Procedure Instruction
for the client administration in

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A pproval Documentation

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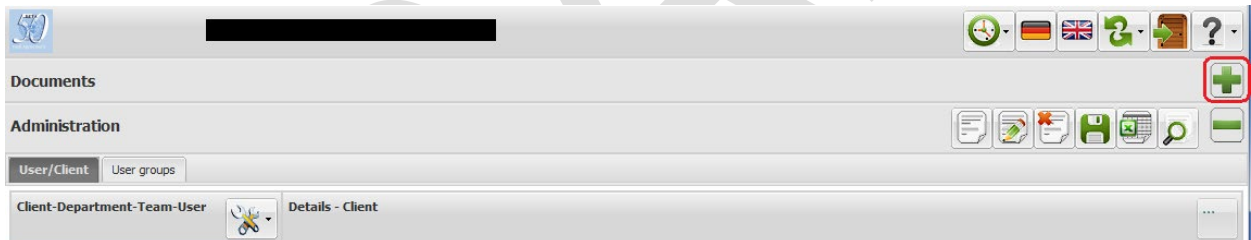
1 Client administrator

As a client administrator your main doing is to reset user's passwords or to create new users. But you can also manage the client structure and associate the users of your client to certain user groups.

1.1 Change into administrator view

To change into the administrator view, click on at the bottom right of the page.

To change back to the documents area click on at the top right of the page.

In administration view there are two tabs, "User/Client" and "User groups".

- **User/Client**
    - Management of the organization structure and users of the client
- **User groups**
    - Management of the membership of the users to certain groups

2   User/Client

2.1   Client Tree

The organizational structure of the client has 4 levels: Client – Department – Team – User.

That structure cannot be changed. A user has always to be assigned to a team, a team relates to a department and a department relates to the client.

2.1.1   Create new department or team

You can create new departments and teams for your client. For creating a new department click on the entry of your client and then select "New" from the toolbar or with the right mouse key.

For creating a new team do accordingly when the department entry is marked.

For example: If you want to distinguish your client into countries, you can create a department for every country and there you distinguish different cities in the country you can create a team for each city.

Attention! The department or team name cannot be changed after they are created. So if you want to change the name you must create a new department or team and move all associated users.

Departments and the teams do not have any influence on the users, they are only a feature for the overview.

2.1.2   Delete department or team

If you want to delete a team you must be sure that there is no user listed under this team. Click with the right mouse key on the team you can choose "Delete…" and then follow the wizard to delete the team.

If you want to delete a department you must be sure that there is no team listed under this department. Click with the right mouse key on the department and choose "Delete…". Then follow the wizard to delete the department.

2.2 User management

2.2.1 Shown users

Users are listed under the team. If you do not want to see the invalid users as well mark the box "Hide invalid users".

2.2.2 Create new user

The client administrator can create new users for his client. New users can be created by selecting "New" from the toolbar or with the right mouse key when the team is selected.

A wizard opens. Here the attributes of the user have to be assigned.

User account: This is the login name the user has to enter in the login dialogue. The login name has to be unique. It is recommended to create login names that show the belonging to your authority, e.g. KBAxxx

Password: Following rules to create a password have to be observed:

- minimum length 8 characters

- must contain at least

  - 1 capital letter (ABCDEFGHIJKLMNOPQRSTUVWXYZ)

  - 1 special character (<>|,.-;:_#+'*~!\"$%&/()=?{[]})

  - 1 digit (0123456789)

  - 1 lower case letter

Last name: this name is shown within the system, e.g. as creator of a document or logged in user. The user name should show which authority the user belongs to, e.g. KBA_Germany_xxx

First name: The first name of the user. The first name appears at the top of the page when the user is actually logged in.

Email: The email of the user. This is only an information field; the email is not being shown anywhere else.

Remark: for additional information, e.g. phone etc.

Expiry date: If this date is set, the user cannot login anymore after that date.

Password change each: Actually that value is set to 42 days and is not changeable.

Selected language: automatically selected language after login. You can choose English or German. For DETA English should be chosen.

Attention! Mandatory fields are marked with a black exclamation mark above a yellow background.

After assigning the attributes click "Next>" for chosing the user groups for the new user. With a click on "Finished" the new user is created.

Another possibility for creating a new user is to copy an existing user by clicking with the right mouse key on the user you would like to copy. In the submenu you choose "Duplicate…".
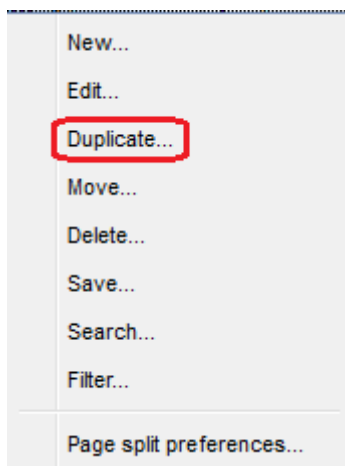
In the first step you change all attributes like above for the new user.

In the second step the selected user groups are the same as those of the user which was duplicated. You only change the user groups if changes are necessary. With a click on "Finished" the new user is created.

2.2.3   Search user

There are two ways to search for users. The first way is to click on "Start search" [🔍] at the top of the page. Secondly you can mark your team and then select "Search…" on right mouse key.

You can search for any attribute you have set for the users.

By default only valid users are searched for. If also invalid users shall be shown check the "invalid" checkbox. Invalid users are those where the expiry date is set on a date before today's date.

If you uncheck the "**Case Sensitive**"-checkbox it does not matter if you use capital or lower case letters for the search.

With a click on "Search" you start the search.
With a click on "Clear Search Fields" the filled attributes will be cleared.
With a click on the "Delete Result"-button all results in the list will be deleted.

To change into the user details you can do a double click on the user or click on "Goto/Use selection".

The search result can be exported to Excel with a click on "Export".

2.2.4   Change user

2.2.4.1   Change user attributes

If you have selected the right user you can change the user's attributes.

Attention! The attributes that have a yellow background are not changeable.

Attention! The changes will not be saved automatically. You must press the shortcut "ctrl+s" or click on

"Save" [💾] at the top of the page or choose "Save…" with the right mouse key on the user in the context menu.

2.2.4.2   Change membership of user groups

You can change the membership of the users and their user groups. When you click on a group which is listed under "Assigned groups" you can check or uncheck the user groups for the user in the pop up. With a click on "Finished" you commit the changes.

Attention! The changes will not be saved automatically, see above (2.2.4.1)

2.2.4.3   Reset user password

If a user has forgotten the password you can reset it easily.

First you search for the right user. With a double click you get into the view of the user details. There you can enter the new password in the password attribute.

Attention! You must also reset the counter of Login failures via click on the "Reset"-button.

Attention! The changes will not be saved automatically. See above

2.2.5   Move user

To move a user from one team to another click with the right mouse key on the user and on "Move…" in the submenu. You can follow the wizard and select the new team the user shall belong to. Then click on "Finished".

Attention! You can only move one user at a time.

Hint: First define your client structure and select the right team before you create a new user.

2.2.6   Delete user

As client administrator you can delete any user under your client. If the user is not owner of one or more documents you can delete the user without any error messages by clicking with the right mouse key on the user and choose in the submenu "Delete…".

But if the user is owner of one or more documents you get this message:
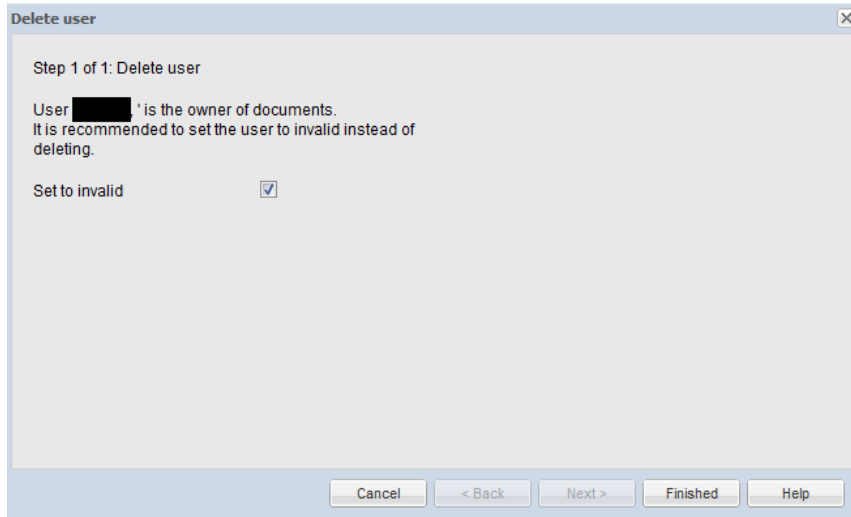
The system recommends to set the user to invalid because he is owner of documents. If you delete this user you cannot see who has uploaded the documents because the owner would be set into "???".

In these cases follow the recommendation of the system. A user that is set invalid can no longer login into DETA.

3   User groups

The tab "User groups" is information for you. There you see all user groups you can handle with and which user is member of the groups. You cannot create a new group or change any existing group.

You can also assign users to your user groups. If you click on the "Associated users" a pop up comes up and there you can check or uncheck all your users.

4   Blocked account

If you mistype the password for three times your account will be blocked. Please inform the DETA-administration then (DETA@kba.de). The DETA-administration will unblock your account then.

5   Further help

If this manual is not help enough please refer to the system help
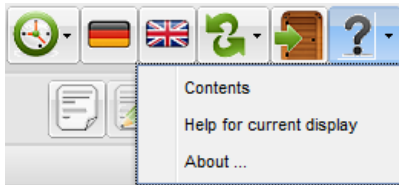
If everything does not help you, you can ask the DETA-administrator (DETA@kba.de).

Editorial

We score with road safety!