# Epicor ECM (DocStar) – Users & Groups

In this course, we’ll go through a brief overview of users, groups, and security classes in Epicor ECM (DocStar). Then we’ll look at how to create user groups, individual user accounts, and also the bulk creation of users.

Select the right arrow to get started.

Objectives

* Overview of Users, Groups, and Security Classes
* Creating User Groups
* Creating User Accounts
* Creating Bulk Users

Overview

First, a brief overview of users, groups, and security classes – and how they relate to each other.

So, each user of Epicor ECM (DocStar) will need a user account to access the application. Apart from the usual basic things you’d expect in a user account – email, password, etc. – one important feature is the ability to set admin permissions.

Admin Permissions enable users to access different components of Epicor ECM (DocStar) functionality. A few examples include: the ability to create new users, add Fields and modify their types, edit the BuzzSpace, or access the Recycle Bin.

However, Epicor ECM (DocStar) also offers you the ability to create user groups. A group is simply a collection of users. The good thing about groups is that, instead of entering the admin permissions separately for each user, you can set the admin permissions at the group level, then all the users you place in that group will have those permissions.

And what about Security? Security applies to objects such as content files, content types, inboxes, folders, and workflows. The application uses Security Classes for this purpose.

When you create a security class, you add users or groups to it, and then specify the security permissions each group or user will have in that security class.

In a security class, you can set various security permissions. These include the ability to view, or modify, or delete items.

What’s more, within a security class, you can assign different security permissions to different users or groups.

So, on the one hand, you create a security class, add users or groups to it, and set the security permissions they will have. Then, you apply a specific security class to things like content items, content types, inboxes, or workflows.

Now we’ll look at the details of how you set up Groups, User Accounts, and Bulk Creation of Users.

Select the right arrow to continue.

Creating User Groups

We’ll start with groups. Why? Because it’s logical to create your user groups first, and set their admin permissions, and then, when you create users, you can add multiple users to the group, and they will all inherit the same settings. Not only does this speed up the process of adding new users, it also makes keeping track of permissions a whole lot easier.

To create groups, go to the Admin page, and, in the Manage column, select Groups. This brings up the Edit Group screen. By default, this screen is set up for you to create a new group. You can also view a list of existing groups in this drop-down.

Every Epicor ECM (DocStar) site starts out with a Default Group. But now we’re creating a new group.

In the Group Name field, enter a name for the group. Groups will usually correspond to a particular role within the business.

On the right, you can see the Users in Group section. This contains all the users available in the system. To add users to the group, simply select them in this list. To select more than one user, hold CTRL and select each user. All highlighted users are now members of this group.

The Admin Permissions enable users or groups to access different components of Epicor ECM (DocStar) functionality. When you check a box here, access to those features is enabled for all users that are members of this group.

When you’re done creating your group, hit Save.

Now, as I said, each site starts out with a Default Group. The idea behind the default group is to have all users in this group, and to give this group the bare minimum permissions. Usually this means the Edit Columns permission (which enables users to move columns around on their screen, and edit the metadata in them if they have security rights to do that) and the Manage Custom Lists permission, which enables users to add or modify any lists being used to file by). In the Admin Permissions, if you click All, you can select and deselect all permissions – then select the few that you want to give to the group.

So, if you have a default group with basic permissions, and all users are in this group, you can then create other groups for a specific subset of users. For example, you set up an Accounting group for the users who will be viewing certain documents. These additional groups won’t need much in terms of extra admin permissions; instead, they’ll need specific security permissions, which we’ll cover in another course dedicated to that topic.

It’s also a good idea to create a Site Administrators group, with all the Admin Permissions enabled. So, you’ll have a Default Group with minimal permissions, containing all users, and a Site Admin group with all permissions, where you place only the Site Administrator user.

Select the right arrow to move onto the next topic.

Creating User Accounts

If you’re a Site Administrator, you’ll likely be adding new users in Epicor ECM (DocStar). Here’s how. Go to the Admin page and, in the Manage column, select Users. The Edit User screen displays.

This screen is set up to enter a new user by default - -- New – shows in the Select User drop-down. In this drop-down, you can also see a list of all the existing users, but for now we just want to create a new one.

In the Username, enter the user’s email address, and enter a temporary password for them.

The Enable Independent checkbox allows you to create a username (in the format of an email address) to allow a user to login via LDAP integration.

The Enable Integrated button will be checked if you have turned on LDAP integration and the selected user account has been imported from that operation. In the User Principal Name or UPN field, you will see the name associated with that user’s Active Directory account name – which would look like [loginname.domain.local].

The Named checkbox allows you to specify if this user will take up one of your Named User licenses or will be a concurrent user. Each DocStar implementation has a set of Named user licenses and Concurrent user licenses.

• Named user licenses are always available for key users to use to log in, and are used for licensing certain seat-based licenses, such as Office Integration.

• Concurrent user licenses have a login limit – for example, if you have 4 concurrent user licenses and 6 concurrent users, only 4 of them will be able to log in and be active at the same time. Licenses can be retrieved during periods of inactivity to allow the other two users to login and perform tasks.

On the right-hand side of the screen, you have the Groups section. This lists all the user groups currently in the system.

To assign this new user to user groups, highlight them in this list. To select more than one, hold CTRL and click each group.

As with groups, you can set admin permissions just for this user. But, setting permissions at the group level makes it easier to keep track.

So, what if I set certain admin permissions for the user, and also add them to a group with other admin permissions? Or, what if I add them to several different groups with different permissions?

The answer is that admin permissions are “cumulative”. The user will have the sum of all permissions applied to their user account, and to all the groups they are part of.

Click Save.

If you’re using LDAP integration, new users can log in with their domain credentials, without you having to go through the process of adding them (as long as your domain has been set up correctly).

The first time they log in, they’ll see this message.

If the user wants to see workflow notifications, or receive emails from the Epicor ECM (DocStar) system, they’ll need to verify their email address in the email they receive from the system. Alternatively, they can click Unsubscribe, which means they won’t receive any emails from the system.

Now, typically, you’ll have (at least) one user who is the Site Administrator.

In the user account, all you have to do is select the Site Admin check box. This makes this user a master user, “if you will”. All the Admin Permissions are automatically selected, and grayed out. So, this user has admin access to everything.

By the way, for Cloud installations, a user is always designated as the Site Admin at the implementation stage.

Select the right arrow to move to the next topic..

Creating Bulk Users

Creating new users one-by-one can take a while. One option is to use the Create Bulk User tool instead.

At the bottom of the Users screen, select Create Bulk User. The Create Bulk User window displays.

In the Username(s) field, enter all the users’ email addresses, separated by a comma.

Next, select the Groups these users will be members of. Remember, hold down CTRL to select multiple groups.

Select the Admin Permissions you want these users to have.

Select the Send Email check box. The users will receive an email with a link to log in to the site, so enter a Subject and Body for the email, to tell users what to do.

Require New Password is the right way to go; when the new user signs in, they’ll be prompted to create a new password for their account.

Hit Send.

When the users access the link to sign in for the first time, they should enter a new password.

Select the right arrow to move on to a short recap.

Recap

In this course, we started with an overview of Users, Groups, and Security Classes. Then we looked at user groups and how to create them, as well as user accounts, and how to create those. We also noted the importance of Site Administrator accounts, and then we went through the bulk creation of users.

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