



PETAL

User Training Manual

LLPT 1.6 - User Management

CONTENTS



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USER MANAGEMENT

Navigation: Setup -> ADMIN -> User Management

Home / Setup / Admin

User Management System Integration System Notifications

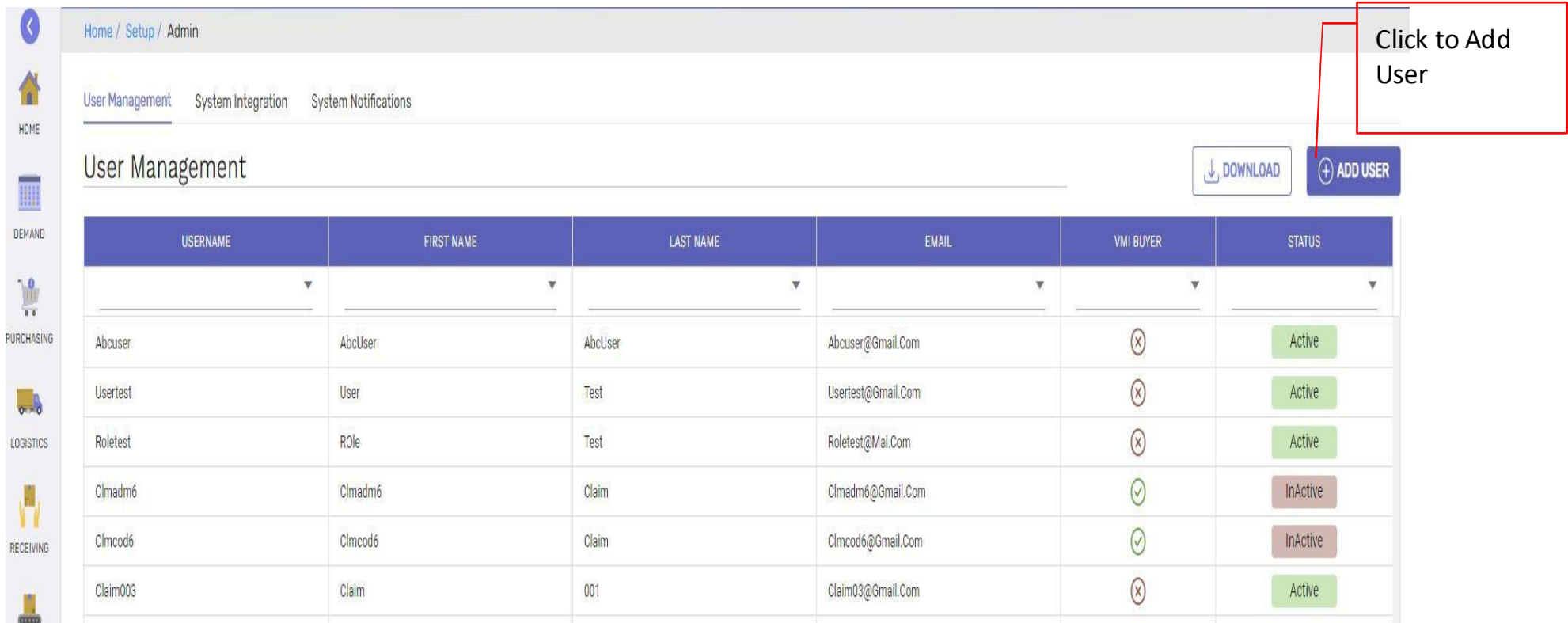
User Management DOWNLOAD ADD USER

USERNAME	FIRST NAME	LAST NAME	EMAIL	VMI BUYER	STATUS
Abcuser	AbcUser	AbcUser	Abcuser@Gmail.Com	⊗	Active
Ustest	User	Test	Ustest@Gmail.Com	⊗	Active
Roletest	Role	Test	Roletest@Mail.Com	⊗	Active
Clmadm6	Clmadm6	Claim	Clmadm6@Gmail.Com	✓	InActive
Clmcod6	Clmcod6	Claim	Clmcod6@Gmail.Com	✓	InActive
Claim003	Claim	001	Claim03@Gmail.Com	⊗	Active
Testrole266	Test	D	Test156@Gmail.Com	✓	InActive
Testrole262	Test	D	Test152@Gmail.Com	✓	InActive
Testrole261	Test	D	Test151@Gmail.Com	✓	InActive
Customer002	Test	D	Customer002@Gmail.Com	✓	Active
Claim002	Claim2	002	Claim002@Gmail.Com	⊗	Active
Claim001	Claim	001	Claim001@Gmail.Com	⊗	Active
Customer001	Customer	001	Customer001@Gmail.Com	⊗	Active
Bvhgk	Hhhjhjhjhj	Kjhjhjhjhj	Hg@Mail.Com	⊗	Active
HHJHJDJD	GHHH3456	HJHHYTYUYU	GFFGGGHHGGH@MAIL.COM	⊗	InActive

- User Management function contains the list of internal application users under a client.
- Data can be sorted, filtered and downloaded into excel template.
- Column order can be re-arranged.

How to Add a New User?

➤ Navigate to setup -> Admin and click on “Add User” button.

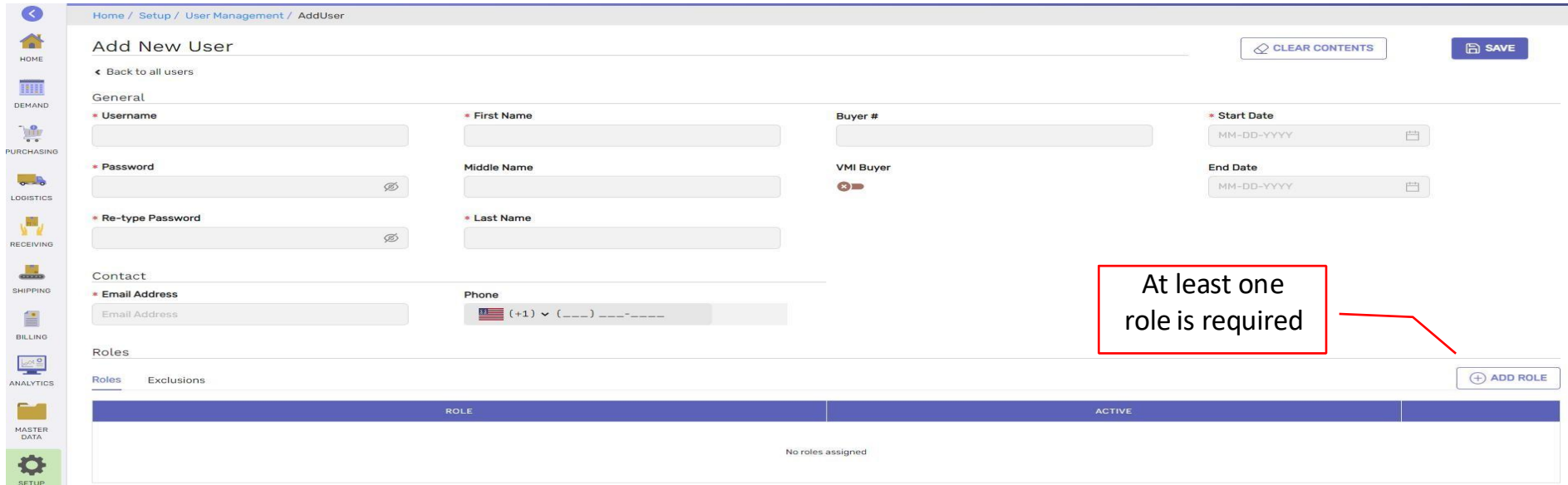


The screenshot shows the 'User Management' interface. The breadcrumb trail is 'Home / Setup / Admin'. The main heading is 'User Management'. There are two buttons: 'DOWNLOAD' and 'ADD USER'. The 'ADD USER' button is highlighted with a red box and a callout that says 'Click to Add User'. Below the buttons is a table with the following columns: USERNAME, FIRST NAME, LAST NAME, EMAIL, VMI BUYER, and STATUS. The table contains six rows of user data.

USERNAME	FIRST NAME	LAST NAME	EMAIL	VMI BUYER	STATUS
Abcuser	AbcUser	AbcUser	Abcuser@Gmail.Com	(X)	Active
Ustertest	User	Test	Ustertest@Gmail.Com	(X)	Active
Roletest	ROle	Test	Roletest@Mail.Com	(X)	Active
Clmadm6	Clmadm6	Claim	Clmadm6@Gmail.Com	(✓)	InActive
Clmcod6	Clmcod6	Claim	Clmcod6@Gmail.Com	(✓)	InActive
Claim003	Claim	001	Claim03@Gmail.Com	(X)	Active

USER MANAGEMENT

User Creation:



Home / Setup / User Management / AddUser

ADD NEW USER

< Back to all users.

CLEAR CONTENTS SAVE

General

* Username

* Password

* Re-type Password

* First Name

Middle Name

* Last Name

Buyer #

VMI Buyer

* Start Date

End Date

Contact

* Email Address

Phone

Roles

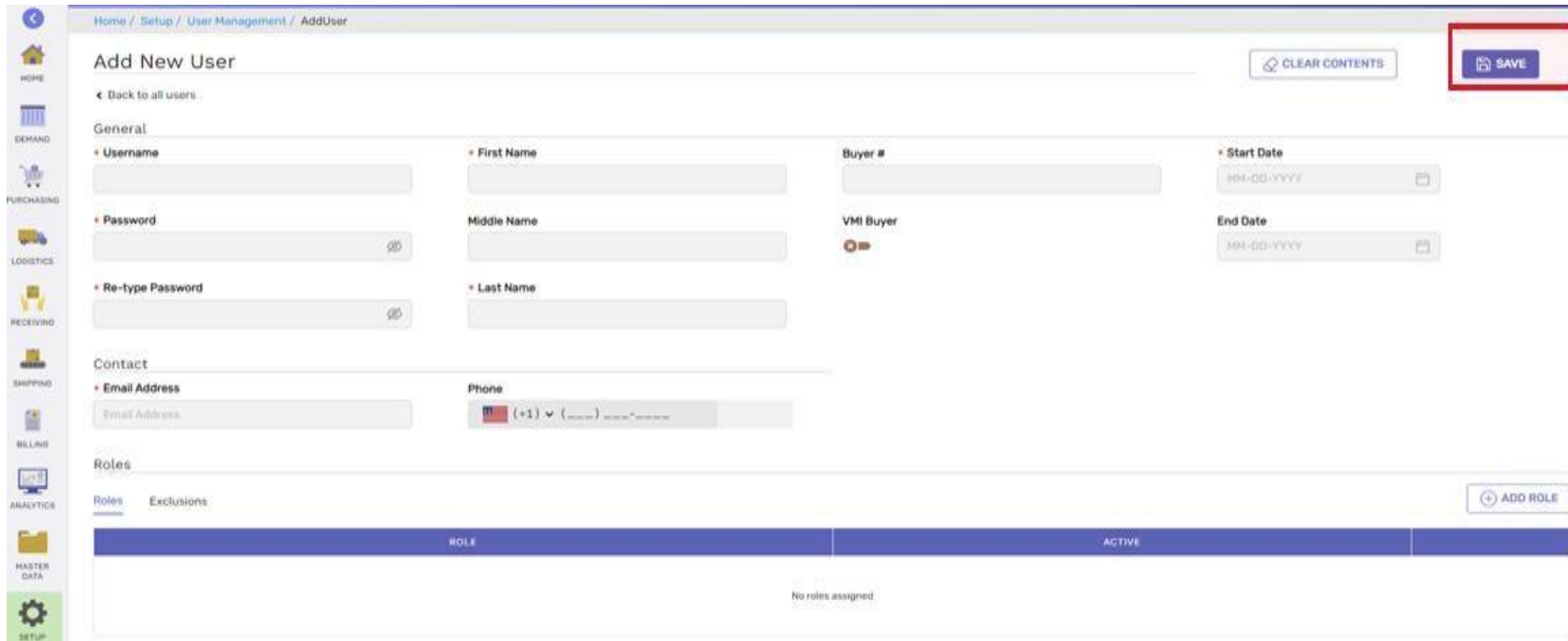
Roles Exclusions

ADD ROLE

ROLE	ACTIVE
No roles assigned	

- All mandatory fields marked with an asterisk (*) require user input.
- Click on 'Add Role' to assign a role to the user.
- All available roles, based on the client type, will be displayed in the list of values.
- The 'Exclusions' tab is provided to limit functionalities under a specific role.
- The user's start date can be set to the current date or any future date.
- User access can be revoked by specifying an end date.
- Once the user is created and saved, a confirmation message will be displayed.

USER MANAGEMENT



Home / Setup / User Management / AddUser

ADD NEW USER

← Back to all users

CLEAR CONTENTS SAVE

General

Username First Name Buyer # Start Date

Password Middle Name VMI Buyer End Date

Re-type Password Last Name

Contact

Email Address Phone

Roles

Roles Exclusions ADD ROLE

ROLE	ACTIVE
No roles assigned	

- Only Users with “System Admin” role can manage user access such as create new user, change password or deactivate user accounts.

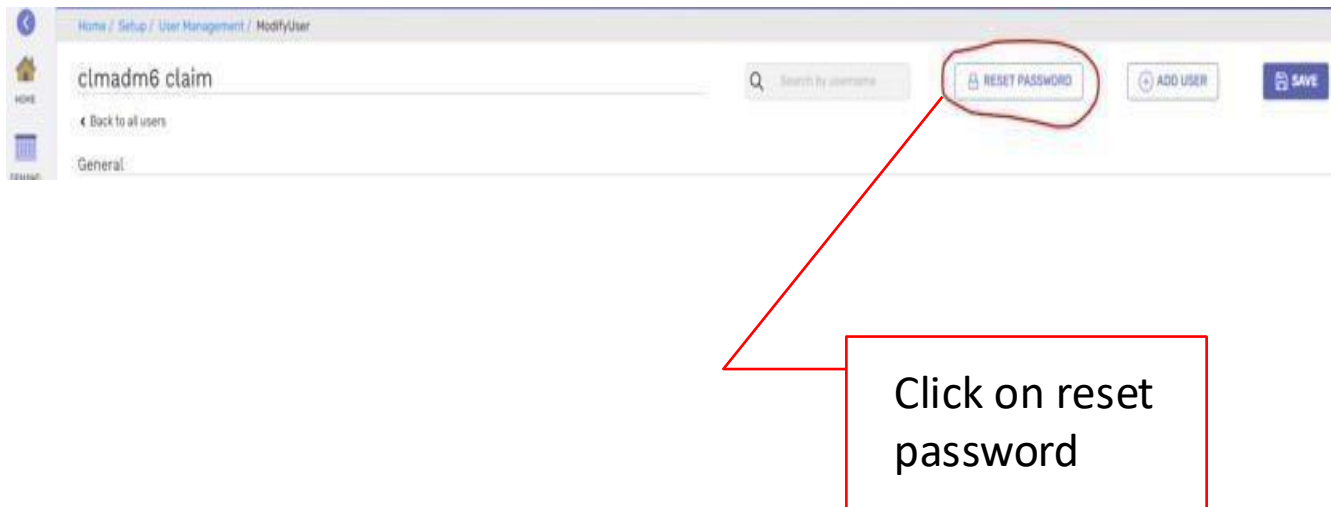
Note: The username, e-mail, and last name must be unique for each user account.

Types of roles

The Main reason for creating different Users is for assigning different roles based on their day-to-day activities.

Role	Activities
System Admin	Can Add Users and Assign the Roles , System Configurations (Setups)
Order Processor	Purchase Orders Transactions
Shipping Admin	Receiving Transactions
Billing Admin	Invoice Transactions

How to reset Password?



- I. Search user and click on password reset.
- II. Password reset window opens.
- III. Enter and re-enter the password and click on Reset.
- IV. Password will be reset and confirmation message is displayed on screen.

Note: A Password reset option will not be enabled for ldap users (this will mostly happens when C&S employee added to the vendor account).

How to Exclude functions from the role?

Roles

Roles [Exclusions](#)

ROLE		FUNCTIONS	EXCLUSIONS
System Admin			
Billing Admin			

- Click on exclusions tab under a user record
- All roles assigned to the user are displayed
- Click on a role name, which populates the functions under that role

Roles

Roles [Exclusions](#)

ROLE		FUNCTIONS	EXCLUSIONS
System Admin		→ Run Reports	No exclusions
Billing Admin		→ Generate Billing On Customer PO	
		→ Receive Notifications	
		→ Review Invoice Status	
		→ Review Claim Notifications	

- Select the function that needs to be excluded for the users in the assigned roles, so that the function will move into exclusions block to the right

THANK YOU