

## 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

The screenshot shows the 'New User' form in the system. The form is titled 'New User' and contains the following fields and options:

- First Name**: Text input field.
- Last Name**: Text input field.
- E-Mail**: Text input field.
- Company**: Text input field.
- Password**: Text input field with a strength indicator (0/42) and a toggle icon.
- User active**: Checked checkbox.
- Create Sandbox**: Unchecked checkbox.
- Valid from**: Date field set to 04/16/2021.
- Valid until**: Date field set to 04/16/2022.
- Language Selection**: Dropdown menu set to '-'.
- Profiles (0)**: Section showing no profiles are assigned.
- SAVE** and **CANCEL** buttons at the bottom right.

Select **Add User** in **Users** menu in the sidebar.

An empty user data sheet opens.

### On this Page:

- Creating a User
  - Entering Personal User Data
  - Entering Account Data
  - Assigning a Profile
  - Assigning a Role

**Related Pages:**

- Managing Users
  - Editing a User
- Managing Profiles

## Entering Personal User Data

Master Data

First Name

Irene

Last Name

Adler

E-Mail

irene.adler@acme-corp.com

Company

ACM

Valid from

04/16/2021

Valid until

04/16/2022

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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.

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TODAY

CANCEL

Valid from

04/16/2021

Valid until

04/16/2022

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.

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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

	<p>On the right side of the <b>Master Data</b> section, the account specific data of the user can be filled in:</p>
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☒ User active

☐ Create Sandbox

Login

Password



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 cannot log in

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- **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**.

<div data-bbox="162 136 730 220"><div>Login</div><div>irene.adler</div><div></div></div>	<p>Insert the users <b>Login</b>. This is the ID for the user to log in to the business system.</p> <div data-bbox="982 346 1096 1522"><div></div><div>P le a s e n o t e : O n c e s e t u p , t h e <b>L o g i n</b> c a n n o t b e c h a n g e d a n y m o r e.</div></div>
<div data-bbox="162 1564 730 1669"><div>Login</div><div>irene.adler</div><div>This user name is already in use.</div><div></div></div>	<p>Every login has to be unique.</p> <p>Your entry in the <b>Login</b> field is checked automatically. If it is already in use, you will have to change the login name.</p>

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

.....



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: `! , @ , # , \$ , % , \_



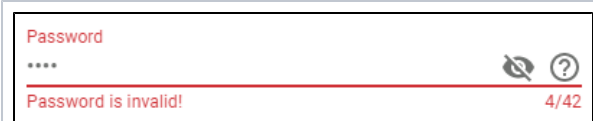
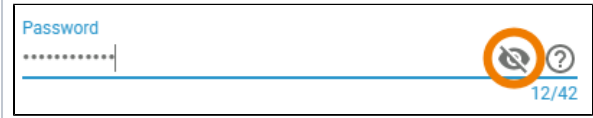

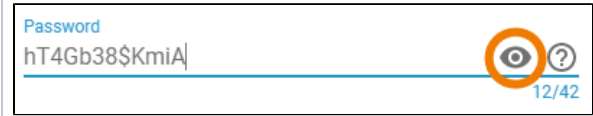


Make sure  
that the  
password ...

- 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



icon.

 <p>A screenshot of a password input field. The label 'Password' is in red. The input contains four dots. Below the field, the message 'Password is invalid!' is displayed in red. To the right of the field are two icons: a crossed-out eye and a question mark. The character count '4/42' is shown in red at the bottom right.</p>	<p>If your chosen password is not matching the password criteria, the error message <b>Password is invalid!</b> is displayed. Enter a password that matches the password criteria.</p>
 <p>A screenshot of a password input field. The label 'Password' is in blue. The input contains ten dots. To the right of the field are two icons: a crossed-out eye and a question mark. The character count '12/42' is shown in blue at the bottom right.</p>	<p>The password is not visible when icon  is displayed. Click the icon to display the password.</p>
 <p>A screenshot of a password input field. The label 'Password' is in blue. The input contains the text 'hT4Gb38\$KmiA'. To the right of the field are two icons: an open eye and a question mark. The character count '12/42' is shown in blue at the bottom right.</p>	<p>The visible password is indicated by icon .</p>
 <p>A screenshot of a language selection dropdown menu. The label 'Language Selection' is in grey. The dropdown is open, showing 'German' and 'English' as options. To the right of the dropdown is a hand cursor icon.</p>	<p>The content of field <b>Language Selection</b> determines the language of the user interface of the platform components.</p> <p>Expand the selection list to choose one of the available languages (English, German).</p>



New User

Profiles (0)

No profiles are assigned to the user

ASSIGN

Additional Data | Technical Information | User Object | Meta

Organisation

Department

Phone

At least one profile must be assigned to a user!

SAVE CANCEL

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](#).

Profiles (0)

No profiles are assigned to the user

ASSIGN

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.

New User - Assign Profiles

(9)

#	Name	Display Name	Namespace	Activated
1	<input checked="" type="checkbox"/> analytics_admin	analytics_admin		Yes
2	<input type="checkbox"/> bpaas_execution_user	bpaas_execution_user		Yes
3	<input type="checkbox"/> pas_user	pas_user		Yes
4	<input type="checkbox"/> sandbox_acme_admin	ACME Admin Sandbox	sandbox_acme_admin	Yes
5	<input checked="" type="checkbox"/> pas_admin_user	pas_admin_user		Yes
6	<input type="checkbox"/> administration_user	administration_user		Yes
7	<input type="checkbox"/> _dashboard_access_transactions	Dashboard: Wildcard Transactions		Yes
8	<input checked="" type="checkbox"/> pas_base	pas_base		Yes

analytics\_admin pas\_base

APPLY CANCEL

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

**ScheerPAS Portal**,

the entry point to the platform.

← → New User - Assign Profiles

Search (40) ✕ 🔍

#	Name	Display Name	Namespace	Activated
1	<input type="checkbox"/> bpaas_design_user	bpaas_design_user		Yes
2	<input type="checkbox"/> bpaas_execution_user	bpaas_execution_user		Yes
3	<input type="checkbox"/> mobile_autosync	mobile_autosync		Yes
4	<input type="checkbox"/> _dashboard_access_processes	Dashboard: Wildcard Processes		Yes
5	<input type="checkbox"/> _dashboard_access_transactions	Dashboard: Wildcard Transactions		Yes
6	<input type="checkbox"/> analytics_user	analytics_user		Yes
7	<input checked="" type="checkbox"/> analytics_admin	analytics_admin		Yes

analytics\_admin pas\_admin\_user pas\_base

APPLY CANCEL

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

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

← → New User

Profiles (3) ASSIGN MORE

Designer	Name	Display Name	Namespace
	analytics_admin	analytics_admin	
	pas_base	pas_base	
	pas_admin_user	pas_admin_user	

SAVE CANCEL

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 is assigned or denied for

profiles with namespace. Referring to [Editing a User](#) for information on how to grant write permission is on profile

S.

← → Show Users

(1) ✕ ▾

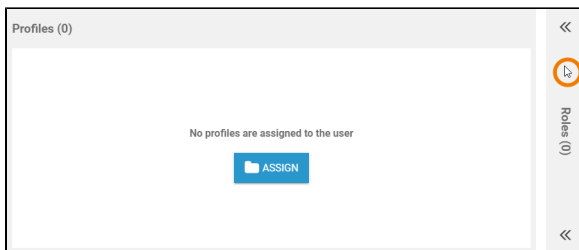
#	Last Name	First Name	Login	Company	Valid until	Activated
1	Adler	Irene	irene.adler	ACME Corp.	12/31/2099	Yes

Saved successfully! [Reopen Data Sheet](#)

The data sheet closes and the new user is displayed in the user list.

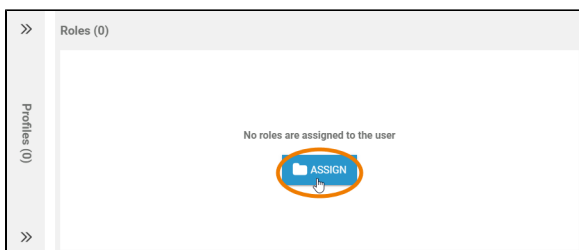
You can use the link in the success message to reopen the user data sheet, for example to [edit the user data](#) or to check whether the sandbox has been created and assigned.

## 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.

← → New User - Assign Roles

Search (22) ✕ ▾

#	Name	Activated
1	<input type="checkbox"/> head_hr	Yes
2	<input type="checkbox"/> head_production	Yes
3	<input checked="" type="checkbox"/> employee	Yes
4	<input type="checkbox"/> head_sales	Yes
5	<input type="checkbox"/> head_it	Yes
6	<input type="checkbox"/> acme_facility	Yes
7	<input checked="" type="checkbox"/> acme_manager	Yes

employee

APPLY CANCEL

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

← → New User - Assign Roles

Search (22) ✕ ▾

#	Name	Activated
1	<input type="checkbox"/> head_hr	Yes
2	<input type="checkbox"/> head_production	Yes
3	<input checked="" type="checkbox"/> employee	Yes
4	<input type="checkbox"/> head_sales	Yes
5	<input type="checkbox"/> head_it	Yes
6	<input type="checkbox"/> acme_facility	Yes
7	<input checked="" type="checkbox"/> acme_manager	Yes

acme\_ceo acme\_manager employee

APPLY CANCEL

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

Click **Apply** to assign the roles.

← → New User

Roles (3) ASSIGN MORE

Name	
employee	✕ ↗
acme_manager	✕ ↗
acme_ceo	✕ ↗

Profiles (0)

SAVE CANCEL

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



Don't forget to save the data sheet before closing it.