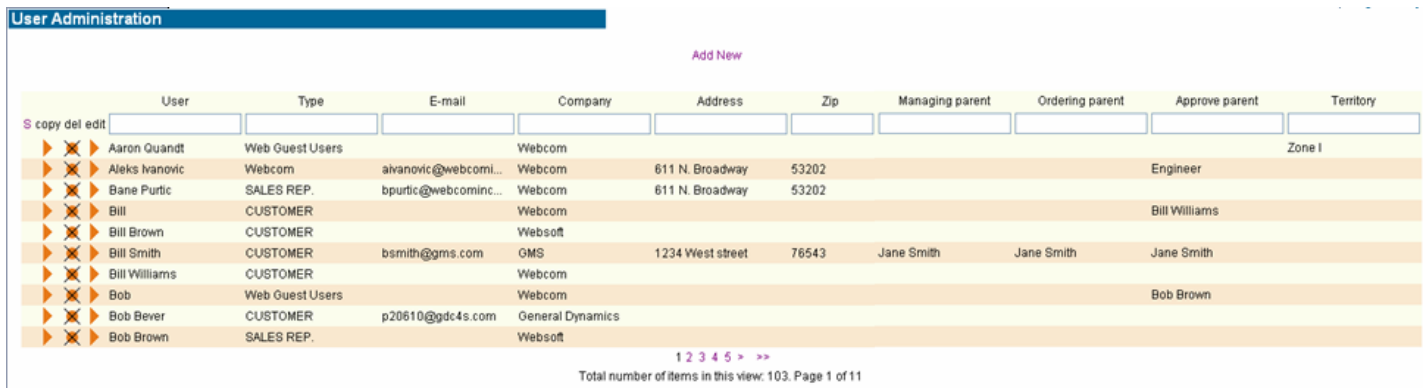


## WEB SITE USERS

Selecting the **Users** link under the **Users/Groups** drop down will bring up the **User Administration** screen shown in Figure 37-1.



User Administration										
<a href="#">Add New</a>										
	User	Type	E-mail	Company	Address	Zip	Managing parent	Ordering parent	Approve parent	Territory
S	copy del edit									
▶	Aaron Quandt	Web Guest Users		Webcom						Zone I
▶	Aleks Ivanovic	Webcom	aivanovic@webcomi...	Webcom	611 N. Broadway	53202			Engineer	
▶	Bane Purtic	SALES REP.	bpurtic@webcominc...	Webcom	611 N. Broadway	53202				
▶	Bill	CUSTOMER		Webcom					Bill Williams	
▶	Bill Brown	CUSTOMER		Websoft						
▶	Bill Smith	CUSTOMER	bsmith@gms.com	GMS	1234 West street	76543	Jane Smith	Jane Smith	Jane Smith	
▶	Bill Williams	CUSTOMER		Webcom						
▶	Bob	Web Guest Users		Webcom					Bob Brown	
▶	Bob Bever	CUSTOMER	p20610@gdc4s.com	General Dynamics						
▶	Bob Brown	SALES REP.		Websoft						

1 2 3 4 5 > >>  
 Total number of items in this view: 103. Page 1 of 11

Figure 37-1 – User Administration

To Edit, Copy, or Delete a User, click the respective symbol to the left of the User Name. Click **Add New** to add a new user. This displays the User Definition screen shown in Figure 37-4 and Figure 37-5. This same screen is displayed when a user is edited.

Figure 37-4 shows the first section of the page and Figure 37-5 shows the second section. Only the fields highlighted in **Yellow** are required to create the user. Most are standard fields that include information such as the user's name (login and real), company, user type, expiration date, territory, and other contact information. User type refers to the **User Groups**. If the desired user type, company, country, or territory is unavailable, then refer to those sections of administration to add the desired field.

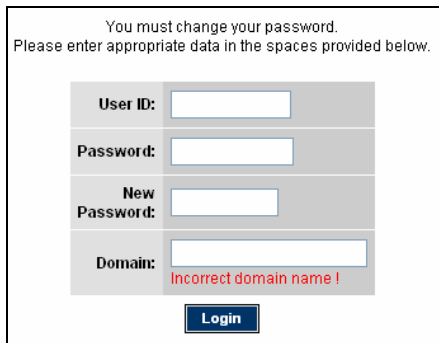
### PASSWORD MANAGEMENT

The password field is the only field that is required only when creating the user. If a user is being edited then it is not necessary to set a new password. To change a user's password, simply edit the user and enter a new password.

To force a user to change their password at the next login, select the check box next to **Must Change Password at Next Login**. The next time a user tries to log in, a window similar to Figure 37-2 will appear.

To create a password that expires, click the calendar icon next to the **Expiration Date** field to select a date. The date selected must be more than a month from the current date. Otherwise the error "Wrong Date Format!" will appear. Default Password Expiration is set in **Default User Parameters** (Chapter 35). When the default expiration is set, then every user created will have the same length of time before their password expires. Entering a negative value as the default value will prohibit newly created users from logging in.

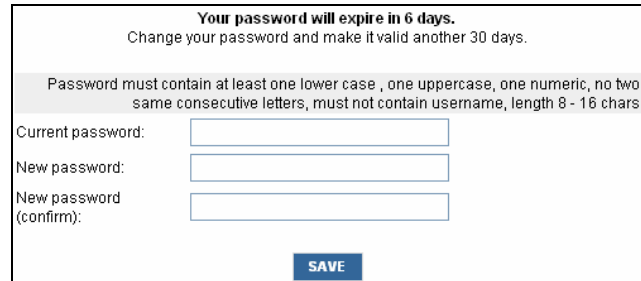
To set the length before a user sees a warning that their password expires, go to **Global Parameters** and click the **Application Parameters** link. An option on that page can be set for the max number of days before a warning is shown to the user. The warning a user sees will look similar to the window shown in Figure 37-3. Users will be unable to login with expired passwords.



You must change your password.  
Please enter appropriate data in the spaces provided below.

User ID:	<input type="text"/>
Password:	<input type="text"/>
New Password:	<input type="text"/>
Domain:	<input type="text"/> <span style="color: red;">Incorrect domain name !</span>

Figure 37-2 – Force Change of Password



**Your password will expire in 6 days.**  
Change your password and make it valid another 30 days.

Password must contain at least one lower case , one uppercase, one numeric, no two same consecutive letters, must not contain username, length 8 - 16 chars

Current password:	<input type="text"/>
New password:	<input type="text"/>
New password (confirm):	<input type="text"/>

Figure 37-3 – Password Expiration

It should also be noted that there are two parameters that affect passwords under Application Parameters, **Max Days before Password Expiration Warning is Shown** and **Number of Days Password is Valid**.


<b>Real name:</b>	<input type="text"/>
Title:	<input type="text"/>
Company:	Webcom <input type="button" value="v"/>
<b>Username:</b>	<input type="text"/>
Password Rules: <ul style="list-style-type: none"> <li>• Must be between 8 and 50 characters long</li> <li>• must differ from user name</li> <li>• must differ from previous password</li> <li>• must contain only alphas and numerics</li> </ul>	
<b>Password:</b>	<input type="password"/>
<b>Retype Password:</b>	<input type="password"/>
<b>Must change password at next login:</b>	<input type="checkbox"/>
<b>Password locked:</b>	<input type="checkbox"/>
User type:	Web Guest Users <input type="button" value="v"/>
Expiration Date (leave blank for permanent passwords)	<input type="text"/>  <input type="button" value="RESET EXP DATE"/>
Email:	<input type="text"/>
ID Code:	<input type="text"/>
Address(1):	<input type="text"/>
Address(2):	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
ZIP Code:	<input type="text"/>
Country:	United States <input type="button" value="v"/>
Phone:	<input type="text"/>
Fax:	<input type="text"/>

Figure 37-4 - User Administration (First Section)

Default multiplier:	<input type="text" value="1"/>
Managing parent user	Not specified <input type="button" value="v"/> <input type="button" value="CLEAR"/>
Ordering parent user	Not specified <input type="button" value="v"/> <input type="button" value="CLEAR"/>
User-level administrative privileges	<input type="text" value="Administer Firms"/> <input type="text" value="Administer Users"/>
User can add other users to following groups	<input type="text" value="ALLSCRIPTS"/> <input type="text" value="Careerbuilder"/> <input type="text" value="Channel"/> <input type="text" value="CUSTOMER"/>
Select date format:	mm dd yy <input type="button" value="v"/>
Select date separator:	/ <input type="button" value="v"/>
Show quotes within (up to the current date):	Use Global <input type="button" value="v"/>
Approve parent:	Not specified <input type="button" value="v"/> <input type="button" value="CLEAR"/>
Select territory	select... <input type="button" value="v"/>

Figure 37-5 – User Administration (Second Section)

## USER DEFINITION

Figure 37-4 shows the first section of the User Definition page. These fields mainly consist of standard fields for the user's title, company, type, and contact information. ID Code can also be entered and can be used in tags and expressions such as `<*CO_INFO(user_id_code)*>` which returns the Cart Owner's ID Code.

**NOTE:** For a complete list of tags, refer to Appendix A. Chapter 22 also describes tags and expressions in more detail.

Figure 37-5 shows the second section of the User Definition page. This section contains information such as the default multiplier, managing parent, ordering parent, approve parent, privileges, Quote/Cart visibility, date format, and territory.

A **Default Multiplier** can be set for the user. To set conditions and restrict use of multipliers and discounts, open **Discounting Rules** under Global Parameters (see Chapter 26 for more details).

Clicking on the dropdown invokes popup window containing a list of already defined users. Triangular symbols next to every user in the list opens or closes the branch of the user's child users, as shown in Figure 39-3.

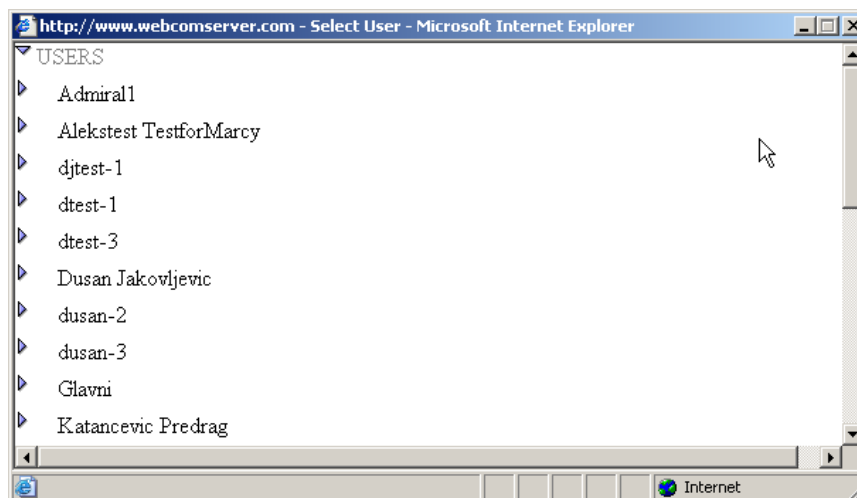


Figure 39-3 Select User

Just pick one and the name will be transferred to the parent dropdown.

WebSource CPQ has built-in mechanism to intercept and prevent "parent loop". User can't be assigned as parent to users that are vertically above him/her in the hierarchy branch.

"Select date format" and "Select date separator" apply to all date input validations for the user throughout the application.

"Select territory" offers no popup screen, but simple single-select dropdown list.

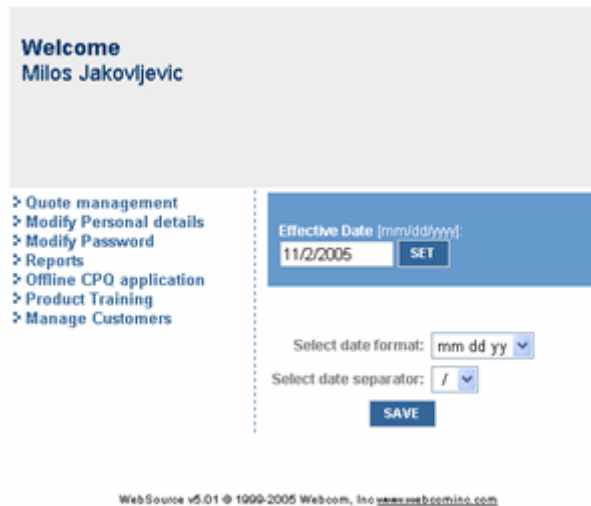
## Managing parent user

Every user has his User Page – after log in as User, user click to “User Page” link and get his User Page, as shown in Figure 39-5.

In User Page User Can change password, work with customers, format date/time, etc.

If User, in User Administration Page, select Managing Parent User than Managing Parent User can:

- Administer Users
- Re-assign quotes batch
- Re-assign quotes and
- Administer Companies



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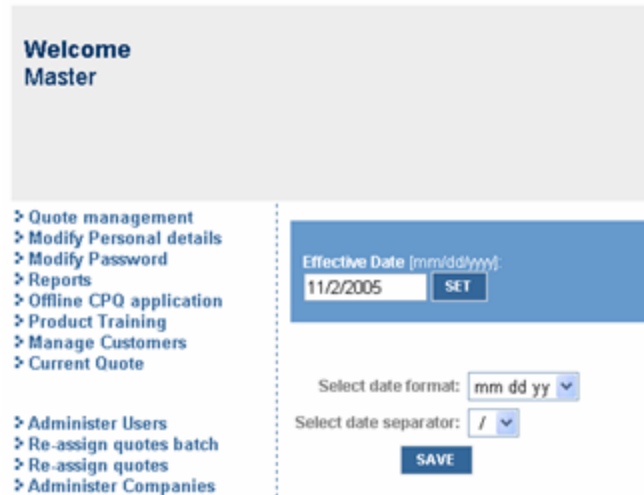
Figure 39-5 – User Page

For **Example**, we created user “test” and select user “Master” for the Managing parent user.

User “Master” now can see screen shown in Figure 39-6 when he log in as User and click to the “User Page” link.

He can

- Administer Users
- Re-assign quotes batch
- Re-assign quotes and
- Administer Companies



**Welcome Master**

- › Quote management
- › Modify Personal details
- › Modify Password
- › Reports
- › Offline CPQ application
- › Product Training
- › Manage Customers
- › Current Quote

Effective Date [mm/dd/yyyy]:  
11/2/2005 SET

Select date format: mm dd yy

Select date separator: /

SAVE

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Figure 39-6 - Managing Parent User

Administer Users is shown in figure 39-7



Select a user to modify, or [add a new user](#)

- Master
  - test

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Figure 39-7 - Administer Users

In this case, there is only one User that “Master” user can Administer.

If we click to the name of the user we got User Administration page as shown in figure 39-8. Managing Parent User can change all of data of “his” users.

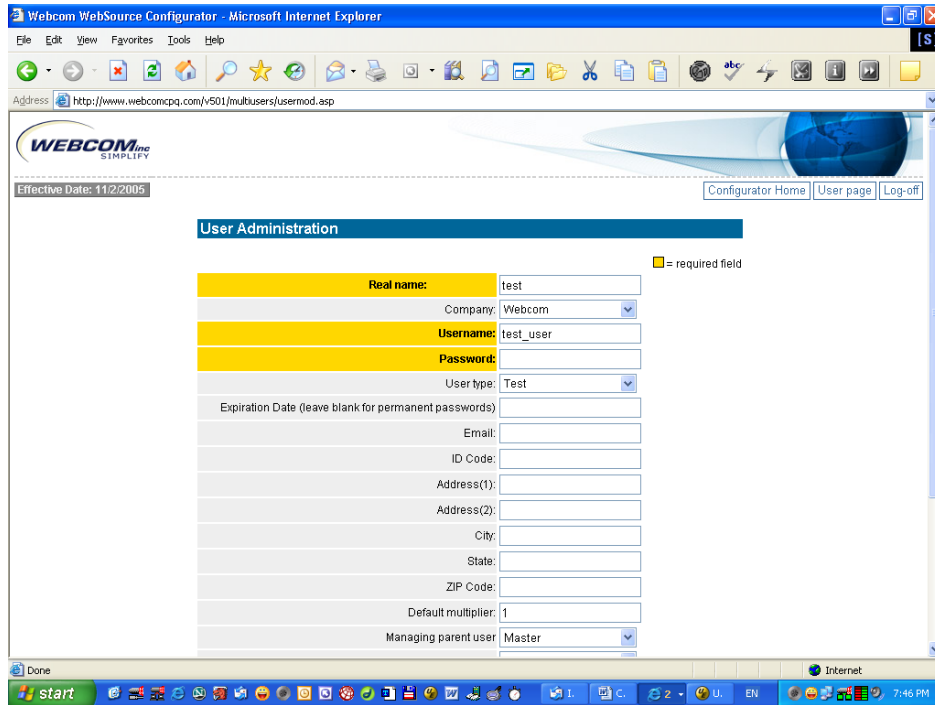


Figure 39-8 – User Administration

Re-assign quotes batch is shown in Figure 39-9.

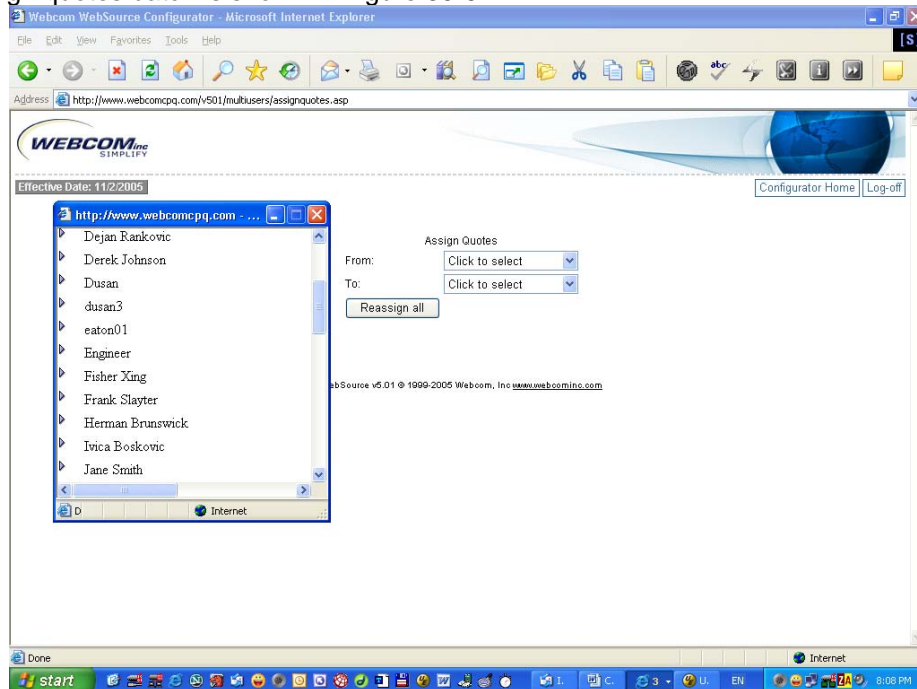


Figure 39-9 - Re-assign quotes batch

Managing Parent User can re-assign quotes from one user to another.

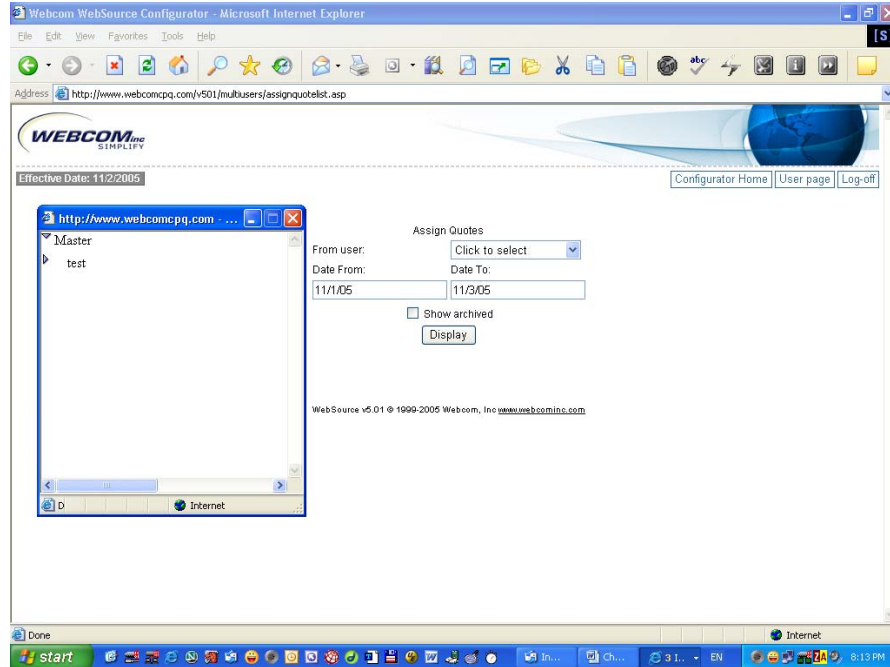


Figure 39-10 - Re-assign quotes

Re-assign quotes is shown in Figure 39-10

Managing Parent User can re-assign quotes from one interval of Time.

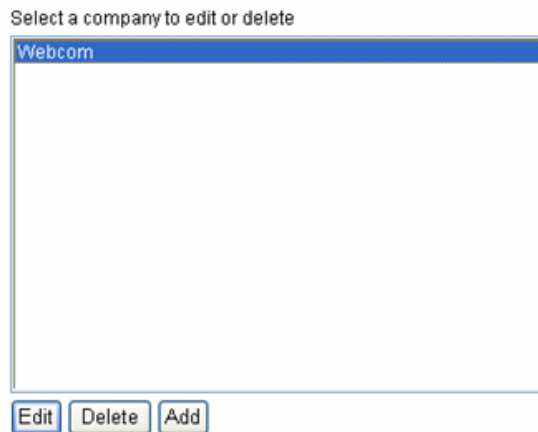


Figure 39-11 - Administer Companies

Administer Companies is shown in Figure 39-11.

Managing Parent User can Edit, Delete or Add Companies from the “child” user – in this case, the user “test.”

## Ordering Parent user

Ordering Parent user is user who receive Place Orders.

When user made a Quote and click to “Place Order” this Quote will be sent via Email to Ordering Parent user.

Ordering Parent user can be selected on User Administration page from list of existing users, as shown in Figure 39-12:

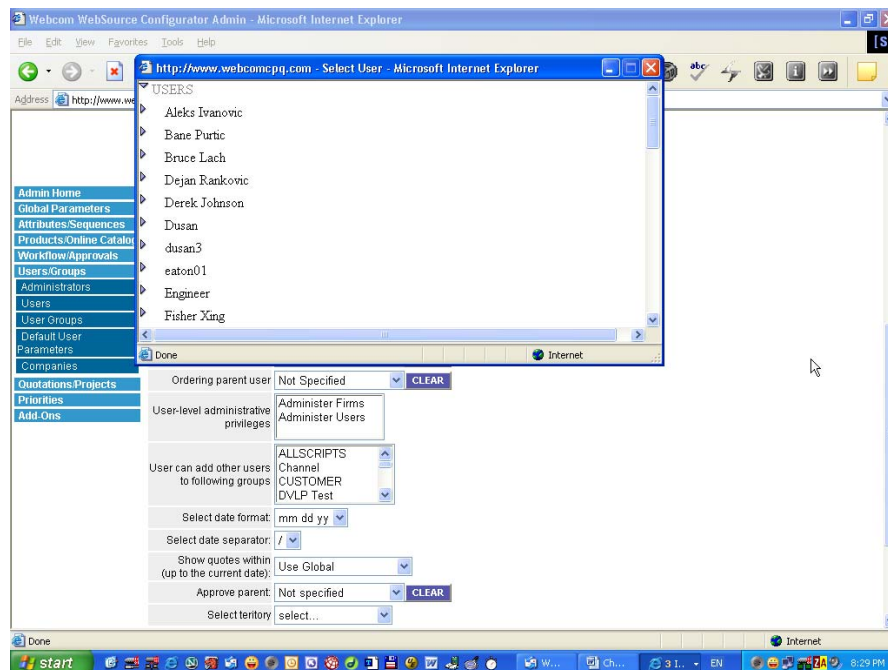


Figure 39-12 – Selecting Ordering Parent user

## **Approve Parent user**

Approve Parent user is user who can approve or reject the Quote of the user if Total Amount Limit (or Discount) is over the Limits.

For Example, if user made the Quote and overflow the Total Amount Limit he will get the information that he exceeded the limits and he no longer has the buttons "Generate Quote", "Place Order" and similar available – he will have only the button "Submit for Approval".

If user clicks the "Submit to Approval" button this Quote will be send via Email to Approve Parent user.

When Approve Parent user receives this Email he can Approve or Reject the Quote.

Approval Process Administration is described in Chapter 40.