How to – Add Users

DOCUMENT SUMMARY SHEET

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NOTES

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Table of Contents

This document shows the screens that are accessed to:

- Allow a high level user to add a new ADempiere user
- allocate a role to the new user
- change the new user's initial password to one of the user's choosing
- allow the new user to logon and select a role using their new credentials

Also shown is the window that needs to be maintained by a system's administrator so that ADempiere can connect to the email system used by your organisation and allow Users to send emails from within ADempiere.

The screen shots included in section 3 and later sections of this document were taken from a system running Compiere. The ADempiere screens are the same. Note that The term "Tenant" in later versions of Compiere has identical meaning to the word "Client" which was used in earlier version of Compiere and most version of ADempiere.
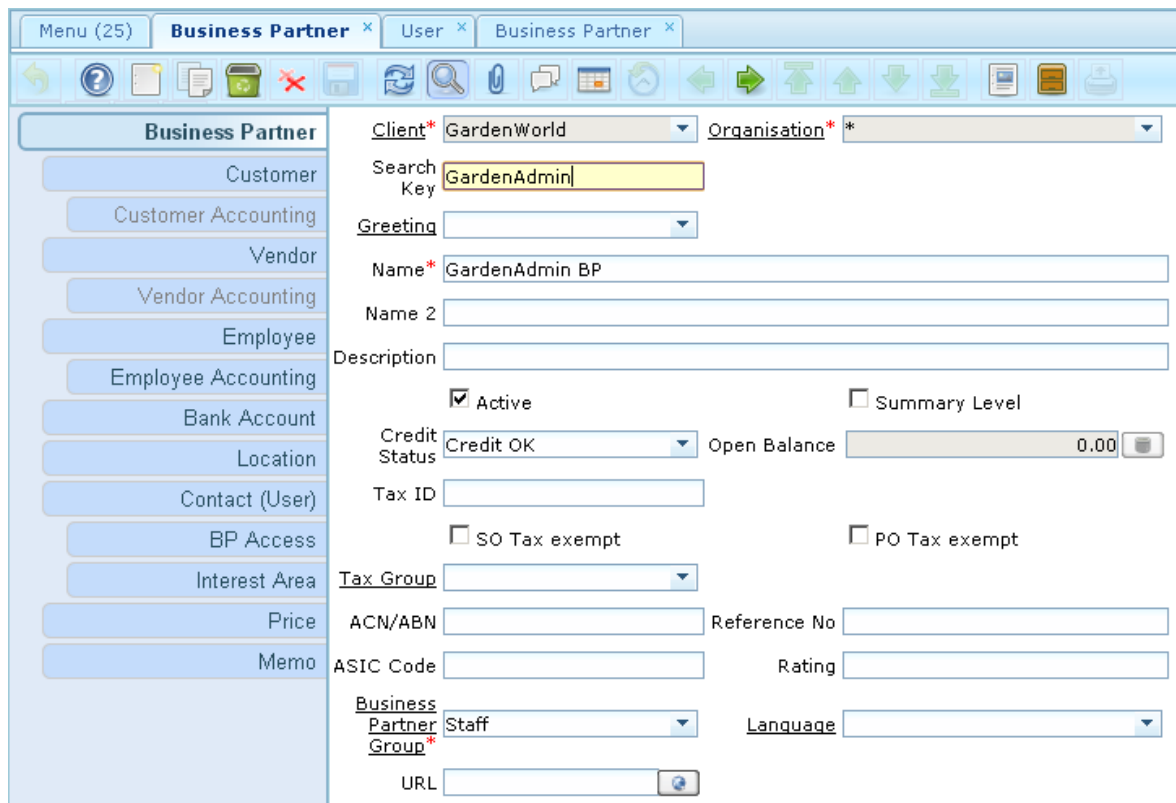
2.1 Log in to ADempiere

Logon to ADempiere with a role that allows access to the USER window. The GardenWorld example is the Role of GardenAdmin. Open the Business Partner wimdow.

2.2 The Business Partner Window

A User of the system that has a Role than can access functionality within the System must be linked to a Business Partner such as the example below. The Business Partner window stores a flag needed for a Contact of that Business Partner to have a role within the System. This is the "Sales Representative" flag displayed on the Employee and Vendor tabs.

The GardenAdmin Business Partner record displays as:

2.3   The Employee Tab

The Employee tab must be ticked and the Sales Representative flag also ticked. (note this same flag is also displayed on the Vendor tab so that external parties such as independent sales organisations can be given access to the system)

You will notice that a Contact can be added directly in the Contact tab in the Business Partner window however not all fields required to set up an internal User are displayed so we will now open the User Window and add the Contact information there.

2.4 The User Window

Enter a User Name and Location and initial password. The Business Partner record you created for your own company should be selected in the Business Partner field.

A new record has been created below for our new employee, Don Quixote.

Enter an initial password for Don. We have used a password of "password001" in the screen shot above. [In current releases of ADempiere the password is hashed and will appears as a long string of asterisk characters]

Add the Roles that the new User, Don Quixote, will have by creating one record for each such role.
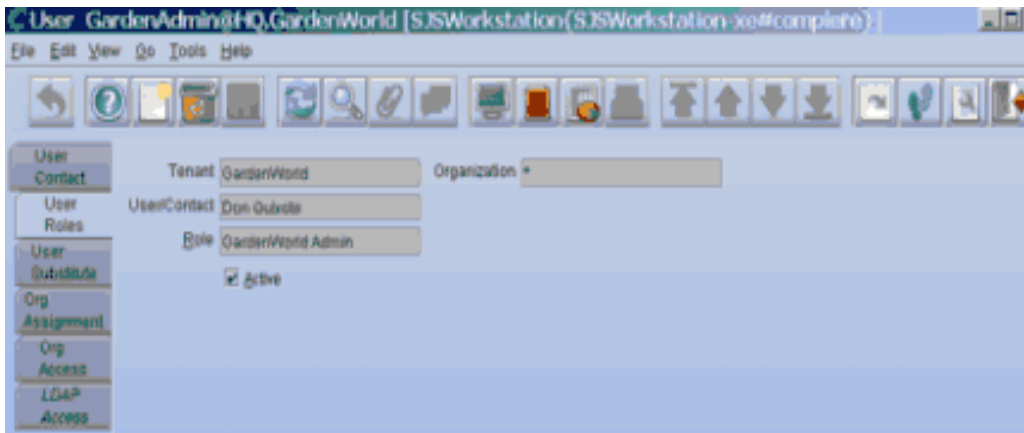
2.5　Role Definition

The definition of roles is a separate issue not covered here, just select the appropriate role from the dropdown list. The role chosen will also define the Organisations that Don can access and what he is able to do within those Organisations.

As noted above, Don Quixote can have multiple roles and each of his roles is available for him to select when he logs in.

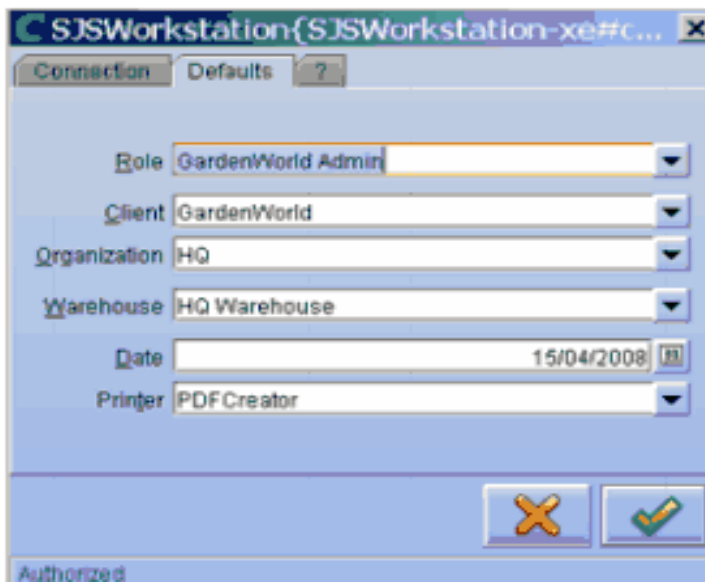Don Quixote can now test his log-on to the system.

2.6　New User logs on for first time.

Don Quixote should now log in by entering the User ID of Don Quixote and the Password that was entered when the User Record was first created, "password001" in this case.

Note that all user names and passwords are CASE SENSITIVE

- Select the required Role (Don presently has only one role and that is all that is visible in the Role dropdown box).
- Select the Organization if multiple Orgs are visible in the dropdown box.
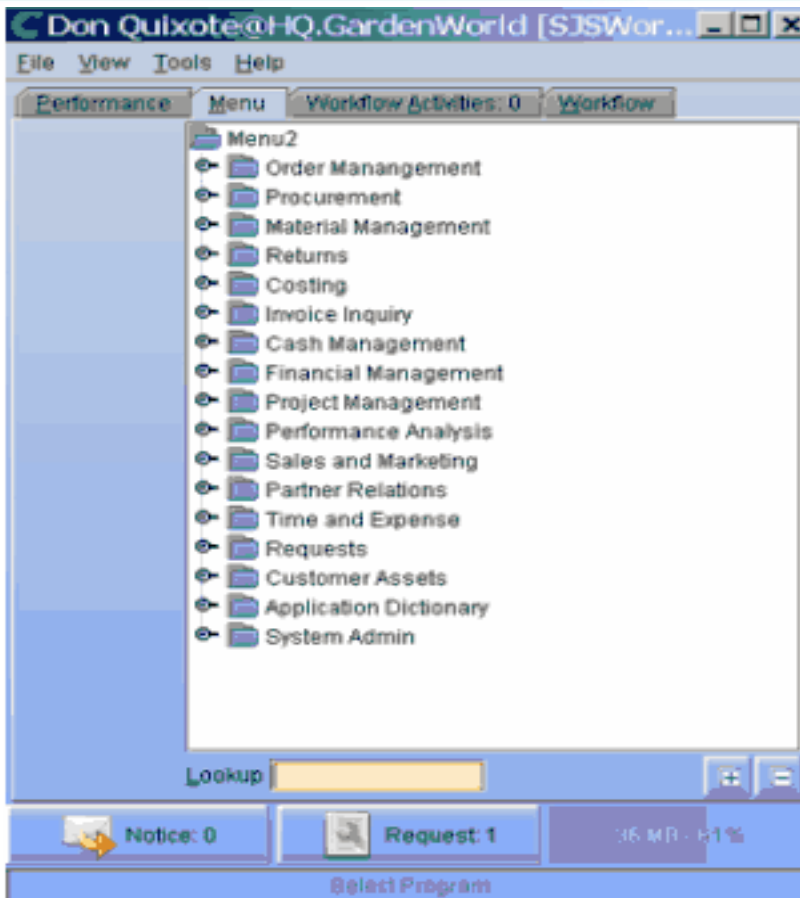- Select the Warehouse if multiple warehouses are visible in the dropdown box.

Don should now be logged in an able to see the main menu which will show those menu items that the selected Role has associated with it. In this example "GardenWorld Admin" has been chosen and will display the following.

2.7 Setting the New User's Password

Don should now go to the Menu Item called RESET PASSWORD. It is usually quickest to just type "**reset p**" and press enter in the yellow LOOKUP box. This will find the menu item called "Reset Passwords" and allow you to select it by clicking on the menu item.

The following message will then be displayed.
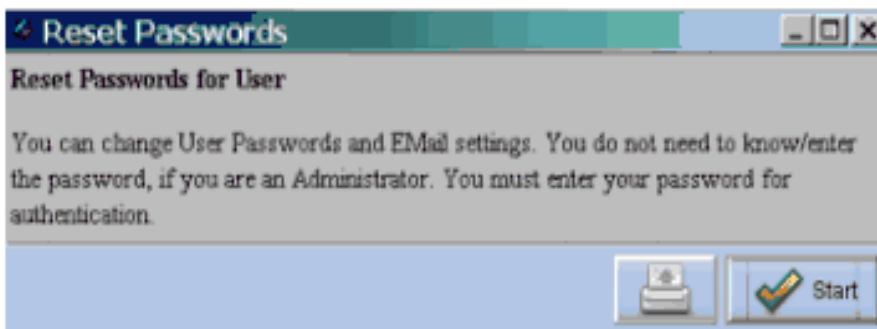
Now complete the entry of the information requested in the form.
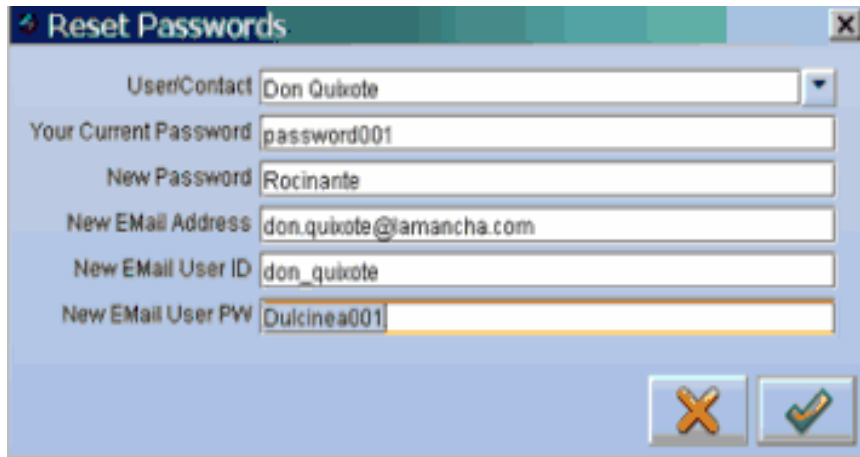

2.8 The Password Reset Fields

- Your current password is the password for the user Don Quixote to connect to ADempiere.
- New Password is the password to connect to ADempiere after this change.
- New email address only needs to be filled in if it has changed.
- New Email User ID is the ID that you use to connect to the company's email system. For most people this is the user ID that you use to log onto your workstation as this also gives access to the mail system by default.
- New Email Password is the password you use to log onto your email system. Again for most people this is the password you use to log onto your workstation. If your logon password has to be changed every 30 days (or by whatever other policy applies) then you must also make the same change here or you will be unable to send emails from within ADempiere as the username/password credentials that ADempiere will send to your email server will no longer be valid.

You will need to select your user record and enter your password to change anything in the form (unless you are a User with System Administration privileges). If you do not enter a value for the other fields then they will remain unchanged.

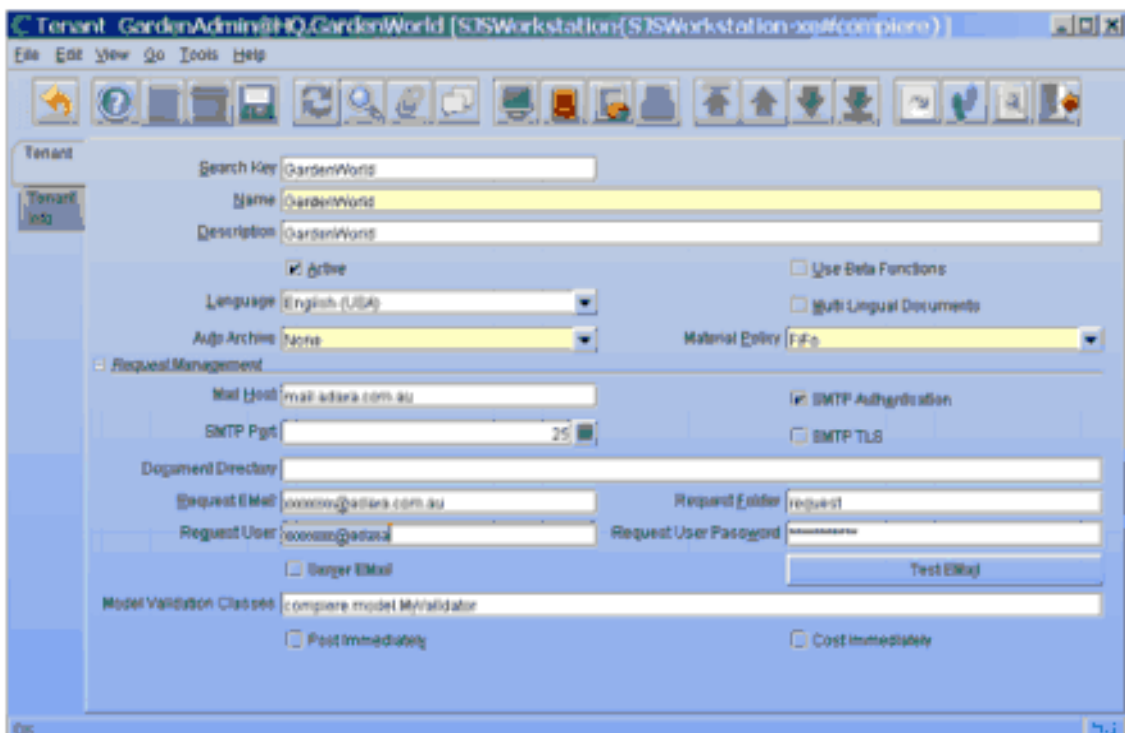The following message box shows the successful change.
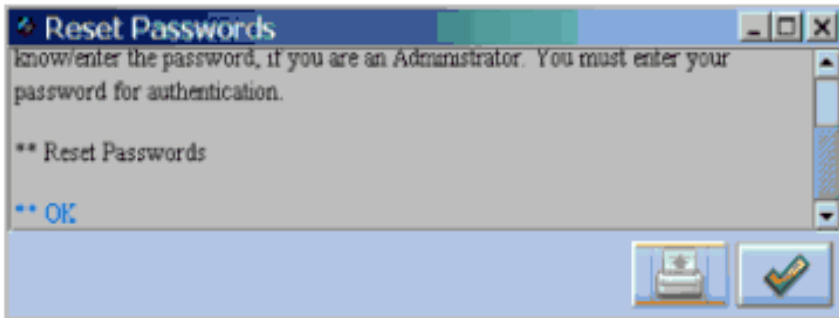
Don Quixote can now log out and then log back in using his username of Don Quixote and his new password which is known only to him.

3.1 Client Settings to enable ADempiere to send email

Before ADempiere can allow a User to send an email message from within ADempiere it is necessary to set some values in the system.

When logged in as an administrative user with access to most windows, select the window called "Client". [This window was named "Tenant" in the Compiere version from which this screen shot was taken]. The window displays the following:

Enter the value for the Mail Host. It will probably be something with a form like like "mail.laMancha.com".

Enter a valid email address within your company for mail sent to the default user to be sent.

Enter a valid email account in the Request User and Request User Password fields. This information is the information that needs to be sent to the Mail Host so that it knows that the mail is being sent from an authorised mail user within your mail system. Ask the systems administration people for assistance with these values.

Click the "Test Email".

If your set-up is correct the "Request User" will receive an email from the system and the screen will display the following:
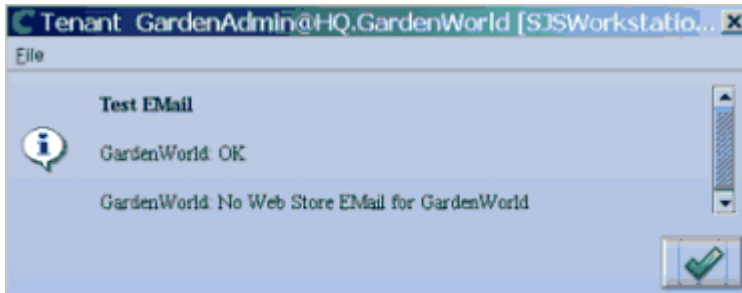
Users should now be able to send emailed documents from within the ADempiere system.

4 Adaxa's Offices and Contacts

Information of a general nature about Adaxa and its services can be found at www.adaxa.com or obtained by sending an email to info@adaxa.com with a description of the information that you would like to receive. If you are an existing client and wish to initiate a request for software support please send an email to helpdesk@adaxa.com with as much detail as possible about the nature of your support request.

For all other information please contact the Adaxa office nearest to you.

4.1   Australia

Address: 10 Kylie Place, Melbourne, Victoria, 3192, Australia

Contacts: Office

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- +613 9510 4788 (Outside of Australia)

4.2   New Zealand

Address: 73 Boston Road, Mt Eden, Auckland, 1023, New Zealand

Contacts: Office

- 0800 232 922 (Within New Zealand)
- +649 9744 600 (Outside of New Zealand)

4.3   United States of America

Address: 4400 NE 77th Ave, Suite 275, Vancouver, WA 98662, USA

Contacts: Office

- +1 760 576 5115