

USER GUIDE

ADMINISTRATOR ROLE

Version 1.5

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INTRODUCTION

In this guide, you will learn how to:

- Define the user role in order to configure the permissions of use in the PIM,
- Define the scope of responsibility and level of access to the products for user groups, according to local and categories (Enterprise feature),
- Define the level of access to groups of attributes for user groups,
- Define the level of access to import and export profiles for user groups (Enterprise feature).

GLOSSARY

Main concepts

User

A user is an access account to log in into the PIM for one or several persons in a company. A user has at least one login, one password, one email, and a role.

Role

A role is a set of permissions in the PIM. A role may be assigned to none or several users. The permissions are cumulative: the permissions the most permissive are applied.

User group

A user group is a set of users grouped by a name. A user may be a part of several user groups. For example, the user group "Marketing Dpt" gathers all the users in the Marketing Department of the company. The user group "Managers" gathers all the users who are manager of a department. Some users can be in the "Marketing Dpt" only.

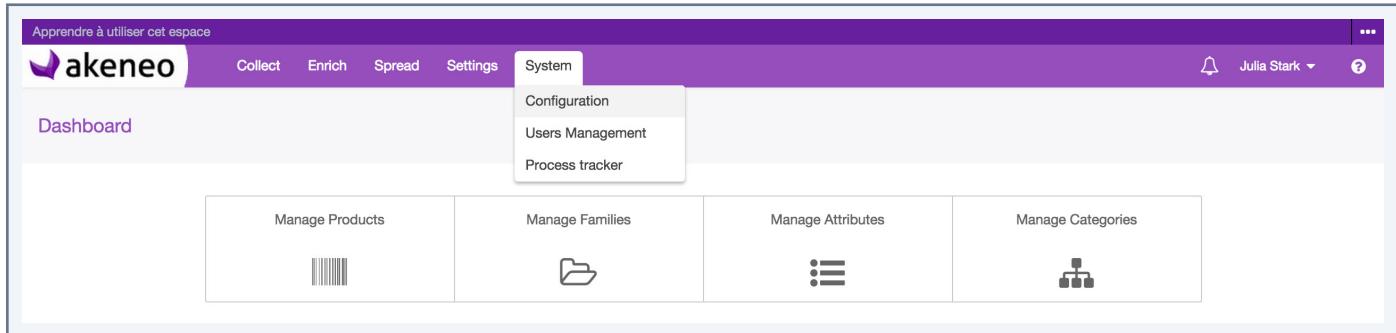
Advanced rights are applied on User groups, only available in the Enterprise Edition. In the Community Edition, there is no permission applied on user groups.

SELECT THE DEFAULT LANGUAGE

Most user interfaces in the PIM are translated. For available translations, go to the [Https://fr.crowdin.com/project/akeneo](https://fr.crowdin.com/project/akeneo) website.

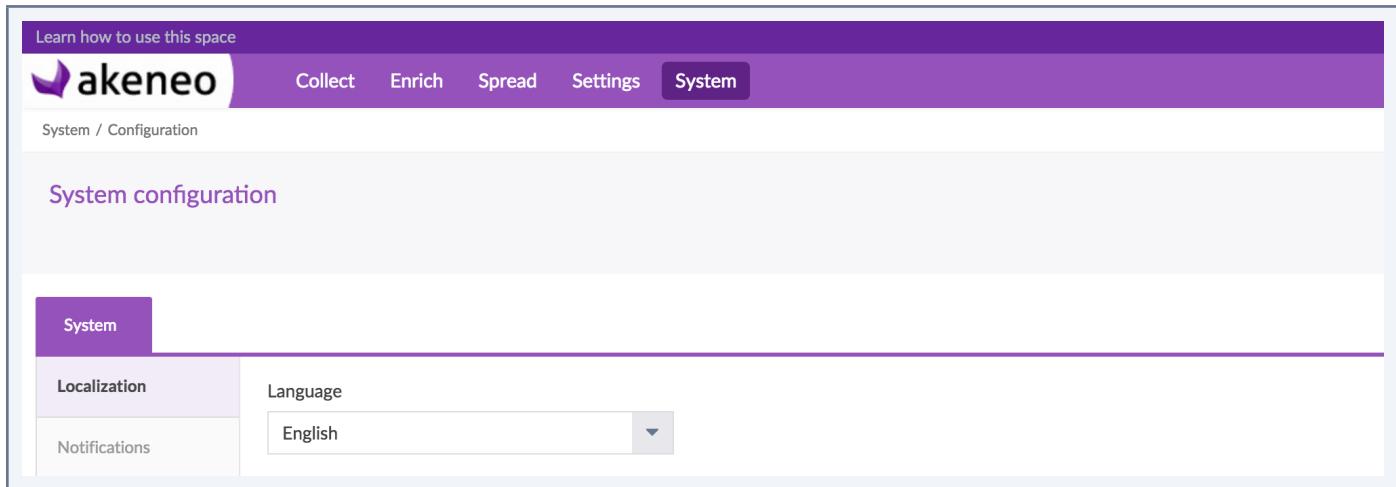
Setting the default language

1. Log in with a user account with the rights to “System Setup” menu.
2. Go to System → Configuration



The screenshot shows the Akeneo PIM dashboard. At the top, there's a purple header bar with the Akeneo logo, navigation links for Collect, Enrich, Spread, Settings, and System, and a user profile for Julia Stark. The 'System' menu is open, showing options like Configuration, Users Management, and Process tracker. Below the header is a main content area with a 'Dashboard' section and four cards: 'Manage Products' (with a barcode icon), 'Manage Families' (with a folder icon), 'Manage Attributes' (with a list icon), and 'Manage Categories' (with a tree icon).

3. Select the default language you wish from the drop down menu.



The screenshot shows the 'System configuration' page. The top navigation bar has tabs for Learn how to use this space, Collect, Enrich, Spread, Settings, and System. Below that, it says 'System / Configuration'. The main content area has a title 'System configuration'. A sidebar on the left has tabs for System (which is selected and highlighted in purple), Localization, and Notifications. The 'Localization' tab is active, showing a 'Language' dropdown menu with 'English' selected. There's also a small dropdown arrow icon next to the language selection.

4. Click on the “Save” button to apply your settings

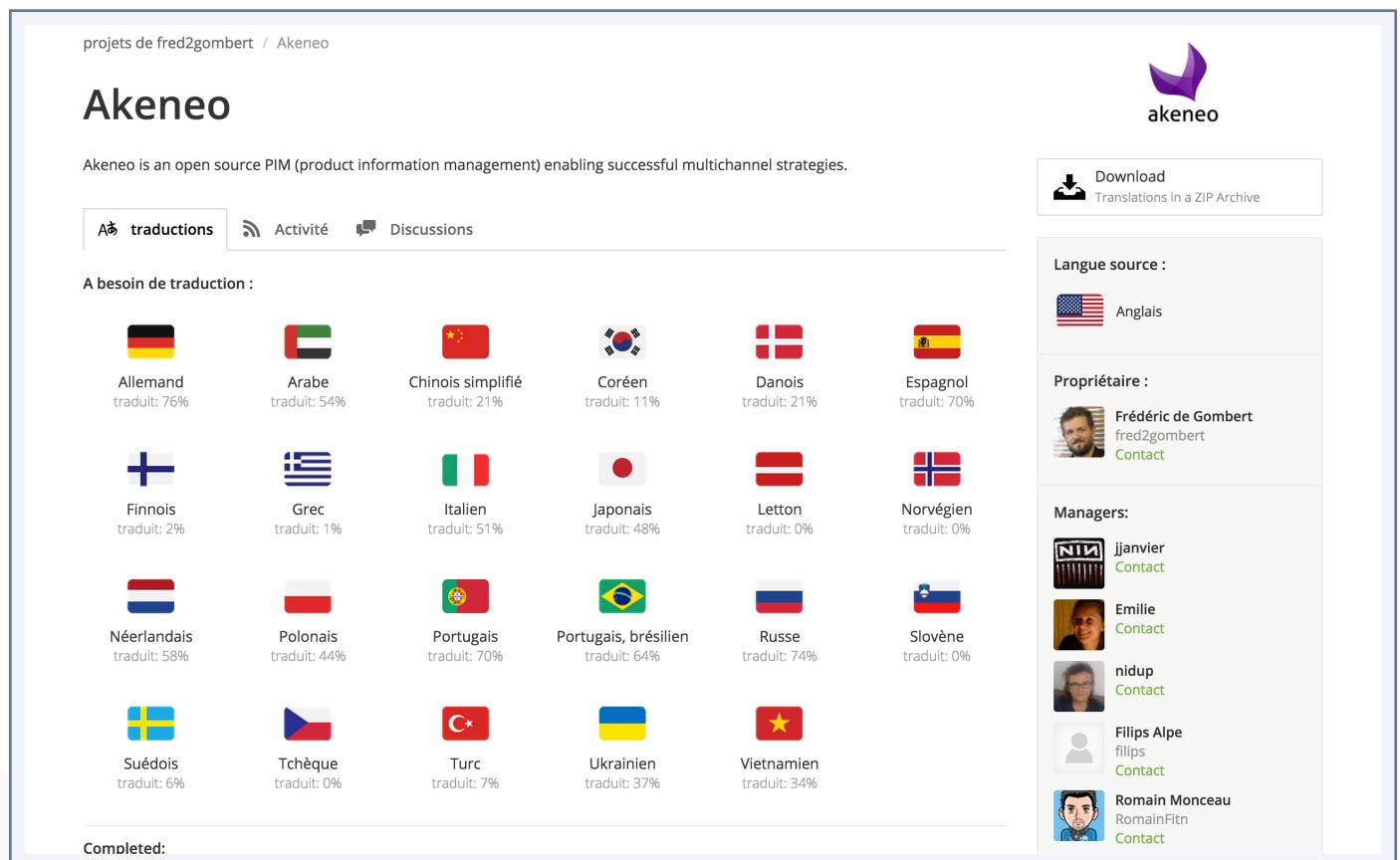
Note

The locales in the list are all the locales installed for your Akeneo PIM. These locales should be >= 80% translated in crowdin, but this rate can be changed for your installation.

The UI locale for each user can be defined in his user account.

How to participate to Akeneo PIM translation

The application <https://fr.crowdin.com/> provides a collaborative environment for the community to translate the PIM. By default, Akeneo PIM is set in English. Sometimes, thus some translations are missing in the different languages, depending on the contributions of the community. Please feel free to help to remediate and the end-user impact. Access to Crowdin is free, simply register to access to Akeneo project <https://fr.crowdin.com/project/akeneo>. For now, here is the current status on PIM translation on **Crowdin**:



projets de fred2gombert / Akeneo

Akeneo

Akeneo is an open source PIM (product information management) enabling successful multichannel strategies.

[À traductions](#) [Activité](#) [Discussions](#)

A besoin de traduction :

Allemand traduit: 76%	Arabe traduit: 54%	Chinois simplifié traduit: 21%	Coréen traduit: 11%	Danois traduit: 21%	Espagnol traduit: 70%
Finnois traduit: 2%	Grec traduit: 1%	Italien traduit: 51%	Japonais traduit: 48%	Letton traduit: 0%	Norvégien traduit: 0%
Néerlandais traduit: 58%	Polonais traduit: 44%	Portugais traduit: 70%	Portugais, brésilien traduit: 64%	Russe traduit: 74%	Slovène traduit: 0%
Suédois traduit: 6%	Tchèque traduit: 0%	Turc traduit: 7%	Ukrainien traduit: 37%	Vietnamien traduit: 34%	

Completed:

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MANAGING USERS

All users in the PIM can see the firstname and lastname of other users in the application.

The management of the users and their access rights is available only if the rights have been given to the user.

Any PIM user can see his own account details, update his/her password, and set his/her preferences (eg working environment for local and channel).

View the list of users

1. Log in with a user account with the rights to “List of user groups”.
2. Go to System → User Management → Users.

The screenshot shows the Akeneo PIM dashboard. At the top, there's a purple header bar with the Akeneo logo and navigation links: Collect, Enrich, Spread, Settings, and System. The 'System' link is highlighted. A dropdown menu for 'System' is open, showing Configuration, Users Management, Process tracker, and three sub-options: Users (which is highlighted), Roles, and Groups. Below the header, there's a main content area with several cards: 'Manage Products' (with a barcode icon), 'Manage Families' (with a folder icon), 'Manage Attributes' (with a list icon), and 'Manage Categories' (with a tree icon). On the far right of the header, there are notifications, user info for 'Julia Stark', and a help icon.

3. To narrow the list of users displayed, use the available filters above the user grid.

The screenshot shows a user list grid. At the top, there's a row of filters: 'Gérer les filtres' followed by dropdown menus for Username, Email, First name, Last name, Created at, Updated at, and Status, each with a clear button. To the right of these are buttons for 'Par page:' (set to 10), 'Mettre à jour', and 'Réinitialiser'. Below the filters is a table header with columns: USERNAME, EMAIL, FIRST NAME, LAST NAME, CREATED AT, UPDATED AT, and STATUS. The table body contains six rows of user data:

USERNAME	EMAIL	FIRST NAME	LAST NAME	CREATED AT	UPDATED AT	STATUS
admin	admin@example.com	John	Doe	sept. 24, 2015 5:53 PM	sept. 30, 2015 11:54 AM	Active
julia	julia@example.com	Julia	Stark	sept. 24, 2015 5:53 PM	sept. 30, 2015 1:35 PM	Active
mary	mary@example.com	Mary	Smith	sept. 24, 2015 5:53 PM	sept. 24, 2015 5:53 PM	Active
pamela	pamela@example.com	Pamela	Rose	sept. 24, 2015 5:53 PM	sept. 24, 2015 5:53 PM	Active
peter	peter@example.com	Peter	Williams	sept. 24, 2015 5:53 PM	sept. 24, 2015 5:53 PM	Active
sandra	sandra@example.com	Sandra	Harvey	sept. 24, 2015 5:53 PM	sept. 24, 2015 5:53 PM	Active

4. To view the information on a user account, click on the row from the grid.

Adding a user

1. View and check the list of users: Users Management → Users

2. Then click on “Create User” button.
3. Fill out at least the information required (red asterisk), then click on “Save”.

The user account has been created.

Note

An email is not sent automatically. It depends on the initial configuration of the PIM. Hence you will need to provide the login and password to the user manually.

Assigning a user group to a user

When a user is created, this latter can be added to at least one of the groups that have been created in the PIM.

Note EE

Assign a user to one group or several groups allows him/her to have permissions on the catalog (EE Rights).

To change the user membership of a group to another one:

1. View and check the list of users: Users Management → Users.
2. Click on the user to proceed.
3. Click on the “Edit user” button.
4. Click on the “Groups and Roles” tab from the menu

The screenshot shows the 'Groups and Roles' tab selected in a user management interface. The 'Groups' section lists several roles with checkboxes: Clothes manager, English translator, Furniture manager, IT support, Manager (which is checked), and Redactor. The 'Roles' section lists: Administrator, Catalog manager (which is checked), Asset manager, and User. There is also a checkbox for 'Email notifications'. The tabs at the top are General, Additional, Groups and Roles (selected), and Password.

5. Check / uncheck the groups to add or remove the user from these groups.
6. Click "Save".

Assigning a role to a user

Assign a role to a user allows him to have access rights in the PIM (CE Rights).

To change the membership of a user:

1. View and check the list of users: Users Management → Users.
2. Click on the user to proceed.
3. Click on the "Edit user" button.
4. Click on the "Groups and Roles" tab from the menu

The screenshot shows a user profile edit form. At the top, there are four tabs: General, Additional, Groups and Roles (which is highlighted in purple), and Password. Below the tabs, there are two sections: 'Groups' and 'Roles'. Under 'Groups', there is a list of checkboxes for 'Clothes manager', 'English translator', 'Furniture manager', 'IT support', 'Manager' (which is checked), and 'Redactor'. Under 'Roles', there is a list of checkboxes for 'Administrator', 'Catalog manager' (which is checked), 'Asset manager', and 'User'. At the bottom of the form, there is a checkbox for 'Email notifications'.

5. Check / uncheck the user to assign role.
6. Click "Save".

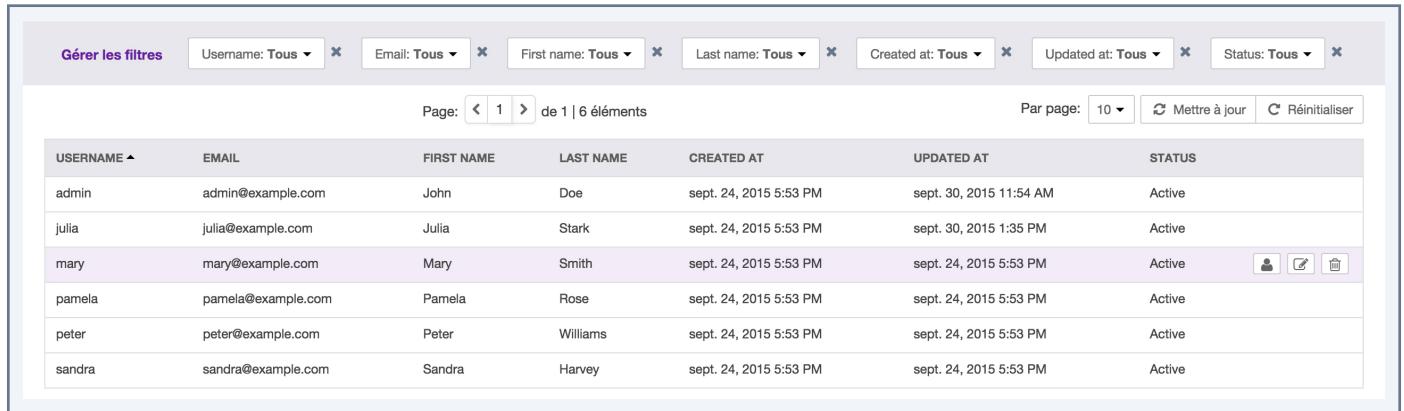
Changing the properties of a user

1. View and check the list of users: Users Management → Users.
2. Click on the user to proceed.
3. Click on the "General" tab.
4. Make the desired changes and click on the "Save" button.

Deleting a user

1. View and check the list of users: Users Management → Users.
2. Click the user to proceed.

- Click on the right on the “Delete” button.



The screenshot shows a user management interface with a search bar at the top containing filters for Username, Email, First name, Last name, Created at, Updated at, and Status, all set to "Tous". Below the search bar is a pagination area showing "Page: 1 de 1 | 6 éléments" and a dropdown for "Par page" set to 10. To the right are buttons for "Mettre à jour" and "Réinitialiser". The main table lists six users with columns: USERNAME, EMAIL, FIRST NAME, LAST NAME, CREATED AT, UPDATED AT, and STATUS. The users are: admin (admin@example.com), julia (julia@example.com), mary (mary@example.com), pamela (pamela@example.com), peter (peter@example.com), and sandra (sandra@example.com). The "Status" column for all users shows "Active". On the far right of each row is a vertical ellipsis menu with three icons: a person, a pencil, and a trash can.

USERNAME	EMAIL	FIRST NAME	LAST NAME	CREATED AT	UPDATED AT	STATUS
admin	admin@example.com	John	Doe	sept. 24, 2015 5:53 PM	sept. 30, 2015 11:54 AM	Active
julia	julia@example.com	Julia	Stark	sept. 24, 2015 5:53 PM	sept. 30, 2015 1:35 PM	Active
mary	mary@example.com	Mary	Smith	sept. 24, 2015 5:53 PM	sept. 24, 2015 5:53 PM	Active
pamela	pamela@example.com	Pamela	Rose	sept. 24, 2015 5:53 PM	sept. 24, 2015 5:53 PM	Active
peter	peter@example.com	Peter	Williams	sept. 24, 2015 5:53 PM	sept. 24, 2015 5:53 PM	Active
sandra	sandra@example.com	Sandra	Harvey	sept. 24, 2015 5:53 PM	sept. 24, 2015 5:53 PM	Active

- Then confirm you want to delete the user.

The user can no longer connect to the PIM application. Though the user actions generated in the PIM will be stored.

MANAGING USER GROUPS

A user group in Akeneo PIM is a way to manage sets of users. Users can belong to multiple groups. Groups are used in the PIM to define the access rights and the visibility to the product catalog.

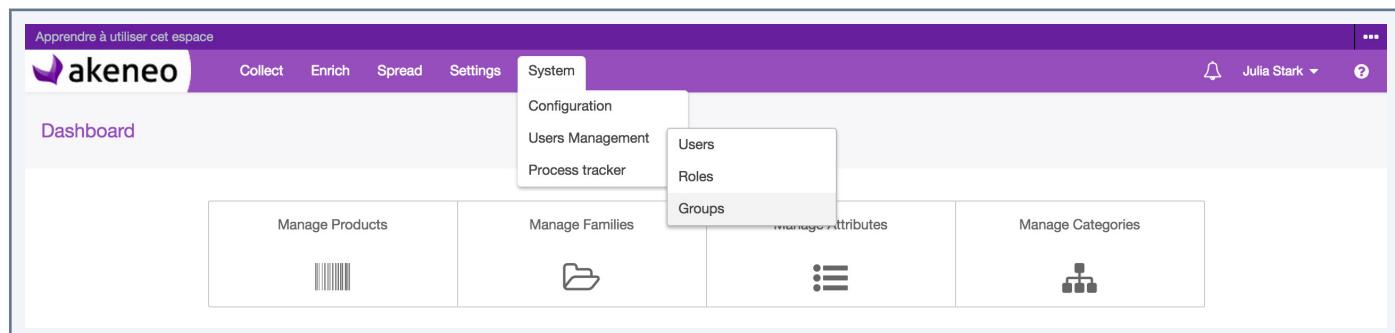
Note

Roles are similar to groups, they also enable & define rights on the product catalog. The main difference is that the roles entitle rights on what the user is allowed to do in the PIM (to sum up, access to all the existing buttons and menus in the PIM).

View the list of user groups

To see which groups have been created:

1. Log in with a user account which has the rights to see the groups (system: List of user).
2. Go to System → Users Management → Group.



3. To see the details of a user group, click on a line in the group to view the information available.

Creating a user group

To create a group

1. Log in with a user account with the rights to create a group (system: Create a group of users).
2. Go to the System menu → Users Management → Groups.
3. Click on "Create group" button to generate a new user group.

The screenshot shows the 'Groups / Furniture manager' page. At the top, there are buttons for Delete, Cancel, Save, and Save and close. Below that, tabs for General and Users are shown, with General selected. A search bar contains the name 'Furniture manager'. The main area is titled 'Users' and includes a filter section with 'Gérer les filtres' and dropdowns for Has group, Username, Email, First name, and Last name, all set to 'Tous'. Below this is a pagination section showing 'Page: 1 de 1 | 6 éléments' and 'Par page: 10'. The user list table has columns: HAS GROUP, FIRST NAME, LAST NAME, USERNAME, and EMAIL. The data is as follows:

HAS GROUP	FIRST NAME	LAST NAME	USERNAME	EMAIL
<input type="checkbox"/>	John	Doe	admin	admin@example.com
<input type="checkbox"/>	Sandra	Harvey	sandra	sandra@example.com
<input type="checkbox"/>	Pamela	Rose	pamela	pamela@example.com
<input type="checkbox"/>	Mary	Smith	mary	mary@example.com
<input type="checkbox"/>	Julia	Stark	julia	julia@example.com
<input type="checkbox"/>	Peter	Williams	peter	peter@example.com

4. Fill the form to name the group.
5. Then click on the "Save" button to update groups.

Editing the name of a user group

To edit the name of a user group:

1. Log in with a user account with the rights to edit a group (system: Change a user group).
2. Go to System → Users Management → Group.
3. Click on the group name to be modified.

The screenshot shows a list of user groups. At the top, there is a filter section with 'Gérer les filtres' and a dropdown for 'Name' set to 'Tous'. Below this is a pagination section showing 'Page: 1 de 1 | 6 éléments' and 'Par page: 10'. The list table has a single column for 'NAME'. The data is as follows:

NAME
Clothes manager
English translator
Furniture manager
IT support
Manager
Redactor

4. Change the name of the group.
5. Then click on the "Save" button to update the user group.

Editing the users in a user group

To edit the users associated to a group:

1. Log in with a user account with the rights to edit a group (system: Editing user groups).
2. Go to System → Users Management → Group.
3. Click on the user group to be modified.

The screenshot shows the 'Groups / Furniture manager' page. At the top, there are tabs for 'General' (selected) and 'Users'. Below the tabs, a search bar contains the text 'Furniture manager'. The main area is titled 'Users' and contains a table with the following data:

HAS GROUP ▾	FIRST NAME	LAST NAME ▾	USERNAME	EMAIL
<input type="checkbox"/>	John	Doe	admin	admin@example.com
<input type="checkbox"/>	Sandra	Harvey	sandra	sandra@example.com
<input type="checkbox"/>	Pamela	Rose	pamela	pamela@example.com
<input type="checkbox"/>	Mary	Smith	mary	mary@example.com
<input type="checkbox"/>	Julia	Stark	julia	julia@example.com
<input type="checkbox"/>	Peter	Williams	peter	peter@example.com

At the bottom of the table, there are buttons for 'Page' (with page number 1), 'Par page' (set to 10), and 'Mettre à jour' (Update). There are also 'Gérer les filtres' (Manage filters) and search filters for 'Has group: Tous', 'Username: Tous', 'Email: Tous', 'First name: Tous', and 'Last name: Tous'.

4. A grid of users is displayed with the users belonging to the respective group. They can be easily identified by the check box in the first column "has group".
5. Look for the users and check the box to add the users to the group. And the other way around, uncheck the box to withdraw the users from the group.
6. Then click on the "Save" button to update the group.

The rights which have been granted to or removed from users (added to or removed from the user group) are automatically applied. The user can still continue to be connected to the PIM: the change on rights will be updated on the next loading of a page in the PIM.

Deleting a user group

Before deleting a group, you should check first if the specific group is used to entitle access rights to other users.

To delete a user group:

1. Log in with a user account with the rights to edit a group (permission System > Remove a user group).
2. Go to System → Users Management → Group
3. You have two ways to proceed:
 - Click on the user group to be deleted and click on the “delete” button on the top right.

HAS GROUP	FIRST NAME	LAST NAME	USERNAME	EMAIL
<input type="checkbox"/>	John	Doe	admin	admin@example.com
<input type="checkbox"/>	Sandra	Harvey	sandra	sandra@example.com
<input type="checkbox"/>	Pamela	Rose	pamela	pamela@example.com
<input type="checkbox"/>	Mary	Smith	mary	mary@example.com
<input type="checkbox"/>	Julia	Stark	julia	julia@example.com
<input type="checkbox"/>	Peter	Williams	peter	peter@example.com

- Click on the “delete” button straight away from the grid dragging the mouse on the group you want to delete.

The screenshot shows a list of groups in the AKENEOPIM interface. The table has a header row with 'NAME' and an action column. Below are six rows of data:

NAME	
Clothes manager	
English translator	
Furniture manager	
IT support	
Manager	
Redactor	

At the top, there are buttons for 'Gérer les filtres' and 'Name: Tous'. Below the table are pagination controls ('Page: 1 de 1 | 6 éléments'), a 'Par page:' dropdown set to 10, and buttons for 'Mettre à jour' and 'Réinitialiser'.

4. Then confirm the message for the suppression of the group.

The screenshot shows the same Groups list page, but with a modal dialog in the center. The dialog title is 'Delete Confirmation' and the message is 'Are you sure you want to delete this group?'. It has two buttons: 'Cancel' and 'Yes, Delete' (highlighted in green).

Please check first the potential impact of the removal of a group on which users are included. For instance, if the group membership was the only way for a user to have a specific right, then due to the group suppression, the user will no longer have his access right in the PIM.

CONFIGURING THE RIGHTS

Setting permissions on actions

Permissions on actions are granted according to the scope of roles of a user. The following table lists all the rights and the features that are attached to it.

Rights	Description
System	
System configuration	Go to the “System → Configuration”.
Create a user group	Button “create” a user group in the System → Management Users → Groups.
Delete a user group	“Delete” button in the edit pages of user groups.
Edit user groups	“Save” button in the edit pages of user groups.
List user groups	Go to entry System → User Management → Groups.
Create role	Button “create a role” in the System → User Management → Roles.
Delete role	Button “Remove” in the pages of editing roles.
Edit a role	Button “Save” in the edit pages of roles.
View a role List	Go to system input → User Management → Roles.
Create user	Button “create user” in the System → User Management → Users.
Delete User	button “Delete” in the users edit pages.
Edit users	“Save” button in the users edit pages.
View the list of users	Go to the system input → Management Users → Users.
View Process Tracker	Go to “System > Process Tracker”.

Import Profiles	
Download import files	Button “Download the imported file” in respect of imports pages. carried
Download the report on import	Button “Download logs” in the report pages of import. executed
View the list of reports on imports	Go to input Collecting → History of imports.
View the details of reports on imports	Shortcut Report” in the grid of import reports + Click on the lines of the grid reports of imports.
Create an import profile	Button “Create an import profile” in the Collect → Import Profiles.
Modify an import profile	Button “Edit” in the Collect → Import Profiles → Page consulting an import profile.
Show History of the import profile	“History” tab in the Collect → Import Profiles → edit an import profile page.
See the list of profile import	Go to collect input> Profiles of imports.
Start an import profile	Shortcut “Start an import” in the grid of imports + button profiles “run” on the comment page of import profiles ..
Delete an import profile	The shortcut “Delete” in each row of the grid Collecting → Import Profiles + the “Delete” button in the edit page of an import profile.
View profile import	Shortcut “View” in the grid of imports profiles + Click on the lines of the grid patterns of imports + The button “view profile” in the implementation report of an import.
Manage permissions for profiles to import	“Permissions” tab in the edit page of an import profile.
Export Profiles	
Download exported files	Button “Download file exported” in the report pages of executed export.

Download the report Export	"Download logs" button in the report pages of executed export.
View the list of exports reports	Go to "collect" input History of exports.
View the details of the export ratio	Shortcut "view report" in the grid of exports + Click Reports on the grid lines of export reports.
Create export profile	Button "create an export profile" in Collect page → Export Profiles.
Edit Profile export	"Edit" button in the Collect → Export Profiles → Profile of an export consultation Page.
See the history of the export profile	"History" tab page in the Collect → Export Profiles → Editing an export.profile>page.
See the list of export profiles	Access to collect input export Profiles
Launch export profile	"Start an export" shortcut in grid profiles 'exports + button "start" on the comment page of the export profiles ..
Delete export profile	"Delete" shortcut in each row of the grid Collecting> Export Profiles + the "Delete" button in the edit page of an export profile.
See the export profile	"View" shortcut in the grid profiles of exports + Click on the lines of the grid export profiles The + "button to see the profile "in the implementation report of export.
Manage permissions by export profiles	"Permissions" tab in the edit page of an export profile. /! \ EE functionality.
Product assets	
Consult the categories of an asset	"Categories" tab in the edit page of an asset.
Create an asset	Button "Create Asset" in Enrich > Assets page.
Enrich an asset	Go to to the Asset edit page.
Delete an asset	Button "Delete" in the Asset Edition Page.

Mass-upload assets	Access to the menu entry "Collect > Mass-upload assets".
Asset categories	
Create an asset category	Button "Create" in the Categories management page.
Edit an asset category	Allows to access to the asset category edit page.
View asset category history	"History" tab of the Asset category form.
List asset categories	Use Asset categories as a filter for asset grid (In Enrich > Assets & Assets picker in the product form).
Manage asset category permissions	"Permissions" tab of the asset category form.
Remove an asset category	Button "Delete" of an asset category.
Products	
Add an attribute to a product	Button "Add Attributes" in the edit page of a product.
Add product to groups	Show "Products" tab in the edit form of a group.
Add the product to a group of variants	Show "Products" tab in the edit form of a variant group.
See the types of association of a product	Go to "Settings"→ Types of associations .
Look at the categories of a product	Go to the tab "Categories" of the publishing of a product form.
Change Product Family	Button "modify family" in the header of the page of a product.
Change product status	Button "enable" or "disable" in the header of the page of a product.
Comment on the products	"Comments" tab in the edit page of a product.

Create a product	"Create product" button in the Enrich page → Products.
Download product PDF	"PDF" button in the edit page of a product.
Edit product attributes	"Attributes" tab in the edit page of a product.
Show product history	tab "History" in the edit page of a productPIM.
List Products	Show Grid products throughout the Enrich → Products in the "Associations" tab of a page product edition in the "Products" tab groups, etc ...
Mass edit on products	Show mass edit button above the grid of products.
Delete a product	"Delete" button the edit page of a product.
To delete an attribute of a product	"cross" icon next optional attributes added to the product.
List asset categories in the asset picker (EE)	"Manage assets" button to open the asset picker and list the asset categories
Restore product (EE)	Display the button "restore" in the grid versions of a product.
Manage published products (EE)	Go to the "Enrich" menu → Published Products.
Locale	
List of locale	View Menu Settings → Local.
Manage permissions by locale (EE)	See the "Permissions" tab in the consultation page locale.
Group Types	
List group types	Go to "Settings" → Group types.
Create a group type	button "Create a group type" in the Settings → Group types.

Modify a group type	"Save" button on the edit page of a type of group + shortcut on the grid of the types of group.
Delete a group type of	"Delete" button on the edit page of a group type + Shortcut on grid types of group.
Variant groups	
List variants groups	Go to the "Enrich" menu → variants Groups.
Create a variant group	"Create Group variant" button in the page Enhance → variations Groups.
Edit a variant group	"Save" button on the editing of a group + page shortcut to grid variations groups.
Adding attributes variant group	"Add Attributes" button tab in the" Attributes "variant groups.
Delete attributes from variant groups	"Cross" icon next attributes to remove the attribute for the form of a group of variants.
Edit attributes of variant group	Attributes added to the variant group are editable.
View variant group history	Go to "History" tab in the variant group.
Delete a variant group	"Delete" button on the edit page of a group + shortcut to grid variations groups.
Groups	
List of groups	Go to the "Enrich" menu → Groups.
Create group	"Create Group" button in the page Enrich → Groups.
Edit a group	"Save" button on the edit page of a group + shortcut on the grid groups.
Display groups history	Go to "History" tab in the groups.
Delete group	"Delete" button on the edit page of a group + shortcut on the grid groups.

Family	
Create a Family	“Create a family” button in the Settings> Families.
Edit the attributes of a family	Go to the “Attributes” tab of families.
Edit the properties of a family	Go to the “Properties” tab of families.
Display History of Family	Go to the “History” tab of families.
Family List	Go to “Settings” → Families.
Delete family	“Delete” button on the edit page of a family + shortcut on the grid families.
Currencies	
List Currency	Go to “Settings” → Currency.
Activate / turn off currencies	Button on the currency grid.
Channels	
Create channel	“Create a channel” button in the Settings → Channels.
Modify a channel	“Save” button on the edit page a shortcut canal + channels on the grid.
View history of a channel	“History” tab of a publishingof a channel page.
List channel	Go to “Settings” → Channels
Delete channel	“Delete” button onthe edit page of a shortcut + channel on the grid of channels.
Categories	
Create a category	“Create a category” or “Create a new tree” button in Enriching page> Categories.
Edit category	In the edit form Access categories.

View the history of category	Go to "History" tab categories.
List Categories	Go to "Enrich" → Categories.
Delete a category	"Delete" button in the edit form categories.
Manage permissions by category (EE)	Go to the "Permissions" tab categories.
Attribute Groups	
Add the attribute to a group	"Add attributes" button in the "Attributes" tab of the edit page attribute groups .
Create a group attribute	"Create an attribute group" button in the Settings → Attribute Groups.
Edit attribute group	Go to "edit" form attribute groups.
View the history of the group Attribute	Go to "History" tab attribute groups.
List of group of attributes	Go to "Settings" → Attribute Groups.
Delete a group of attributes	"Remove" button in the edit page an attribute group.
Delete the attribute of a group	Icon "Trash" next to the attributes in the "Attributes" tab of the edit page attribute groups.
Sort attribute groups	Icon "drag and drop" next attribute groups in the left panel.
Manage permissions for attribute groups (EE)	Go to the "Permissions" tab on attribute groups.
Attributes	
Create attribute	"Create a attribute" button on the Settings → Attributes.
Edit attribute	Go to "edit" form of an attribute.
View attribute history	Go to "History" tab attributes.
Attribute List	Go to "Settings" → attributes.

Delete attribute	"Delete" button on the edit page of a + shortcut attribute in the grid attributes.
Sort out attributes within an attribute group	Icon "drag and drop" next attributes in Attributes tab of the groups of attributes.
Types of associations	
Create a type of combination	"Create a type of association" button in the Settings → Types association of
Edit a type of association	Access to the edit page of a type of association.
View the history of the association type	Accessing the "History" tab of the page publishing a type of association.
List the types of association	Go to "Settings" → Types of association".
Delete a type of association	"Delete" button on the page of "editing a type association".
Rules	
Delete rules	Delete button in the tab rules of an attribute and in the list of rules
View rules	View rules in the tab rules of an attribute and in the list of rules

Configuring Roles

A role in Akeneo PIM is a way to manage sets of users. Users can be part of a multiple roles. Roles are used in the PIM to define the rights of actions and visibility in the PIM.

Note

Roles are similar to groups, they also enable & define rights on the product catalog. The main difference is that the groups entitle rights on the catalog in the PIM (in short, product information managed in the PIM).

Listing roles

To view the roles:

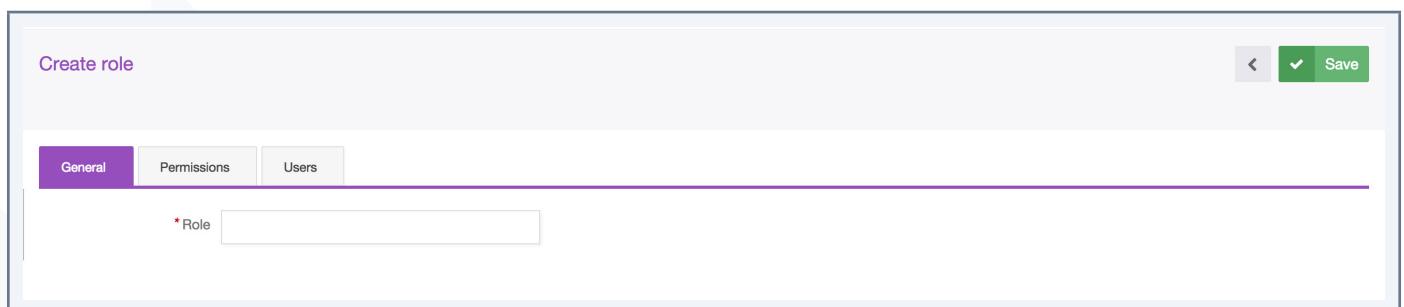
1. Log in with a user account with the rights to see roles (System: List of roles).
2. Go to System → Users Management → Roles.
3. To view the details of a role, click on one of the lines to review the information available for the role.



Creating Role

To create a new role:

1. Log in with a user account with rights to create a role (System: Create a role).
2. Go to System → Users Management → Roles.
3. Click on the “create role” button.
4. Fill the form to give a role name.



5. Click the “save” button to add the new role.

Editing the name of a role

To edit the name of a role:

1. Log in with a user account with rights to edit a role (System: Edit Role).
2. Go to System → Users Management → Roles.
3. Click on the role you want to modify.
4. Change the role name.
5. Click on “Save” button to update the role.

Changing users in a role

To edit the users associated with a role:

1. Log in with a user account with rights to edit a role (System: Editing roles).
2. Go to System → Users Management → Roles.
3. Click on the role to edit and the “Users” tab from the menu.

HAS ROLE ▾	FIRST NAME	LAST NAME ▾	USERNAME	EMAIL
<input checked="" type="checkbox"/>	Julia	Stark	julia	julia@example.com
<input type="checkbox"/>	John	Doe	admin	admin@example.com
<input type="checkbox"/>	Sandra	Harvey	sandra	sandra@example.com
<input type="checkbox"/>	Pamela	Rose	pamela	pamela@example.com
<input type="checkbox"/>	Mary	Smith	mary	mary@example.com
<input type="checkbox"/>	Peter	Williams	peter	peter@example.com

4. A grid of users is displayed with the users belonging to the respective initial role they have been associated to. They can be easily identified by the check box in the first column “has role”.
5. Look for the users and check the boxes to add users to the role. And the other way around, uncheck the boxes for users to be removed from the role.
6. Click the “save” button to update the page.

The rights which have been granted to or removed from users (addition to / removal from a role) are automatically applied. The user can still continue to be connected to the PIM: the change on rights will be updated on the next loading of a page in the PIM.

Deleting Role

Before deleting a role, you should check if that role is already used to assign rights to user.

To delete a role:

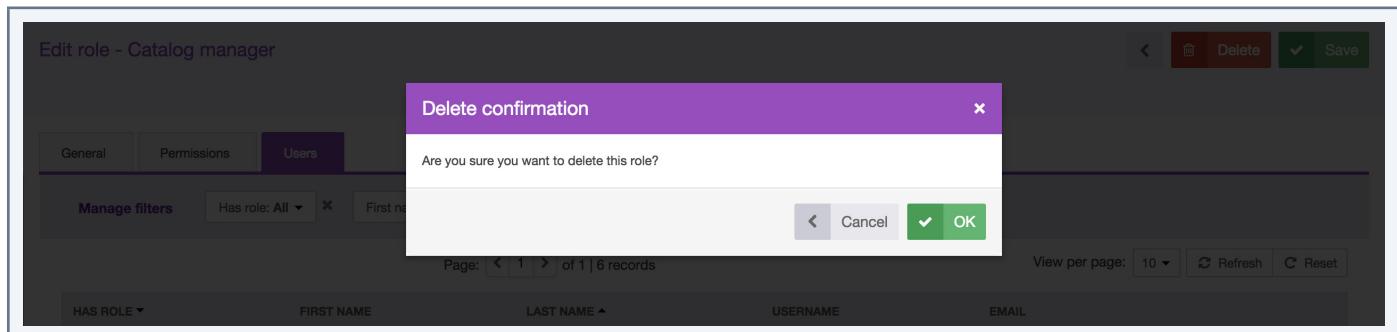
1. Log in with a user account with rights to edit a role (System: Remove Roles).
2. Go to System → Users Management → Roles.
3. You have two way to proceed:
 - Click on the role to be deleted and click on the “delete”button on the top right.

The screenshot shows the 'Edit role - Catalog manager' interface. At the top, there are buttons for back, forward, delete, save, and cancel. Below that, tabs for General, Permissions, and Users are visible, with 'Users' being the active tab. A 'Manage filters' section contains dropdowns for Has role, First name, Last name, Username, and Email, each with a clear button. Below the filters is a grid with columns: HAS ROLE, FIRST NAME, LAST NAME, USERNAME, and EMAIL. The grid shows 1 of 6 records. At the bottom, there are buttons for Page navigation, View per page (set to 10), Refresh, and Reset.

- Or click on the “delete” button straight away from the grid dragging the mouse on the role you want to delete.

The screenshot shows the 'Manage filters' interface with a 'Label: All' dropdown. Below it is a grid of roles. The 'Catalog manager' role is highlighted with a pink background. On the far right of the grid, there are edit and delete icons for each row. The grid shows 1 of 4 records. At the bottom, there are buttons for Page navigation, View per page (set to 10), Refresh, and Reset.

4. Then confirm the message for the suppression of the role.



Please check first the potential impact of the removal of a role on which users have been associated to. For instance, if the role job was the only way for the user to have a specific right, then due to the role suppression, the user will have no longer his access right in the PIM.

Configuring rights to the catalog (Enterprise Edition)

Scope of access rights to assets

Access rights enable to configure the scope of role and visibility of users to the assets in the PIM. The scope of role and visibility is set on 1 axis:

- It is possible to define for each user, which assets can be viewed and / or edited, depending on the classification of assets in the different categories.

Setting the level of access rights to assets according to categories

Setting the level of access to the assets according to Categories:

- Go to "Enrich → Asset Categories"

2. Select the category for which you want to set permissions in the left panel.
3. Click on “Permissions”
4. Click in the fields to select the user to whom the specific permissions will be granted
5. Click on the “Save” button.
6. Permissions are immediately applied to users.

By default, all users are entitled to all the rights to the created categories through the group “All”. Refining permissions to user group, the group “all” will need to be removed.

In which case, the highest right on categories of an asset is applied?

If an asset is in multiple categories of one or more trees and a user has at least a view permission to its categories, so the user can see the asset.

Option “Apply changes to the subcategories”

When changes are applied, they are displayed & listed in the list at the bottom of the “Permissions” form.

Below the list, there is an option to “apply changes to the sub-categories”. This option is checked by default and can apply to all sub-categories of the edited category (apply changes on the last sub-category tab), to apply the changes on the list.

The screenshot shows the 'Permissions' section of the AKENEOPIM interface. It includes two sections for 'Allowed to view assets' and 'Allowed to edit assets', each with checkboxes for 'IT support', 'Manager', and 'Redactor'. Below these is a checkbox for 'Apply changes on children' which is checked. A note below states: 'Changes • The group All will not be allowed to view assets in this category'.

Allowed to view assets	<input checked="" type="checkbox"/> IT support	<input checked="" type="checkbox"/> Manager	<input checked="" type="checkbox"/> Redactor	
Allowed to edit assets	<input checked="" type="checkbox"/> IT support	<input checked="" type="checkbox"/> Manager	<input checked="" type="checkbox"/> Redactor	
Apply changes on children	<input checked="" type="checkbox"/>			
Changes	• The group All will not be allowed to view assets in this category			

In the example above, all sub-categories will have no longer the “All” group in any of the permission category, but they will keep their own configurations.

Scope of access rights to product information

Access rights enable to configure the scope of role and visibility of users to the product catalog in the PIM. The scope of role and visibility sets out 3 axes:

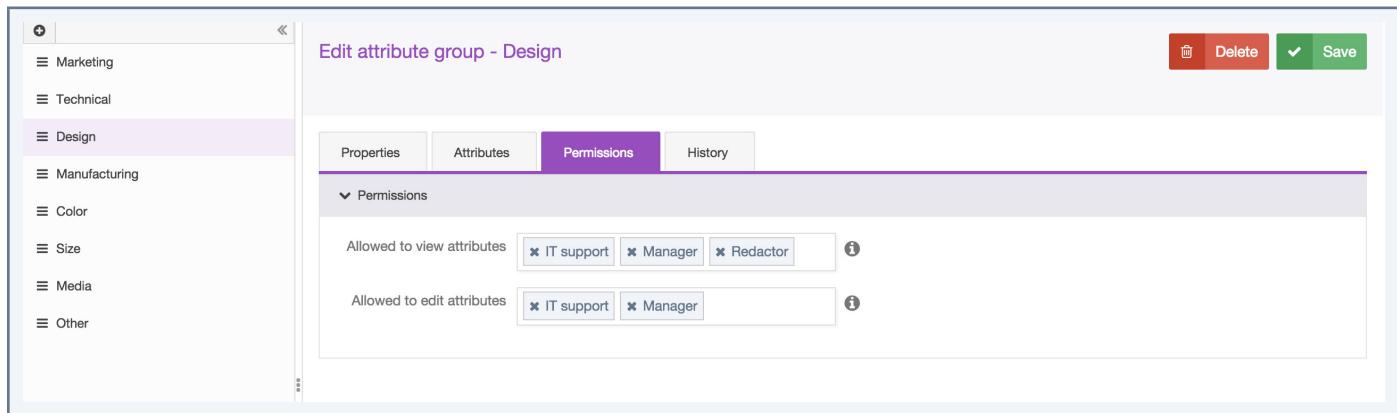
- Locales: if a product catalog is available in several locales, it is possible to define for each user which local can be viewed and / or edited.

The screenshot shows the 'Edit locale - en_US' interface. At the top, there are tabs for 'Properties.title' and 'Permissions.title', with 'Permissions.title' being active. Below the tabs, there is a section titled 'Permissions' with two items: 'Allowed to view product information' and 'Allowed to edit product information', both set to 'All'. A save button is visible at the top right.

- Categories: If a product catalog uses the class tree in the PIM system, it is possible to define for each user, which products can be viewed and / or edited, depending on the classification of products in the different categories.

The screenshot shows the 'Edit category - PRINT IMAGES' interface. On the left, there is a sidebar with a tree view of asset categories, including 'Asset main catalog', 'images', 'PRIORITYSED IMAGES', 'PRINT IMAGES' (which is selected), 'VIDEOS', 'AUDIO', 'CLIENT DOCUMENTS', 'STORE DOCUMENTS', and 'TECHNICAL DOCUMENTS'. The main area has tabs for 'Properties', 'Permissions', and 'History', with 'Permissions' being active. It shows 'Permissions' for 'PRINT IMAGES' with sections for 'Allowed to view assets' (set to 'IT support', 'Manager', and 'Redactor') and 'Allowed to edit assets' (set to 'IT support', 'Manager', and 'Redactor'). There is also a checkbox for 'Apply changes on children'. A note at the bottom states: 'Changes • The group All will not be allowed to view assets in this category'. A save button is visible at the top right.

- Attribute groups: if a product catalog uses the attribute group in the PIM system, it is possible to define for each user, which attributes can be viewed and / or edited, depending on the attribute group in which they are positioned.



Hierarchy of access rights for product information

For each axis there are 3 levels of access:

- Permission to edit information
- Permission to view information.
- No rights: the information is hidden to the user

As rights are subject to 3 axes, hierarchy prevents any conflicts defining permissions for each user. The axes of the hierarchy is as follows:

1. Locale
 - Category
 - Attributes Group

How to apply the rule of hierarchy? It requires at least one access right to view on the parent axis to apply the rule to the child axis.

You will find below a couple of examples to illustrate how the rule of hierarchy applies to each user:

A user has been granted with the following rights

1. Locale "de_DE": No right
 - Category "Shoes": edit permission
 - Attributes Group "General": edit permission

This user will never see the products in the category Shoes, nor edit the attributes in the “General” group in the local “de_DE” because the user cannot select the “de_DE” locale in the user interface preferences.

Let's give the permission to the same user to view the locale “en_US”:

1. Locale “de_DE” No rights & Locale “en_US”: allowed to view products
 - Category “Shoes”: publish permission
 - Attributes Group “General”: edit permission

Then, the user can see the products in the category Shoes and can see the attributes in the “General” group in the locale “en_US”, but cannot edit them because the product has a read permission only for local “en_US”.

Let's give the permission to the same user to edit the locale “fr_FR”, you will see:

1. Locale “de_DE”: no rights & locale “en_US”: allowed to view products & locale “fr_FR”: edit permission
 - Category “Shoes”: edit permission
 - Group of attributes “General”: edit permission

The user can edit the products in the category Shoes and can edit the attributes in the “General” group in the locale “fr_FR”.

The hierarchy is thus applied to each individual axis of the rules.

Defining the level of access to products according to locales

Setting the level of access to products according to locales

1. Go to Settings → Locales.
2. Select the locale from the locale overview grid.

Locale overview

Manage filters Code: All Activated: All

Page: < 1 > of 21 | 210 records View per page: 10 Refresh Reset

CODE	ACTIVATED
de_DE	Active
fr_FR	Active
en_US	Active
oc_FR	Inactive
nso_ZA	Inactive
nn_NO	Inactive
nl_NL	Inactive
nl_BE	Inactive
ne_NP	Inactive

3. Click on the “Permissions.title” tab from the menu.

Edit locale - en_US

Properties.title Permissions.title

▼ Permissions

Allowed to view product information

Allowed to edit product information

4. Click in the fields to select the user groups to which you will grant the appropriate permissions.

Properties.title Permissions.title

▼ Permissions

Allowed to view product information

Allowed to edit product information

Clothes manager

English translator
Furniture manager
IT support
Manager
Redactor

5. Click on the “Save” button.
6. Permissions are immediately applied to users.

Impacts on rights to edit product information in a locale

- The specific locale is displayed in the drop down menu for the available locales
 - From the product grid

The screenshot shows the AKENEOPIM product grid. At the top left, there's a dropdown menu for 'Products' with 'en' selected. Below it is a 'Views' dropdown with 'My default view' selected. On the right side of the top bar is a green 'Create product' button. The main area displays a tree view of the 'Master catalog' containing categories like 'TVs and projectors', 'Cameras', and 'Audio and Video'. To the right of the tree view are several filter buttons: 'Family: All', 'Groups: All', 'Status: All', 'Complete: All', 'Created at: All', 'Updated at: All', 'SKU: All', and 'Permissions: All'. Below these filters are standard grid controls: 'Quick Export', 'Page: 1 of 30 | 300 records', 'View per page: 10', 'Refresh', 'Reset', 'Columns', and an 'Ecommerce' button. The bottom of the grid has columns labeled 'All', 'SKU', 'LABEL', 'FAMILY', 'STATUS', 'COMPLETE', 'CREATED AT', 'UPDATED AT', and 'GROUPS'.

- From the published product grid
- From the editing product form

The screenshot shows the AKENEOPIM product edit form for 'Trust Megapixel Pro'. At the top, there are buttons for 'Download', 'PDF', 'Publish', 'Delete', 'Enabled' (green), and 'Save'. Below this is a header with product details: 'Family: Webcams' (with a link), 'Created: 2015-09-24 17:56:20 By John Doe - admin@example.com', 'Last update: 2015-09-24 17:56:20 By John Doe - admin@example.com', and 'Owner groups: IT support, Manager'. The main form has tabs for 'Attributes', 'Categories', 'Associations', and 'Proposals'. Under the 'Attributes' tab, there are sections for 'Marketing' (SKU: 1209128, Language dropdown showing 'German', 'English', 'French'), 'Technical', and 'Media' (Name: 'Trust Megapixel Pro'). Above the 'Marketing' section is a dropdown for 'Ecommerce' and another for 'English'. To the right of the form are buttons for 'Completeness', 'Comments', and 'History'. At the bottom right are buttons for 'Add Attributes' and 'Compare / Translate'.

- When translating product information (product edit form)

Trust Megapixel Pro

Family: Webcams | Created: 2015-09-24 17:56:20 By John Doe - admin@example.com | Last update: 2015-09-24 17:56:20 By John Doe - admin@example.com | Owner groups: IT support, Manager

Attributes Categories Associations Proposals

Ecommerce English Add Attributes Ecommerce English Working Copy Select Copy

Marketing

SKU: 1209128

Name: Trust Megapixel Pro

German
English
French

Completeness Comments History

Enabled Save

- From the variant groups edit form

Edit variant group - Akeneo T-Shirts

Code: akeneo_tshirt | Type: VARIANT | Axis: main color, secondary color, clothing size | Products: 24

Products Attributes Properties History

Marketing

Marketing

Add attributes

en de Scope

en fr

Price: € \$ ↻ ✖

Response time (ms): ↻ ✖

Save

- From the bulk edit form for common attributes of the selected products.

Products / Mass Edit (3 products)

Choose products Choose operation Configure Confirm

Edit common attributes

The selected product's attributes will be edited with following data for the chosen locale.

English (United States)
German (Germany)
English (United States)
French (France)

Select attributes

Back Next

Impacts on rights to product information in a locale

Restrictions against the edit permission products information in a locale:

- The concerned locale is not displayed in the drop down list of locales available
 - In the edit variant groups form

Impacts on no right to see product information in a locale

Additional restrictions against the view permission of product information in a locale

- The concerned locale is not displayed in the drop down list of available locales
 - In the product grid
 - In the published product grid
 - In the publishing product form,
 - To translate product information (edit product form).

Setting the level of access rights to products according to categories

Setting the level of access to the products according to Categories:

1. Go to “Enrich → Categories”.
2. Select the category for which you want to set permissions on the left panel.
3. Click on “Permissions”.
4. Click in the fields to select the user to whom the specific permissions will be granted.

The screenshot shows the AKENEOPIM interface for managing product categories. On the left, a sidebar displays a hierarchical tree of categories under 'Master catalog': 'TVs and projectors', 'Cameras', 'Audio and Video', 'Print and scan', 'Clothes', and 'Office'. The 'Cameras' category is selected. The main content area is titled 'Edit category - Cameras'. It features a navigation bar with tabs: 'Properties' (disabled), 'Permissions' (selected), and 'History'. The 'Permissions' section contains three groups of checkboxes for granting permissions to users: 'IT support', 'Manager', and 'Redactor' for 'Allowed to view products'; 'IT support' and 'Manager' for 'Allowed to edit products'; and 'IT support' and 'Manager' for 'Allowed to own products'. There is also a checkbox labeled 'Apply changes on children'. At the top right, there are 'Delete' and 'Save' buttons.

5. Click on the “Save” button.
6. Permissions are immediately applied to users.

By default, all users are entitled to all the rights to the created categories through the group “All”. Refining permissions to user group, the group “All” will need to be removed.

In which case, the highest right on categories of a product is applied?

If a product is in multiple categories of one or more trees and a user has at least a view permission to its categories, so the user can see the product.

Option “Apply changes to the subcategories”

When changes are applied, they are displayed & listed in the list at the bottom of the “Permissions” form.

Below the list, there is an option to “apply changes to the sub-categories”. This option, checked by default, can apply to all sub-categories of the edited category (apply changes on the last sub-category tab), to apply the changes on the list.

In the example above, all sub-categories will have no longer the “All” group in any of the permission set the category, but they will keep their own configurations.

Specific rights on categories: Ownership & classification as multi-products

Additional right is available per category: “Ownership” permission (litteral translation for the product “Owner”). This right allows to define for each user, who is responsible for product information according to the product classification in the different categories. For more information on the user role scope with the “Ownership” permission, please refer to the user guide.

A product can be classified into several categories. The most permissive rights are then applied to the product. For instance, a product is classified in 3 different categories: a first category for which the user has no rights, a second category for which the user is entitled to see the products, and a third category for which the user is entitled to edit products. Thus the user has the edit permission on the product.

The allocation of rights impacts the user behavior and what is displayed when connecting to the PIM. Below, you will find the description of the possible impacts for each right:

Be responsible for product information in a category

Extended rights to the edit permission for product information in a category:

- Edit the product information directly rather than going through the workflow of proposal approval.
- View / review the current proposals of product values
- Approve proposals of values that needs to be reviewed
- Reject proposals of values that needs to be reviewed
- Publish a product version
- Unpublish a product version

Publish product information in a category

- Edit a product contribution that needs to be approved by the product manager.
- Generate a proposal that will be processed by the product manager
- Send the proposal for review by the Product manager

View product information in a category

Further restrictions on product publish permission in a category:

- Cannot edit a product contribution
- Cannot generate a product proposal
- Cannot send contributions for review by the product managers

Cannot see products in a category

Further restrictions on the product information view permission in a category:

- In the case of a tree:
 - Do not show the tree from the tree list on the left panel of the categories
 - On the page “Enrich” → Products
 - On the page “Enrich” → Published Products.

- Do not show products only belonging to the tree in the product grid, regardless of the filters applied, in any context:
 - Associations,
 - Groups,
 - Variant groups.
- In the case of a category:
 - Do not show the category in the tree on the left panel of the categories
 - On the page "Enrich" → Products
 - On the page "Enrich" → Published Products.
 - Do not show the category in the tree on the configuration page by mass edit "Classify products"
 - Do not show the products belonging to this category from the product grid, regardless of the filter applied in any context:
 - Associations,
 - Groups,
 - Variant groups.
- In both cases
 - Do not display views using the category or the tree as a filter.

Setting the level of access to the attributes according to the groups of attributes

To do so:

1. Got to "Settings → Attribute Groups".
2. Select the attribute group in the left panel.
3. Click on the "Permissions" tab.
4. Click on the fields to select the user groups entitled to the appropriate rights.
5. Click on the "Save" button.
6. The rights are immediately applied.

Publishing product information in attribute group

- All the attributes of the group are enabled and they can be edited from the edit product page.
- On the right side of the panel, the tab can be selected (checkbox) and use the "copy" button for the translation mode in the edit product page.

This screenshot shows the AKENEOPIM product edit interface for a 'Viewsonic 3DV5' product. The top navigation bar includes buttons for PDF, Publish, Delete, Enabled, Save, and a dropdown menu. Below the header, there are tabs for Attributes, Categories, Associations, and Proposals. The main content area is divided into sections by attribute group: Marketing, Technical, and Media. The Marketing section contains fields for SKU (8538374), Name (Viewsonic 3DV5), and Description (empty). The Technical section contains a note about a rule for updating the description. The Media section contains a Release date field (2011-03-20). The right side of the screen shows a preview of the product details.

- The attribute groups are also available in the “add attributes” option in the product edit page

This screenshot shows the same product edit interface as above, but with the 'Add Attributes' dialog open. The dialog has tabs for Search, MARKETING, and TECHNICAL. Under MARKETING, there is a checkbox for 'Response time (ms)'. Under TECHNICAL, there are checkboxes for 'Maximum scan size', 'Color scanning', 'Maximum print size', and 'Camera type'. An 'Add' button is at the bottom right of the dialog.

- The attribute groups are though not exported by the “quick export”.

Cannot view product information in attribute groups

What are the restrictions on the view permission of the attribute groups:

- All attribute groups are disabled and cannot be edited in the edit product page.

- There are no check box near the “copy” button in the translation mode in the edit product page.
- The attribute groups are not offered in the “add attributes” in the product edit page.
- The attribute groups are not exported by the “quick export” button.

Cannot see the product information in a group of attributes

What are the restrictions on the view permission of the attribute groups:

- The attribute group is not visible in the edit product page nor in the view product page
- The attribute groups are not displayed in the configuration of the pop in columns in the product grid.
- The attribute groups are not displayed in the list of available filters in the product grid
- The attribute groups are not exported by the “quick export” button.
- The attribute groups are available in the “add attributes” option in the product edit page.
- The views using the attribute groups (columns or filter) are not displayed in the list of views.

Restoring a product version

This permission allows to give the right to restore a product version. If this permission is entitled, the user will see the “Restore” button in the grid versions.

Attributes	Categories	Associations	Proposals	Completeness	Comments	History
History						
VERSION AUTHOR LOGGED AT MODIFIED ACTIONS						
➤ 2	Julia Stark - julia@example.com	2015-09-30 17:51:08	description-en_US-ecommerce		Restore	
➤ 1	John Doe - admin@example.com (Comes from variant group oro_tshirt)	2015-09-24 17:56:20	sku, family, categories, description-de_DE-mobile, description-de_DE-print, description-en_US-mobile, description-en_US-print, description-fr_FR-mobile, description-fr_FR-print, maximum_video_resolution, name, picture, release_date-ecommerce, release_date-mobile, total_megapixels, enabled		Restore	

Note

This permission is only relevant if the user has access to the “History” tab of the products, which matches another permission: “Show product history.”

Note

This permission is given by role.

Access to published product tab

This permission enable access to the list of published products. If this right is granted, the user will see a sub-tab in the “Enrich menu → Published Products”.

The screenshot shows the Akeneo PIM dashboard. At the top, there's a purple header bar with the Akeneo logo, navigation tabs (Collect, Enrich, Spread, Settings, System), and a user profile (Julia Stark). Below the header is a sidebar with sections like Dashboard, Mar, and Assets. The main content area has a sidebar with 'Products' and 'Published products' listed under 'Enrich'. The 'Published products' item is highlighted. To the right, there are three cards: 'Manage Families' (with a folder icon), 'Manage Attributes' (with a list icon), and 'Manage Categories' (with a tree icon). At the bottom, there are 'Last operations' and a progress bar indicating 'No operations found'.

Setting the access level on the import and export profiles

To do so:

1. Go to “Collect” → “Import Profiles” or “Spread” → Profiles of export
2. Select the profile to be configured in the grid.
3. Click on the “Edit” button.
4. Click on Permissions.
5. Click on the fields to select the user groups to allow to execute the appropriate job.

The screenshot shows the 'Edit import profile - Demo product import [csv_product_import]' page. The top navigation bar includes 'Collect / Import profiles', 'Edit', 'Delete', and 'Save' buttons. The main content area has tabs for 'General properties', 'Permissions' (which is selected), and 'History'. Under 'Permissions', there are two sections: 'Allowed to execute job profile' and 'Allowed to edit job profile', each containing checkboxes for 'IT support', 'Manager', and 'Redactor'.

6. Click on the “Save” button
7. Permissions are immediately applied.

CONFIGURING IMPORTS / EXPORTS

This is available and can be done only if the rights have been granted to the user.

In the Enterprise version, the permission to execute the job for the imports and exports can be customized for each import and export profile.

What is a import or export profile?

An import or export profile allows to perform imports or exports in the PIM. For each, the profile format is based on:

- A code to identify the import or export profile.
- A job with a connector to define what will make the import or export when executing.
E.g, product import in CSV file, category export in CSV to a Magento platform.
- A set of configuration items, available as a form in the PIM. Each job has its own configuration. Thus the job configuration form “product import” in CSV connector in Akeneo will be different from the job configuration form “product import” in CSV connector of a partner.

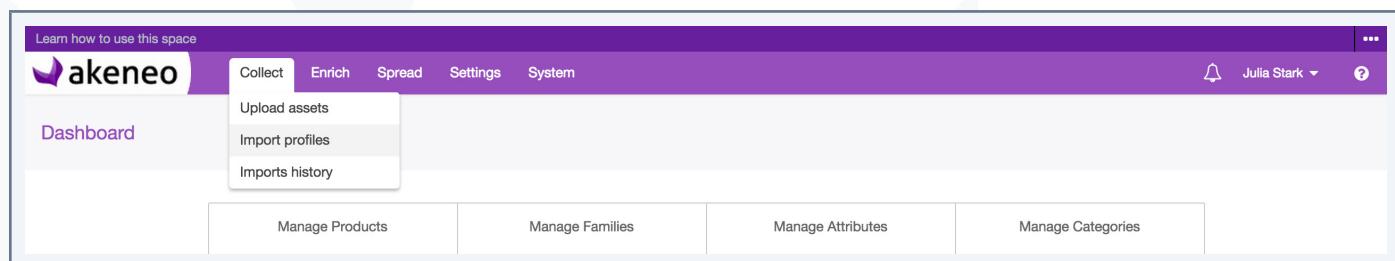
Some service applications are directly provided in the PIM to execute imports and exports:

- The property “Allow send file to the server Yes / No” can be used by all job imports of any connector requiring a file as a data source to process.
- Selecting channels is strongly recommended for use by all job export of any connectors, applying the rules of product selection implemented in the Akeneo PIM to export. However, the use of a channel to run a job export of products is not mandatory in the PIM.

Browsing profiles of imports / exports

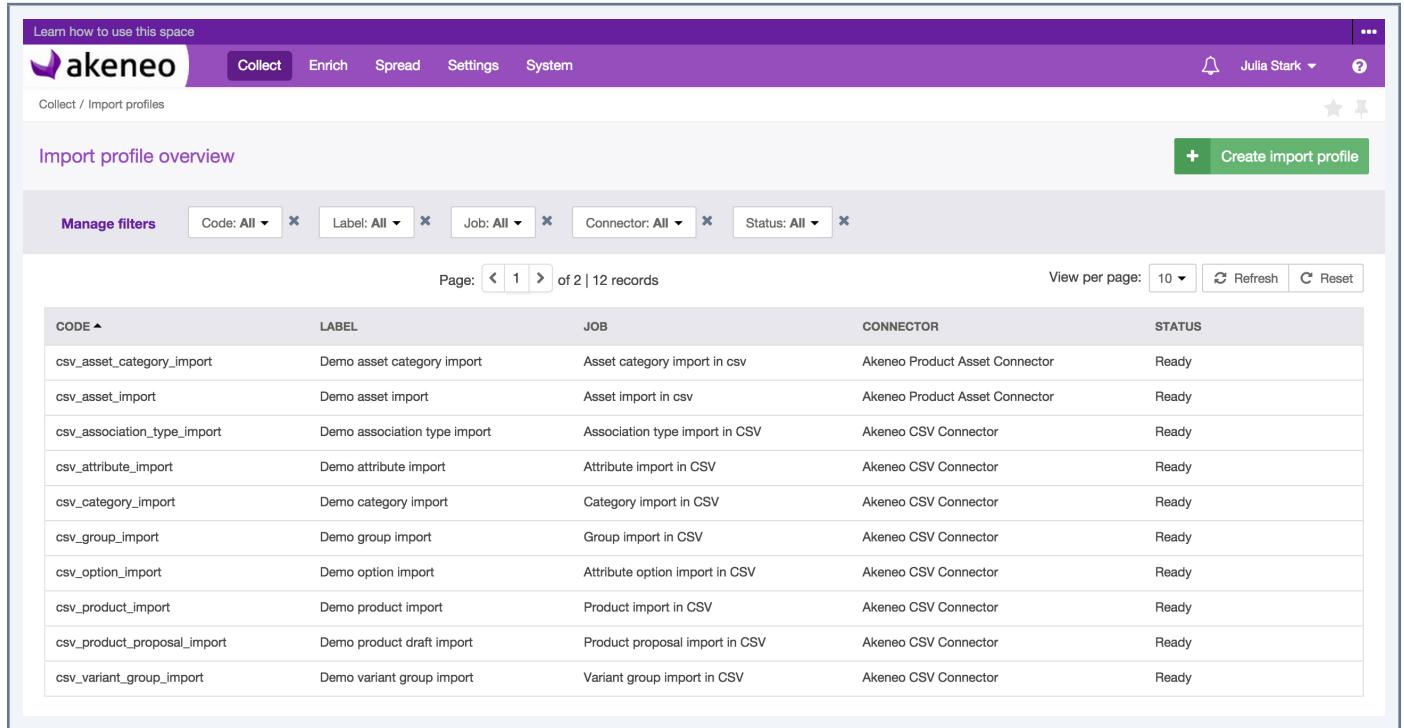
To view the available profiles of imports in the PIM:

1. Log in with a user account with permissions to “View the list of profiles” for imports.
2. Go to “Collect → Import Profiles”.



The screenshot shows the Akeneo PIM dashboard. At the top, there is a purple header bar with the Akeneo logo, navigation links for 'Collect', 'Enrich', 'Spread', 'Settings', and 'System', and a user profile for 'Julia Stark'. Below the header, there is a sidebar with options like 'Dashboard', 'Upload assets', 'Import profiles' (which is highlighted with a blue background), and 'Imports history'. The main content area contains four buttons: 'Manage Products', 'Manage Families', 'Manage Attributes', and 'Manage Categories'.

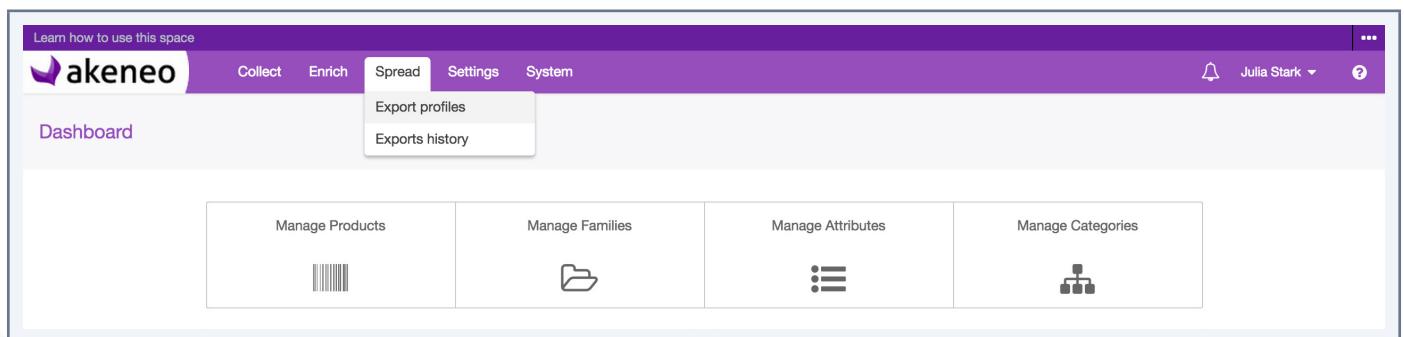
3. To narrow down the list of imports displayed, use the available filters above the grid of Import profiles
 To see the information on an import profile, click on the row in the grid.



CODE ▲	LABEL	JOB	CONNECTOR	STATUS
csv_asset_category_import	Demo asset category import	Asset category import in csv	Akeneo Product Asset Connector	Ready
csv_asset_import	Demo asset import	Asset import in csv	Akeneo Product Asset Connector	Ready
csv_association_type_import	Demo association type import	Association type import in CSV	Akeneo CSV Connector	Ready
csv_attribute_import	Demo attribute import	Attribute import in CSV	Akeneo CSV Connector	Ready
csv_category_import	Demo category import	Category import in CSV	Akeneo CSV Connector	Ready
csv_group_import	Demo group import	Group import in CSV	Akeneo CSV Connector	Ready
csv_option_import	Demo option import	Attribute option import in CSV	Akeneo CSV Connector	Ready
csv_product_import	Demo product import	Product import in CSV	Akeneo CSV Connector	Ready
csv_product_proposal_import	Demo product draft import	Product proposal import in CSV	Akeneo CSV Connector	Ready
csv_variant_group_import	Demo variant group import	Variant group import in CSV	Akeneo CSV Connector	Ready

To view the available profiles of export in the PIM:

1. Log in with a user account with permissions for the “View the list of profiles” for export.
2. Go to “Spread→ Export Profiles”.



3. To narrow down the list of export displayed, use the available filters above the grid of Export profiles.
 To view the information of an export profile, click on the line in the grid

The screenshot shows the Akeneo PIM interface for managing export profiles. At the top, there's a purple header bar with the Akeneo logo and navigation links for Collect, Enrich, Spread, Settings, and System. A user profile for 'Julia Stark' is visible on the right. Below the header, a sub-header reads 'Spread / Export profiles'. The main area is titled 'Export profile overview' and features a table of 13 export profiles. The columns are labeled CODE, LABEL, JOB, CONNECTOR, and STATUS. Each row contains a unique code like 'csv_asset_category_export' and a descriptive label like 'Demo asset category export'. The connector for all profiles is 'Akeneo Product Asset Connector' and the status is 'Ready'. There are filters at the top of the table and pagination controls below it.

CODE	LABEL	JOB	CONNECTOR	STATUS
csv_asset_category_export	Demo asset category export	Asset category export in csv	Akeneo Product Asset Connector	Ready
csv_asset_export	Demo asset export	Asset export in csv	Akeneo Product Asset Connector	Ready
csv_asset_variation_export	Demo asset variation export	Asset variations export in csv	Akeneo Product Asset Connector	Ready
csv_association_type_export	Demo association type export	Association type export in CSV	Akeneo CSV Connector	Ready
csv_attribute_export	Demo attribute export	Attribute export in CSV	Akeneo CSV Connector	Ready
csv_category_export	Demo category export	Category export in CSV	Akeneo CSV Connector	Ready
csv_group_export	Demo group export	Group export in CSV	Akeneo CSV Connector	Ready
csv_option_export	Demo option export	Attribute option export in CSV	Akeneo CSV Connector	Ready
csv_product_export	Demo product export	Product export in CSV	Akeneo CSV Connector	Ready
csv_published_product_export	Demo published product export	Published product export in CSV	Akeneo CSV Connector	Ready

Creating a new profile import or export

To create a new profile import:

1. Log in with a user account with “Create an import profile” permissions.
2. Go to the “Collect→ Import Profiles” menu.
3. Click on the top right button.

This screenshot shows the Akeneo PIM interface for creating import profiles. It has a similar layout to the export profiles screen, with a purple header, user profile for 'Julia Stark', and a 'Create import profile' button. A filter for 'Status: All' is applied. The main area is currently empty, indicating no profiles have been created yet.

4. All fields in the pop-up window must be filled out.

The screenshot shows the Akeneo PIM interface for creating a new import profile. The modal window has three fields: 'Code' (empty), 'Label' (empty), and 'Job' (a dropdown menu). Below the modal, there are two buttons: 'Cancel' and 'Save'. The background features a table with columns 'CODE', 'LABEL', 'CONNECTOR', and 'STATUS'. The table lists various connectors like 'Product Asset Connector', 'CSV Connector', etc., all in 'Ready' status.

- A unique code
- A name for the label to identify the profile more easily in the PIM
- A job to execute the task.

The list of jobs matches all the jobs available to perform imports, for all installed and configured connectors with Akeneo PIM.

5. Click on the "Save" button and the import profile is created

The profile page screen is displayed. It is possible to configure the job import.

To create a new profile for export:

1. Log in with a user account with "Create export profile" permissions.
2. Go to the "Spread → Export Profiles" menu.
3. Click on the top right button.

The screenshot shows the Akeneo PIM interface for creating a new export profile. At the bottom right, there is a green button with a plus sign and the text 'Create export profile'. The rest of the interface is mostly blank or placeholder content.

4. All fields in the pop-up window must be filled out.

CONNECTOR	STATUS
Product Asset Connector	Ready
Product Asset Connector	Ready
Product Asset Connector	Ready
CSV Connector	Ready
CSV Connector	Ready
CSV Connector	Ready
CSV Connector	Ready
CSV Connector	Ready
Akeneo CSV Connector	Ready

- A unique code
- A name for the label to identify the profile more easily in the PIM
- A job to execute the task.

The list of jobs matches all the jobs available to perform exports, for all installed and configured connectors with Akeneo PIM.

5. Click on the “Save” button and the export profile is created.

The profile page screen is displayed. It is possible to configure the job export::

Modifying an import or an export

If a user has no right granted to modify an import or export profile due to his role membership (Community Edition rights), then the permissions which he may benefit due to his group membership (Enterprise Edition rights) will not be applied. For instance, if a user does not have the “edit profiles of imports” permission, his Enterprise Edition rights to edit a specific import profile is ignored.

To modify an import profile:

1. Log in with Account user with edit import profile permission.
2. Go to the “Collect → Import Profiles” menu.
3. Click on the import profile that needs to be modified.
4. Click on the “Edit” button. In the tab “General properties”, the properties code and label are available for all import profiles, the properties in global settings depend of the import job. For example for the CSV product import:

Property	Details
File	Defines the path for the CSV file to import
Allow file upload	Allows a file upload from the specified path
Delimiter	Defines the character to delimit the fields in the CSV file
Enclosure	Defines the character for the field enclosure in the CSV file
Escape	Defines the escape character in the CSV file
Decimal separator	Defines the character used as decimal separator in the imported file
Date format	Defines the format used for dates in the imported file
Enable the product	Defines the default status to create a product in Akeneo: - status "enabled" if yes - status "disabled" if no
Categories column	Defines the column name for categories in the imported file
Family column	Defines the column name for family in the imported file
Groups column	Defines the column name for groups in the imported file
Compare values	Enables the comparison between original values and imported values It can speed up the the import if imported values are very similar to original values
Real time history update	Enables the update of the product history It can be switched off to improve performances

5. Make your changes.
6. Click on the “save” button to update the import profile.

A screenshot of the Akeneo PIM interface. At the top, there's a purple header bar with the Akeneo logo, navigation links for Collect, Enrich, Spread, Settings, and System, and a user profile for Julia Stark. Below the header, a sub-header says "Collect / Import profiles". The main content area has a title "Edit import profile - Demo product import [csv_product_import]". It shows a "Job: Product import in CSV" and "Connector: Akeneo CSV Connector". There are three tabs: "General properties" (selected), "Permissions", and "History". Under "General properties", there's a section for "Properties" with fields for "Code" (set to "csv_product_import") and "Label" (set to "Demo product import"). Below that is a section for "Global settings" with various CSV import configuration options: "File" set to "/tmp/product.csv", "Allow file upload" set to "Yes", "Delimiter" set to ";", "Enclosure" set to "", "Escape" set to "\", "Decimal separator" set to "dot (.)", and "Date format" set to "yyyy-mm-dd".

Note

For other import jobs properties, refer to the contextual help ⓘ or the connector documentation.

To edit an export profile:

1. Connect with a user account with edit permission for an export profile.
2. Go to the "Spread → Export Profiles".
3. Click on the Export profile that needs to be modified.
4. Click on the "Edit" button. In the tab "General properties", the properties code and label are available for all export profiles, the properties in global settings depend of the export job. For example for the CSV product export:

Property	Details
Channel	Defines the channel to export
Decimal separator	Defines the character used as decimal separator in the exported file
Date format	Defines the format used for dates in the exported file
File path	Defines the path for the CSV file generated by the export
Delimiter	Defines the character to delimit the fields in the CSV file
Enclosure	Defines the character for the field enclosure in the CSV file
With header	Defines if the first line of the exported file contains the columns names

5. Make your changes.
6. Click on the “Save” button to update the export profile.

Edit import profile - Demo product import [csv_product_import]

Job: Product import in CSV | Connector: Akeneo CSV Connector

Delete Save

General properties	Permissions	History
<p><input checked="" type="checkbox"/> Properties</p> <p>*Code: csv_product_import</p> <p>*Label: Demo product import</p>		
<p><input checked="" type="checkbox"/> Global settings</p> <p>File: /tmp/product.csv</p> <p>Allow file upload: Yes</p> <p>Delimiter: ;</p> <p>Enclosure: "</p> <p>Escape: \</p> <p>Decimal separator: dot (.)</p> <p>Date format: yyyy-mm-dd</p>		

Note

For other export jobs properties, refer to the contextual help  or the connector documentation.

VIEWING REPORTS OF IMPORTS / EXPORTS

Viewing an import report

There are three options to view an import report:

- From the completion notification of the import,
- From the Akeneo menu,
- From the email notification for the completion of the import job.

To review an import report:

1. Go to “Collect → Import history”
2. Click on the notification of the complete import or select your import executed displayed in the grid.
3. The page of the import job appears::

The screenshot shows the Akeneo PIM interface. At the top, there's a purple header bar with the Akeneo logo, navigation links for Collect, Enrich, Spread, Settings, and System, and a user profile for Julia Stark. Below the header, a sub-header reads "Execution details - Demo product import [csv_product_import]" and indicates the status is "COMPLETED". There are download buttons for "read file" and "log", and a "Show profile" button. The main content area is a table titled "Execution details" with columns for Step, Status, Summary, Start, and End. The table contains three rows corresponding to the steps: File validation, Product import, and Association import, all completed successfully.

STEP	STATUS	SUMMARY	START	END
File validation	COMPLETED	File encoding: skipped, extension in white list	2015-09-30 6:18:36 PM	2015-09-30 6:18:37 PM
Product import	COMPLETED	read lines 112 skipped product (no differences) 112	2015-09-30 6:18:37 PM	2015-09-30 6:18:38 PM
Association import	COMPLETED	read lines 112 skipped product (no differences) 112	2015-09-30 6:18:38 PM	2015-09-30 6:18:38 PM

Example of an implementation report on import

The details of the executing import job are shown on the page. The details are related to each executed import/export profile. For more detailed information, please refer to the documentation of the used Akeneo connector for the execution.

VIEWING REPORTS OF BULK ACTIONS

Viewing a report of a bulk action

To review a report of a bulk action:

1. Two ways to display a report:
 - Go to “System > Process Tracker”.
 - Click on the notification of the completed action or select your executed action displayed in the grid.
2. The page of the report is then displayed:

The screenshot shows a web interface for the Akeneo Process Tracker. At the top, there's a purple header bar with the Akeneo logo and navigation links: Collect, Enrich, Spread, Settings, and System. The System link is highlighted. On the right side of the header, there's a user profile for 'Julia Stark' with a notification badge showing '3'. Below the header, the main content area has a title 'Execution details - Mass edit common product attributes [edit_common_attributes_with_permission]' and a status message 'Status: COMPLETED'. To the right of the title are back, forward, and download log buttons. The main content is a table titled 'Execution details' with two rows of data. The first row represents the step 'Edit common attributes with permission', which was 'COMPLETED' on 2015-09-30 at 6:21:25 PM. The second row represents the step 'Clean files for common attributes', also 'COMPLETED' on the same date and time. The table columns are labeled STEP, STATUS, SUMMARY, START, and END.

STEP	STATUS	SUMMARY	START	END
Edit common attributes with permission	COMPLETED	read 4 processed 4	2015-09-30 6:21:25 PM	2015-09-30 6:21:26 PM
Clean files for common attributes	COMPLETED		2015-09-30 6:21:26 PM	2015-09-30 6:21:26 PM

The details of the executing bulk action are shown on the page. The details are related to each executed action.

DEFINE ASSET TRANSFORMATION FOR CHANNELS

To define the assets transformation for each channel, you have to import a YML file by executing the job “Asset channel configuration import in YML”.

For more details about the format of the file, please refer to our technical documentation.

For more details about how to execute an import, please refer to the user guide “User”, section “Launch an import”.

The assets transformation for each channel can be exported to a YML file by executing the export job “Asset channel configuration export in YML”.

For more details about how to execute an export, please refer to the user guide “user”, section “Launch an export”.

GET YOUR SYSTEM INFORMATION

View your system information and download them

To view your system information:

Go to your System Information: System/System Information.

(screenshot new button System/System Information?)

On this page, you will have a sum up of all technical information that could be very helpful when raising a ticket: Edition version, Storage, Environment, Activated bundles...

The screenshot shows the Akeneo interface with a purple header bar. The 'System' tab is selected. Below the header, it says 'System / System information'. The main content area is titled 'System information' and contains a table of system details:

Edition	EE
Version	1.5.0
Storage	doctrine/orm
Environment	prod
Install time	2016-02-23T10:57:52+01:00
Registered bundles	APY\JsFormValidationBundle\APY\JsFormValidationBundle AcmeEnterprise\Bundle\AppBundle\AcmeEnterpriseAppBundle Akeneo\Bundle\BatchBundle\AkeneoBatchBundle Akeneo\Bundle\BufferBundle\AkeneoBufferBundle Akeneo\Bundle\ClassificationBundle\AkeneoClassificationBundle Akeneo\Bundle\FileMetadataBundle\AkeneoFileMetadataBundle Akeneo\Bundle\FileStorageBundle\AkeneoFileStorageBundle Akeneo\Bundle\FileTransformerBundle\AkeneoFileTransformerBundle Akeneo\Bundle\MeasureBundle\AkeneoMeasureBundle Akeneo\Bundle\RuleEngineBundle\AkeneoRuleEngineBundle Akeneo\Bundle\StorageUtilsBundle\AkeneoStorageUtilsBundle Doctrine\Bundle\DoctrineBundle\DoctrineBundle Doctrine\Bundle\FixturesBundle\DoctrineFixturesBundle Doctrine\Bundle\MigrationsBundle\DoctrineMigrationsBundle Escape\WSSEAuthenticationBundle\EscapeWSSEAuthenticationBundle FOS\JsRoutingBundle\FOS\JsRoutingBundle FOS\RestBundle\FOS\RestBundle JMSSerializerBundle\JMSSerializerBundle Knp\MenuBundle\Knp\MenuBundle Lip\ImagineBundle\Imagine\ImagineBundle Nelmio\ApiDocBundle\Nelmio\ApiDocBundle

On the right side of the table, there are download and text file buttons: a download icon and a 'TXT' button.

Once you land on this page, click on "TXT" button on the right hand corner to download a text file containing all this information.

This page has been developed in order to gather most of the information you need to raise tickets through our Helpdesk.

If you're raising a ticket, please attach the text file downloaded to your ticket (Attachment field).

THANK YOU.