

How to create new User



by [OSOE Project](#).

▼ Details

This tutorial teaches how to create new users in ERP5. The difference between Person and User is that a Person in ERP5 holds information related to an individual which is relevant to your organisation (for example a prospect, client supplier or employee) while a User has access to your ERP5 instance. The permissions, a user has in ERP5 are defined by assignments.

During this tutorial, you will create two Users:

- Cédric de Saint Martin: Information Systems Manager of your company and
- Yingjie XU: Support Agent of your company.

During this tutorial please replace "VIFIB" with your company name.

Agenda

- Create a Person
- Start the Assignment
- Create a new User Account
- New User log in
- Created Second User

▼ Details

The process of creating a new User has three steps: Firstly, create and validate a Person who is the future User of your ERP5 instance. Secondly, add Assignment to this new User by using the Action item list. Finally, create User Account for this Person by using the Action item list. Then this new User can access to your ERP5 instance using the login and password you have set during the creation.

Create a Person

The screenshot shows the ERP5 web interface for creating a new person. The browser address bar shows "ERP5 / Persons / Cédric De Saint Martin" and "Data updated." The user is logged in as "jingjing.xu". The form is titled "View" and has tabs for "Details", "Assignments", "Transactions", "Financial Information", "Documents", "Events", and "History". The form fields are as follows:

Title		Email	
First Name	Cédric	Default Telephone	
Last Name	De Saint Martin	Mobile Telephone	
Organisation	VIFIB	Fax	
Gender	Male	Street Address	
Roles	Internal	Postal Code	75016
Function	Information Systems/Information Systems Manager	City	Paris
Activity		Region	France
Product Interest		State	Draft
Nationality	French		

Description

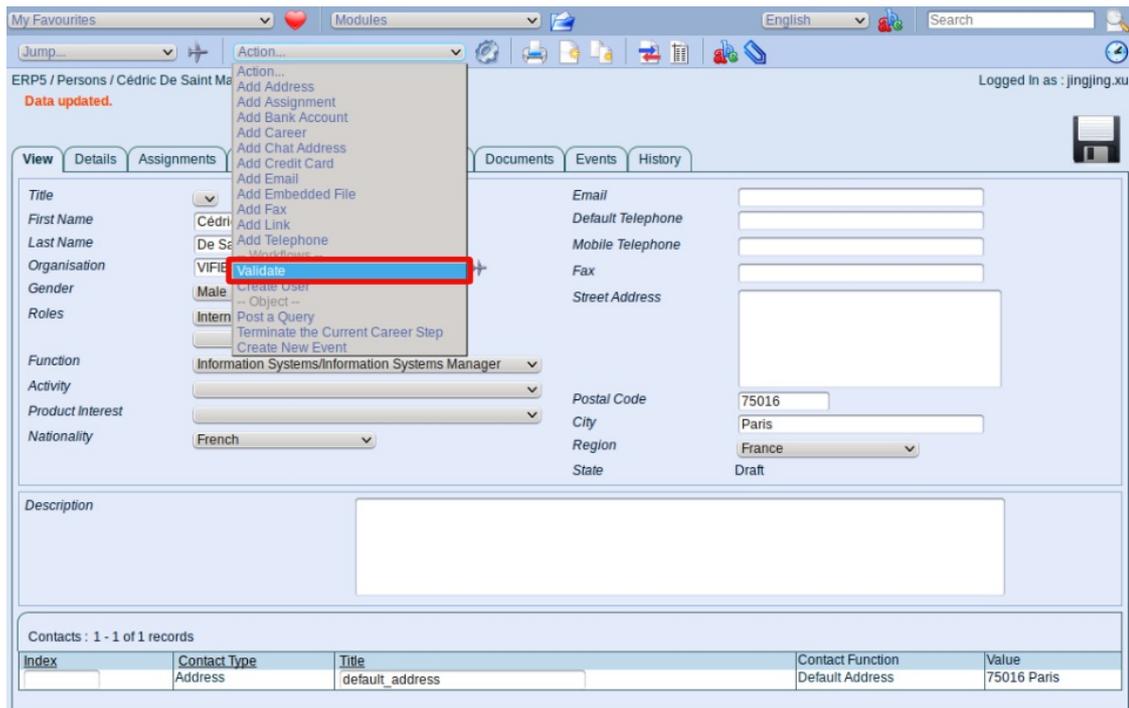
Contacts : 1 - 1 of 1 records

Index	Contact Type	Title	Contact Function	Value
	Address	default_address	Default Address	75016 Paris

▼ Details

After reading the tutorial "[How to create Persons](#)", you can now try to create a new Person account for a staff of your company. In our case, we create an account for a VIFIB manager Cédric de Saint Martin, as shown in the screenshot.

Validate the Person



The screenshot shows the ERP5 interface for a person record. The 'Action...' menu is open, and the 'Validate' option is highlighted with a red box. The person's details are as follows:

- Title: [Dropdown]
- First Name: Cédric
- Last Name: De Saint Martin
- Organisation: VIFIB
- Gender: Male
- Roles: Intern
- Function: Information Systems/Information Systems Manager
- Activity: [Dropdown]
- Product Interest: [Dropdown]
- Nationality: French

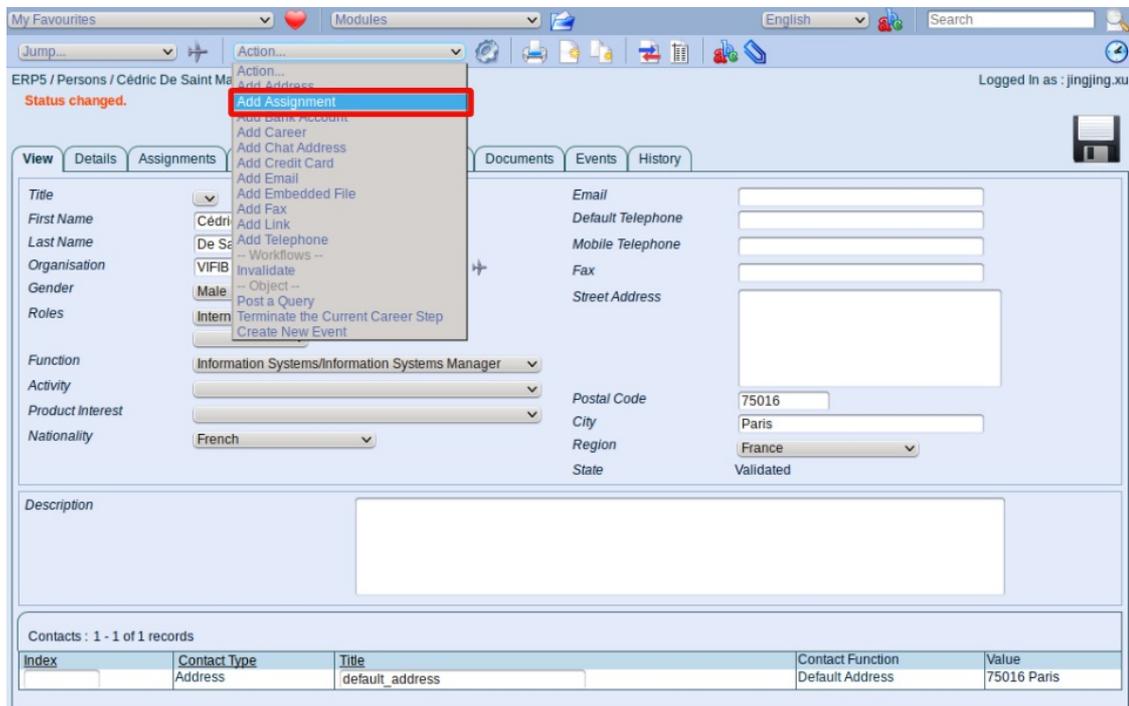
Contact information fields include Email, Default Telephone, Mobile Telephone, Fax, Street Address, Postal Code (75016), City (Paris), Region (France), and State (Draft).

Index	Contact Type	Title	Contact Function	Value
	Address	default_address	Default Address	75016 Paris

▼ Details

Validate the Person you just created before going to next step.

Action: Add Assignment



The screenshot shows the ERP5 interface for a person record. The 'Action...' menu is open, and the 'Add Assignment' option is highlighted with a red box. The person's details are as follows:

- Title: [Dropdown]
- First Name: Cédric
- Last Name: De Saint Martin
- Organisation: VIFIB
- Gender: Male
- Roles: Intern
- Function: Information Systems/Information Systems Manager
- Activity: [Dropdown]
- Product Interest: [Dropdown]
- Nationality: French

Contact information fields include Email, Default Telephone, Mobile Telephone, Fax, Street Address, Postal Code (75016), City (Paris), Region (France), and State (Validated).

Index	Contact Type	Title	Contact Function	Value
	Address	default_address	Default Address	75016 Paris

▼ Details

Without the assignment, even you has added a user account to the person document, the person still won't be able to access your ERP5 instance. To start an assignment, open the Action item list and click on "Add Assignment".

Edit Assignment

My Favourites | Modules | English | Search

ERP5 / Persons / Cédric De Saint Martin / 1 /

Object created.

View | History

Title	SlapOS Community Manager	Organisation	VIFIB
Project		Group	VIFIB
Start Date	1 / 10 / 2011	Activity	
Stop Date	31 / 12 / 2099	Function	
		Role	
		Site	
		State	Draft

Description

▼ Details

Now you are located in the Assignment document. Fill in the fields and save the data.

Note: there two important fields to fill up. First, you must select the Group for the Assignment, and the Group must be your company, otherwise the User won't be able to access your ERP5 instance. Second, fill carefully the Assignment Start Date and Stop Date. The Assignment is only valid in the defined interval, which means the User can only login your ERP5 instance in the defined interval.

Action: Start Assignment

My Favourites | Modules | English | Search

ERP5 / Persons / Cédric De Saint Martin / SlapOS Community Manager /

Data updated.

Action...
 -- Workflows --
 -- Cancel Assignment --
Start Assignment
 -- Object --
 Post a Query

View | History

Title	SlapOS Community Manager	Organisation	VIFIB
Project		Group	VIFIB
Start Date	01 / 10 / 2011	Activity	
Stop Date	31 / 12 / 2099	Function	
		Role	
		Site	
		State	Draft

Description

▼ Details

After adding an Assignment to the new User, you have to start the Assignment, if not, the User account will not work. Open Action item list and click on "Start Assignment".

Assignment "Started"

▼ Details

Fill the dialog box with the User Login and the Password you set for this new User to access to your ERP5 instance. Then click on "Create User".

New User Login

▼ Details

Try to log in your ERP5 instance with the new User Login and Password.

Note: It is important to remember the three steps must be performed correctly. Don't forget to **Validate** the person you created and to **Start Assignment** . Otherwise it won't be possible to connect to ERP5 using the user created.

Create Second User

- First Name: Yingjie
- Last Name: XU
- Organisation: VIFIB
- Gender: Male
- Role: Internal
- Function: Company / Agent
- User Name: yingjie.xu

▼ Details

Now that you learned how to create a user, please create a second user "Yingjie Xu". This user will be required to do the following tutorials. Make sure that you create the Person, the Assignment, start the Assignment and create the user account just like you did it for Cédric but using the information presented in this slide.