Managing Users

The foundation of a successful CPQ program is making sure the right people have the right access. As an administrator, you can help secure your configurator environment by managing users.

In this course, you will learn to perform basic user maintenance, how to ensure user records are accurate, and learn how to track license use in the administrative dashboard.

Choose an option to get started!

Maintain the User

To begin maintaining users, click the gear icon in the upper-right to open the administrative interface.

That appears as a thin bar of icons on the left side of the window.
Click Users and Roles and then Users to see a list of all the current users.
Like all lists, this one can be searched (by typing in the search bar above the list) and sorted (by clicking the list's column headers).

Don't forget, lists support a wildcard search.

Type a portion of what you know into the search bar between *asterisks*, then press Enter.

All the records that have any word containing the characters you typed will appear.

For example, you can display all the users from a certain email domain by typing *domain*.
To clear a search, just clear the search field and press Enter again.
You can create a user by clicking the "add" button at the bottom of the user list.

A new blank user record appears. Mandatory fields are shown with an asterisk next to them.

You must complete these to save the record. To create your new user, type the first name, last name, and e-mail address.

Select any roles they need to complete their job. You can select more than one role.

When you save this new user, they will receive a welcome email. They must follow the instructions in this email to activate their account. Note that their password is never displayed. Nobody can see their password, not even a company administrator.

Editing a user is straightforward. First, find the user in the list by searching or sorting. Then click the user's email address to open the record. Make any updates or corrections to the record, and then click "save".

If you don't want to save your work, just click "cancel". You'll return to the list, with no changes saved.

To delete one or more users, you'll need to select them first. Note that a checkbox appears to the left of every item. If you check off one or more items in a list, it is selected.

Clicking an action button at the bottom of the list will perform that action on each of those selected records.

When you press the Delete button at the bottom of the list and you confirm, the records you selected will be deleted.

Here's a tip. Usually, you would deactivate a user first, and only delete that user later, after a grace period of a few days or when you're running low on licenses.

Once deleted, a user record cannot be restored.

Ensuring Accurate User Records

Managing your users is more than just creating, editing, and deleting their records.

Here are some common administrative tasks to ensure accurate records.
You may need to temporarily deactivate a user.

Maybe they are on leave for an extended period of time, or they are a contractor whose project is over, but will have another one in the future.

To deactivate a user, first find the user's record, and edit it.

Uncheck the "active" checkbox and click Save.

Now this user is still in the system, but can no longer log in.

In the future, when they return to work, simply enable the user again by turning the "active" checkbox back on.

Sometimes, a user may be deactivated automatically if they haven't logged in for many days. It's a security feature.

Once the inactive user is auto deactivated, they cannot log in. An administrator must reactivate their account.

To Reactivate an inactive user, first find the user in the list, and click their email address to open the record.

Press the "Reset Deactivation Timer" button. You're notified of the reset. You can return to the list of users: no need to press "Save".

You can click the "Reset Deactivation Timer" whenever you like on a user. They are not informed, and it does not change how they work.

The timer is automatically reset every time they log in.

Also, the duration of this deactivation timer for all users can be adjusted.

So, if your company wants to extend or shorten the amount of time, visit the Settings menu.

If you want to delete a user and purge any personal information about them, you can open the user record and press "Delete and Anonymize".

This will not only delete the record but also remove any traces of personal information stored on this user record.

Track License Use

Learn more about licenses, and other statistics, in the Admin Dashboard.
As you would expect, the configurator environment tracks the number of active users.

If you try to create a user record but don't have any more user licenses available, you'll see a warning and won't be able to save the new user.
To see the current license use, Open the administrative interface, Click Settings, and then Dashboard.
In the Licenses section of the dashboard, you can see the types of licenses your organization currently has, how many there are, and how many are being used.

As an administrator, you should review your license use from time to time by visiting this dashboard.

If you are running low on licenses, be sure to inform your team and decide the best approach.

You can either delete existing users who are no longer needed or purchase more licenses.

To learn more about the various license types and what combination would be best for your organization's needs, contact your Epicor sales representative.
The dashboard also has sections that identify how many quotes have been created, how many interactions users have had with the system, and who your most active users are when it comes to creating quotes.

The statistics shown here summarize data across all of your environments including dev, test, and production.

Recap

As an administrator, you help secure your configurator environment by managing users.

In this course, you learned to perform basic user maintenance, such as creating a user record, editing that record with updates, or deleting a user record.

We also discussed keeping user records are accurate, by disabling a user record temporarily, resetting any timeout the user has, or purging the system of any personal info about the user.

Finally, you saw how to Track license use in the administrative dashboard.

About Epicor

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Corporate Office
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean
Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298