



# User Management Manual

Version: 1.0

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## Introduction

In this release we introduce the new **User Management** module, which allows you to manage all user provisioning operations, such as adding users, managing permissions and more, making it easy, accessible and intuitive to manage the users in your projects.

In addition, if you are working on multiple projects with Panaya, this new module gives you the ability to review and manage users in all projects from one central place.

## Previous Versions

In earlier versions, when you needed to add new Panaya users or change users' permissions, you had to contact Panaya Support.

## Main Features

The new User Management module allows you to perform the following activities:

1. Add/update users in all your projects
2. Set users' permissions
3. Reset users' passwords
4. Allow/deny access to Panaya projects

**Important note:** The ability to access the User Management module is by permission. If you need to perform the activities described above, please contact your account admin in your organization.

## User Management – New and Altered Screens

### Access to User Management Module

On the Setup page, a new link was added: **Manage Users**, as shown in figure 1. Pressing this link brings you to the main page, from which you can perform all user management activities.

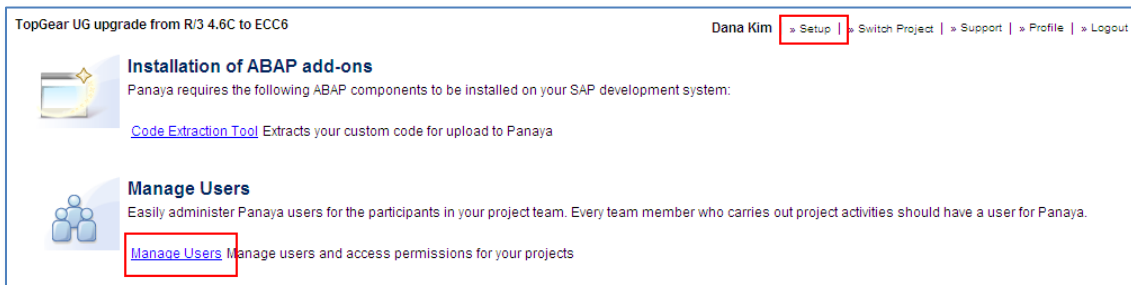


Figure 1

### User Management Main Page


Pressing the **Manage Users** link in the Setup page opens a new page with a list of all users in all projects that you have Manage Users permission on, as shown in figure 2.

The screenshot shows the 'Manage Users' main page. It features a table with columns for First Name, Last Name, Email, and Projects. The table lists 14 users, each with their email address and the projects they are associated with. The page also includes a navigation menu on the left with 'Manage Users' and 'Create User' options, and an 'Export' button with links for Excel, CSV, and PDF.

First Name	Last Name	Email	Projects
April	Pealot	<a href="mailto:April.Pealot@topgear.biz">April.Pealot@topgear.biz</a>	TopGear SP upgrade to SAP ERP 6.0 SP Stack 16 TopGear UG upgrade from R/3 4.6C to ECC6
Benjamin	Over	<a href="mailto:Benjamin.Over@topgear.biz">Benjamin.Over@topgear.biz</a>	TopGear SP upgrade to SAP ERP 6.0 SP Stack 16 TopGear UG upgrade from R/3 4.6C to ECC6
Bob	Shrunkle	<a href="mailto:Bob.Shrunkle@topgear.biz">Bob.Shrunkle@topgear.biz</a>	TopGear UG upgrade from R/3 4.6C to ECC6
Chris	Anthemum	<a href="mailto:Chris.Anthemum@topgear.biz">Chris.Anthemum@topgear.biz</a>	TopGear UG upgrade from R/3 4.6C to ECC6
Dana	Kim	<a href="mailto:dana.kim@topgear.biz">dana.kim@topgear.biz</a>	TopGear SP upgrade to SAP ERP 6.0 SP Stack 16 TopGear CL Cleansing TopGear UG upgrade from R/3 4.6C to ECC6
Ivana	Tinkle	<a href="mailto:Ivana.Tinkle@topgear.biz">Ivana.Tinkle@topgear.biz</a>	TopGear UG upgrade from R/3 4.6C to ECC6
Jaques	Strapp	<a href="mailto:Jaques.Strapp@topgear.biz">Jaques.Strapp@topgear.biz</a>	TopGear UG upgrade from R/3 4.6C to ECC6
Jena	Talia	<a href="mailto:Jena.Talia@topgear.biz">Jena.Talia@topgear.biz</a>	TopGear UG upgrade from R/3 4.6C to ECC6
Mike	Rotch	<a href="mailto:Mike.Rotch@topgear.biz">Mike.Rotch@topgear.biz</a>	TopGear UG upgrade from R/3 4.6C to ECC6
Peter	Wiener	<a href="mailto:Peter.Wiener@topgear.biz">Peter.Wiener@topgear.biz</a>	TopGear UG upgrade from R/3 4.6C to ECC6
Scott	Free	<a href="mailto:Scott.Free@topgear.biz">Scott.Free@topgear.biz</a>	TopGear UG upgrade from R/3 4.6C to ECC6
Steven	Harrison	<a href="mailto:Steven.Harrison@topgear.biz">Steven.Harrison@topgear.biz</a>	TopGear UG upgrade from R/3 4.6C to ECC6
Tara	Dikov	<a href="mailto:Tara.Dikov@topgear.biz">Tara.Dikov@topgear.biz</a>	TopGear UG upgrade from R/3 4.6C to ECC6

Figure 2

The following table contains an explanation of the fields in the table:

Setting	Description
	Open the Update User page
<b>First Name</b>	User's first name
<b>Last Name</b>	User's last name
<b>Email</b>	Email address, used as the username to login to the Panaya application
<b>Projects</b>	List of projects that the user can access

## Create New User

1. Access the User Management module.
2. Press the **Create User** link on the menu on the left side.

The following screen is displayed:

TopGear UG upgrade from R/3 4.6C to ECC6 Steven Harrison | » Setup | » Support | » Profile | » Logout

**Create User**

- Email:  The email address is used as the Panaya user name. The initial password will be generated automatically and sent to this email address.
- First Name:
- Last Name:  [First Name].[Last Name]: will be shown as task owner.
- Receive Updates:  Receive important updates on Panaya releases and planned maintenance windows. We will not spam you.

**Select Projects**  
Select Panaya projects relevant for this user. You control the user permissions for each project individually.

<input checked="" type="checkbox"/> TopGear UG upgrade from R/3 4.6C to ECC6 <small>details</small>
SAP User Name: <input type="text" value="DEBORAHM"/> <small>If a Panaya user also has access to the SAP Development system, please indicate the SAP user and Panaya will assist you in reallocating the right tasks to the user</small>
<b>Permissions:</b>
<input type="checkbox"/> Upload Code <small>Permission to send code to Panaya for analysis</small>
<input checked="" type="checkbox"/> Budget <small>Permission to use the budget module of Panaya</small>
<input type="checkbox"/> Manage Users <small>Permission to manage users and roles for this account</small>
<input checked="" type="checkbox"/> Mass Edit <small>Permission to edit multiple tasks at once</small>

Figure 3

3. Enter user's settings:
  - a. User Details
    - **Email:** The email address used as the Panaya user name
    - **First Name:** User's first name
    - **Last Name:** User's last name
    - **Receive Updates:** Allows user to receive important updates on Panaya releases and planned maintenance windows
  - b. Select Project
    - **Project name checkbox:** Choose the project by checking the box next to the project name
    - **SAP User Name:** SAP user as it is defined in this SAP system
  - c. Define permissions – choose one or more permissions:
    - **Upload Code:** Permission to upload code to Panaya for analysis
    - **Budget:** Permission to use the budget module of Panaya
    - **Manage Users:** Permission to manage users and permissions for this project
    - **Mass Edit:** Permission to edit multiple tasks simultaneously
4. Press the **Save** button. The user is added to the Panaya application; the initial password is generated automatically and sent to the email address set in the **Email** text field.

**Note:** There is no limitation on the number of users that can be added to a project.

## Update an Existing User

1. Access the User Management module.
2. Press the **Update User** icon in the Manage Users table on the User Management main page.

The following screen is displayed:

TopGear UG upgrade from R/3 4.6C to ECC6 Steven Harrison | » Setup | » Support | » Profile | » Logout

**Update User**

Email:  The email address is used as the Panaya user name. The initial password will be generated automatically and sent to this email address.

First Name:  [First Name].[Last Name] will be shown as task owner.

Last Name:  [First Name].[Last Name] will be shown as task owner.

Receive Updates:  Receive important updates on Panaya releases and planned maintenance windows. We will not spam you.

Reset Password:  Reset the password for this user. An email will be sent to the user with the new password.

**Select Projects**  
Select Panaya projects relevant for this user. You control the user permissions for each project individually.

Project	Permissions
<input checked="" type="checkbox"/> TopGear UG upgrade from R/3 4.6C to ECC6 <span style="float: right;">details ▾</span>	
SAP User Name: <input type="text"/>	<small>If a Panaya user also has access to the SAP Development system, please indicate the SAP user and Panaya will assist you in reallocating the right tasks to the user</small>
<input type="checkbox"/> Upload Code	Permission to send code to Panaya for analysis
<input type="checkbox"/> Budget	Permission to use the budget module of Panaya
<input type="checkbox"/> Manage Users	Permission to manage users and roles for this account
<input type="checkbox"/> Mass Edit	Permission to edit multiple tasks at once.

Figure 4

3. Update user's setting as needed.
4. Press the **Save** button. User's settings are updated in the Panaya application.

**Note:** For changes to be applied, user must again log in to the Panaya application.

## Create / Update User When Working With Multiple Projects

When you manage multiple projects, you are able to assign users to all the projects you have Manage Users permission on.

The Create/Update User displays all projects, as shown in figure 5.

Under the **Select Projects** section, all available projects are shown.

Pressing the **Details** link expands this project's settings and enables you to define the SAP User Name and assign permissions to the user for this specific project.

Unchecking the **Project Name** checkbox denies this user access to the project.

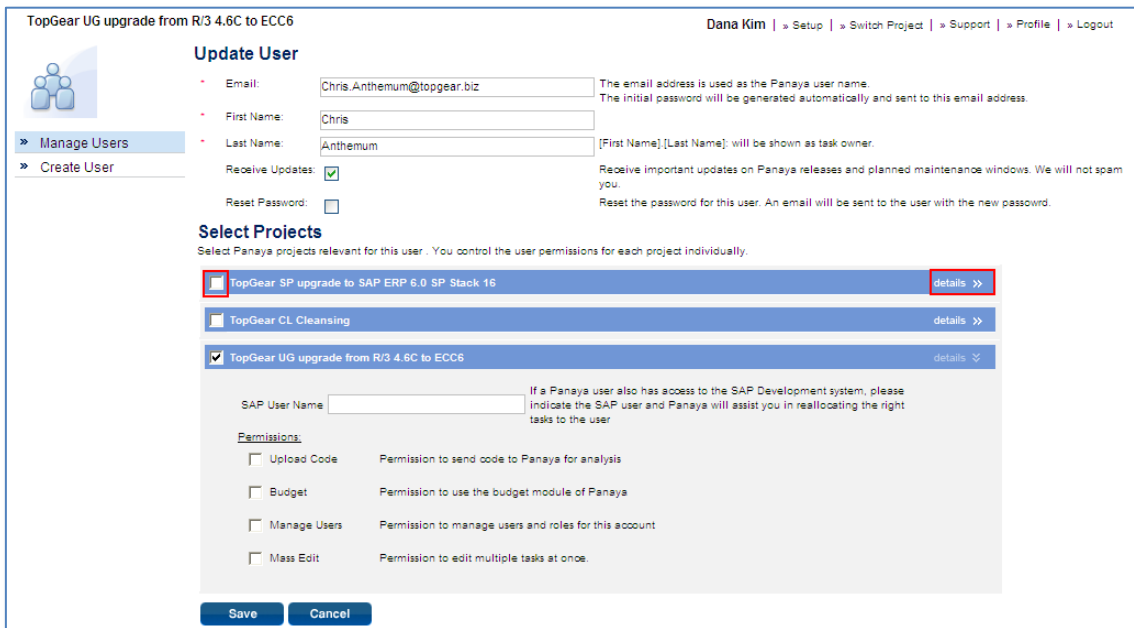


Figure 5

Following are all scenarios for adding new users when working with multiple projects:

1. If the user already exists in the Users list, check the project name checkbox.  
The user receives an email inviting him to connect to the new project, using the same username and password that he is using for other Panaya projects.
2. If the user does not exist in the Users list, follow the **Create User** procedure to add the user.
  - a. If the user already has a Panaya login username, he receives an email invitation to connect to the new project, using the same username and password used for other Panaya projects.
  - b. If this is a new user, he receives an email with Panaya credentials and instructions on how to connect to the Panaya application.

If you have any problems or questions, please contact our support team at [support@panayainc.com](mailto:support@panayainc.com)  
Panaya Support Team