



Slide 1

We are working with User Access Profiles and in this tutorial we are going to look at examples of how we can Copy Menu Profiles



Slide 2

When we copy Menu Profiles, the effect is taking place only in the current Data Mart where we are working.

Now when would we want to use the Copy options for Menu Profiles? This is a way of constructing a complete new Menu structure or adding to an existing Menu structure for a User Profile in a specific Data Mart i.e. a Data Mart in which we are working at the moment.

So we would use this method to create a new Non Logon Profile and we can also use it for a User where we do not use Subscription Profiles but rather construct or build the menu manually.



Slide 3

In my examples now I am going to use a user code called "JS" for John Smith

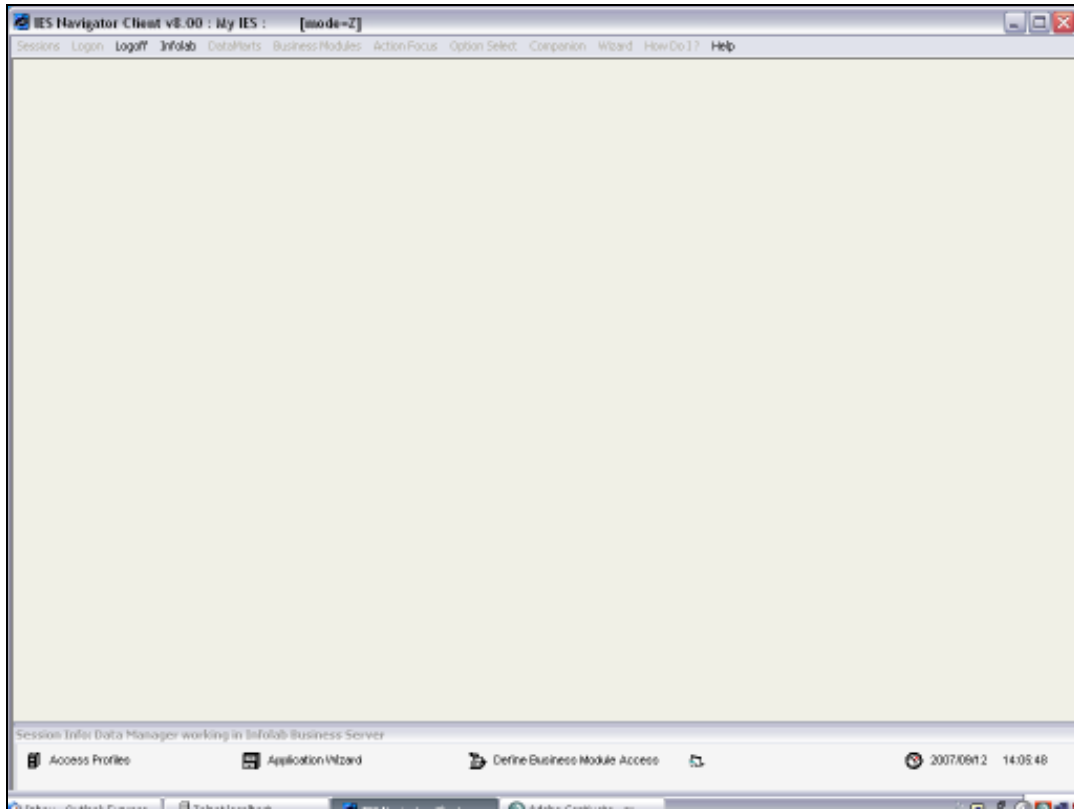


Slide 4

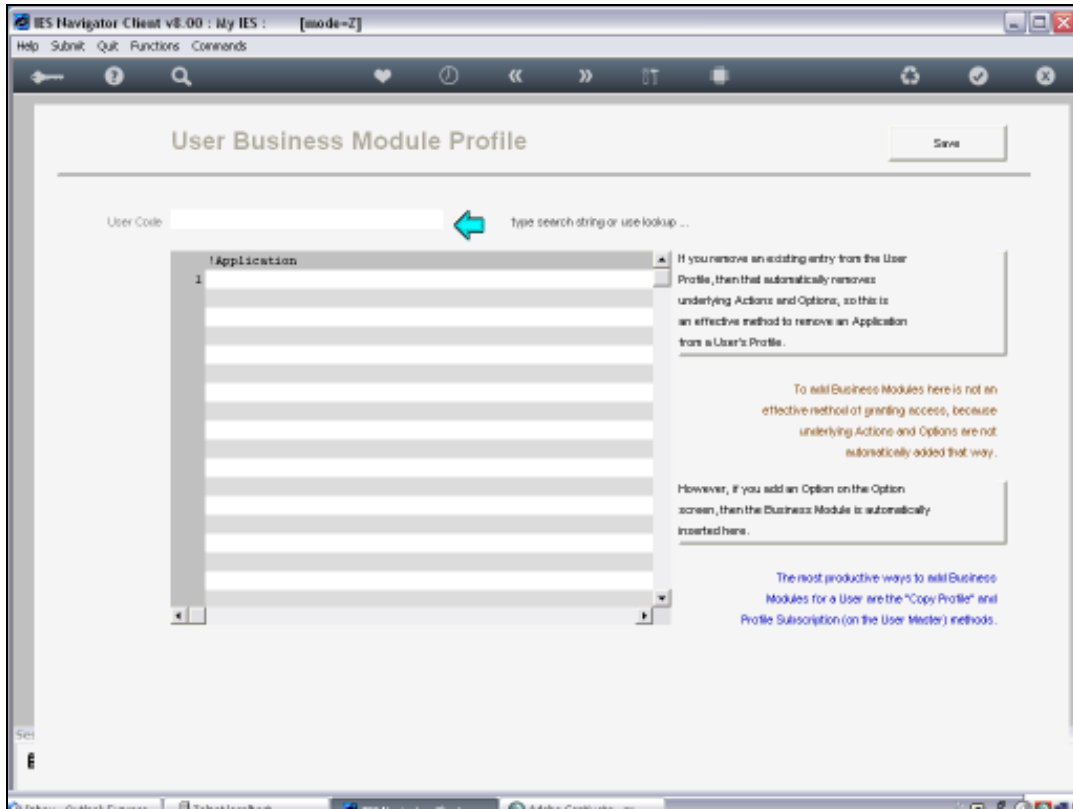
And 1st of all I just want to show that at the moment, if I look at the Business Modules



Slide 5

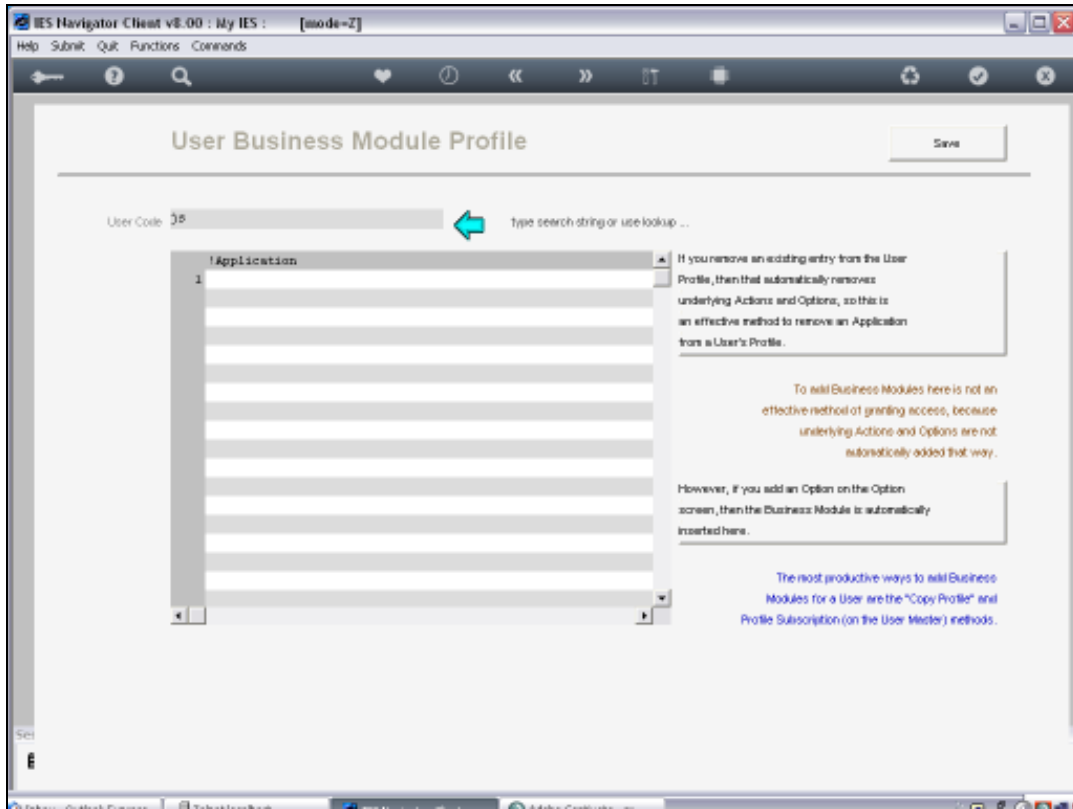


Slide 6

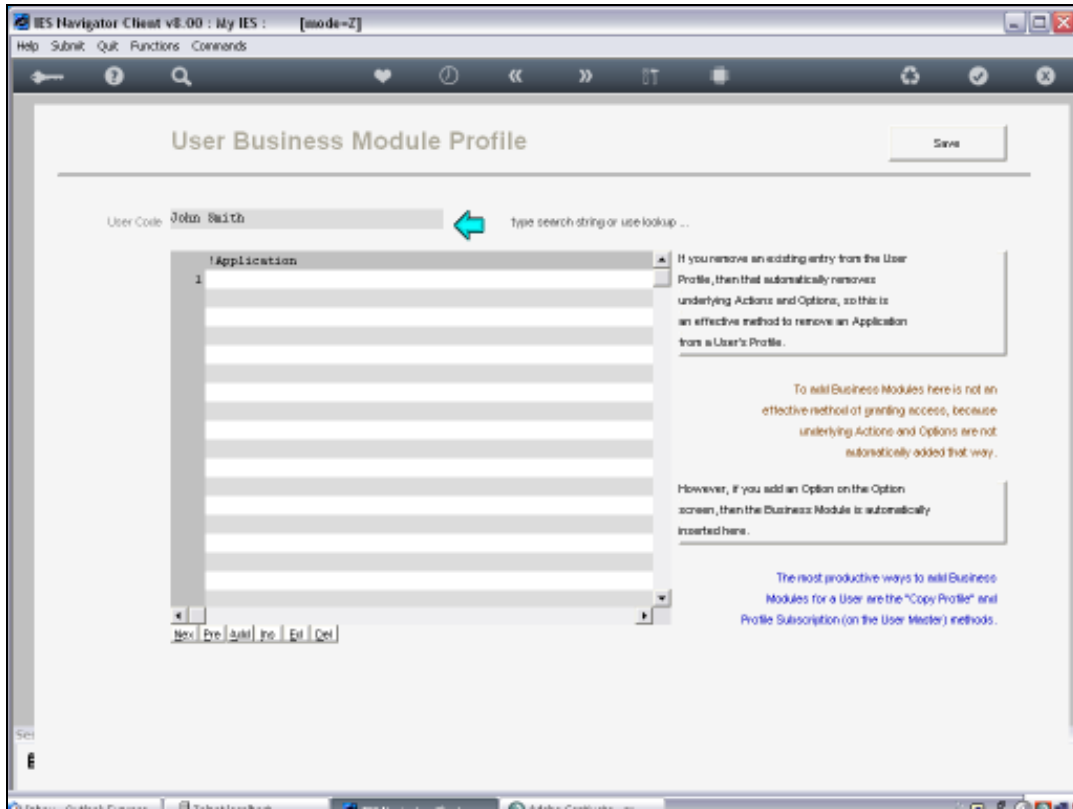


Slide 7

For this Data Mart for "JS"

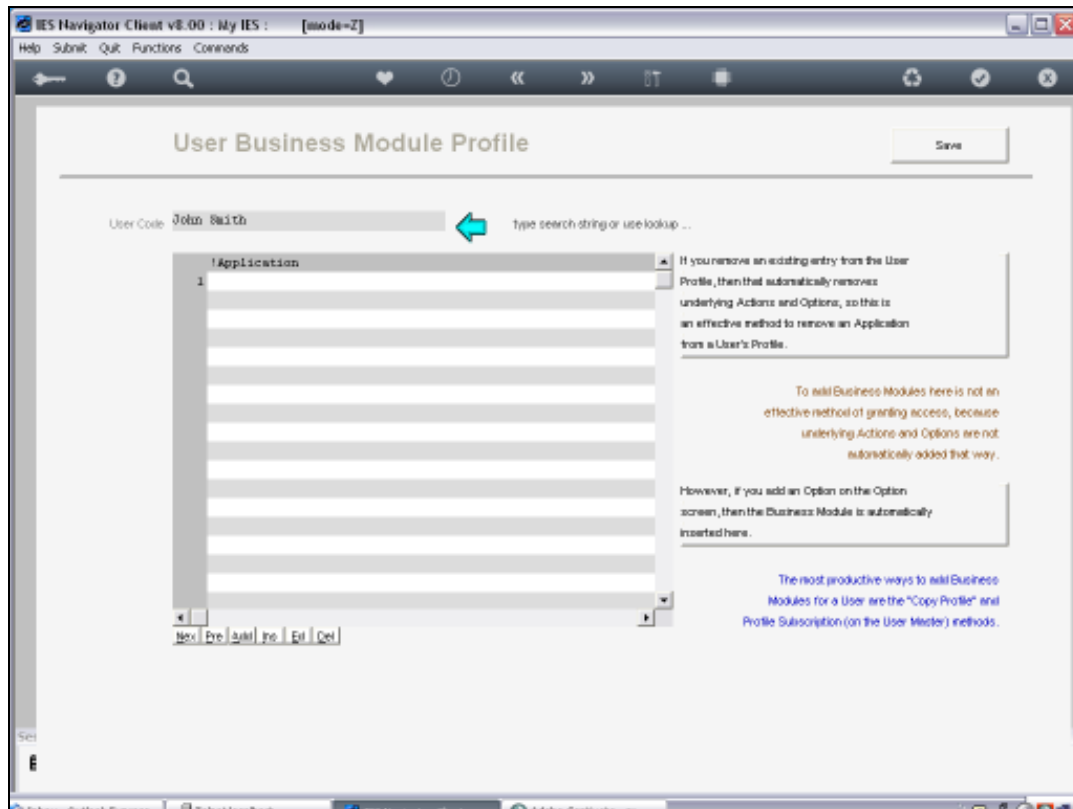


Slide 8



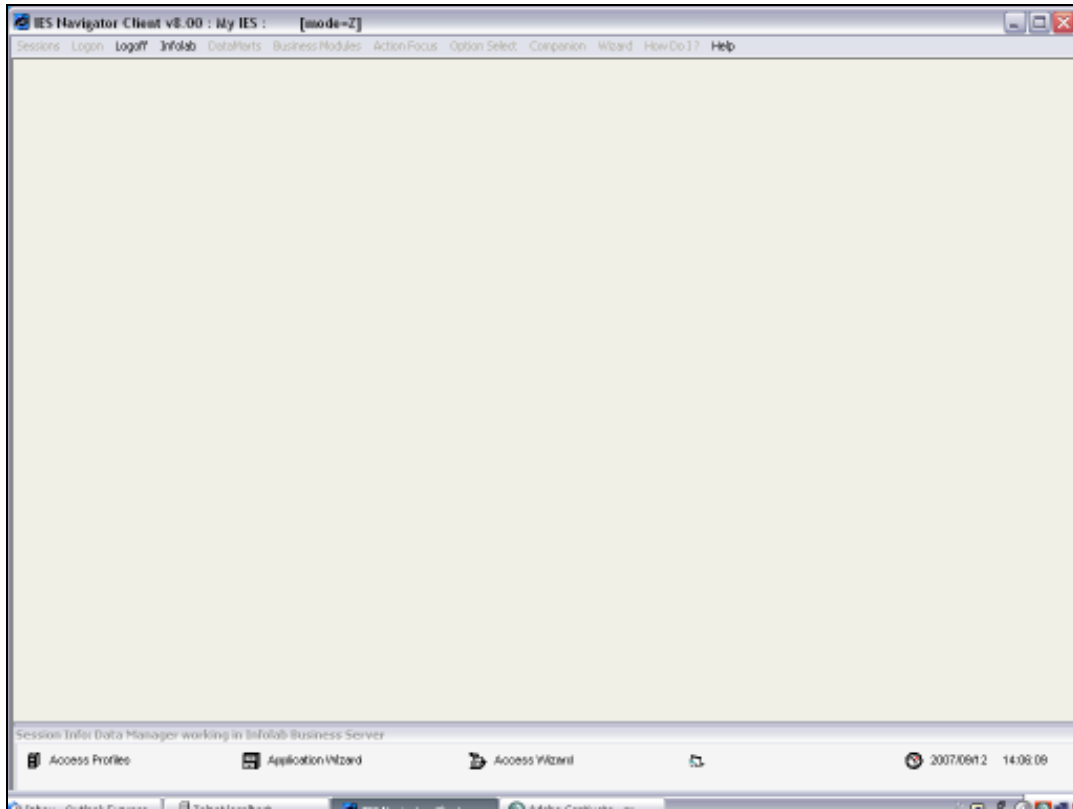
Slide 9

We can see that there is nothing on the application list here



Slide 10

We do not see any entries. That means that this User, John Smith, does not have any Menu Access in the current Data Mart at the moment.



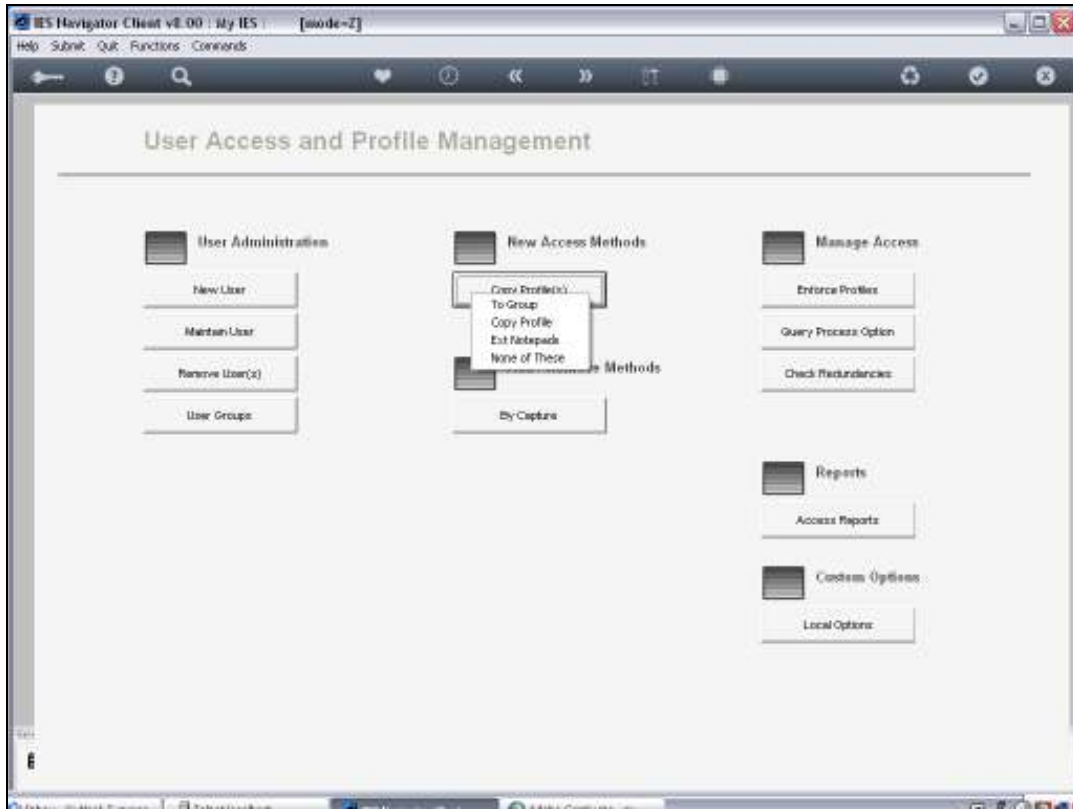
Slide 11

So what I am going to do now, is I am going to the Copy Method



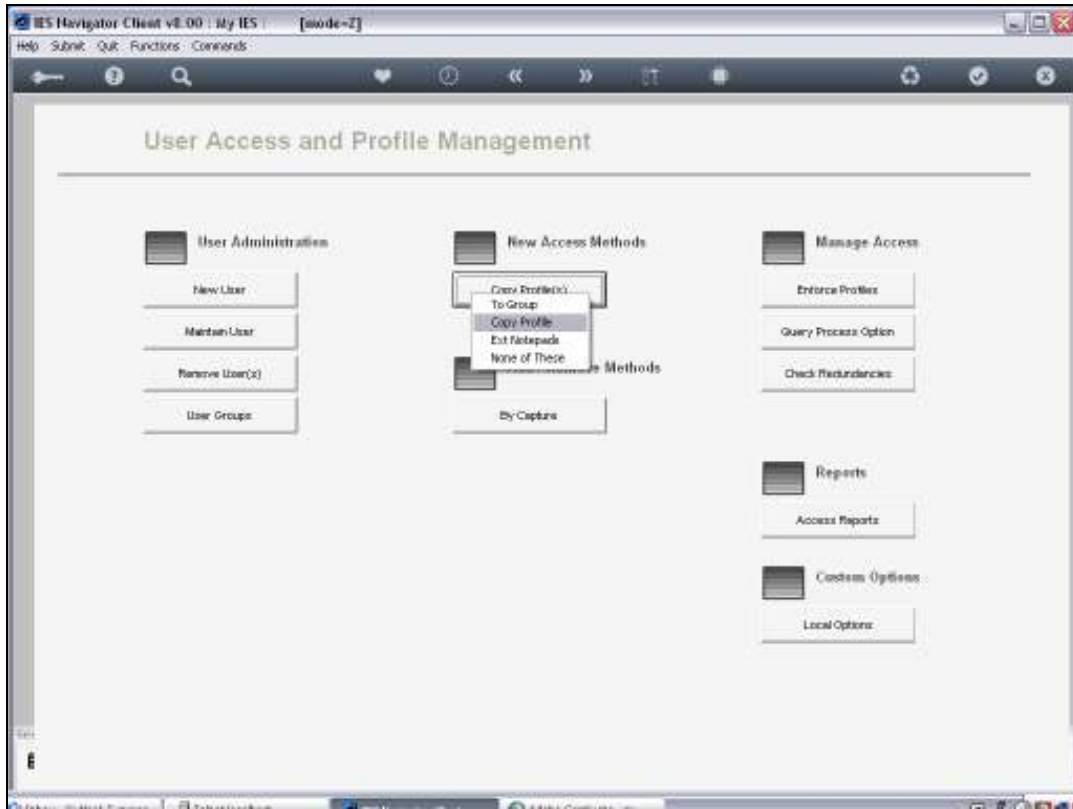
Slide 12

New Access Methods
Copy Profile(s)



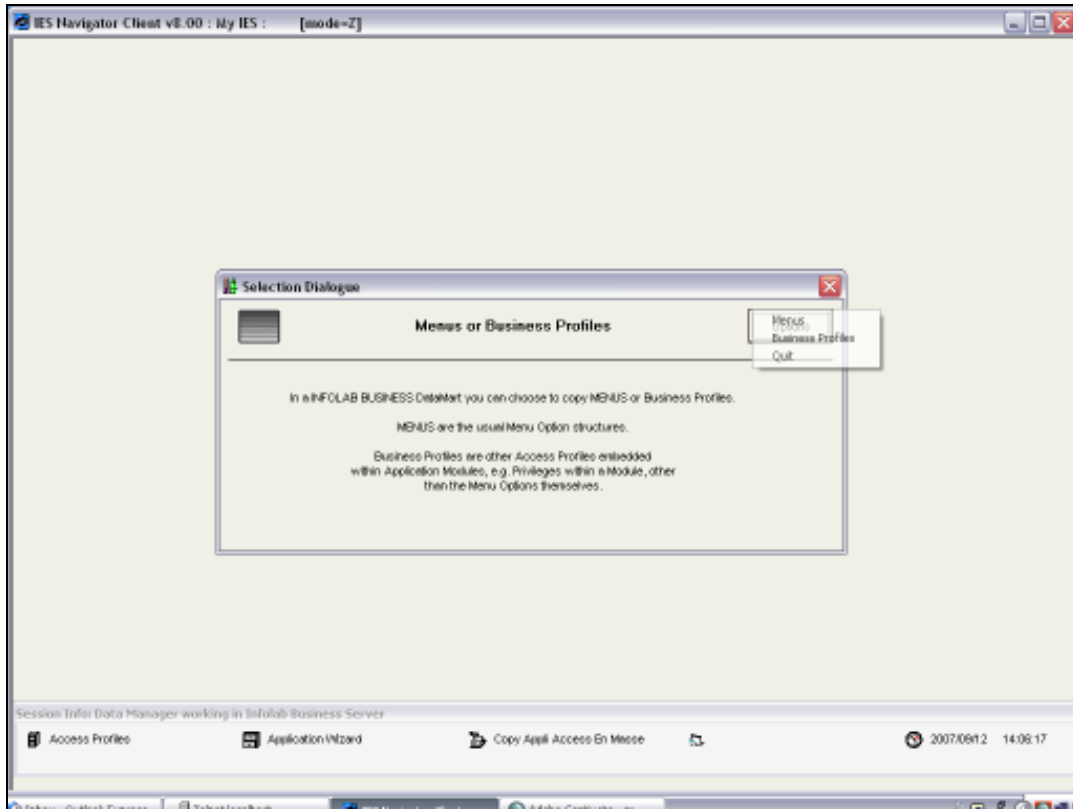
Slide 13

And I am going to choose



Slide 14

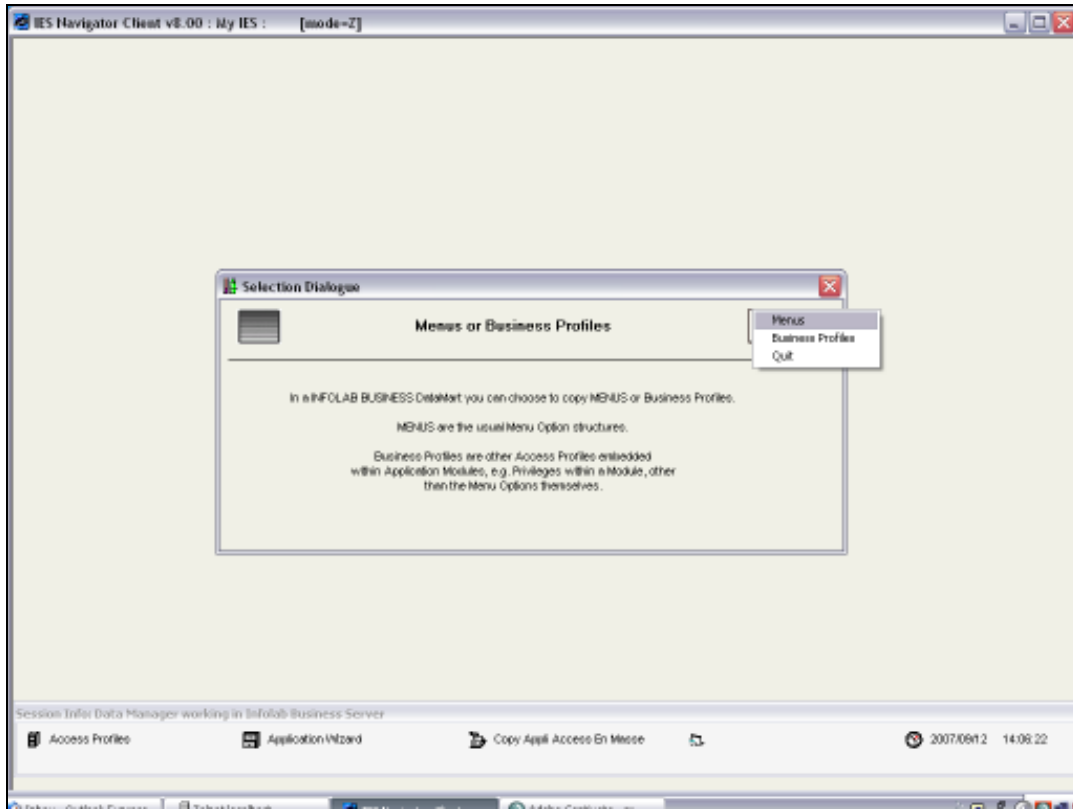
Copy Profile



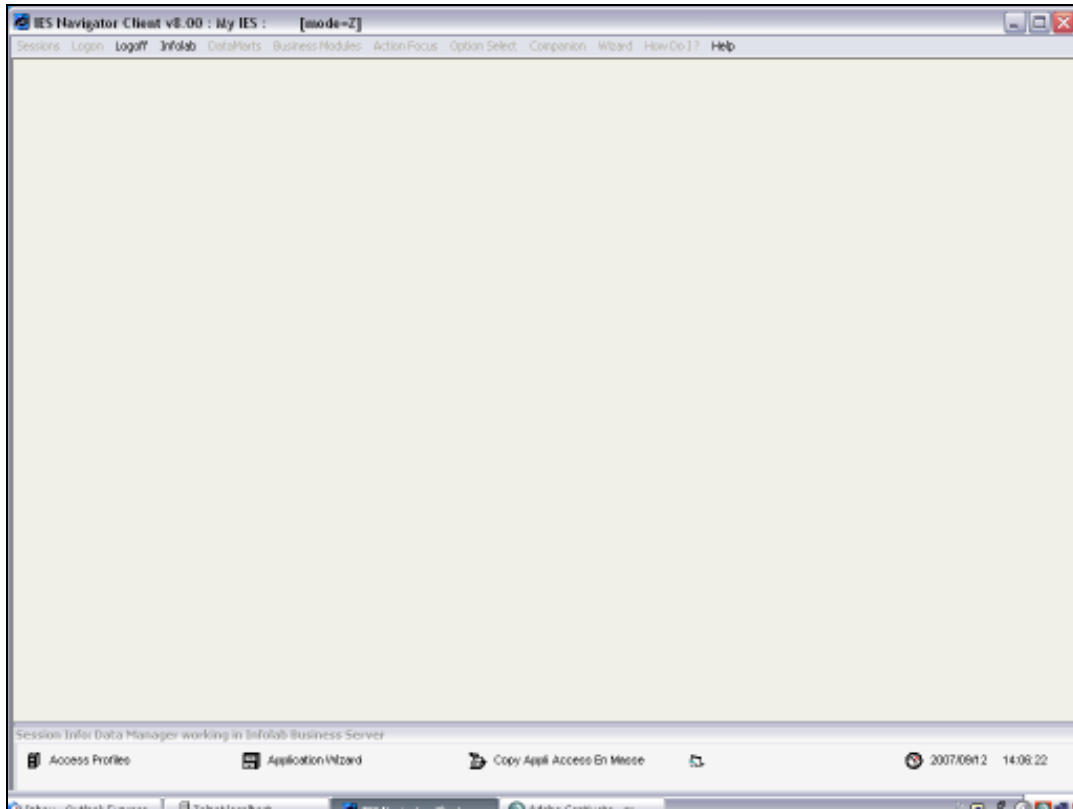
Slide 15

And then I will select Menus.

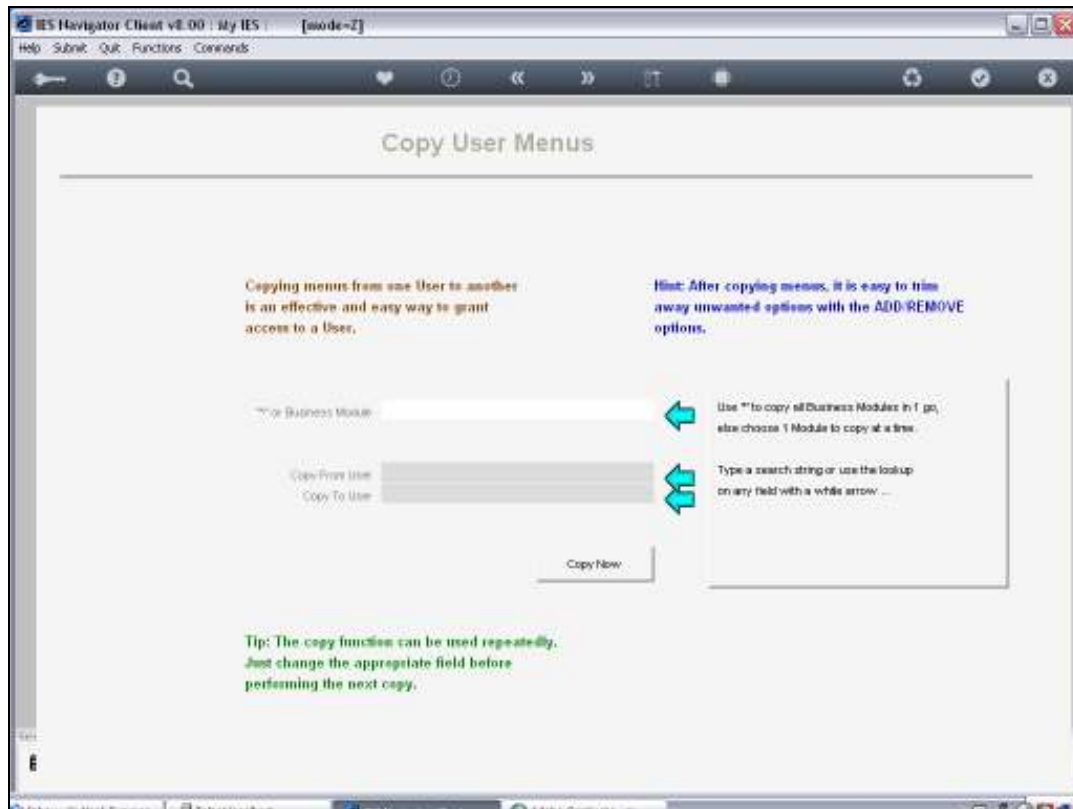
There is a difference between Menu Profiles and Business Profiles.



Slide 16



Slide 17

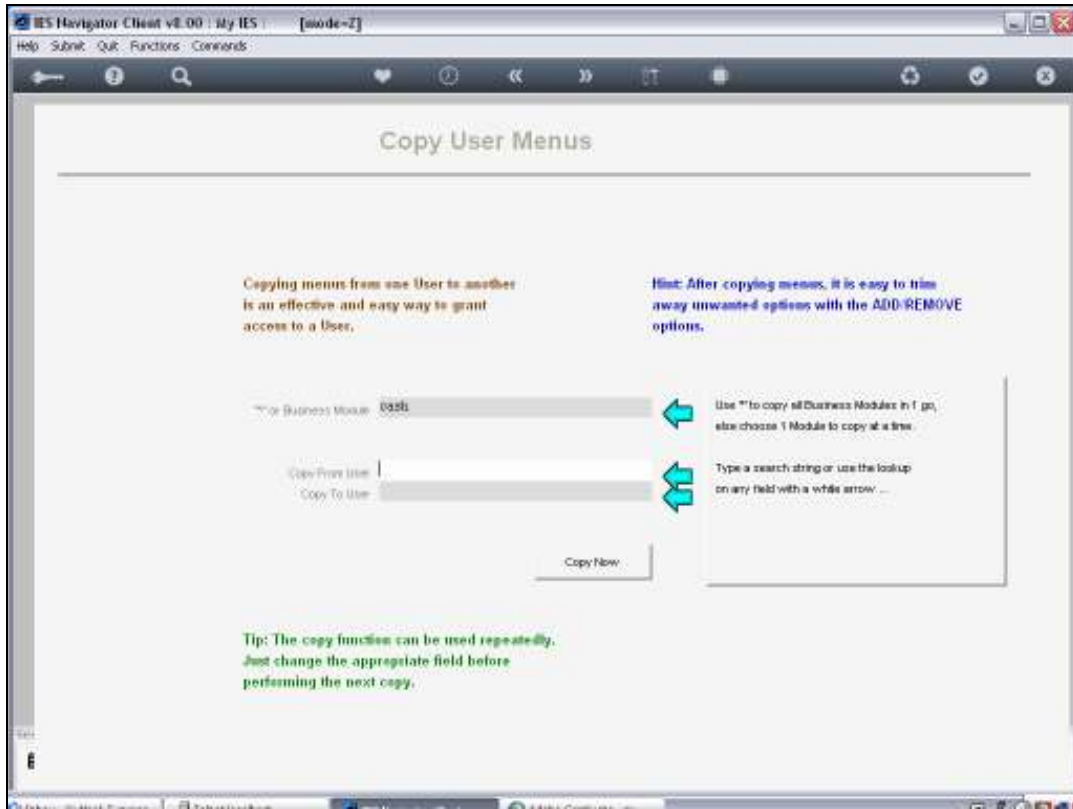


Slide 18

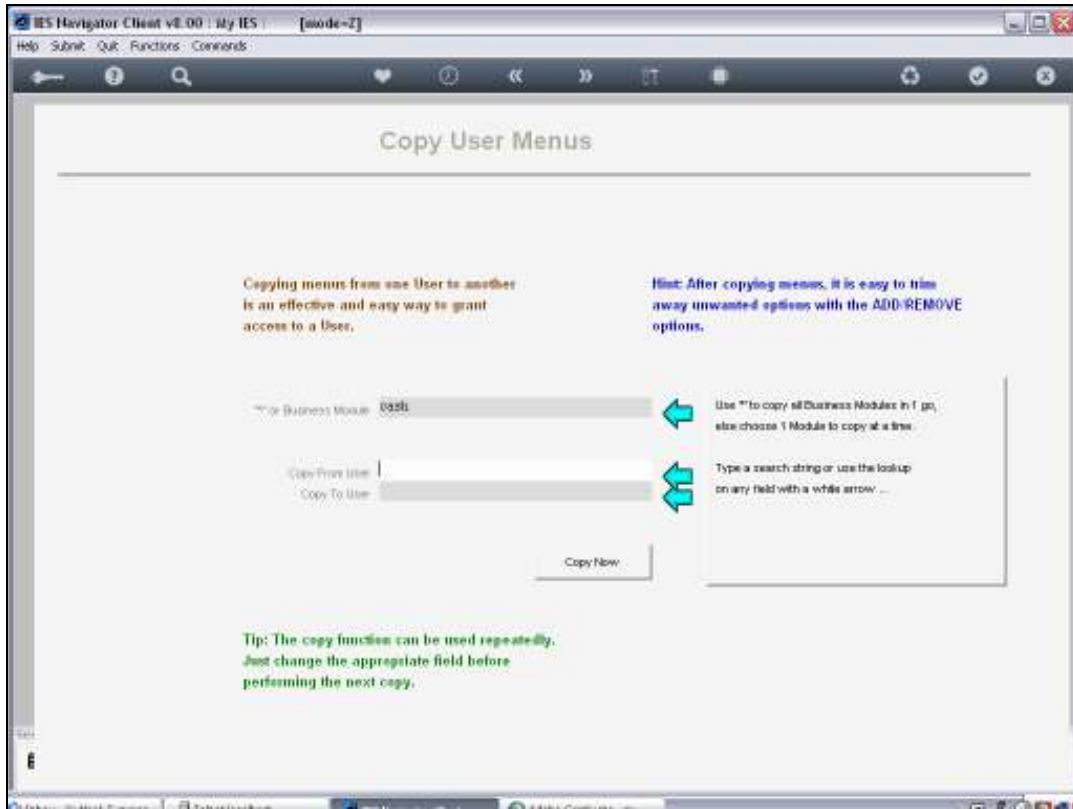
I am working with Menu Profiles.

Now when I get to this step, I have a choice of either copying a single Business Module, at the time, and I can repeat that step and do it for 3 Business Modules, for example.

Or I can copy All the Business Modules from the "From User" to the "To User" in one go if I use the *star - the asterisk.

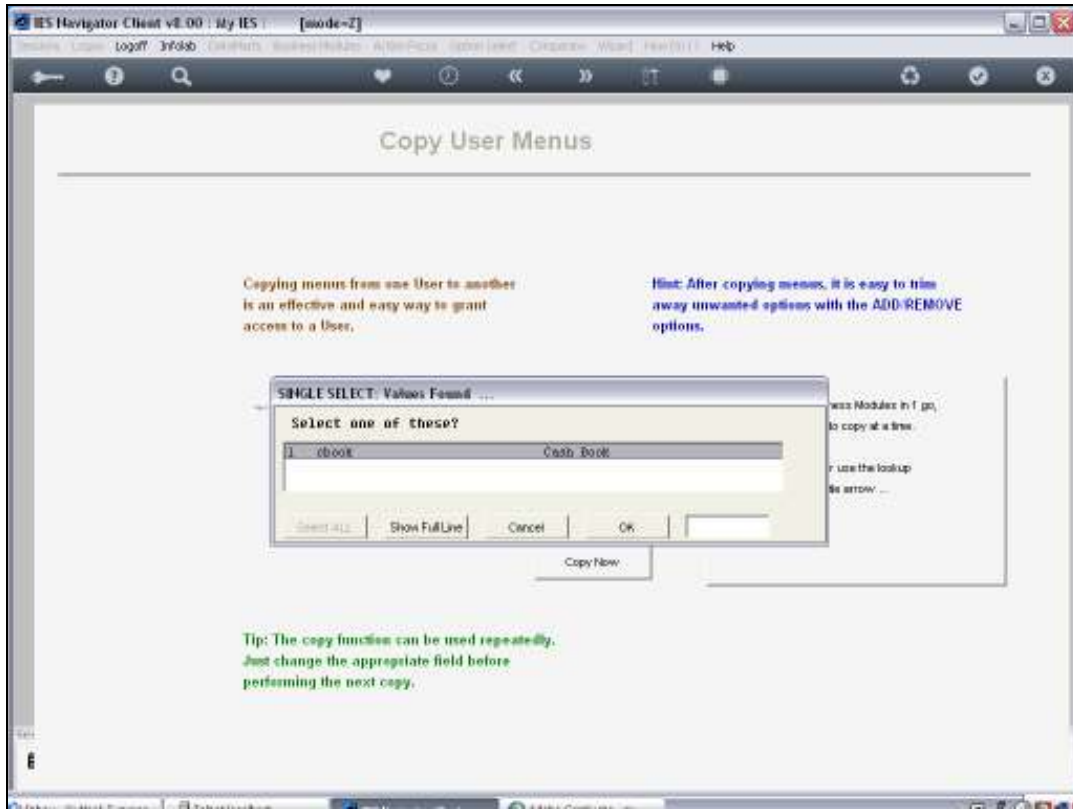


Slide 19



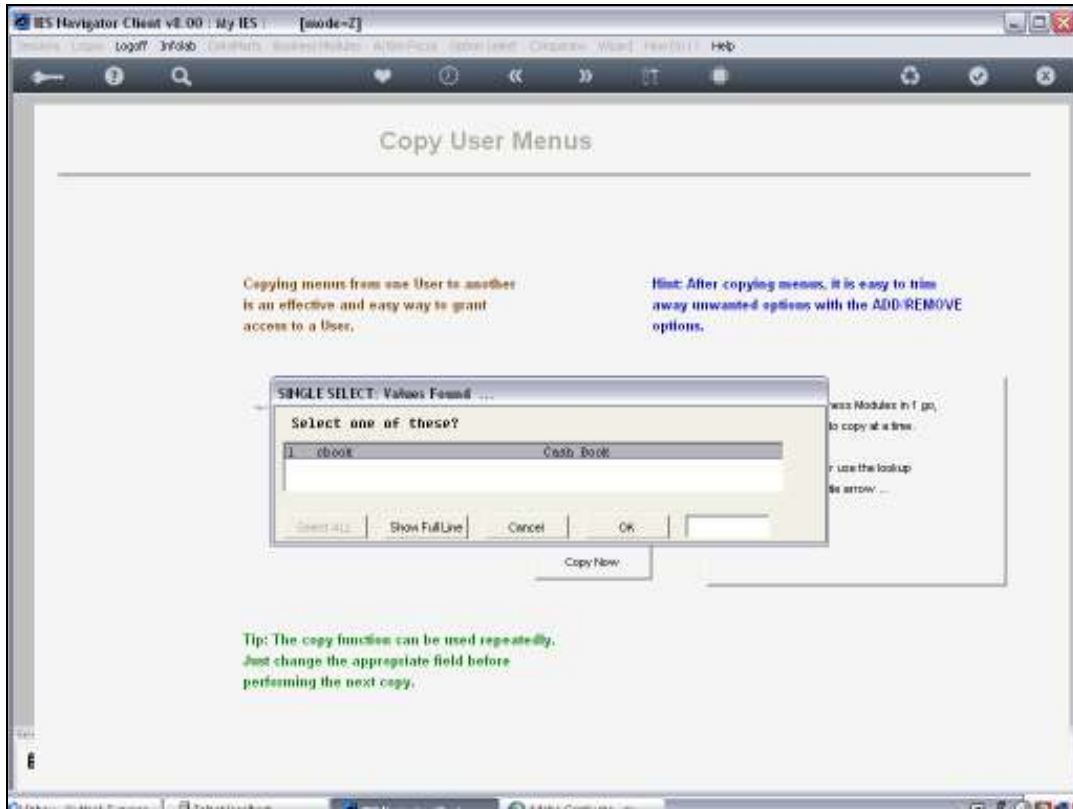
Slide 20

So I am going to say Cash for Cash Book.

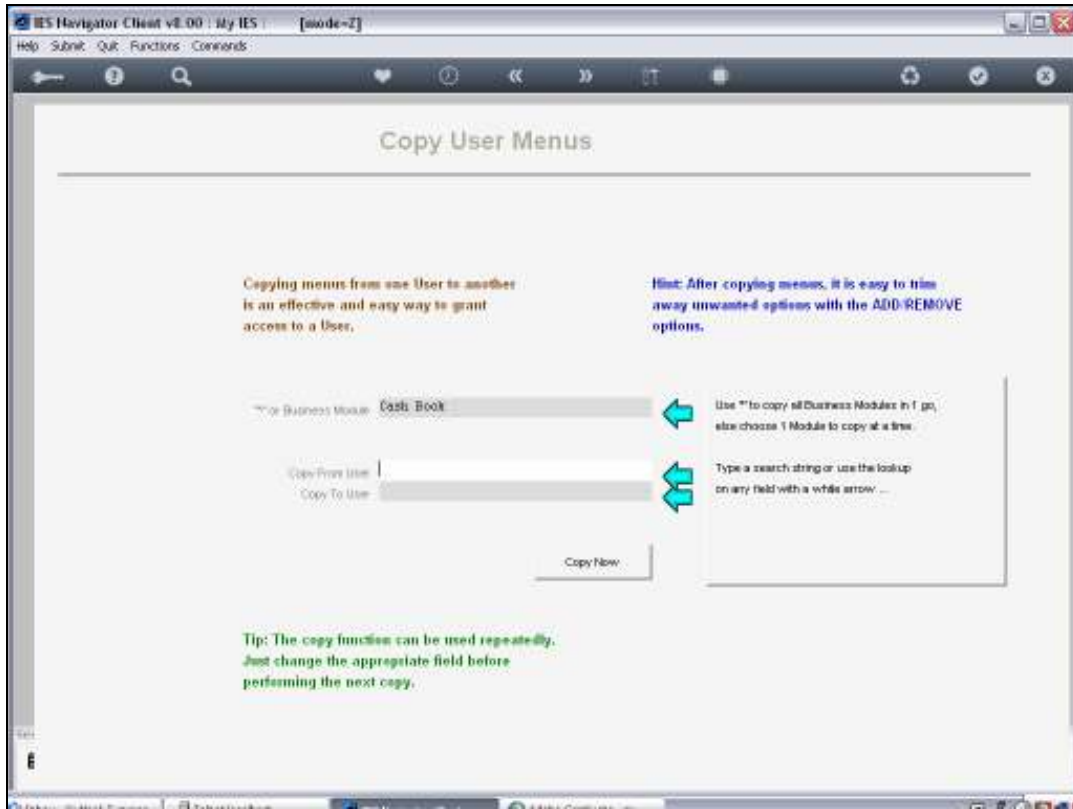


Slide 21

And the system finds it for me and I Select it

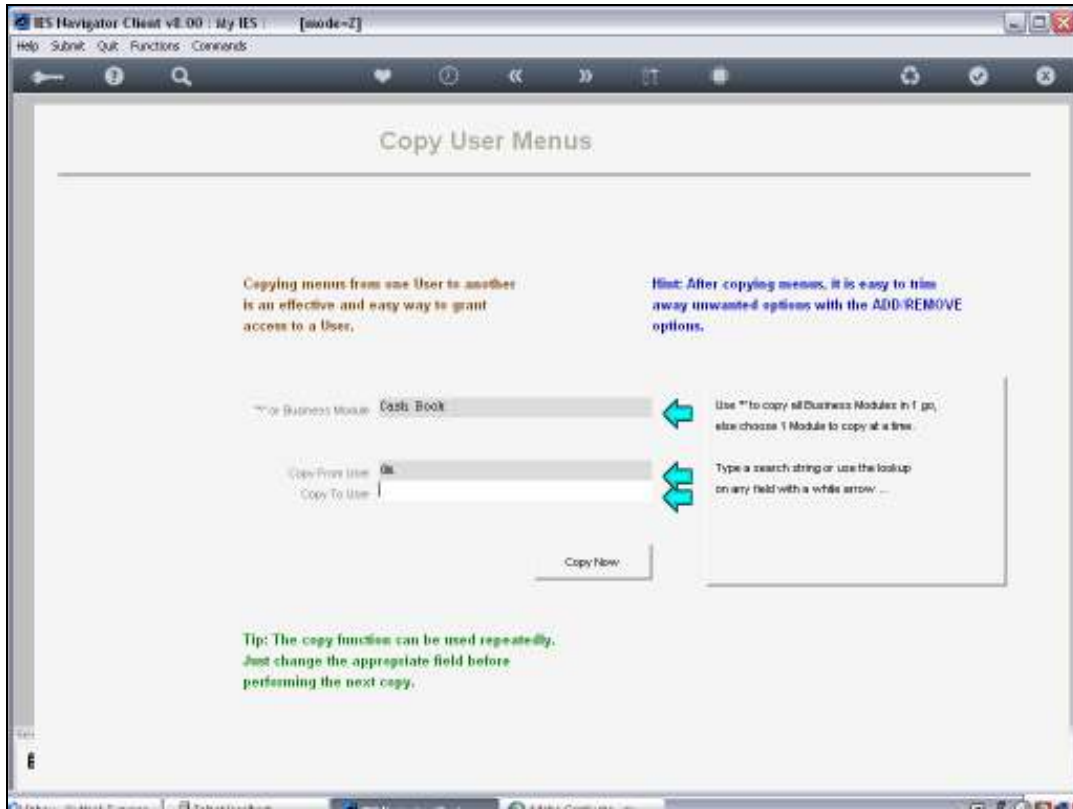


Slide 22

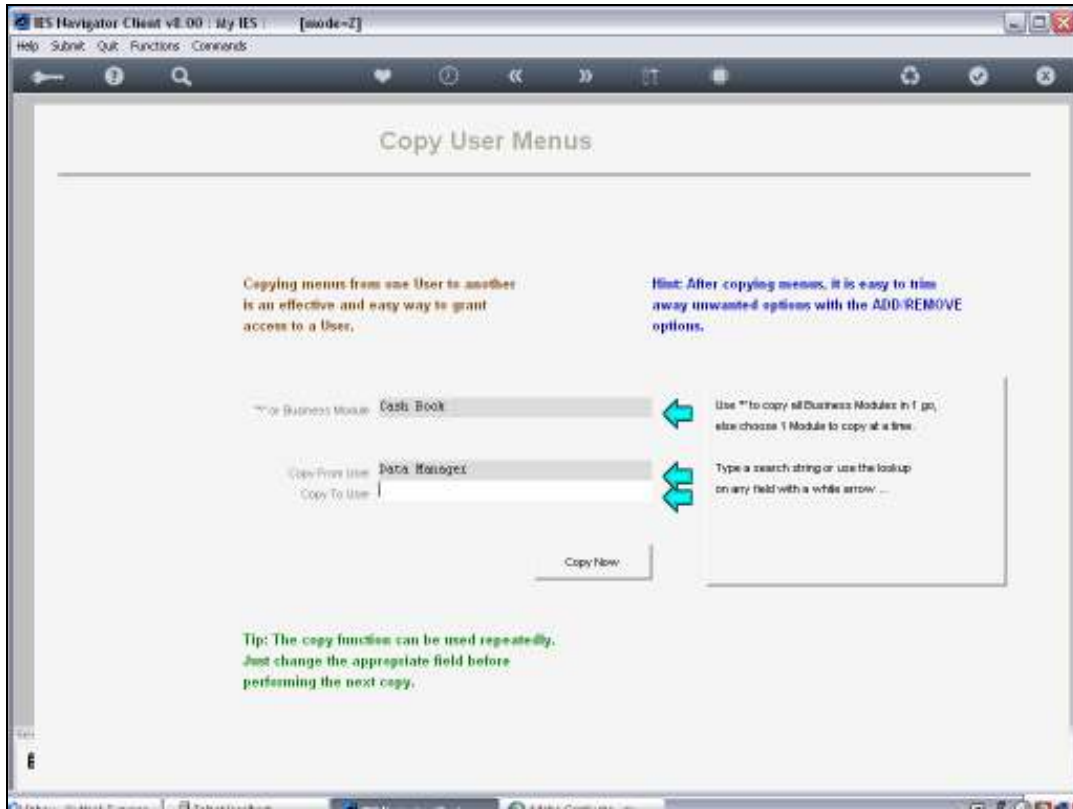


Slide 23

And then I state the User that I am copying from

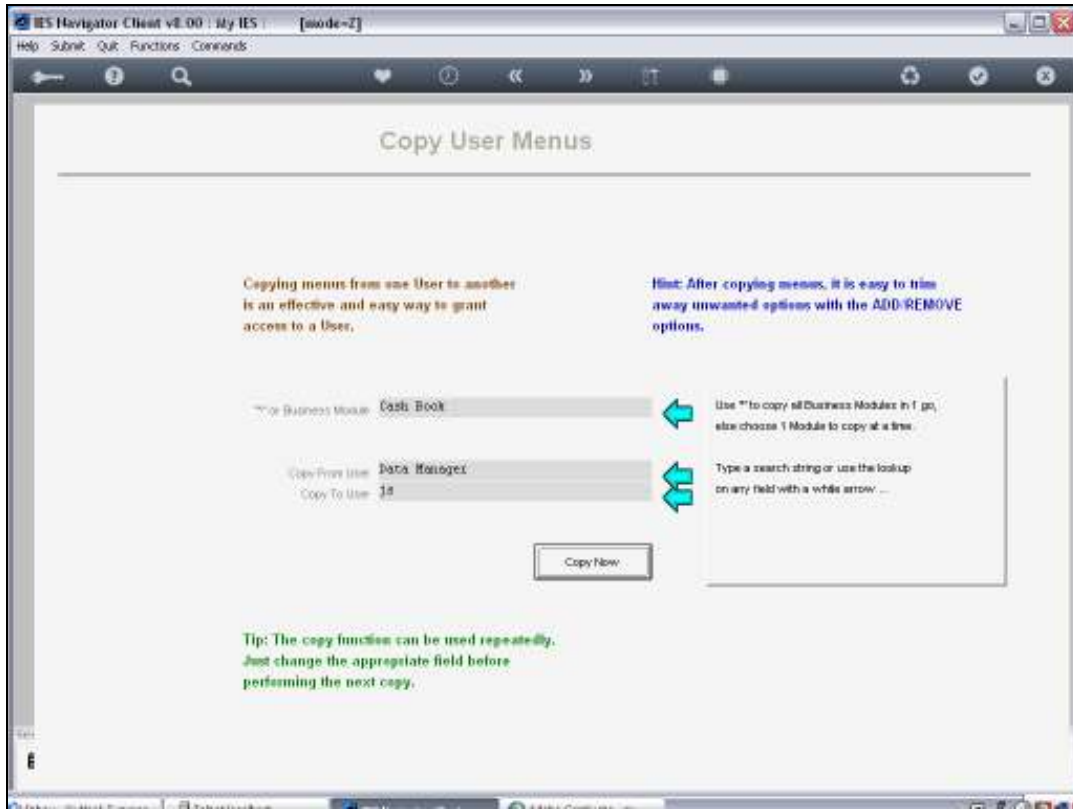


Slide 24



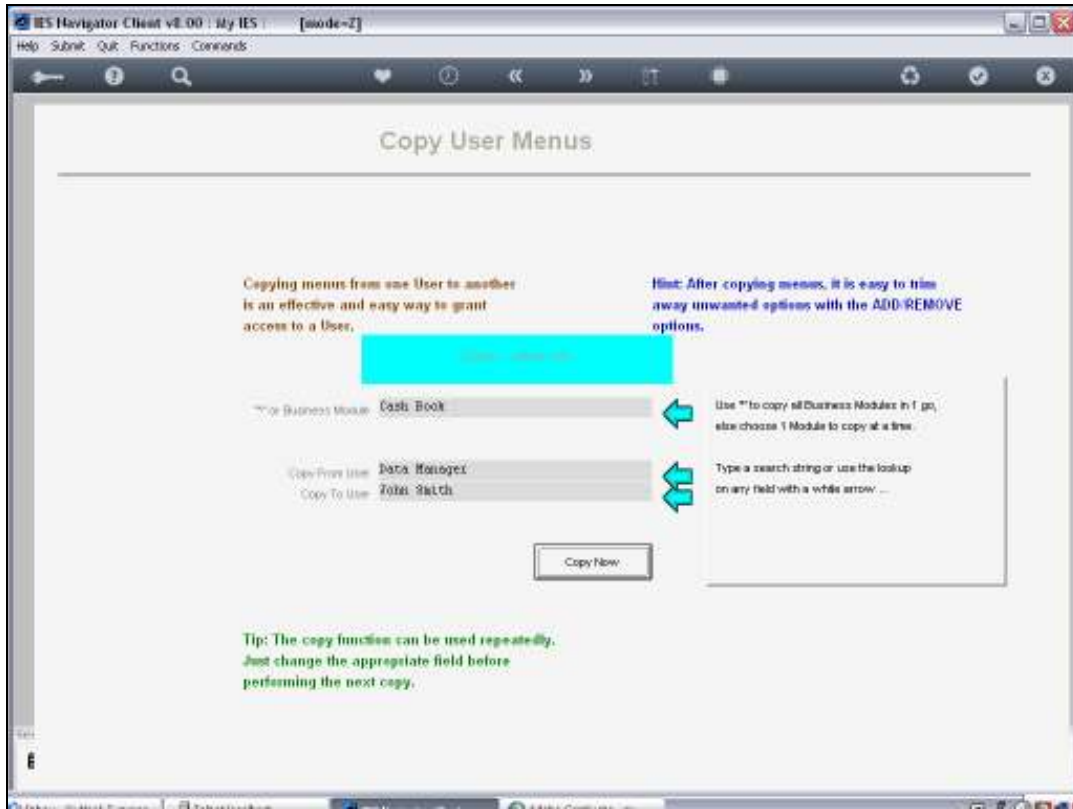
Slide 25

In other words everything that User DM has for Cash Book, must now be copied to John Smith



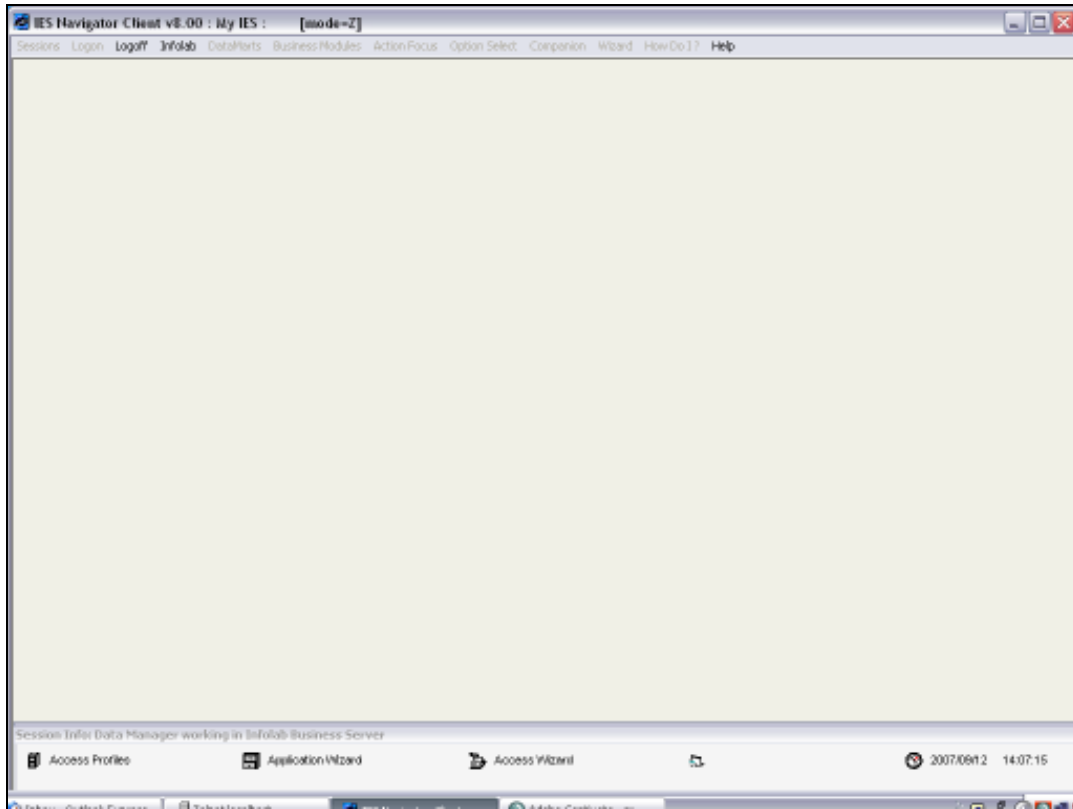
Slide 26

Right. And I am going to say Copy Now



Slide 27

Ok. Now that is being done. But I just want to show now what has happened



Slide 28



Slide 29

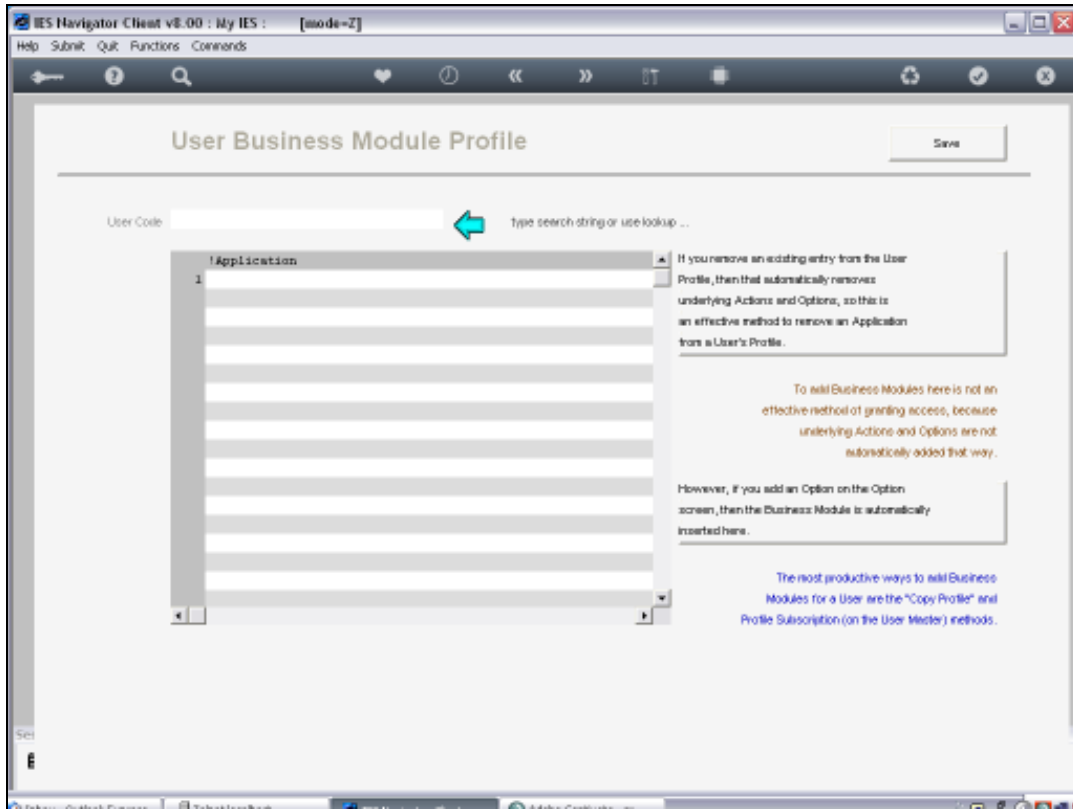


Slide 30

And therefore I will go again to this option

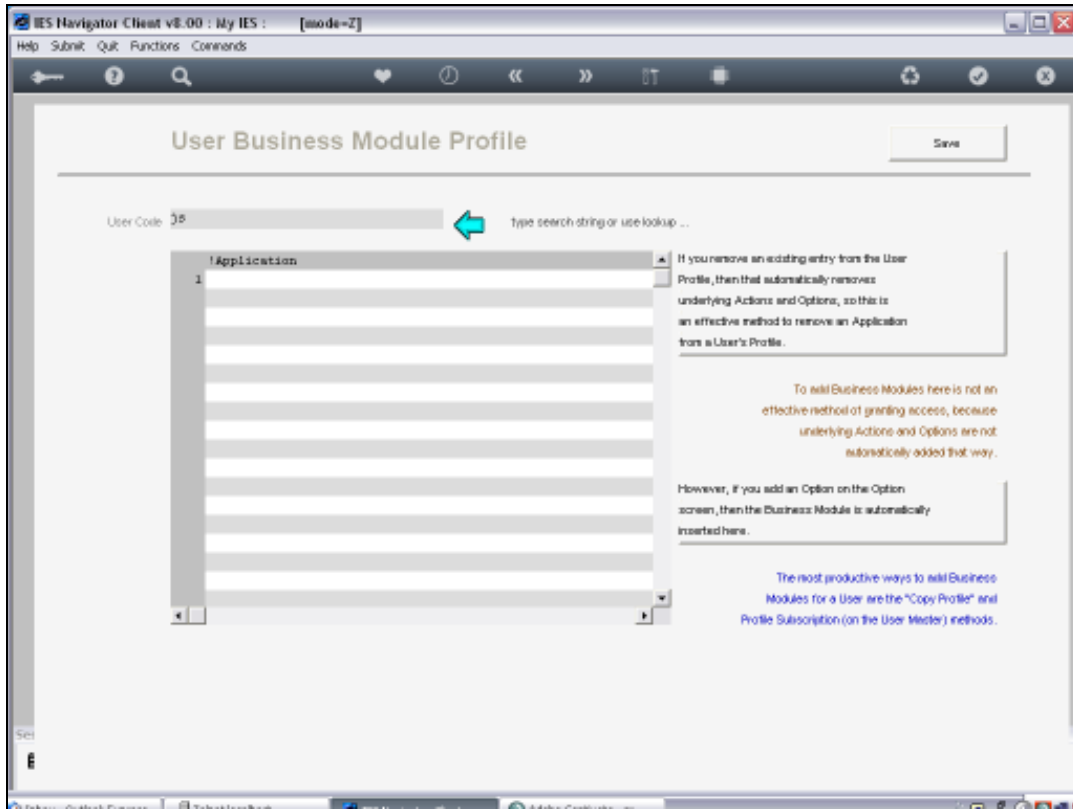


Slide 31



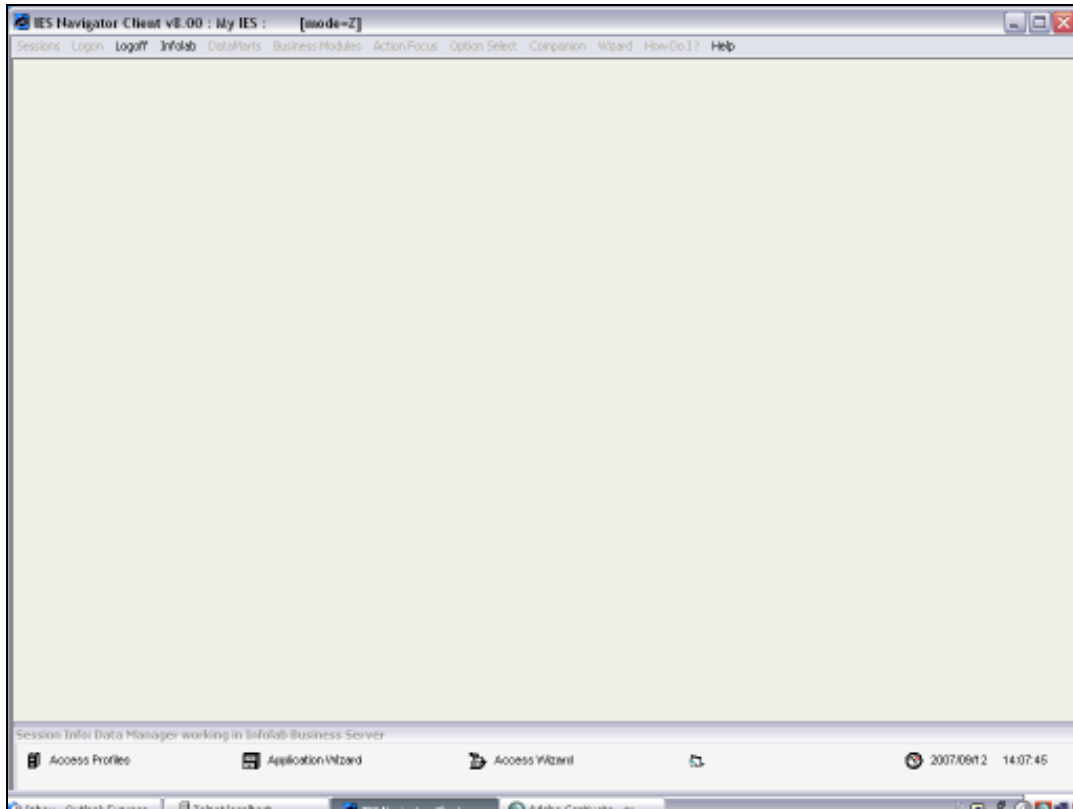
Slide 32

On the Business Modules



Slide 33

Just to show what has happened with J S

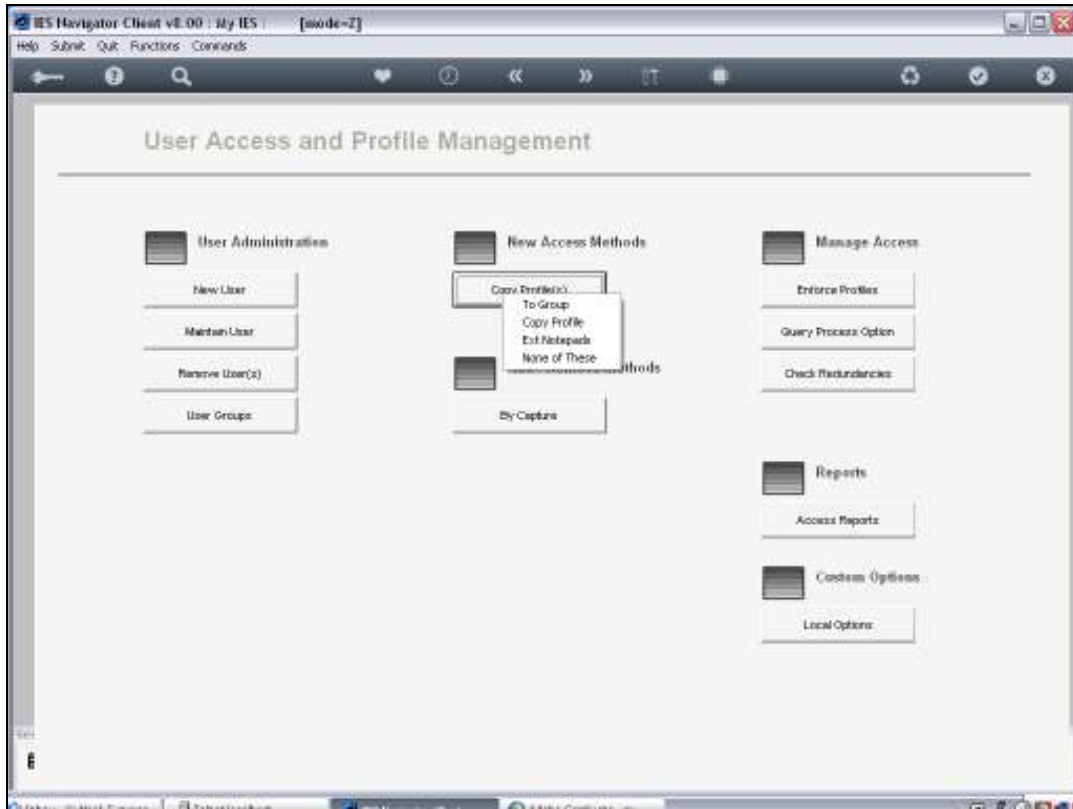


Slide 35

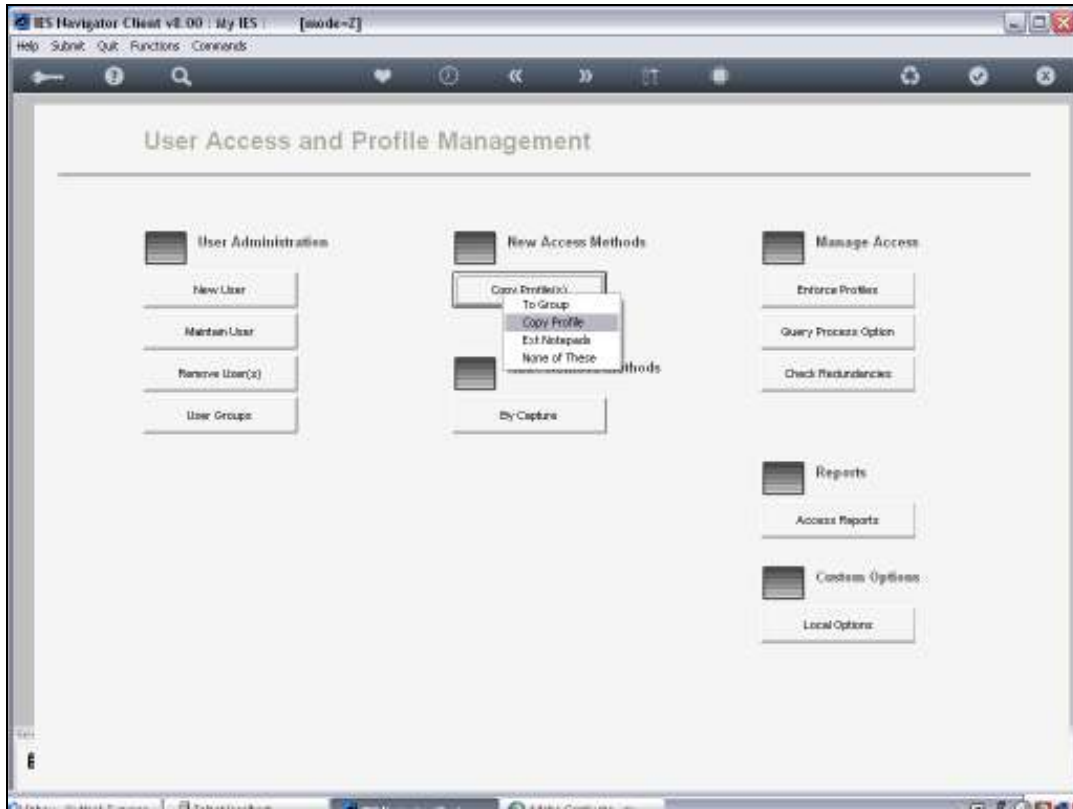


Slide 36

Now let us repeat that and do another Business Module

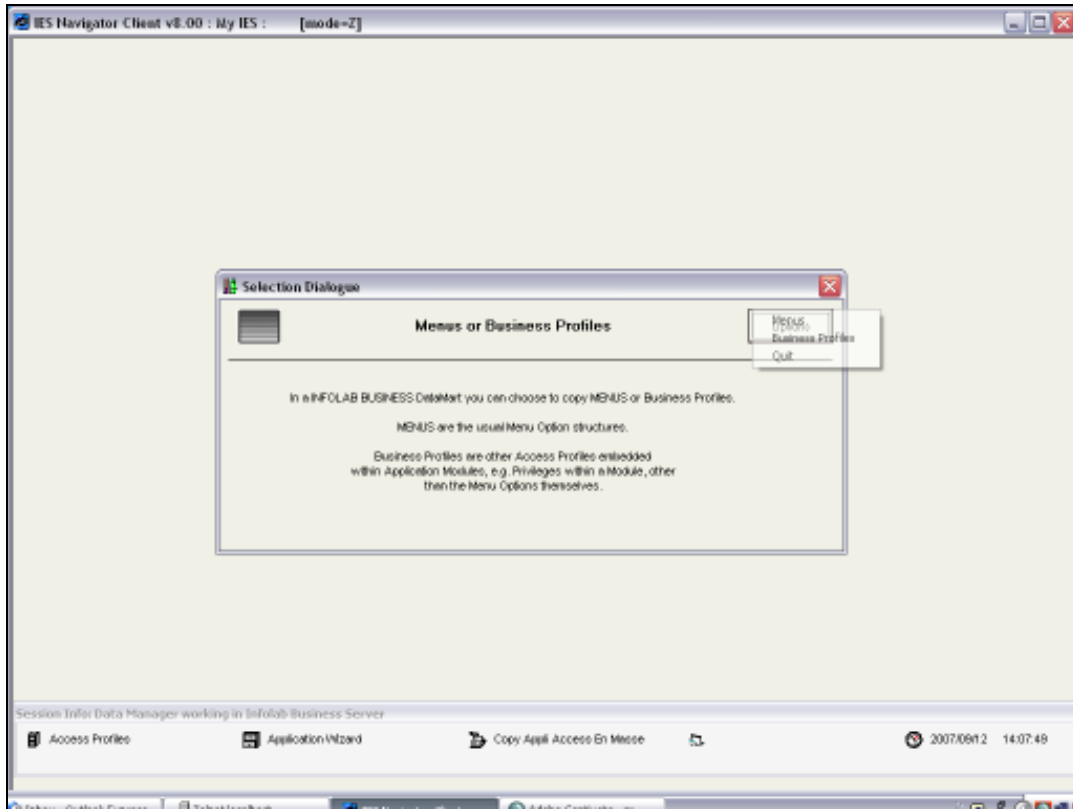


Slide 37

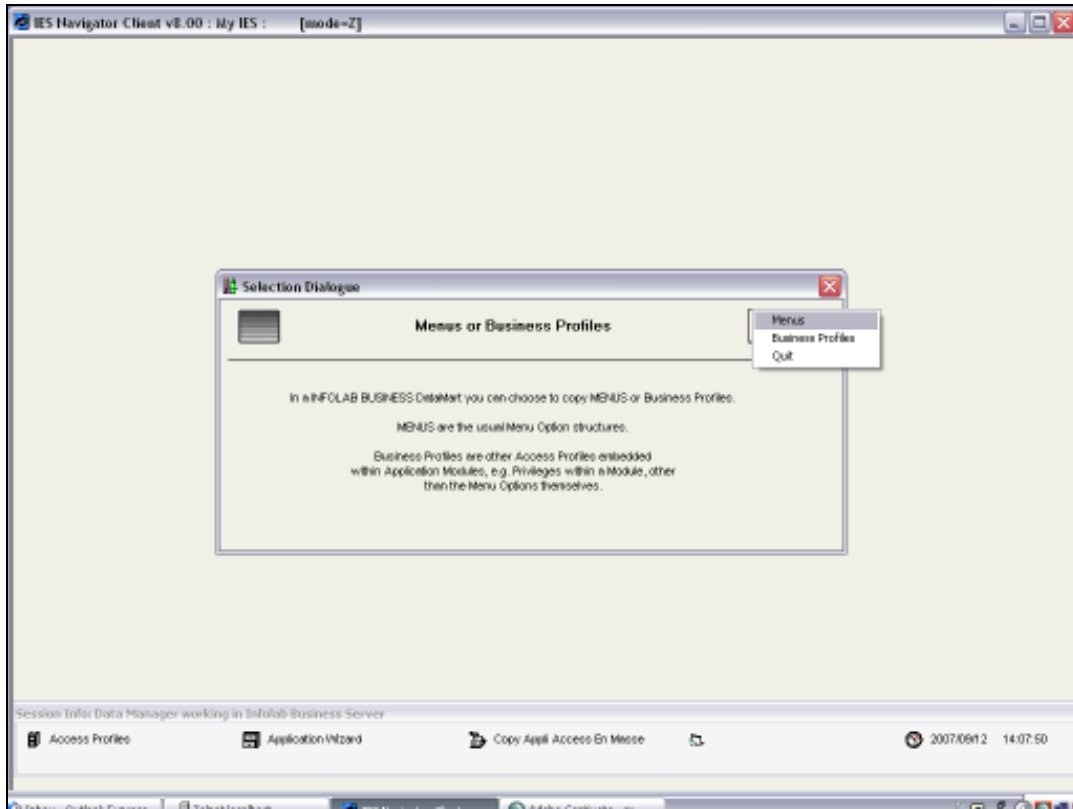


Slide 38

I am going to go to Copy Profile

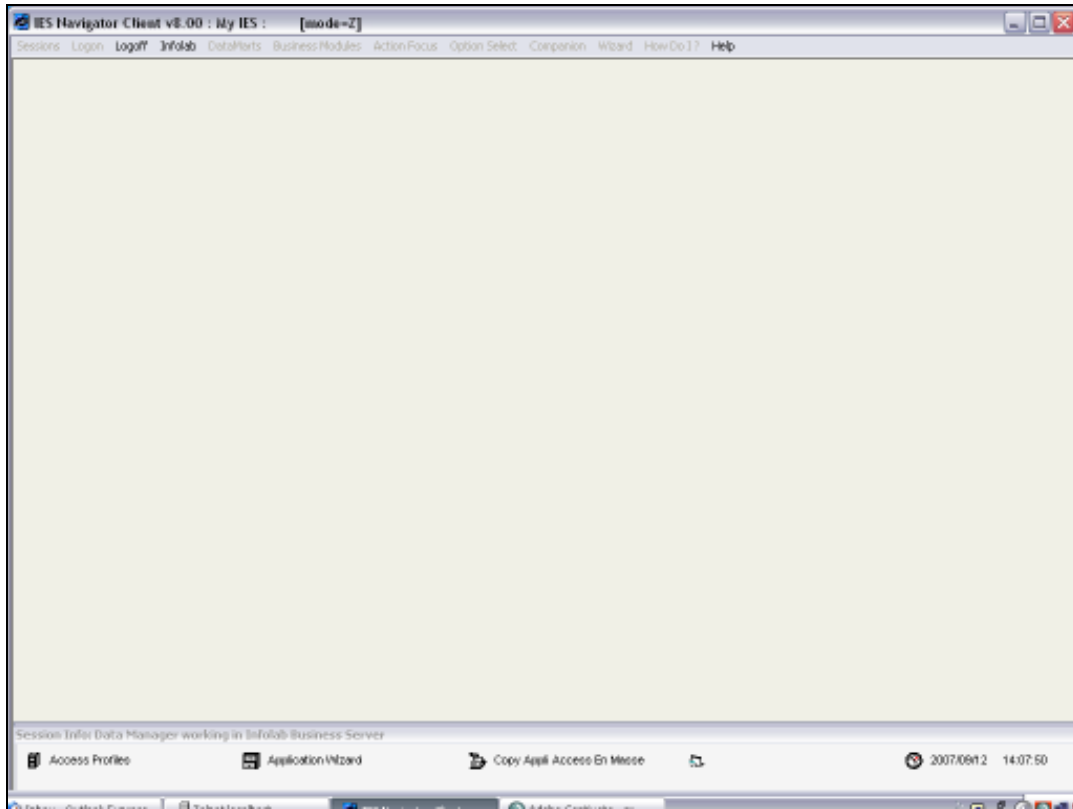


Slide 39

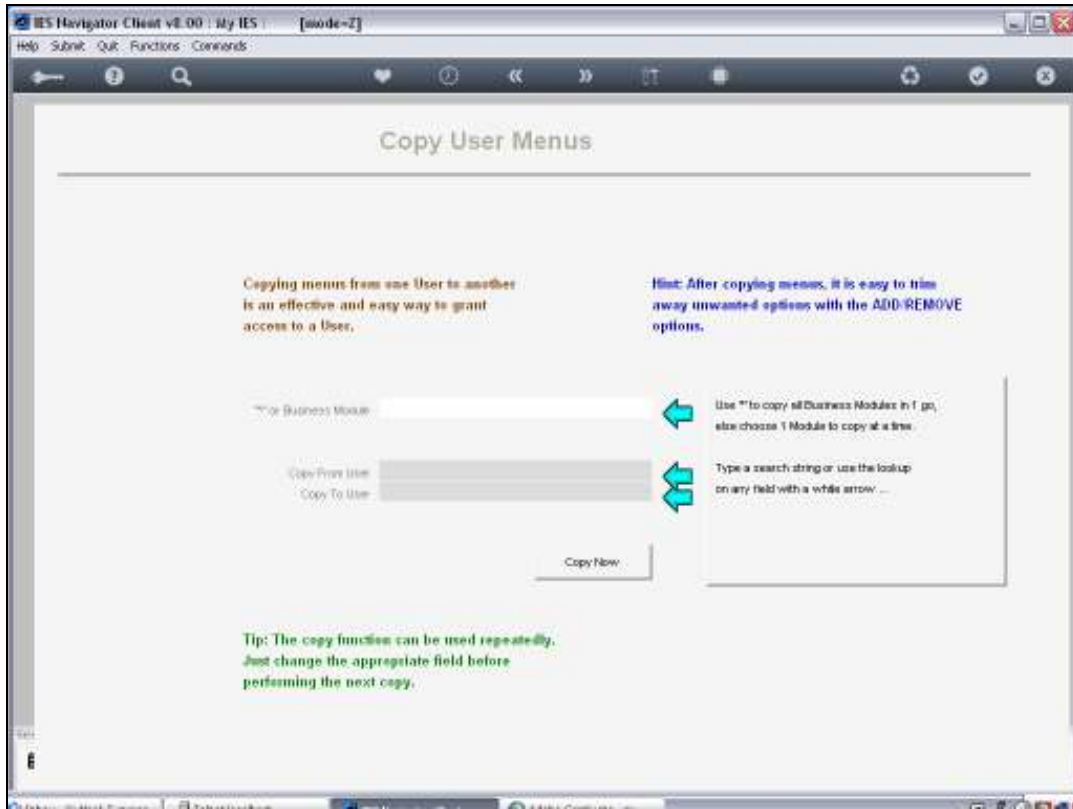


Slide 40

Menus

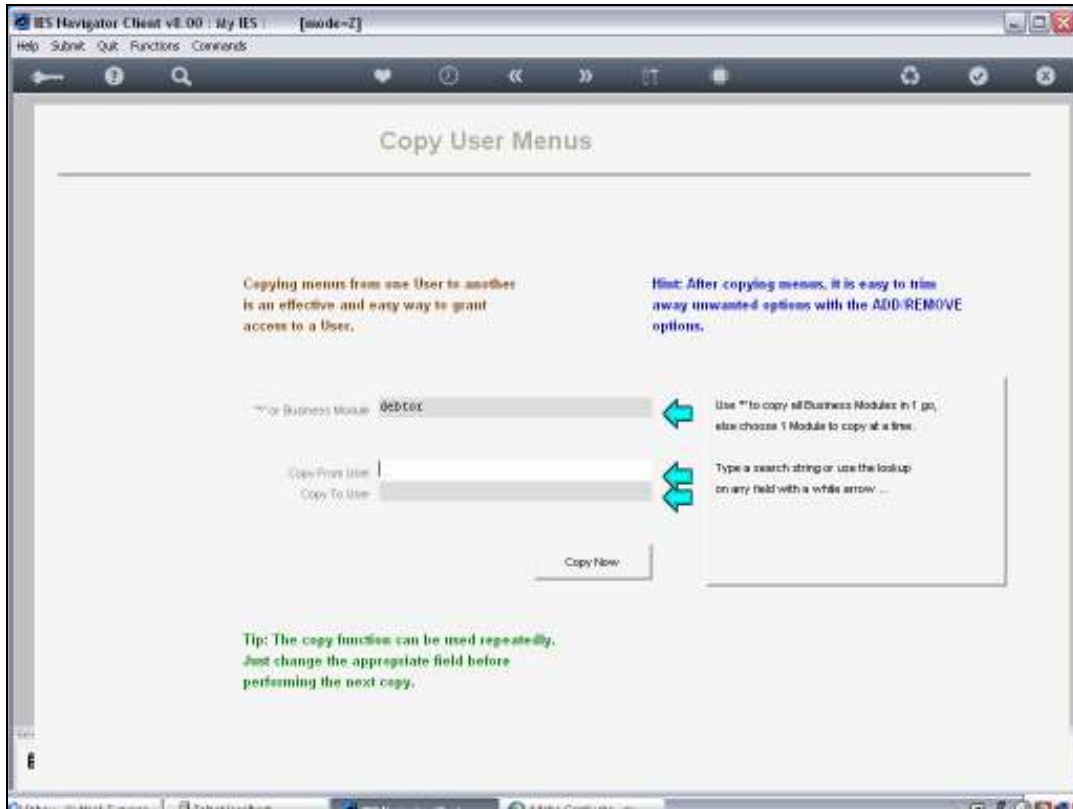


Slide 41

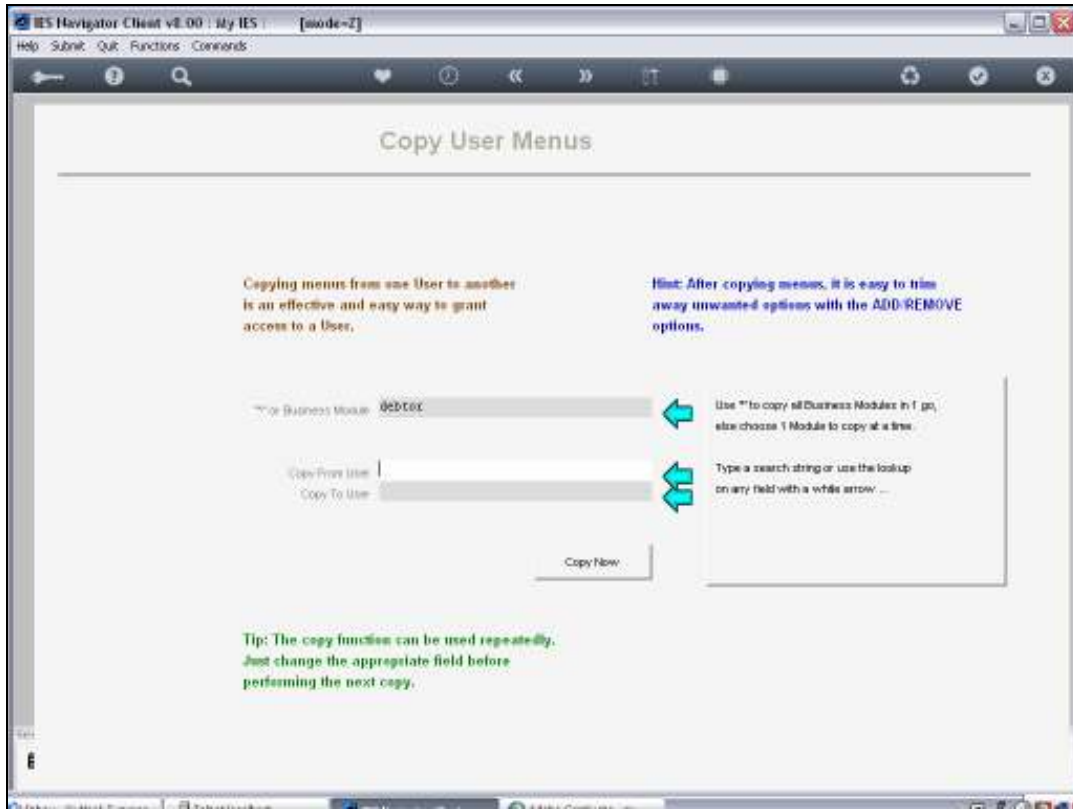


Slide 42

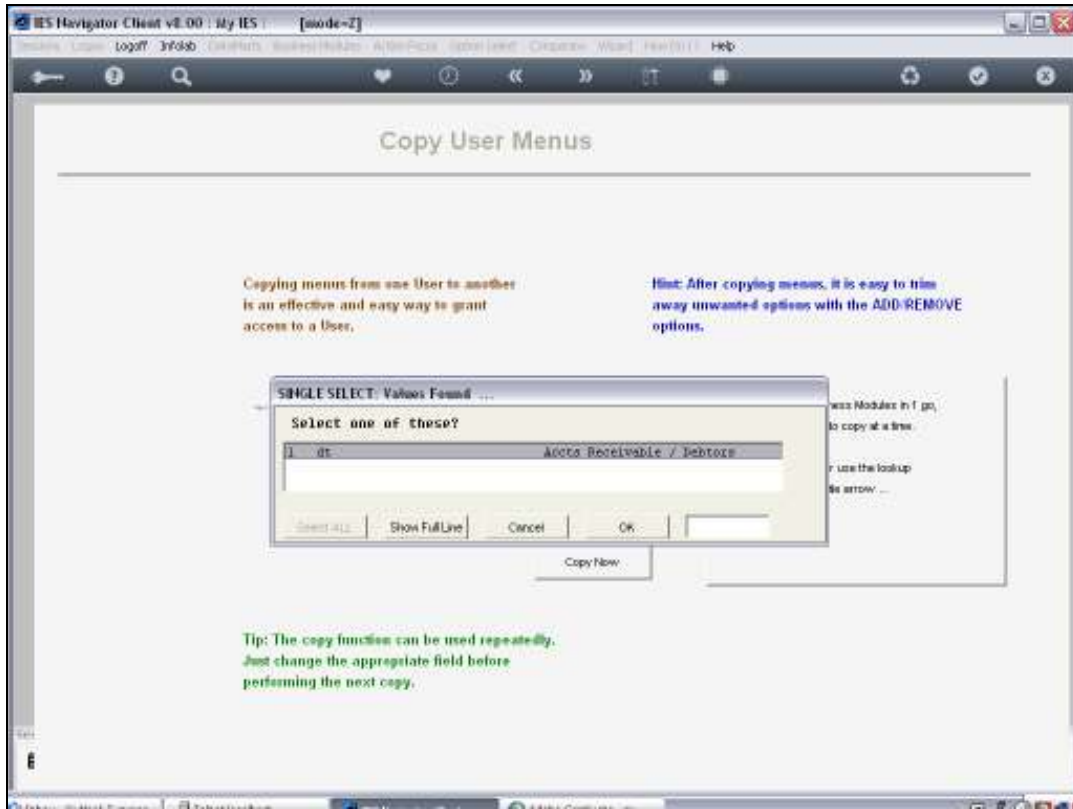
And this time I am going to choose Debtors



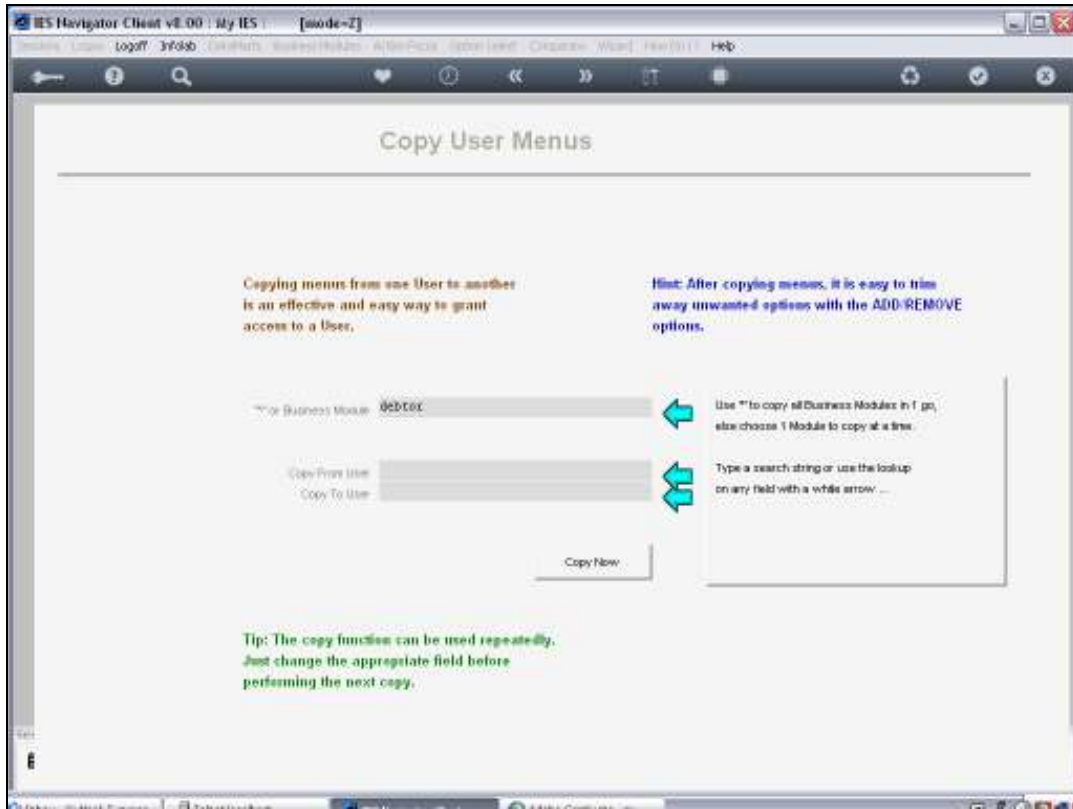
Slide 43



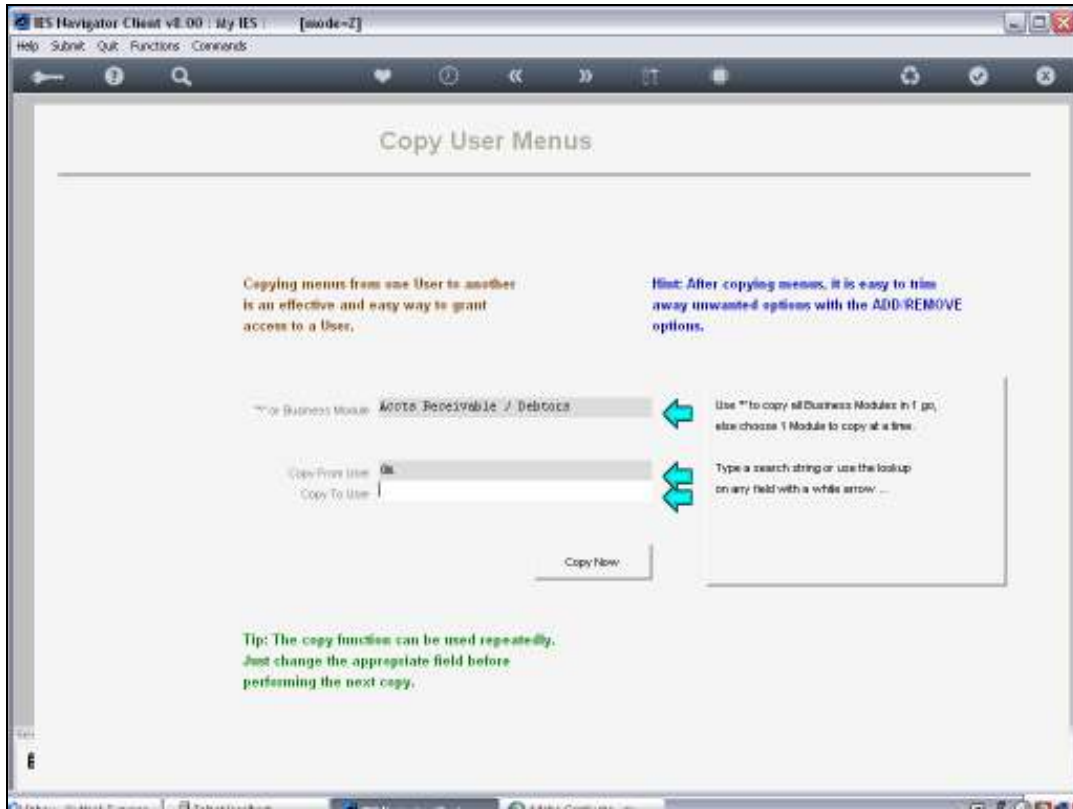
Slide 44



Slide 45

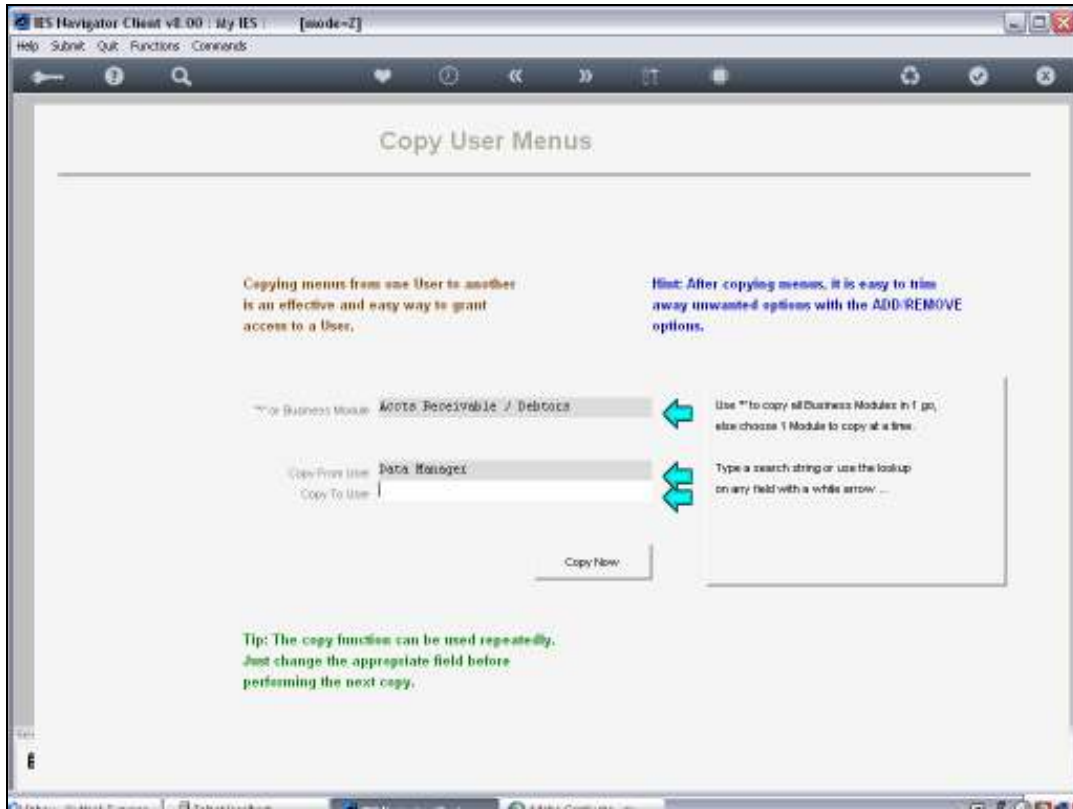


Slide 46

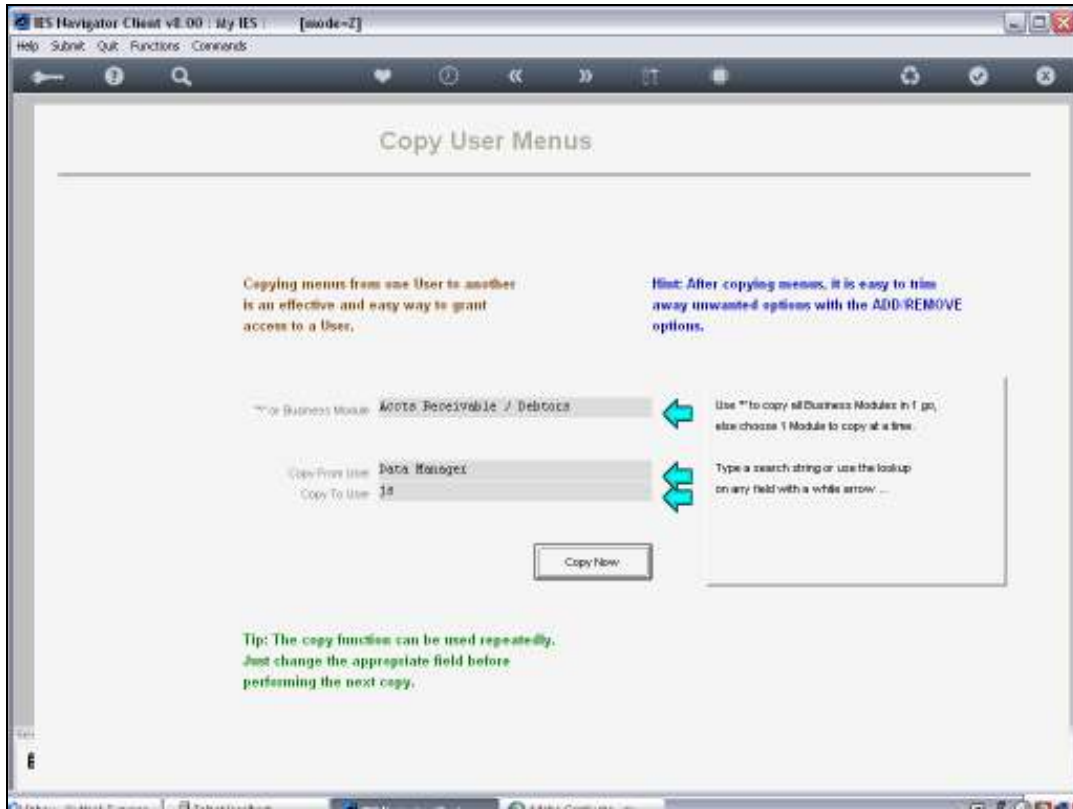


Slide 47

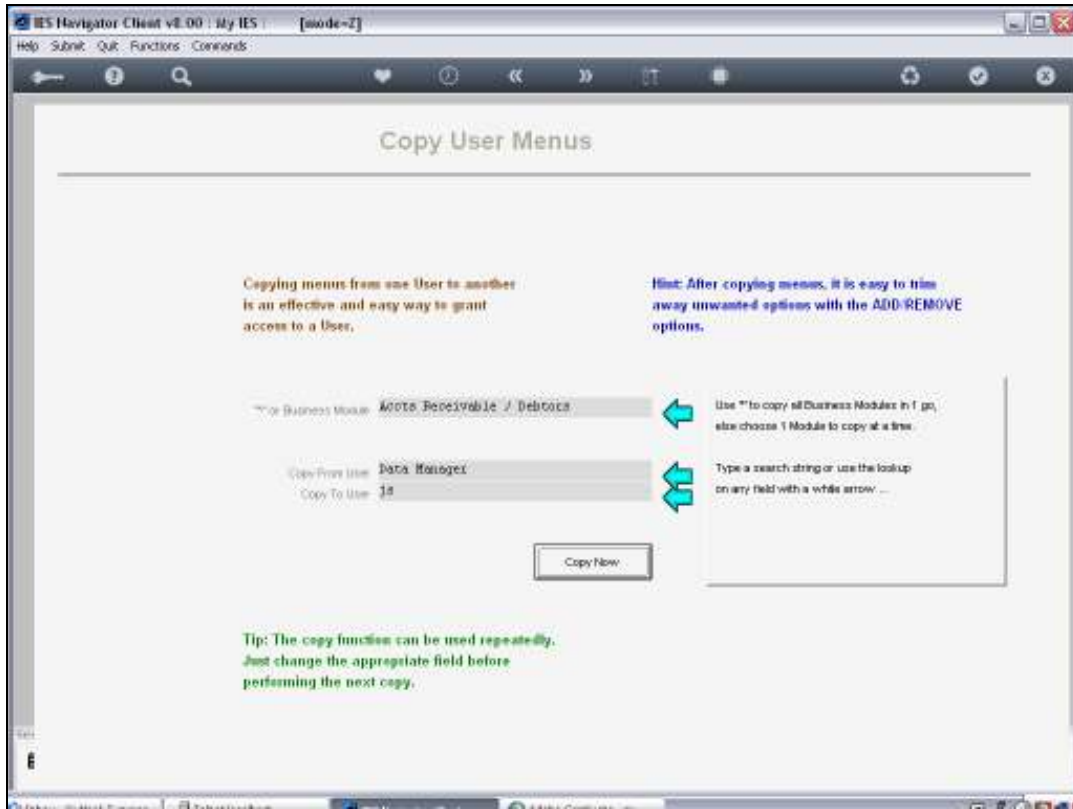
And I am copying again from DM to JS



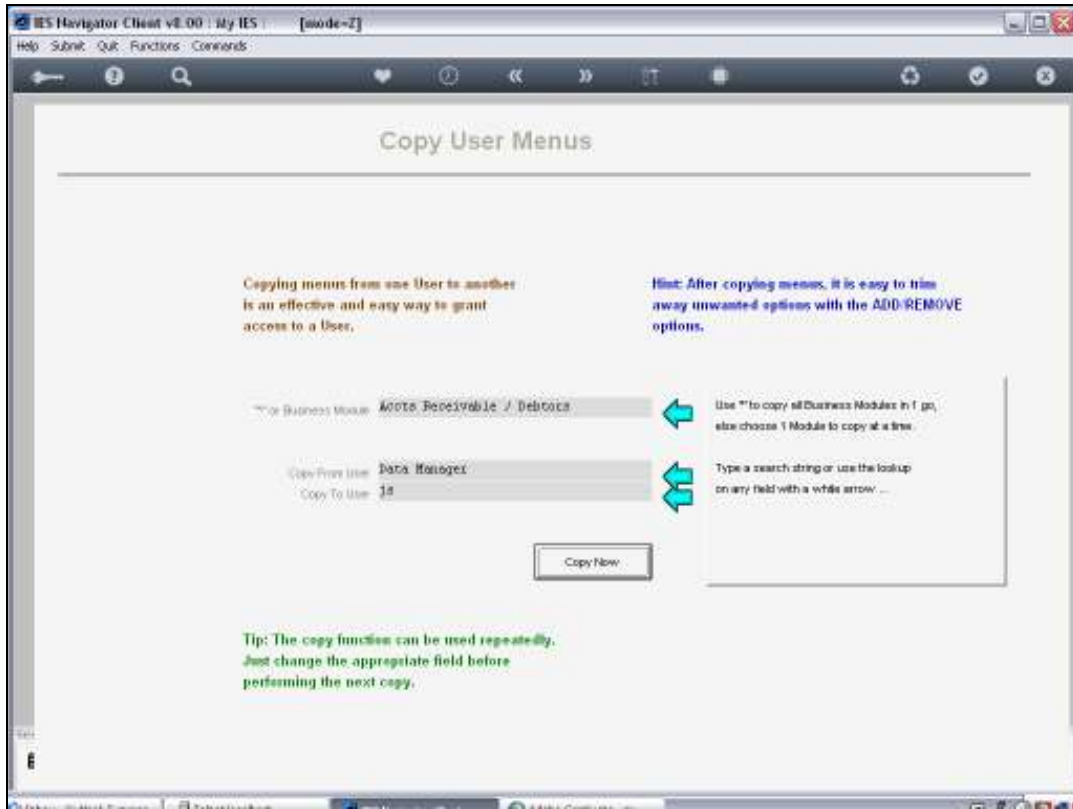
Slide 48



Slide 49

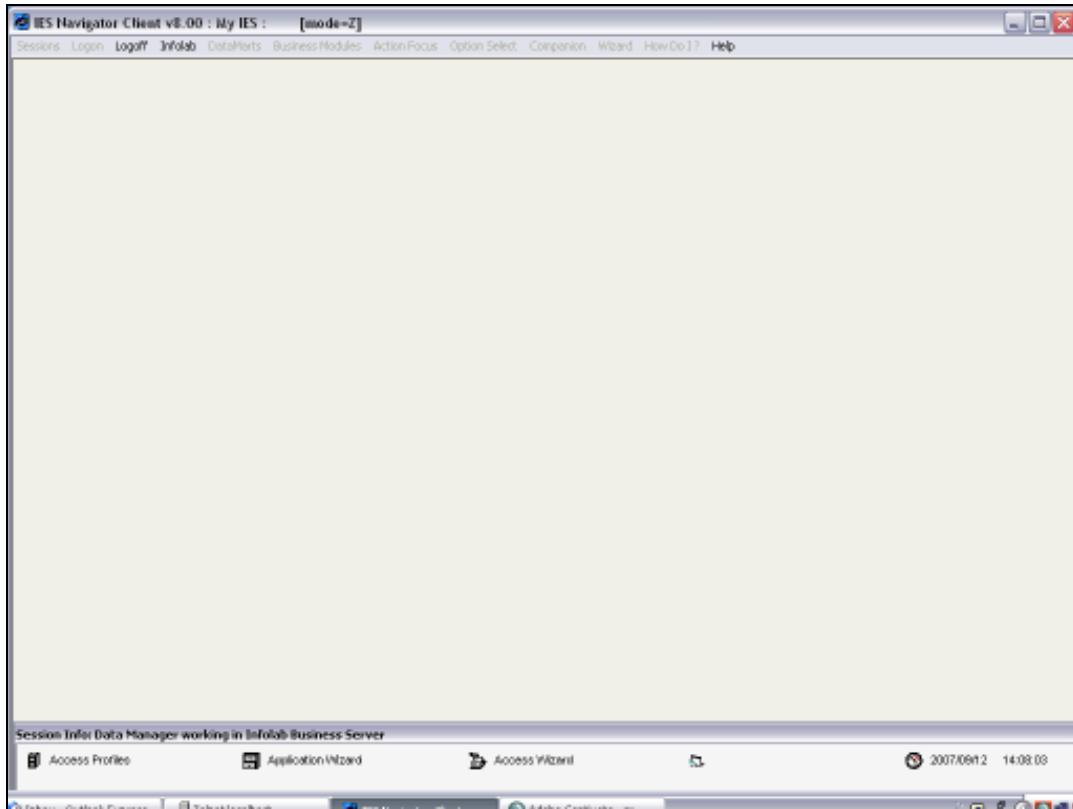


Slide 50



Slide 51

Copy Now



Slide 52



Slide 53

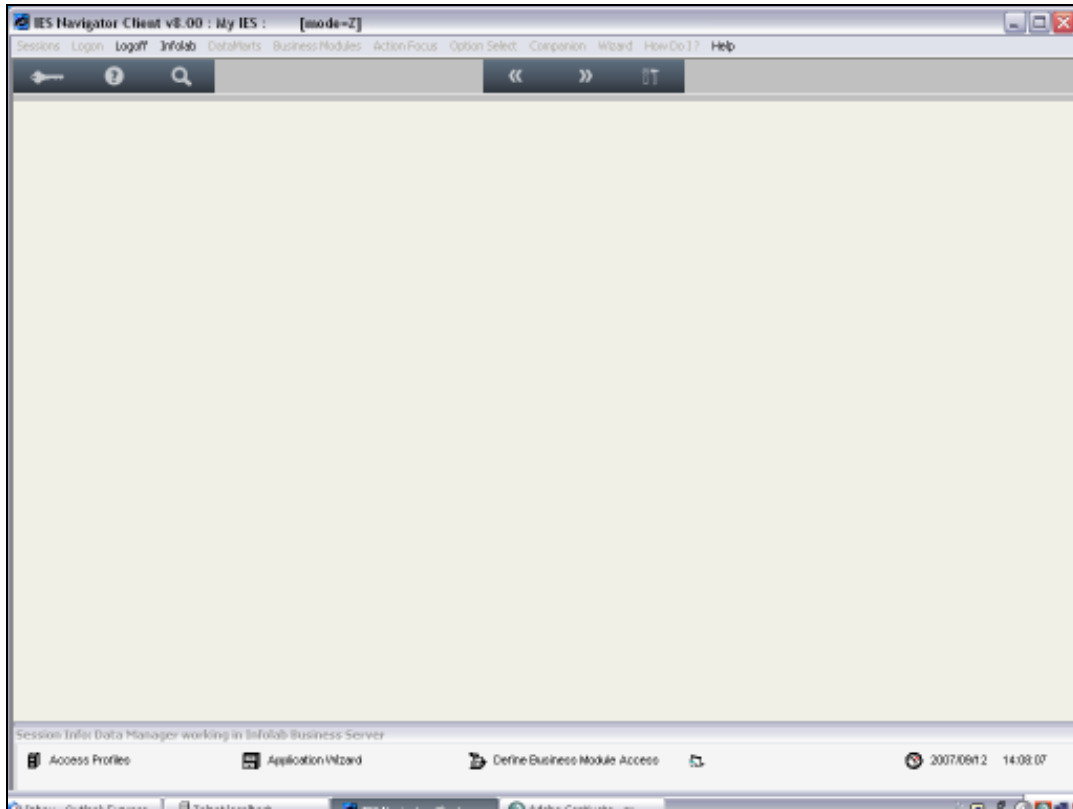
And I am going to show what has happened



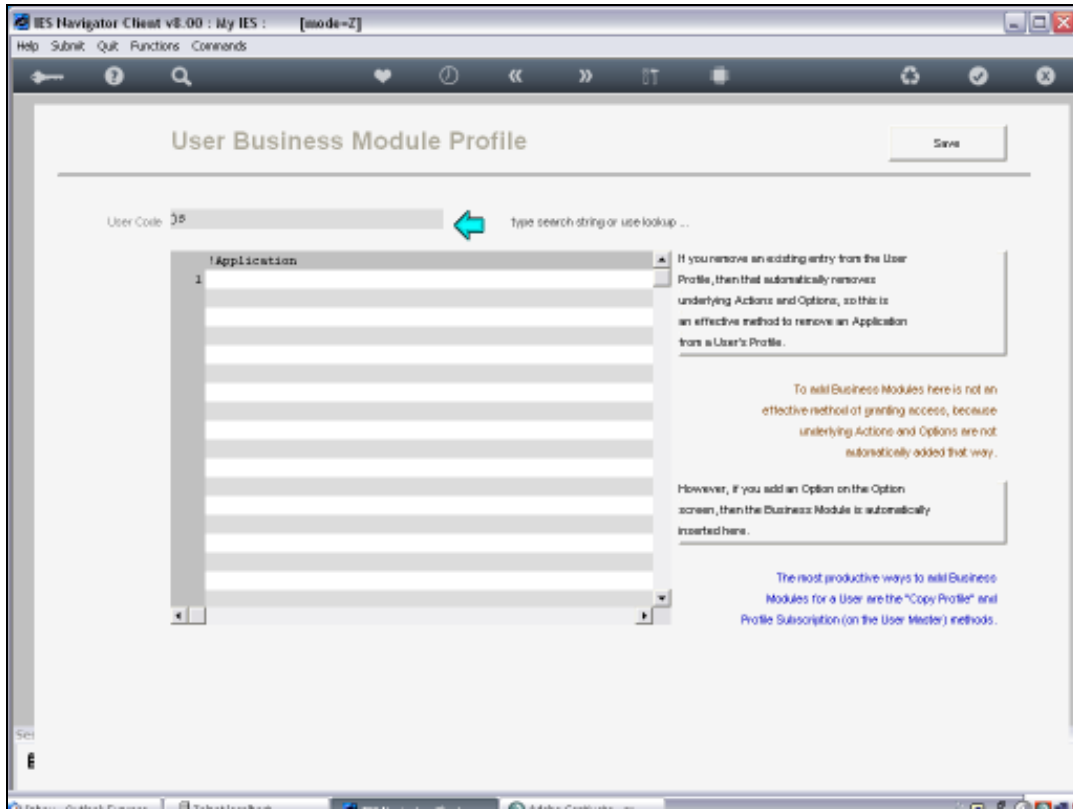
Slide 54



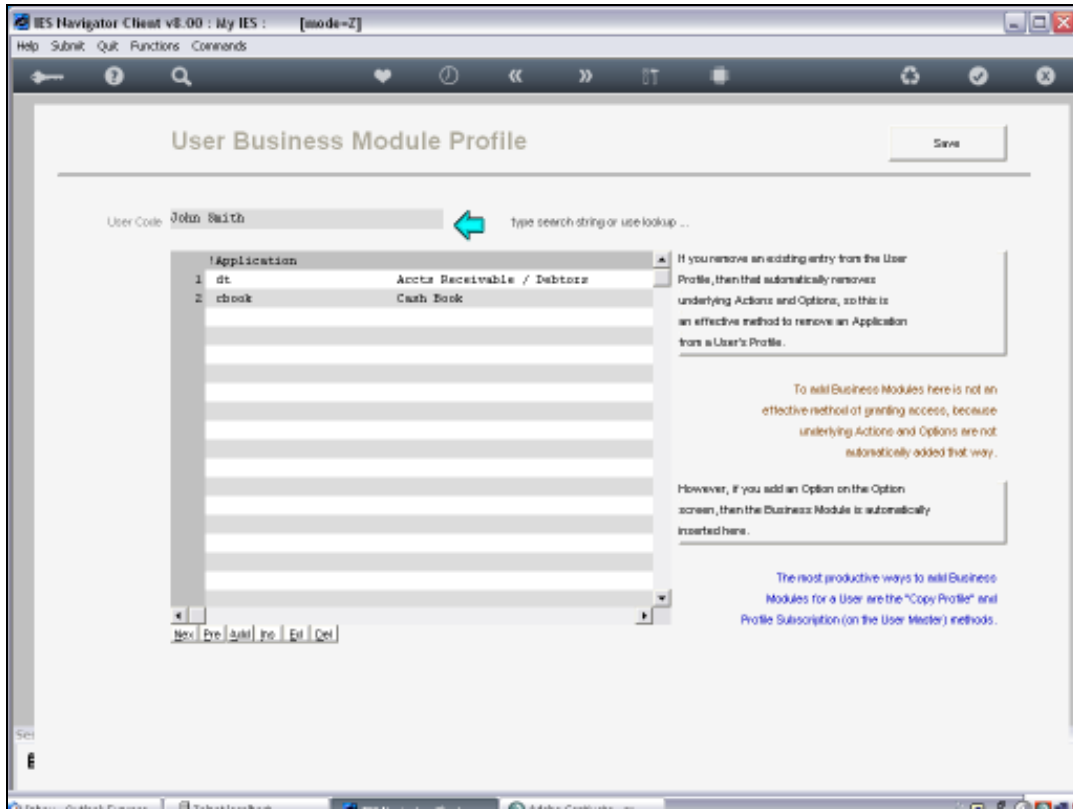
Slide 55



Slide 56

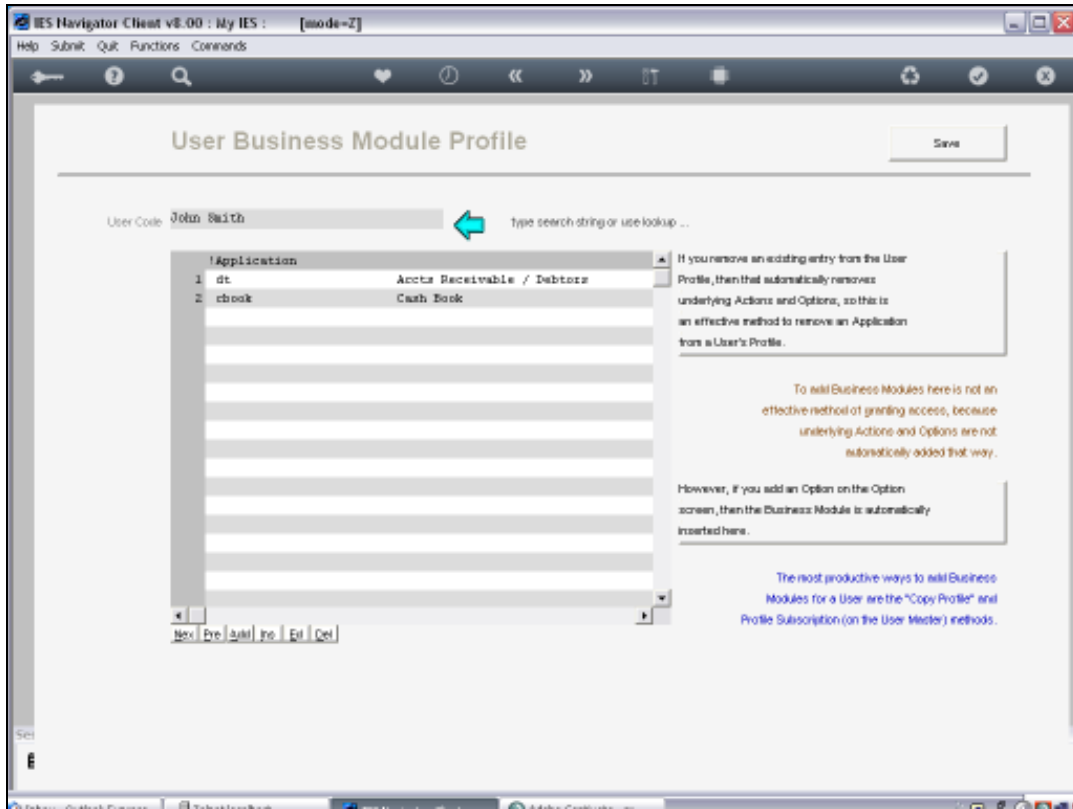


Slide 58



Slide 59

I just want to show the point that these Application Access Menus



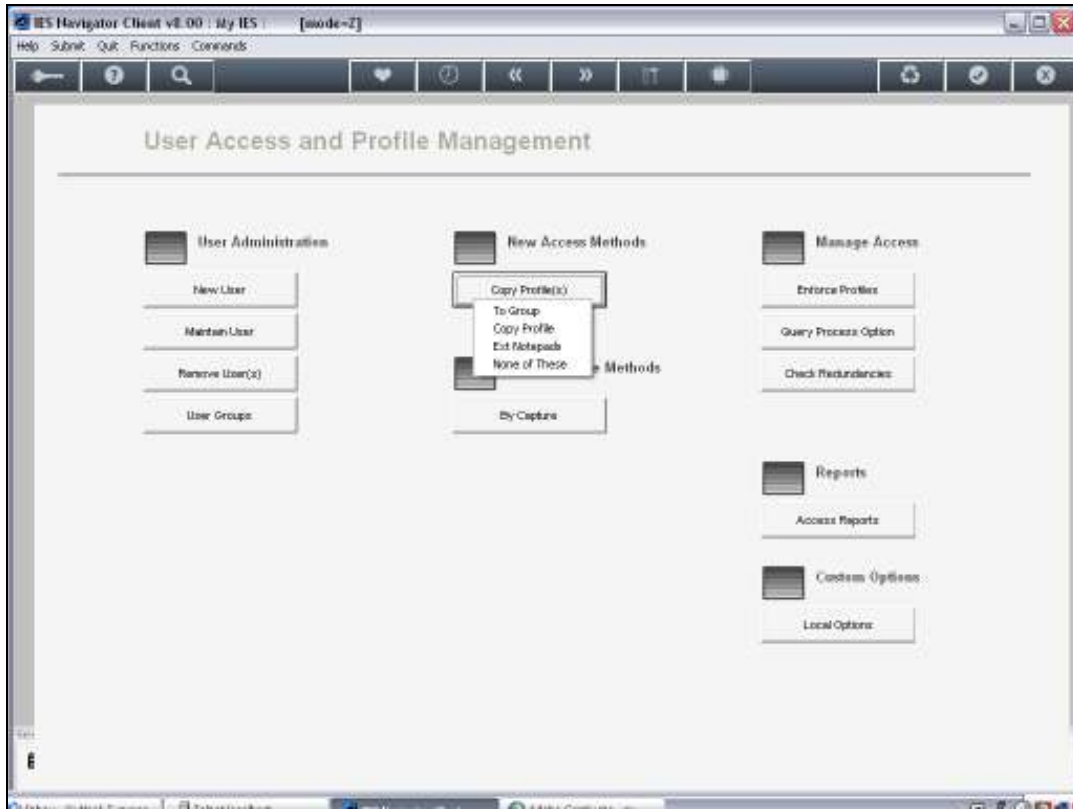
Slide 60

From User Dm have now effectively been copied to User John Smith, who now has Debtors en Cash Book on his Application list



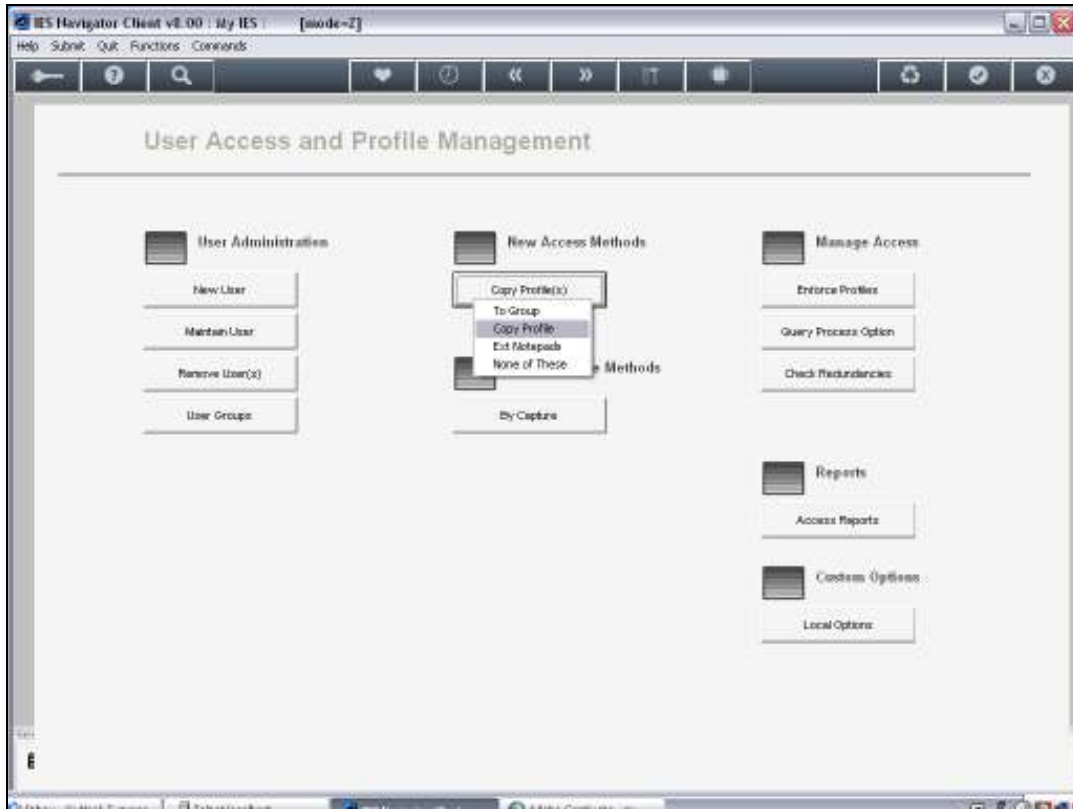
Slide 61

Now in my next example I am going to Copy All the Business Modules in one go



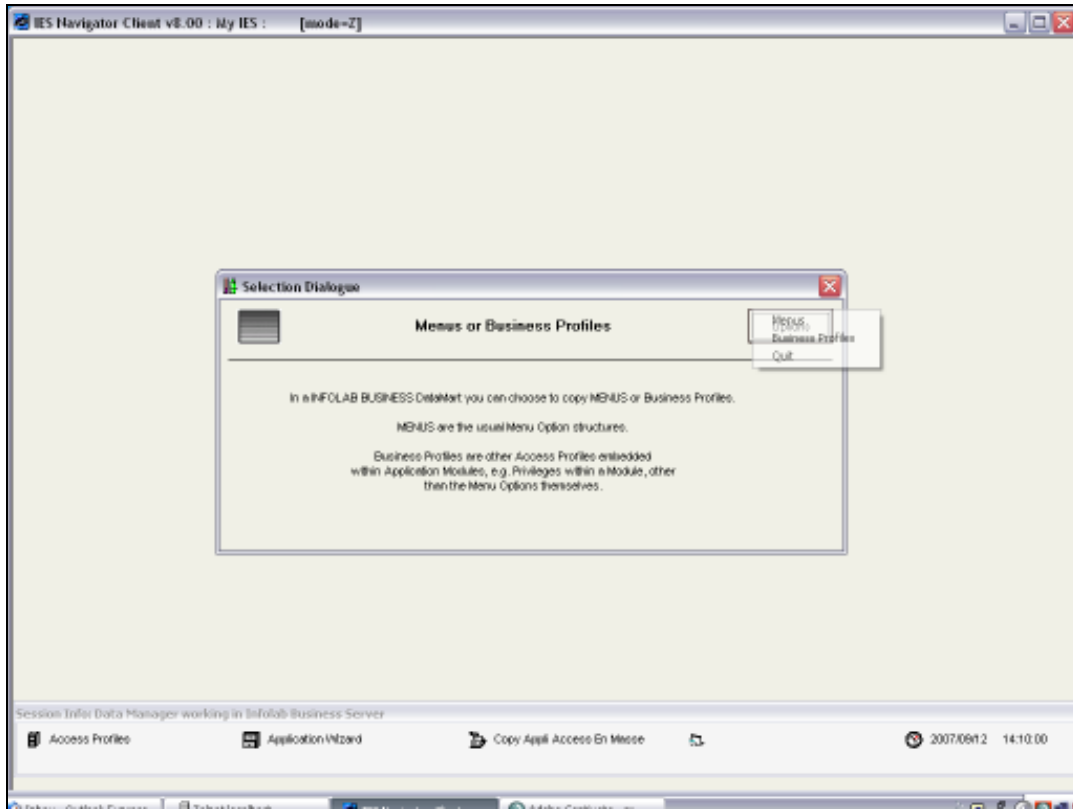
Slide 62

So let us see how we do that



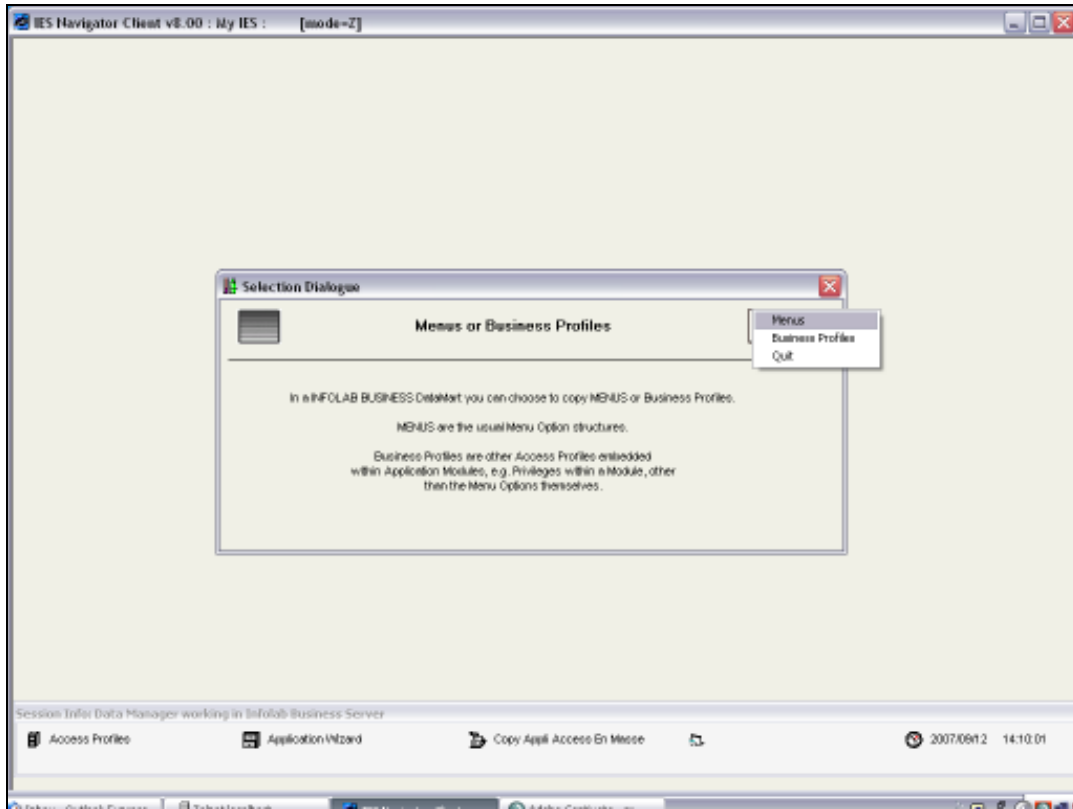
Slide 63

So Copy Profile again

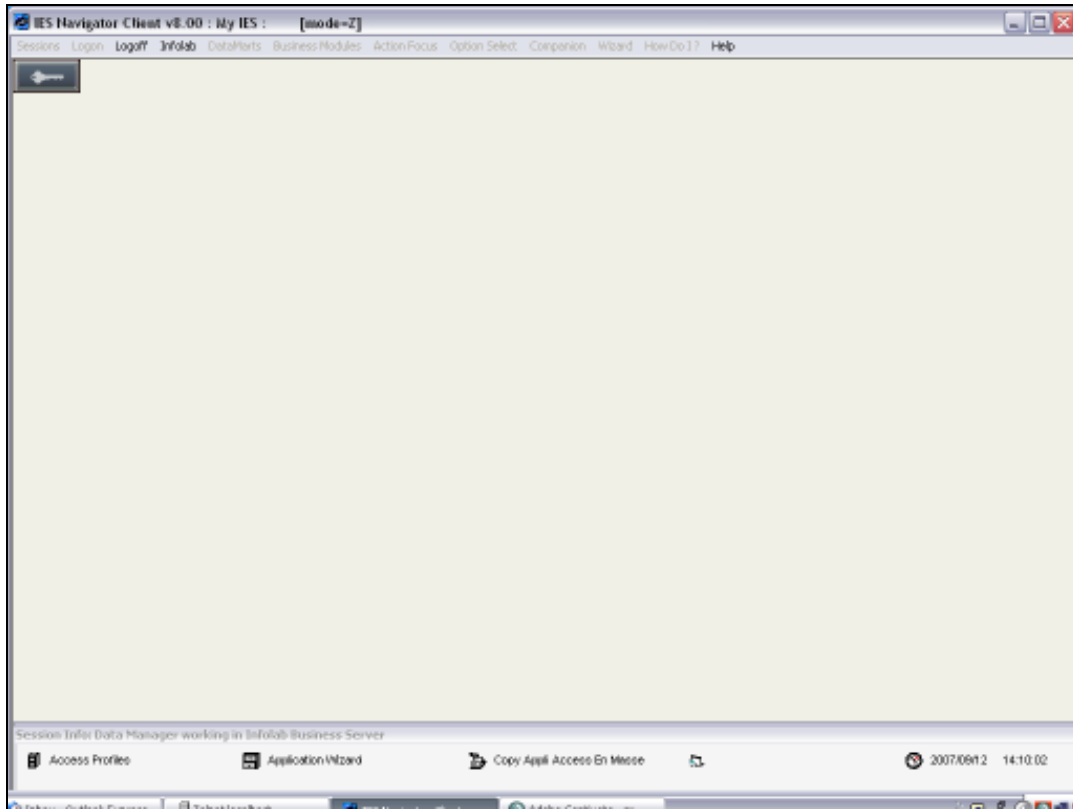


Slide 64

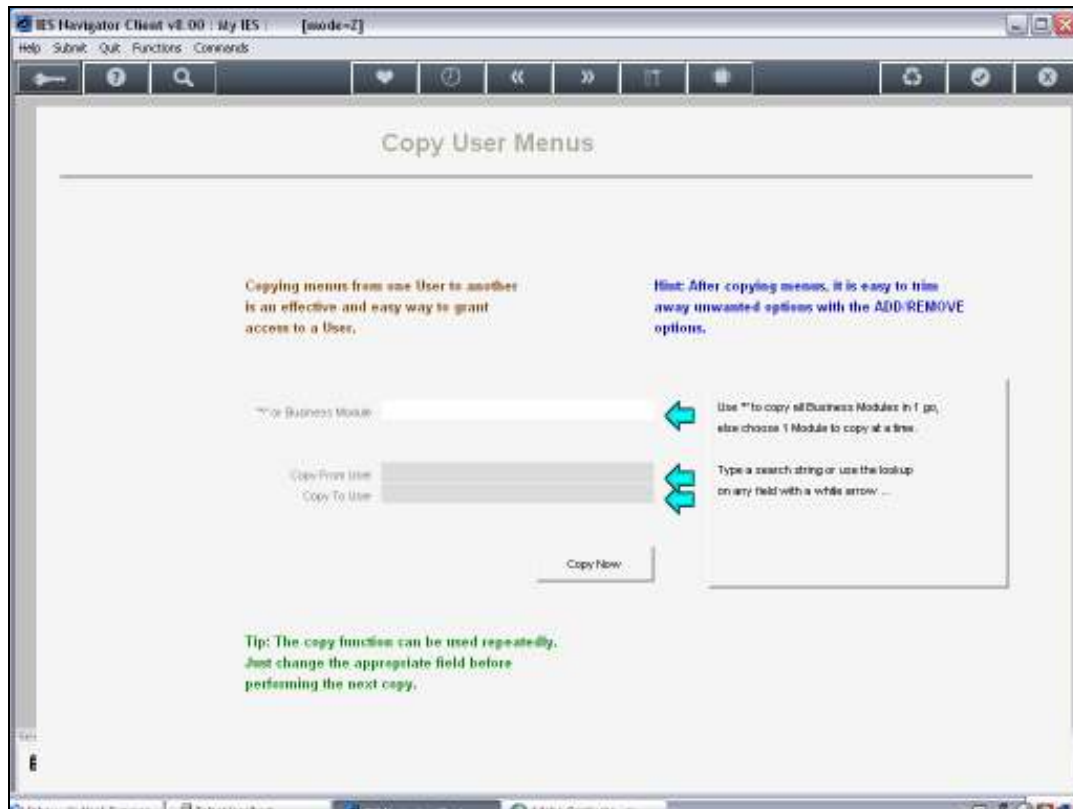
Menus again



Slide 65



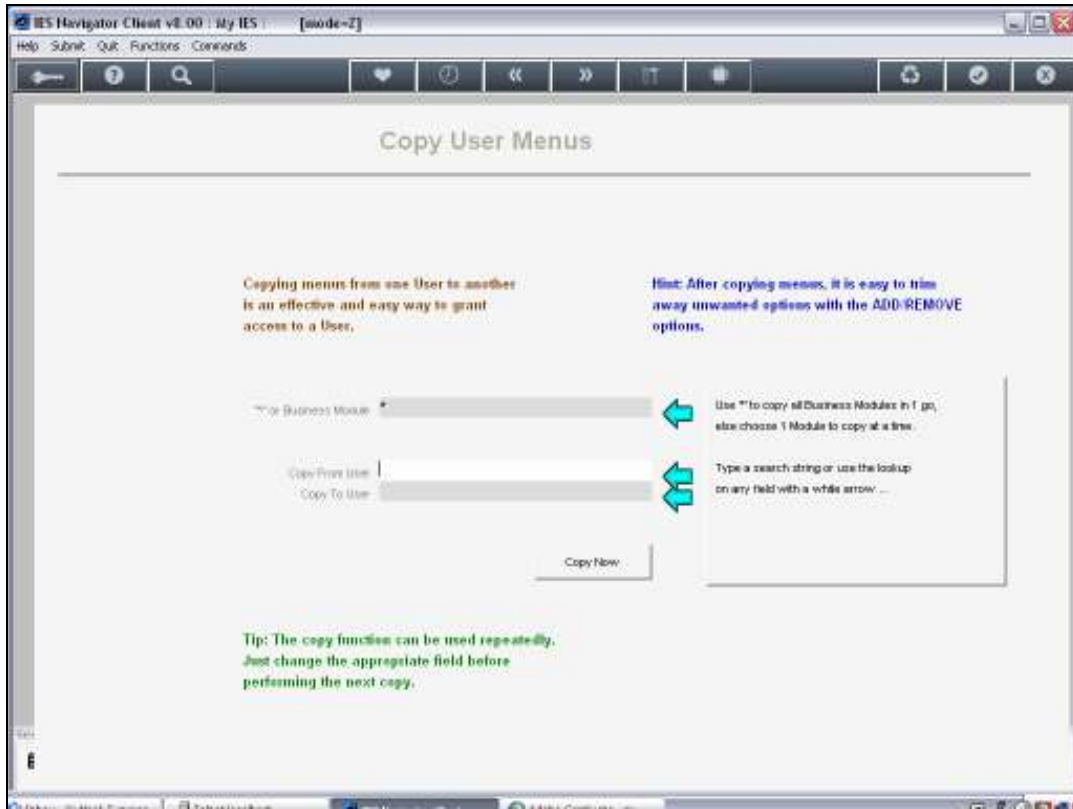
Slide 66



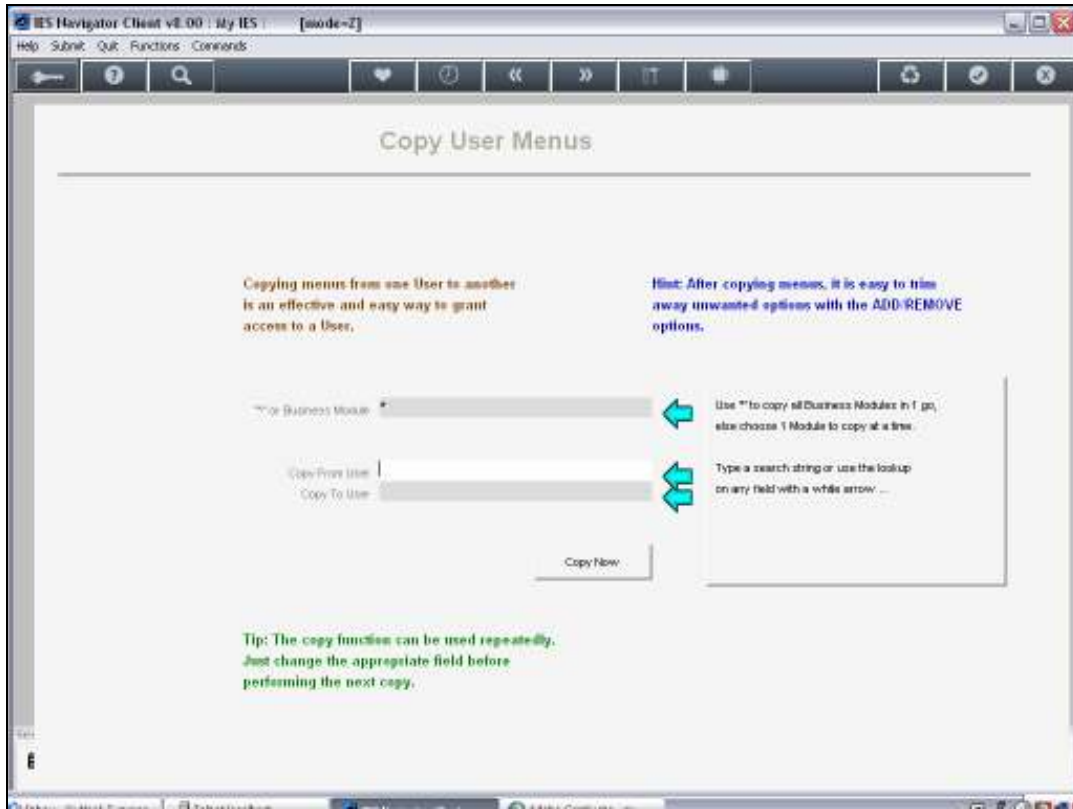
Slide 67

But this time I do not choose a specific Business Module.

I just choose "*" i.e. All.

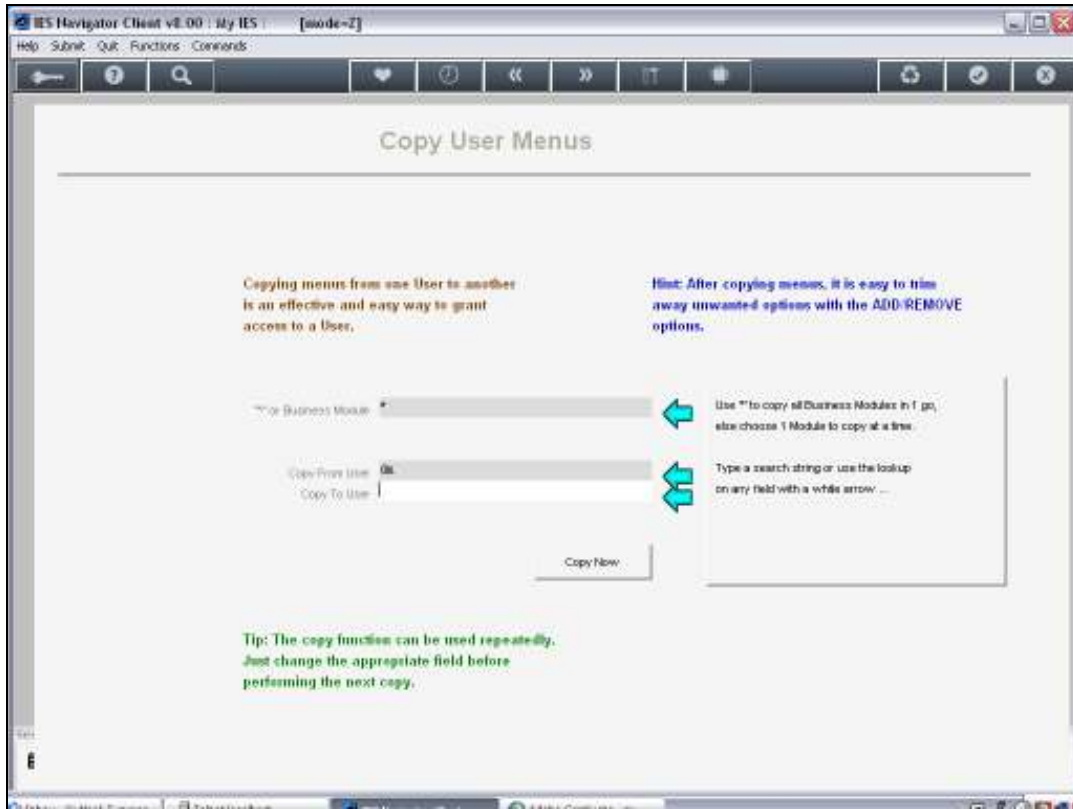


Slide 68

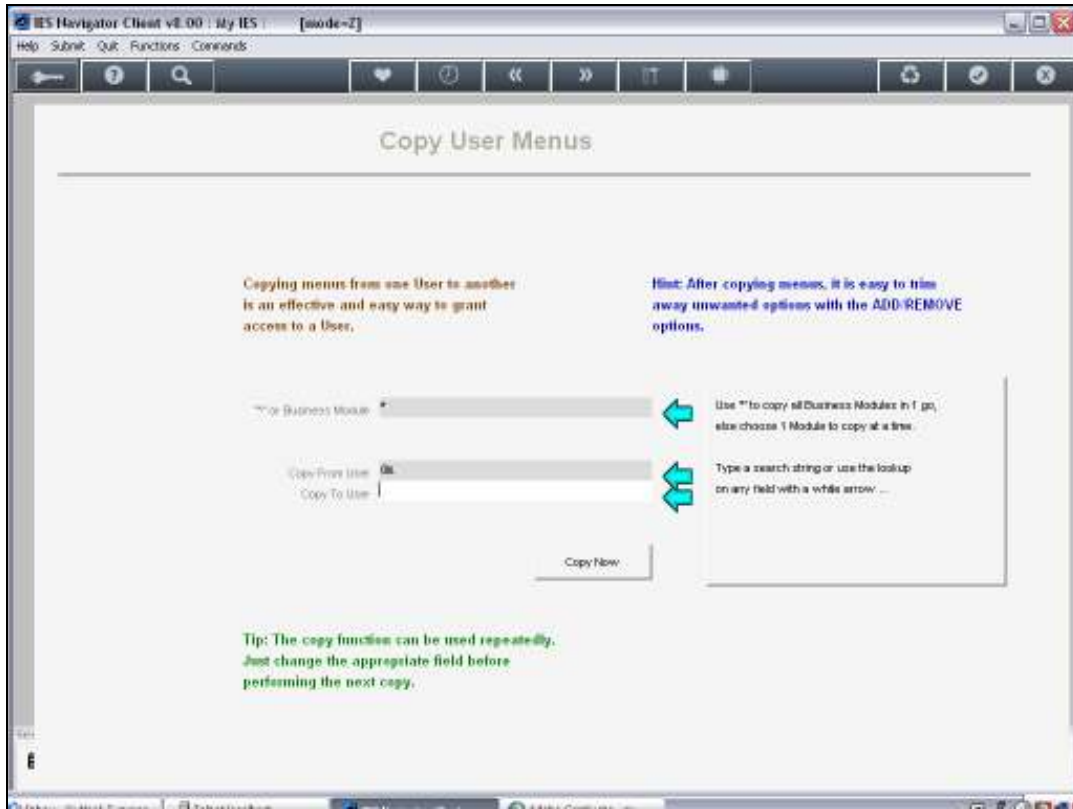


Slide 69

* Star and I say From User DM

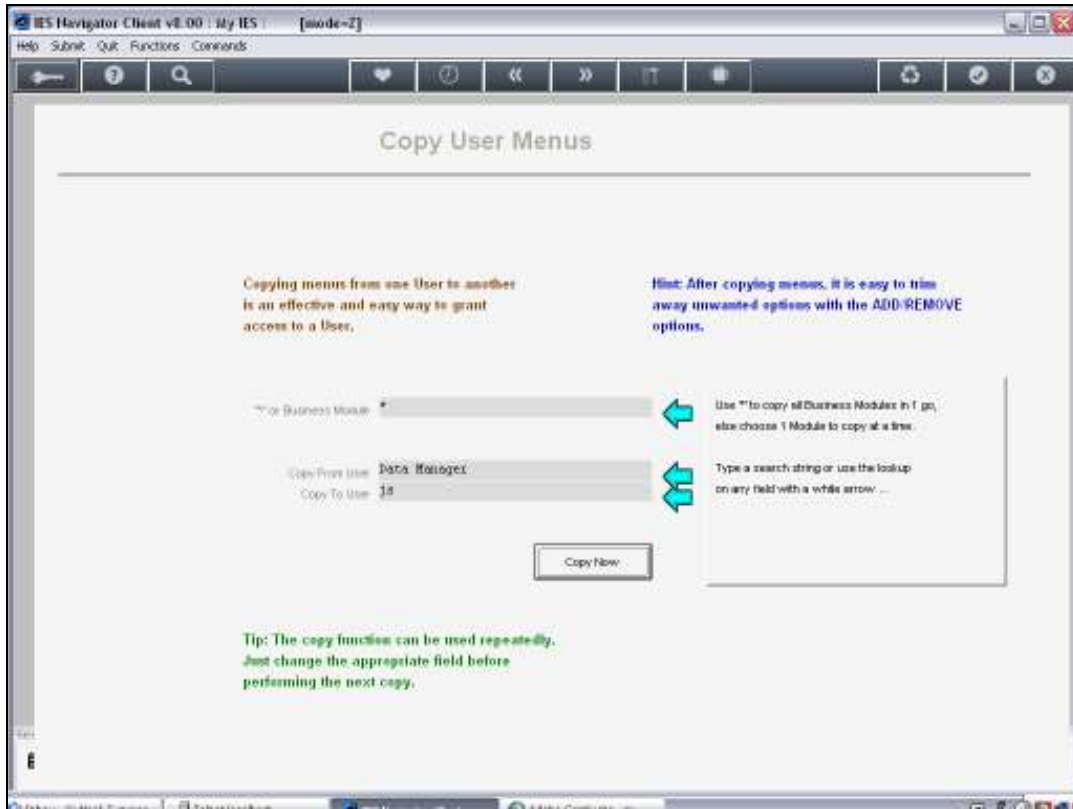


Slide 70

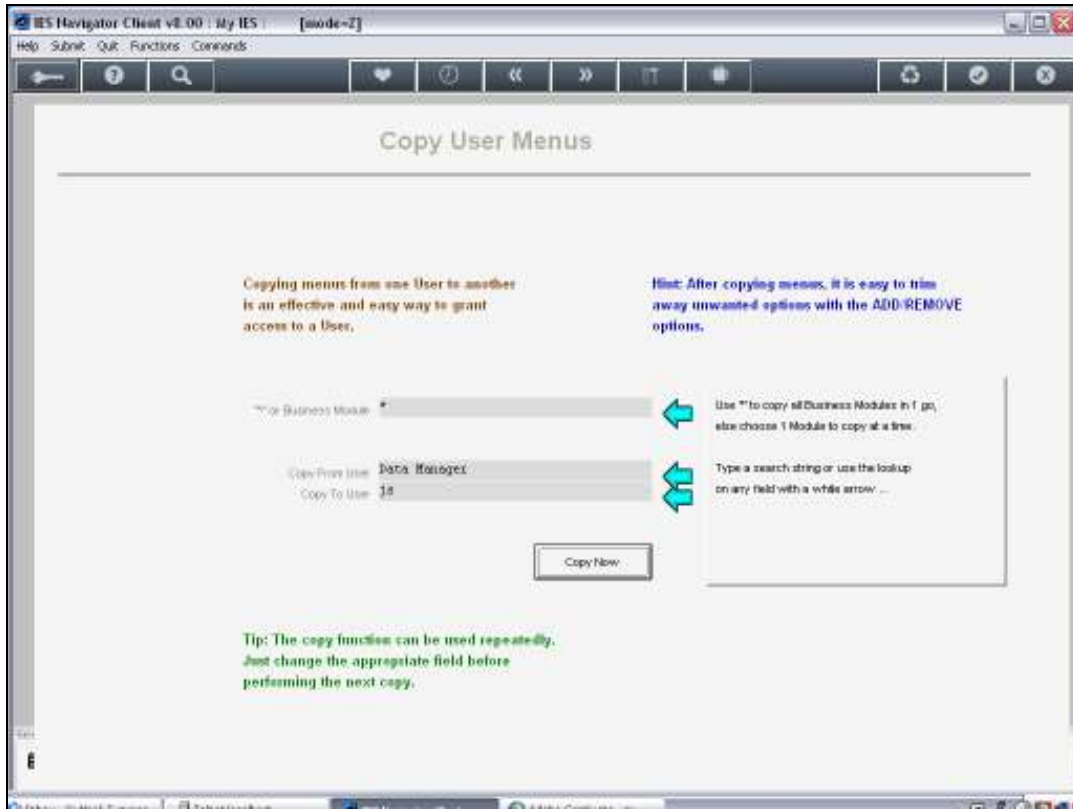


Slide 71

To User JS

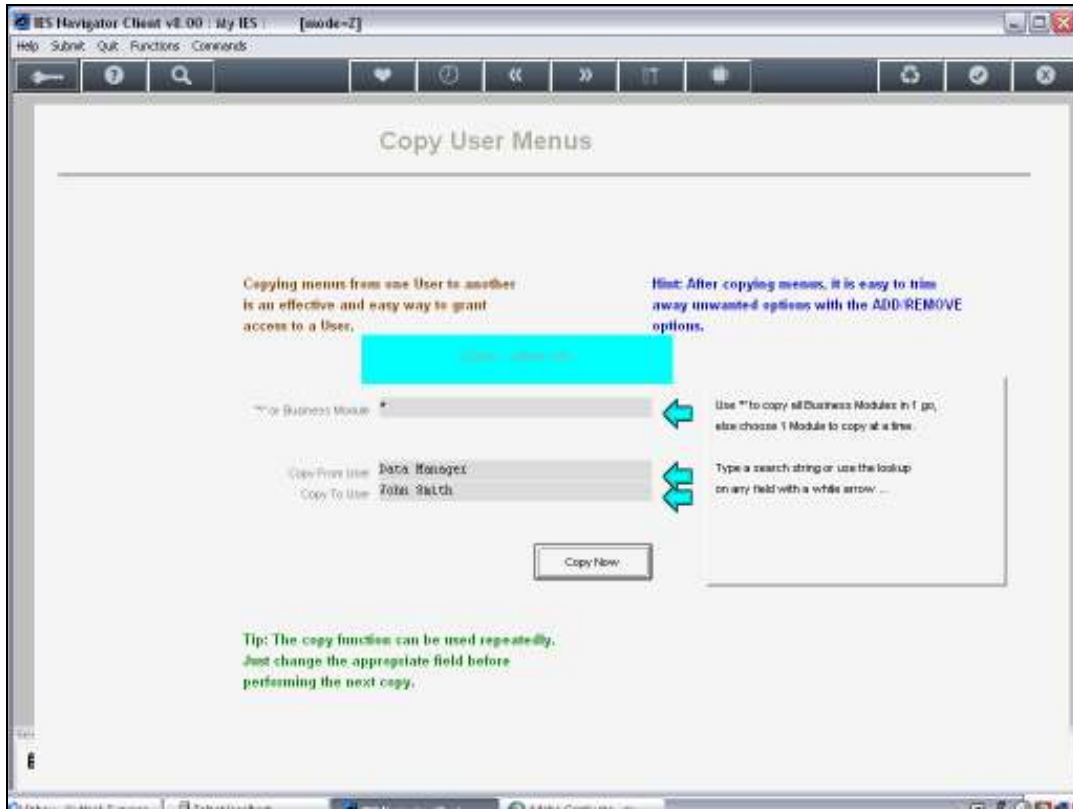


Slide 72



Slide 73

Copy to User John Smith js



Slide 74

Copy Now

And now the copying process will take a little bit longer because there may be thousands of options that the Data Manager has in this Business Data Mart and all of these are being copied to John Smith



Slide 75

The Copy process is complete now and I just want to show what has happened

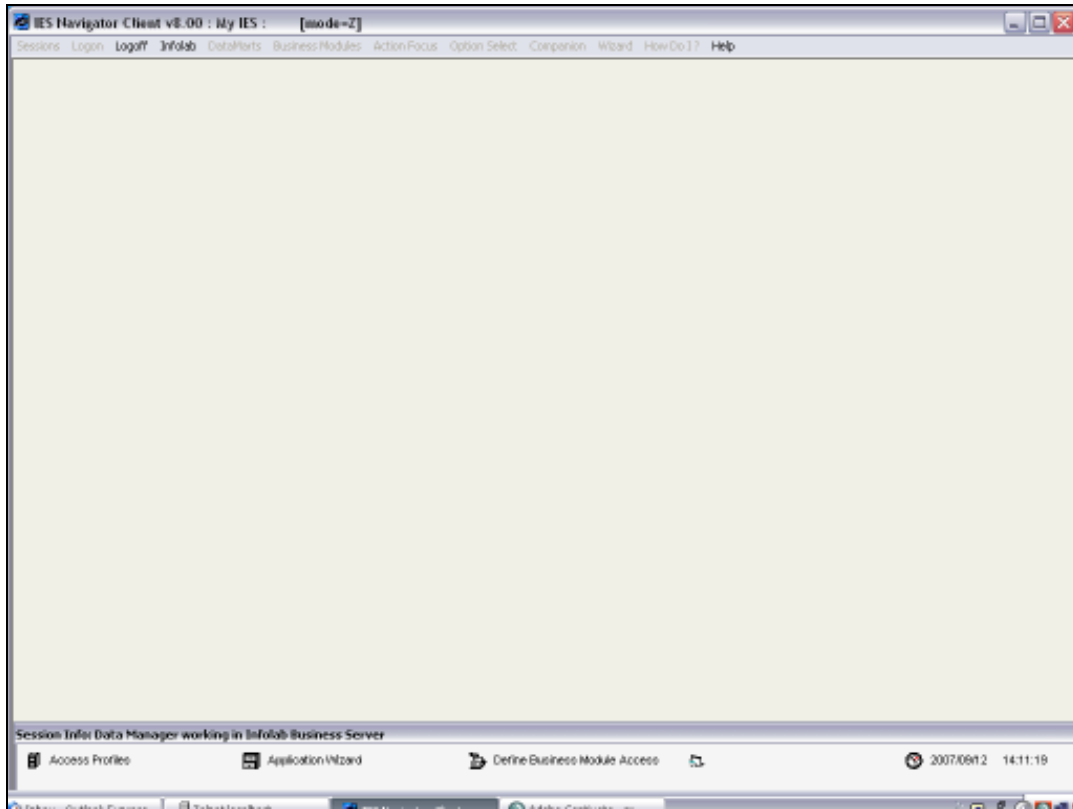


Slide 76

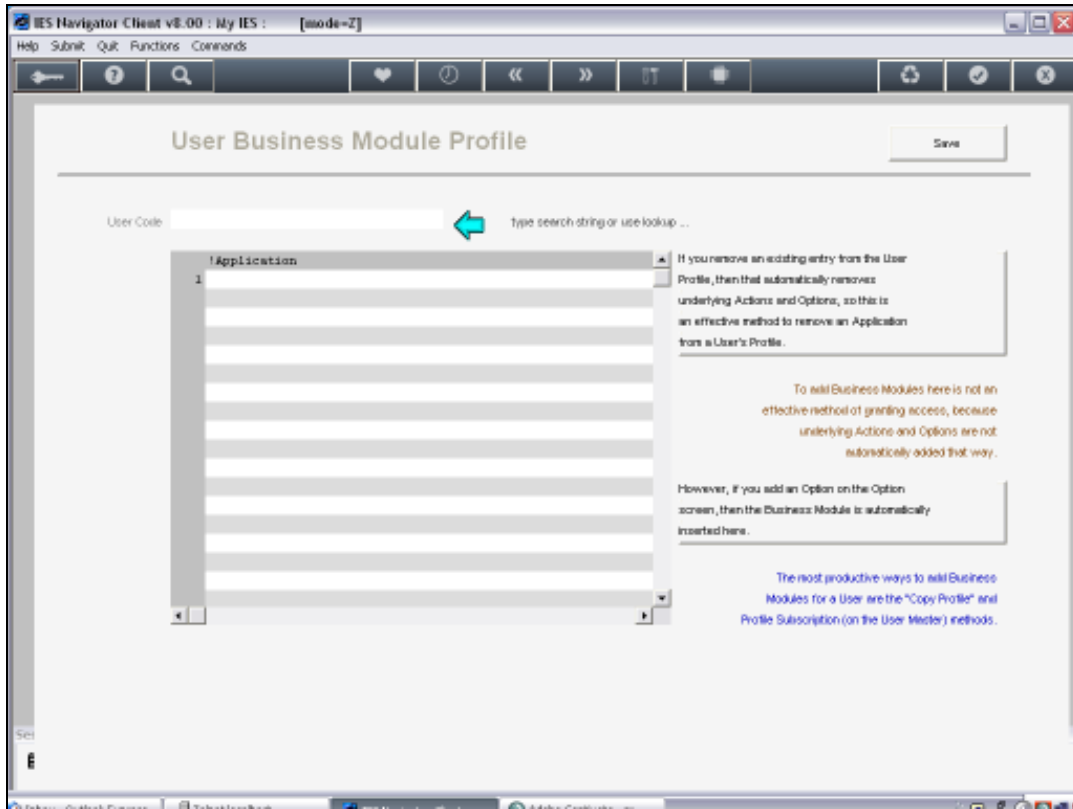


Slide 77

So if I look at John Smith's Business Modules

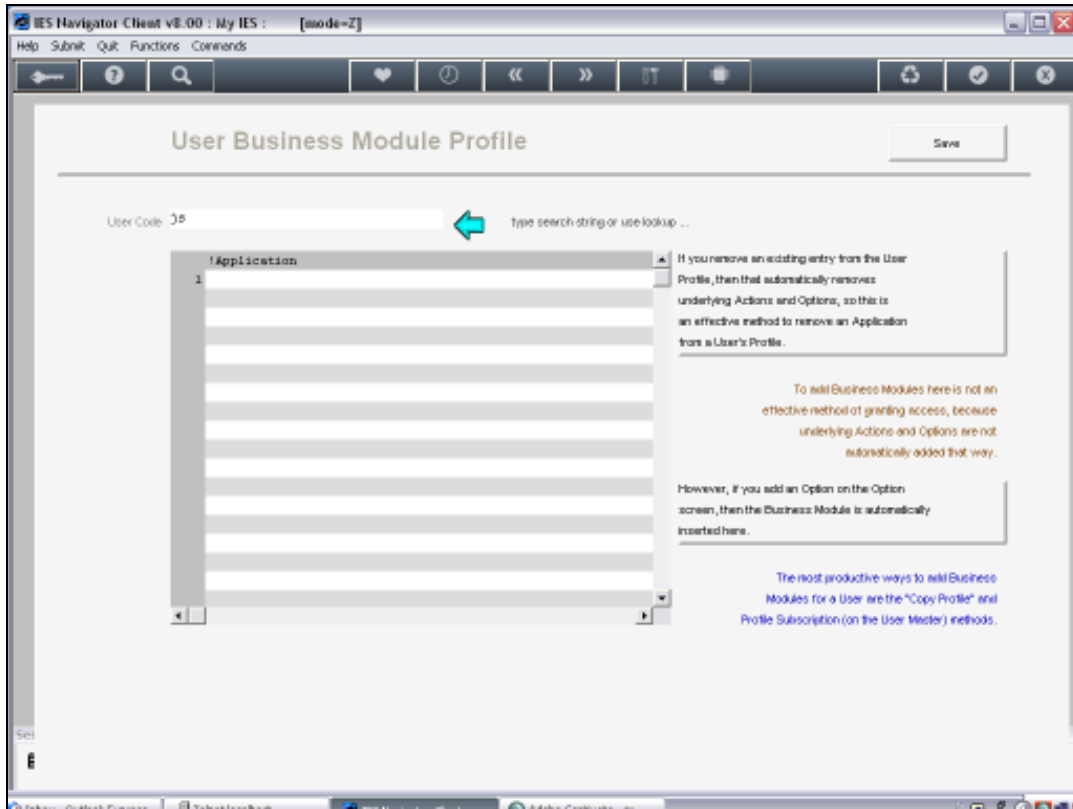


Slide 78

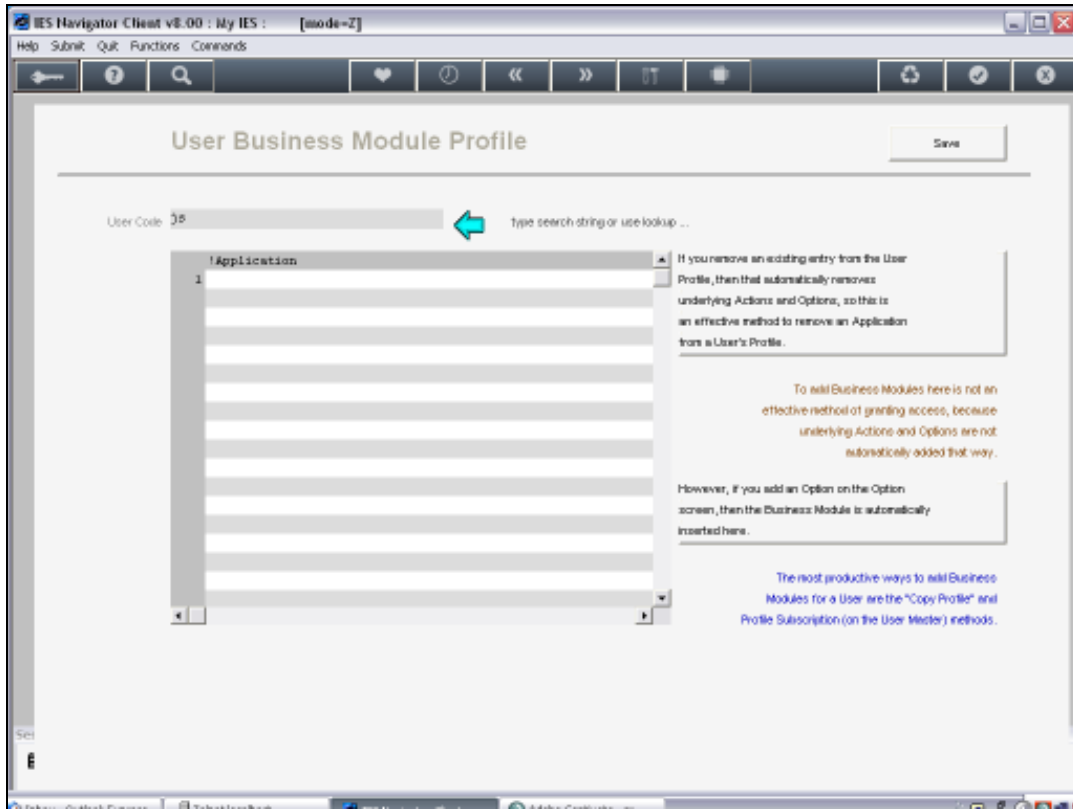


Slide 79

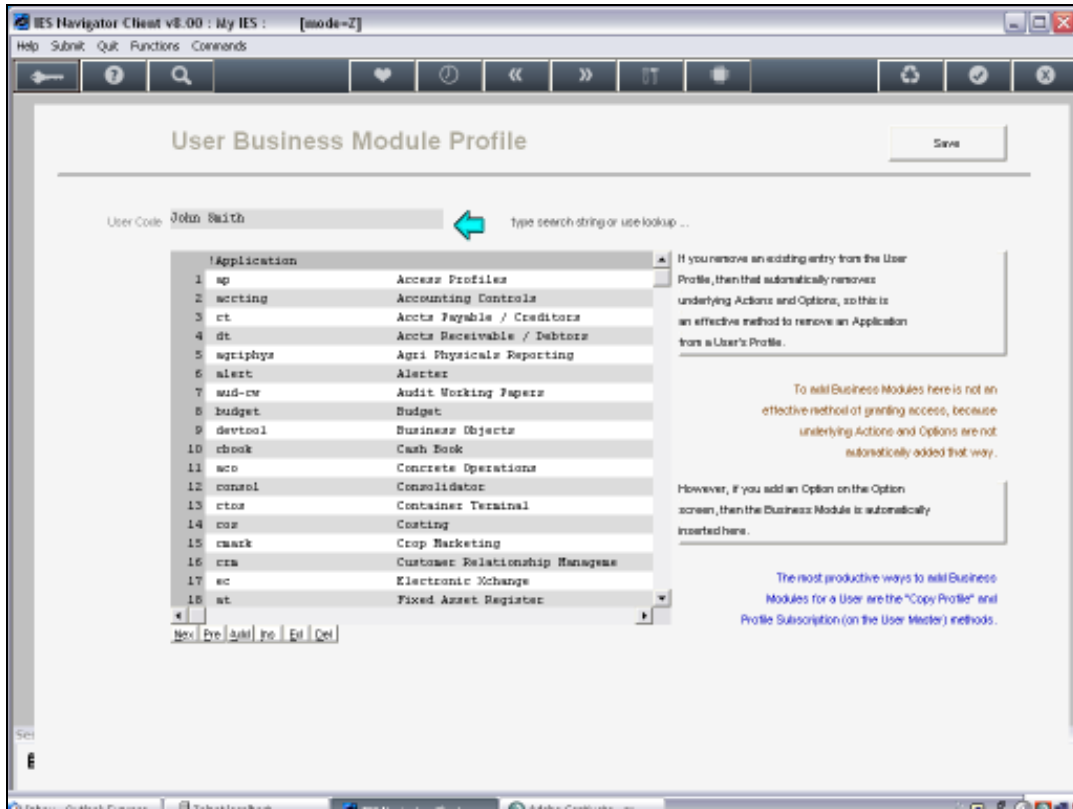
Or application list, then we see a new picture now



Slide 80



Slide 81

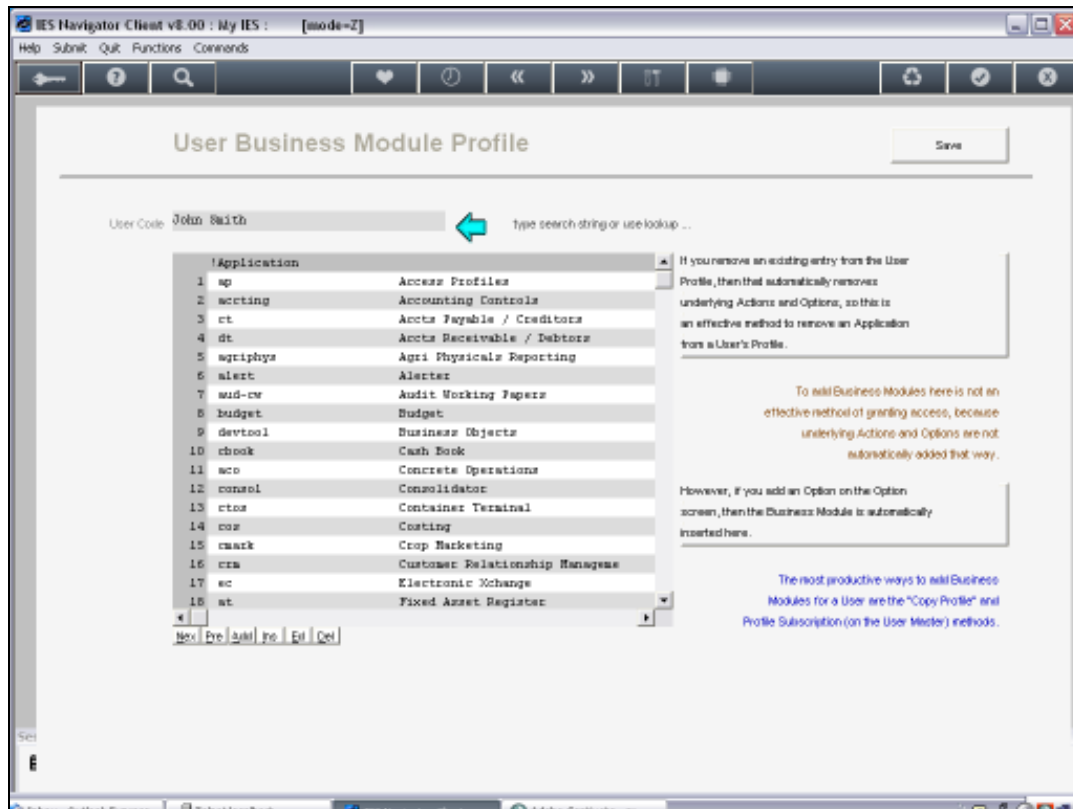


Slide 82

So it does not matter what was there before. When I use that Global option i.e. for all the Modules, then the system looks at the From User, in this case the Data Manager, who happens to have complete access in the system and I have copied all of that in one go to J Smith.

Now if the User we are copying From only has a number of Modules, then of course only those Modules will be copied.

If John Smith already has Access Profiles like the 1st option here on the list, at that stage, and I copy from another User who has 3 Modules, but not Access Profiles, that will still be here, plus the 3 new Modules



Slide 83

So when we Copy From, then the existing Menu Profiles that are there for the Copy To User, will stay in place, but anything new that the From User has, and which is not here on the To User, will be copied onto the To User.

So this option will typically be used. It is by far the easiest way to start creating a new Profile that we want to build manually. In other words, when we are not using Subscription Profile for a User, and we want to Build a Profile for a Normal Standard User, or in fact when we are building a Non Logon Profile New User Menu System.

Then this is the method that we will use to start and after we have copied all the modules that we want on here, then we will use the Trimming Functions to take away any Menu Options that should not be there.

We will look at the removing or trimming of some of the access in another tutorial.

In this tutorial we wanted to show how we can copy any single Business Module or Application at a time from one User to another, or in total all the Modules found in the From User to the To User, when we use the * or asterisk parameter. Now we have copied everything from Dm to John Smith and this applies only in the current Data Mart.