the user list.

You can use the link in the success message to reopen the user data sheet, for example to edit the user data or to check whether the sandbox has been created and assigned.

Assigning a Role

Roles are assigned according to the same principle as profiles.

Use the sidebar of the profiles window to switch to the roles window.

Click the **Assign** button to open the list of available roles.

Tick the checkboxes to choose the roles you want to assign to the user.

All chosen roles are displayed in the footer of the list.

Click **Apply** to assign the roles.

Your selection is transferred to the **Roles** window of the user data sheet.

Do not forget to save the data sheet before closing it.