USER GUIDE

ADMINISTRATOR ROLE

Version 1.5

TABLE DES MATIÈRES

INTRODUCTION

In this guide, you will learn how to:

- Define the user role in order to configure the permissions of use in the PIM,
- Define the scope of responsibility and level of access to the products for user groups, according to local and categories (Enterprise feature),
- Define the level of access to groups of attributes for user groups,
- Define the level of access to import and export profiles for user groups (Enterprise feature).

GLOSSARY

Main concepts

User

A user is an access account to log in into the PIM for one or several persons in a company. A user has at least one login, one password, one email, and a role.

Role

A role is a set of permissions in the PIM. A role may be assigned to none or several users.
The permissions are cumulative: the permissions the most permissive are applied.

User group

A user group is a set of users grouped by a name. A user may be a part of several user groups. For example, the user group “Marketing Dpt” gathers all the users in the Marketing Department of the company. The user group “Managers” gathers all the users who are manager of a department. Some users can be in the “Marketing Dpt” only.

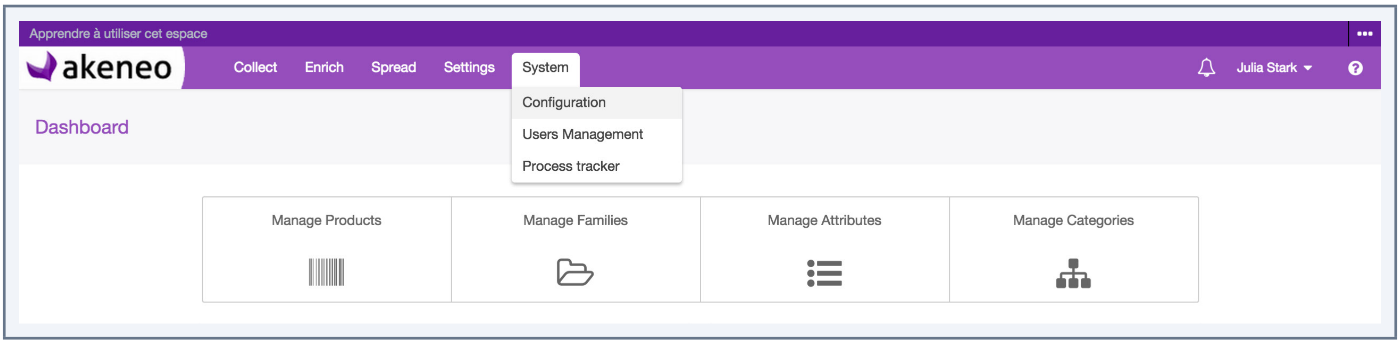
Advanced rights are applied on User groups, only available in the Enterprise Edition. In the Community Edition, there is no permission applied on user groups.

SELECT THE DEFAULT LANGUAGE

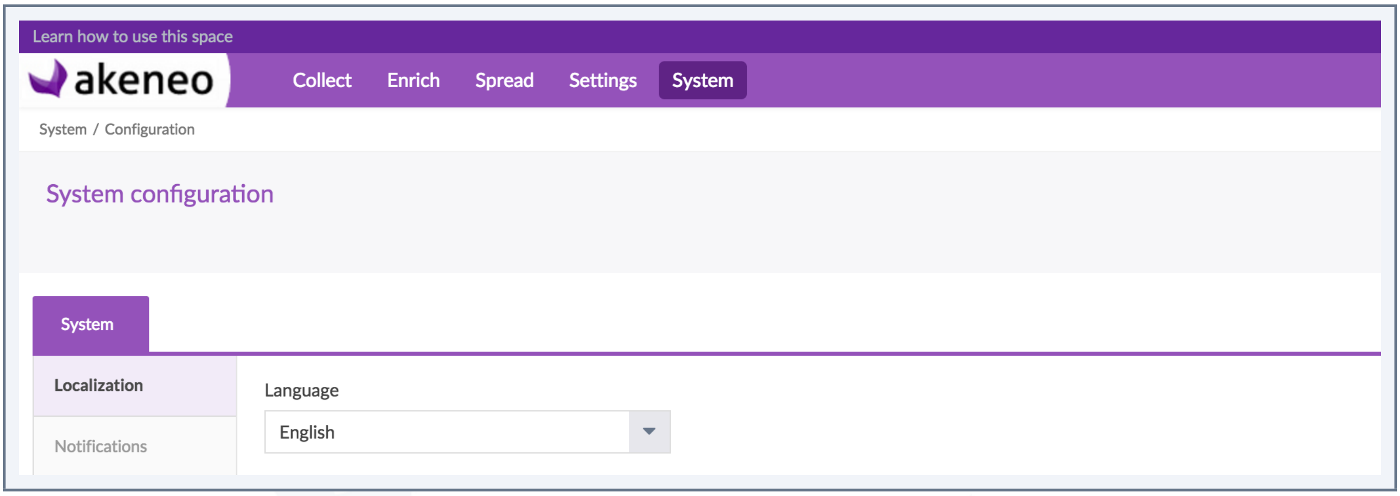
Most user interfaces in the PIM are translated. For available translations, go to the Https://fr.crowdin.com/project/akeneo website.

Setting the default language

1. Log in with a user account with the rights to “System Setup” menu.
2. Go to System → Configuration



3. Select the default language you wish from the drop down menu.



4. Click on the “Save” button to apply your settings

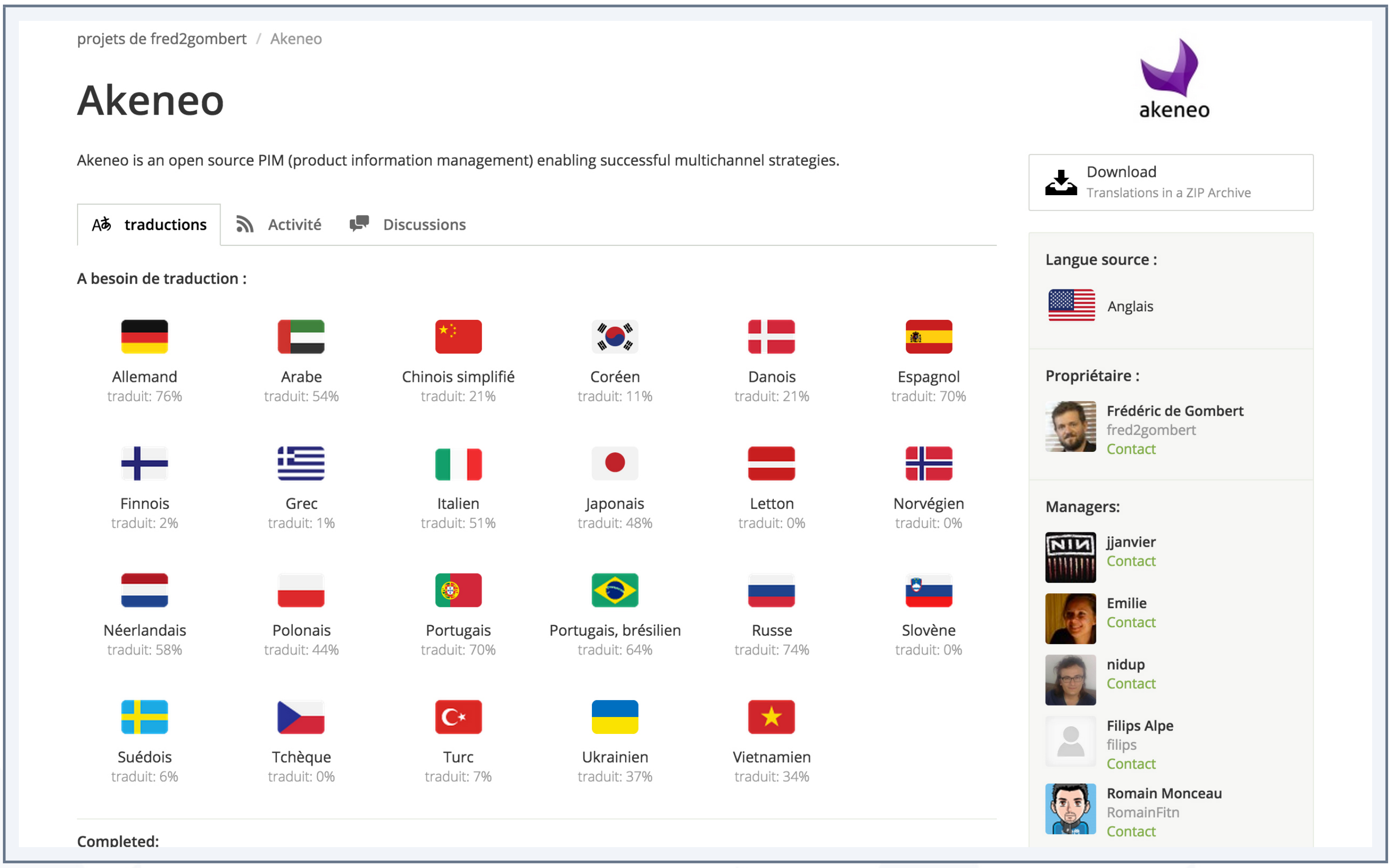
Note

The locales in the list are all the locales installed for your Akeneo PIM. These locales should be >= 80% translated in crowdin, but this rate can be changed for your installation.

The UI locale for each user can be defined in his user account.

How to participate to Akeneo PIM translation

The application **https://fr.crowdin.com/** provides a collaborative environment for the community to translate the PIM. By default, Akeneo PIM is set in English. Sometimes, thus some translations are missing in the different languages, depending on the contributions of the community. Please feel free to help to remediate and the end-user impact. Access to Crowdin is free, simply register to access to Akeneo project **https://fr.crowdin.com/project/akeneo**. For now, here is the current status on PIM translation on **Crowdin**:



MANAGING USERS

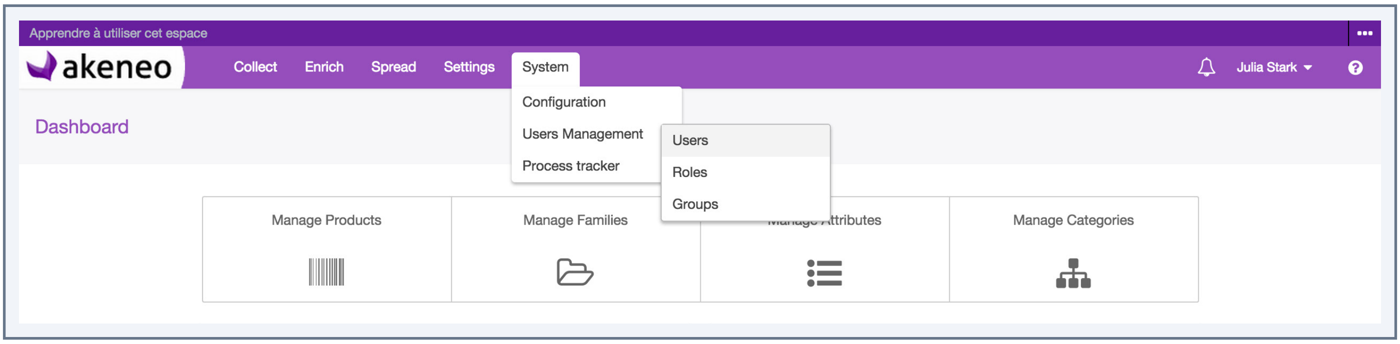
All users in the PIM can see the firstname and lastname of other users in the application.

The management of the users and their access rights is available only if the rights have been given to the user.

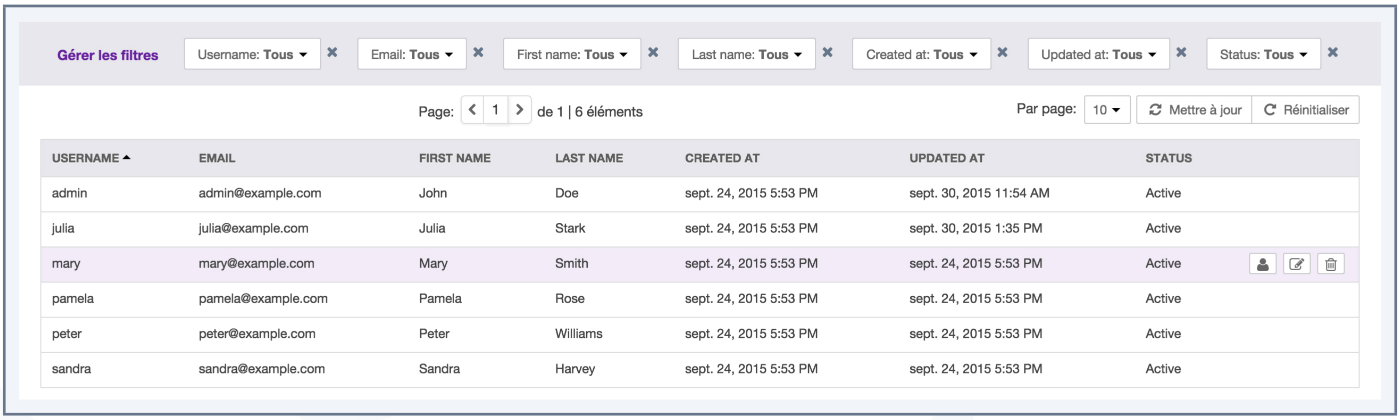
Any PIM user can see his own account details, update his/her password, and set his/her preferences (eg working environment for local and channel).

View the list of users

1. Log in with a user account with the rights to “List of user groups”.
2. Go to System → User Management → Users.



3. To narrow the list of users displayed, use the available filters above the user grid.



USERNAME	EMAIL	FIRST NAME	LAST NAME	CREATED AT	UPDATED AT	STATUS
admin	admin@example.com	John	Doe	sept. 24, 2015 5:53 PM	sept. 30, 2015 11:54 AM	Active
julia	julia@example.com	Julia	Stark	sept. 24, 2015 5:53 PM	sept. 30, 2015 1:35 PM	Active
mary	mary@example.com	Mary	Smith	sept. 24, 2015 5:53 PM	sept. 24, 2015 5:53 PM	Active
pamela	pamela@example.com	Pamela	Rose	sept. 24, 2015 5:53 PM	sept. 24, 2015 5:53 PM	Active
peter	peter@example.com	Peter	Williams	sept. 24, 2015 5:53 PM	sept. 24, 2015 5:53 PM	Active
sandra	sandra@example.com	Sandra	Harvey	sept. 24, 2015 5:53 PM	sept. 24, 2015 5:53 PM	Active

4. To view the information on a user account, click on the row from the grid.

Adding a user

1. View and check the list of users: Users Management → Users

2. Then click on “Create User” button.
3. Fill out at least the information required (red asterisk), then click on “Save”.

The user account has been created.

Note

An email is not sent automatically. It depends on the initial configuration of the PIM. Hence you will need to provide the login and password to the user manually.

Assigning a user group to a user

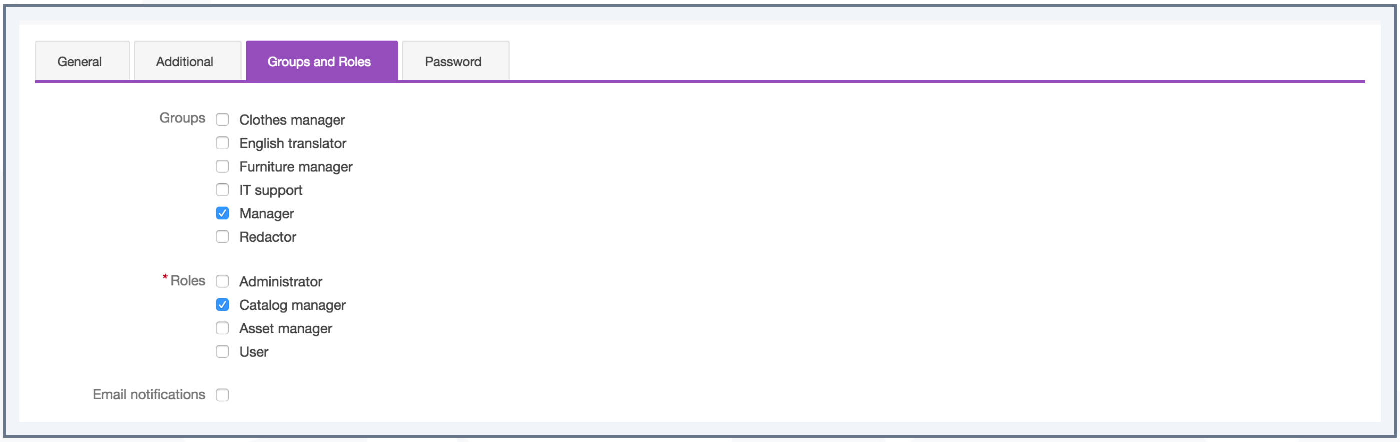
When a user is created, this latter can be added to at least one of the groups that have been created in the PIM.

Note EE

Assign a user to one group or several groups allows him/her to have permissions on the catalog (EE Rights).

To change the user membership of a group to another one:

1. View and check the list of users: Users Management → Users.
2. Click on the user to proceed.
3. Click on the “Edit user” button.
4. Click on the “Groups and Roles” tab from the menu



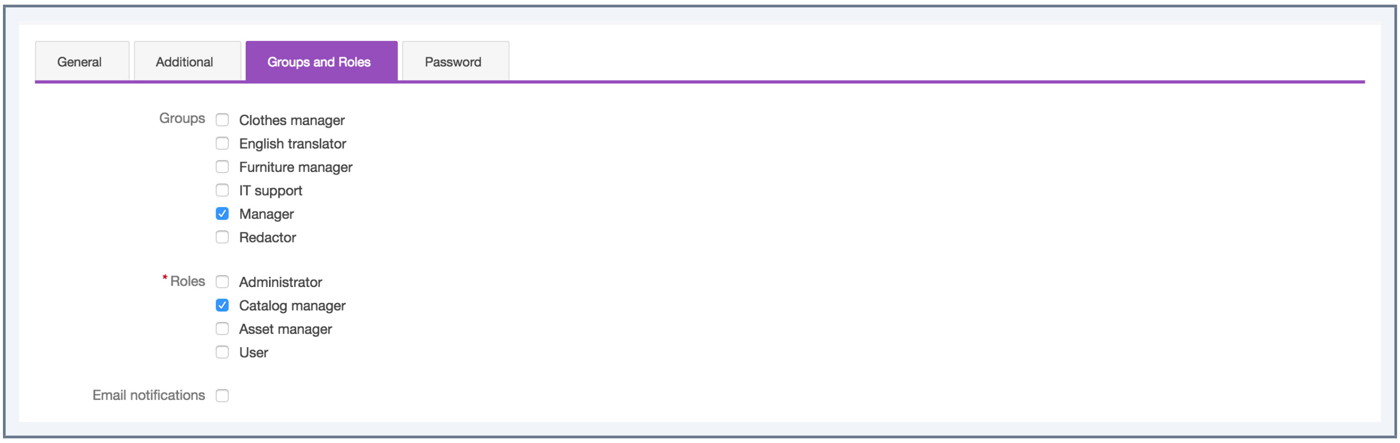
5. Check / uncheck the groups to add or remove the user from these groups.
6. Click "Save".

Assigning a role to a user

Assign a role to a user allows him to have access rights in the PIM (CE Rights).

To change the membership of a user:

1. View and check the list of users: Users Management → Users.
2. Click on the user to proceed.
3. Click on the "Edit user" button.
4. Click on the "Groups and Roles" tab from the menu



5. Check / uncheck the user to assign role.
6. Click "Save".

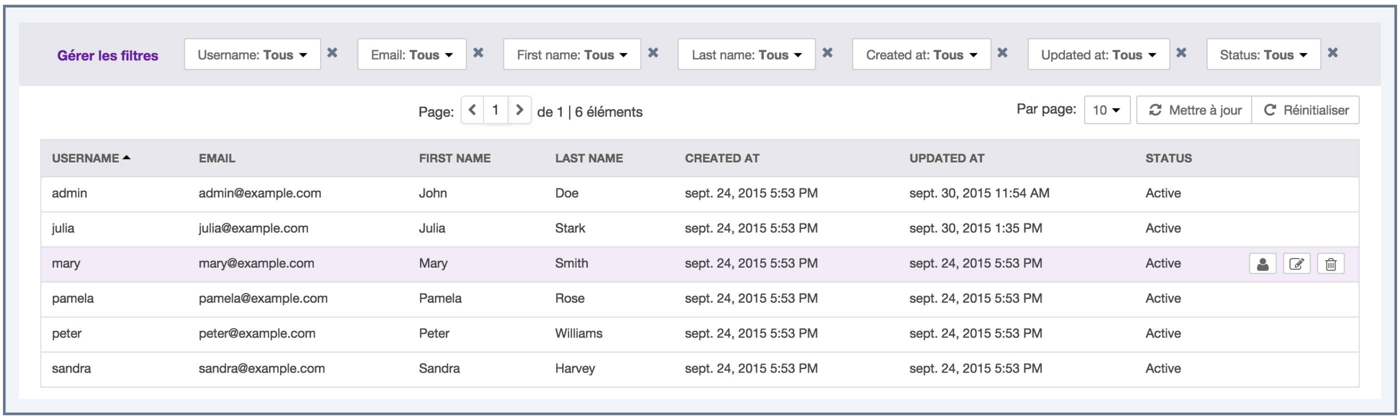
Changing the properties of a user

1. View and check the list of users: Users Management → Users.
2. Click on the user to proceed.
3. Click on the "General" tab.
4. Make the desired changes and click on the "Save" button.

Deleting a user

1. View and check the list of users: Users Management → Users.
2. Click the user to proceed.

3. Click on the right on the “Delete” button.



4. Then confirm you want to delete the user.

The user can no longer connect to the PIM application. Though the user actions generated in the PIM will be stored.

MANAGING USER GROUPS

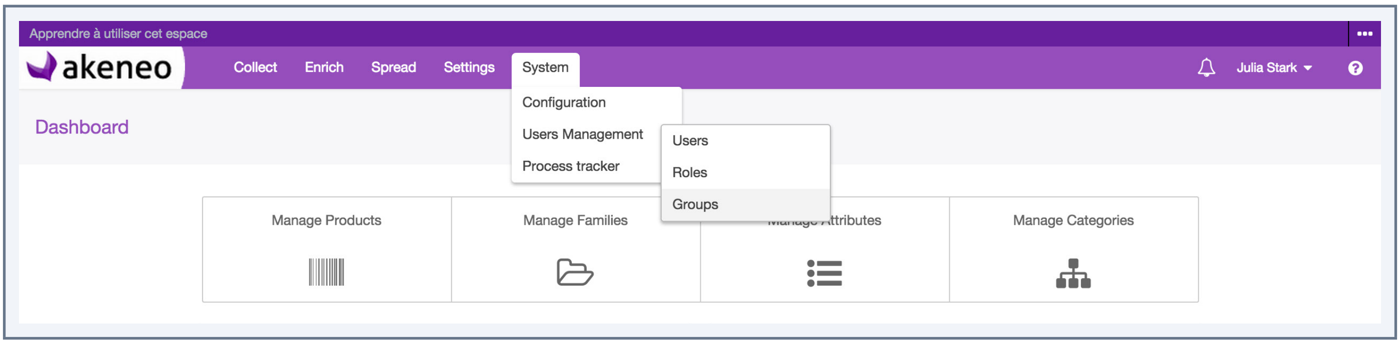
A user group in Akeneo PIM is a way to manage sets of users. Users can belong to multiple groups. Groups are used in the PIM to define the access rights and the visibility to the product catalog.

> **Note**
>
> Roles are similar to groups, they also enable & define rights on the product catalog. The main difference is that the roles entitle rights on what the user is allowed to do in the PIM (to sum up, access to all the existing buttons and menus in the PIM).

View the list of user groups

To see which groups have been created:

1. Log in with a user account witch has the rights to see the groups (system: List of user).
2. Go to System → Users Management → Group.

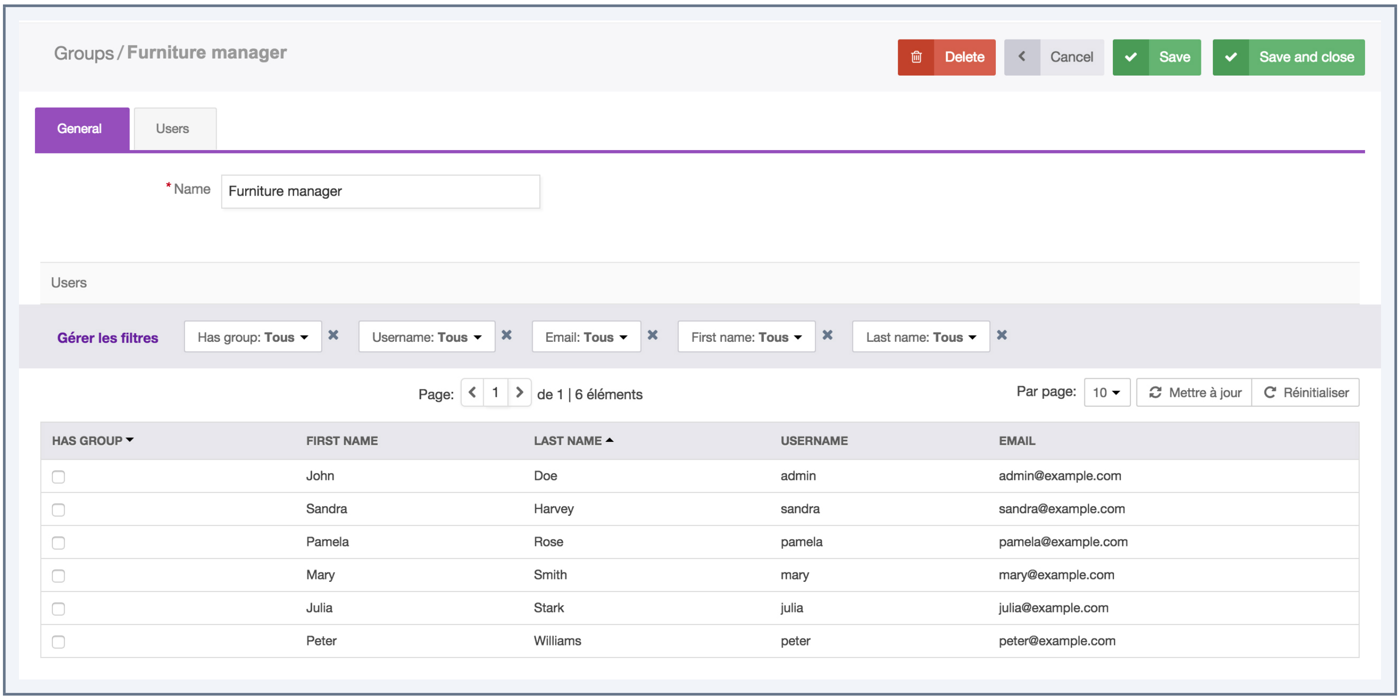


3. To see the details of a user group, click on a line in the group to view the information available.

Creating a user group

To create a group

1. Log in with a user account with the rights to create a group (system: Create a group of users).
2. Go to the System menu → Users Management → Groups.
3. Click on “Create group” button to generate a new user group.



4. Fill the form to name the group.
5. Then click on the “Save” button to update groups.

Editing the name of a user group

To edit the name of a user group:

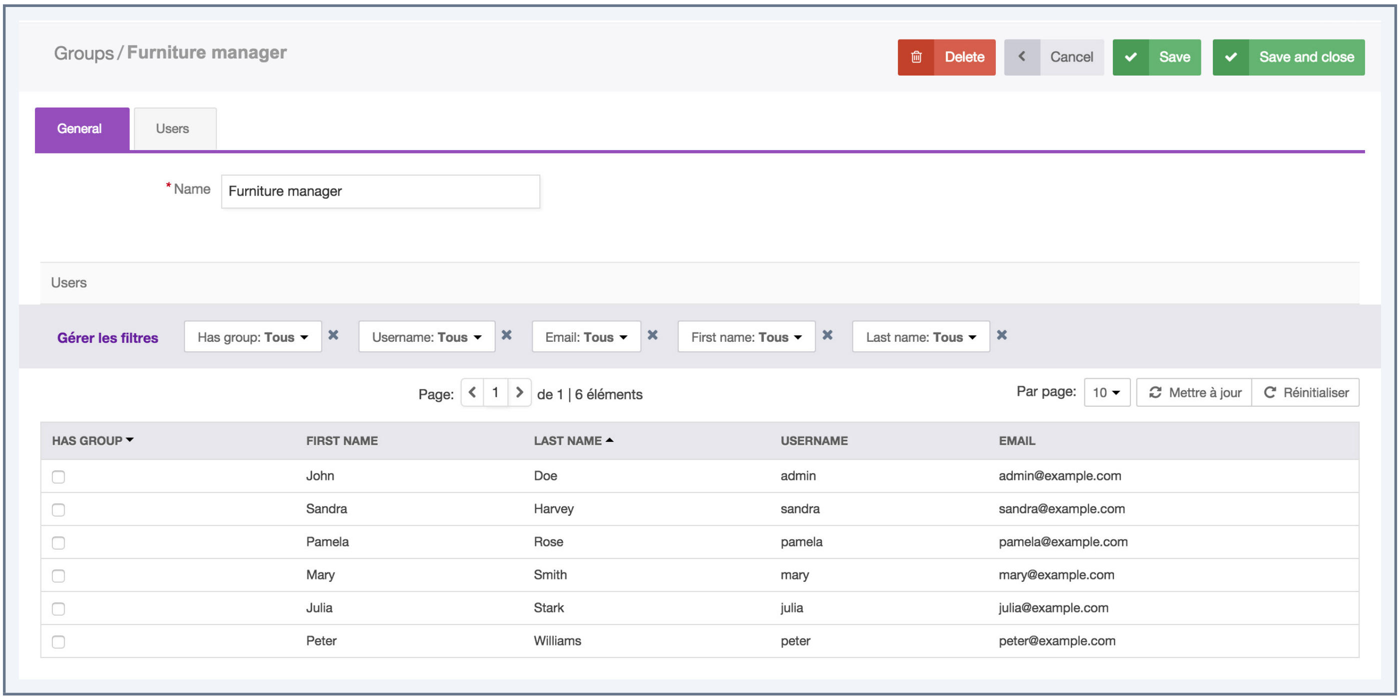
1. Log in with a user account with the rights to edit a group (system: Change a user group).
2. Go to System → Users Management → Group.
3. Click on the group name to be modified.

4. Change the name of the group.
5. Then click on the “Save” button to update the user group.

Editing the users in a user group

To edit the users associated to a group:

1. Log in with a user account with the rights to edit a group (system: Editing user groups).
2. Go to System → Users Management → Group.
3. Click on the user group to be modified.



4. A grid of users is displayed with the users belonging to the respective group. They can be easily identified by the check box in the first column “has group”.
5. Look for the users and check the box to add the users to the group. And the other way around, uncheck the box to withdraw the users from the group.
6. Then click on the “Save” button to update the group.

The rights which have been granted to or removed from users (added to or removed from the user group) are automatically applied. The user can still continue to be connected to the PIM: the change on rights will be updated on the next loading of a page in the PIM.

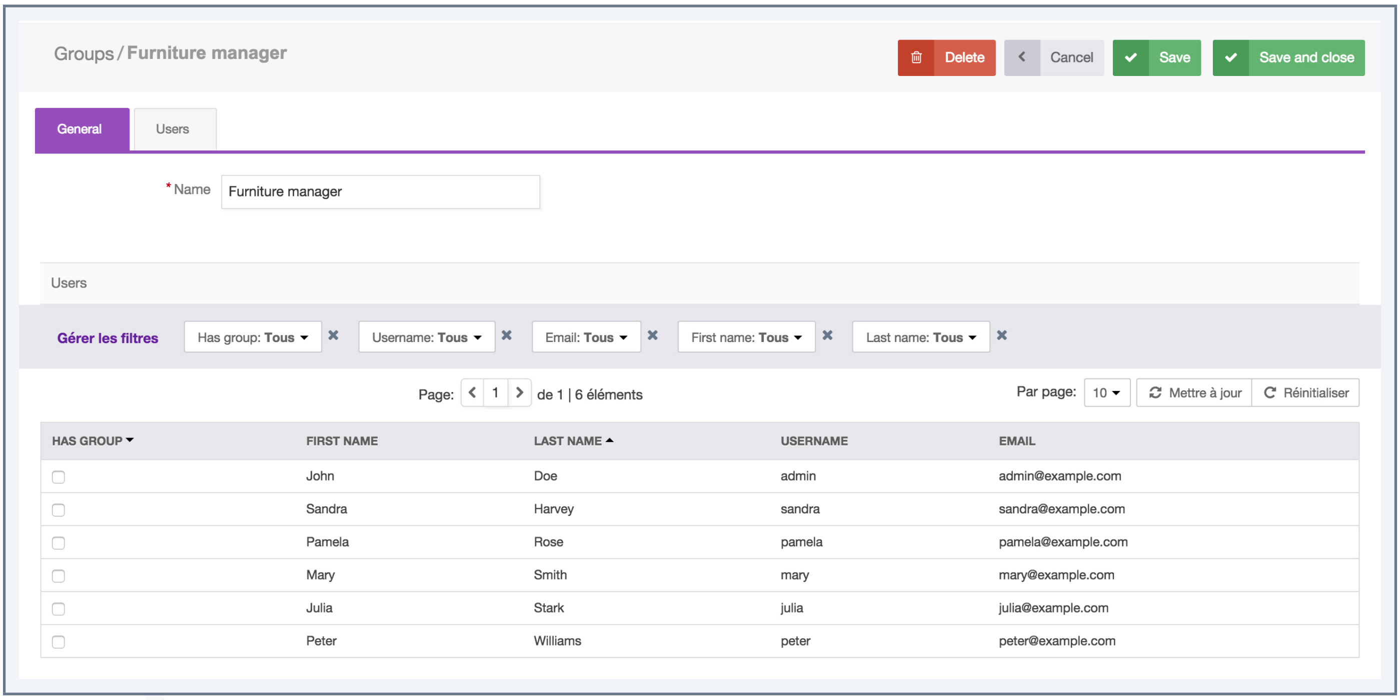
Deleting a user group

Before deleting a group, you should check first if the specific group is used to entitle access rights to other users.

To delete a user group:

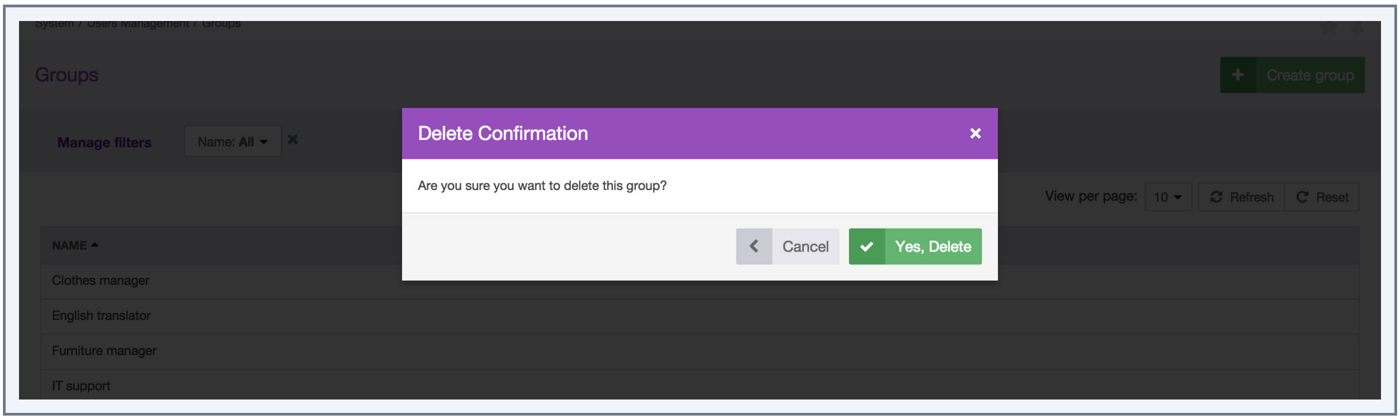
1. Log in with a user account with the rights to edit a group (permission System > Remove a user group).
2. Go to System → Users Management → Group
3. You have two ways to proceed:

- Click on the user group to be deleted and click on the “delete” button on the top right.



- Click on the “delete” button straight away from the grid dragging the mouse on the group you want to delete.

4. Then confirm the message for the suppression of the group.



Please check first the potential impact of the removal of a group on which users are included. For instance, if the group membership was the only way for a user to have a specific right, then due to the group suppression, the user will have no longer his access right in the PIM.

CONFIGURING THE RIGHTS

Setting permissions on actions

Permissions on actions are granted according to the scope of roles of a user. The following table lists all the rights and the features that are attached to it.

Rights	Description
System	
System configuration	Go to the “System → Configuration”.
Create a user group	Button “create” a user group in the System → Management Users → Groups.
Delete a user group	“Delete” button in the edit pages of user groups.
Edit user groups	“Save” button in the edit pages of user groups.
List user groups	Go to entry System → User Management → Groups.
Create role	Button “create a role” in the System → User Management → Roles.
Delete role	Button “Remove” in the pages of editing roles.
Edit a role	Button “Save” in the edit pages of roles.
View a role List	Go to system input → User Management → Roles.
Create user	Button “create user” in the System → User Management → Users.
Delete User	button “Delete” in the users edit pages.
Edit users	“Save” button in the users edit pages.
View the list of users	Go to the system input → Management Users → Users.
View Process Tracker	Go to “System > Process Tracker”.

Import Profiles	
Download import files	Button “Download the imported file” in respect of imports pages. carried
Download the report on import	Button “Download logs” in the report pages of import. executed
View the list of reports on imports	Go to input Collecting → History of imports.
View the details of reports on imports	Shortcut Report” in the grid of import reports + Click on the lines of the grid reports of imports.
Create an import profile	Button “Create an import profile” in the Collect → Import Profiles.
Modify an import profile	Button “Edit” in the Collect → Import Profiles → Page consulting an import profile.
Show History of the import profile	“History” tab in the Collect → Import Profiles → edit an import profile page.
See the list of profile import	Go to collect input> Profiles of imports.
Start an import profile	Shortcut “Start an import” in the grid of imports + button profiles “run” on the comment page of import profiles ..
Delete an import profile	The shortcut “Delete” in each row of the grid Collecting → Import Profiles + the “Delete” button in the edit page of an import profile.
View profile import	Shortcut “View” in the grid of imports profiles + Click on the lines of the grid patterns of imports + The button “view profile” in the implementation report of an import.
Manage permissions for profiles to import	“Permissions” tab in the edit page of an import profile.
Export Profiles	
Download exported files	Button “Download file exported” in the report pages of executed export.

Download the report Export	"Download logs" button in the report pages of executed export.
View the list of exports reports	Go to "collect" input History of exports.
View the details of the export ratio	Shortcut "view report" in the grid of exports + Click Reports on the grid lines of export reports.
Create export profile	Button "create an export profile" in Collect page → Export Profiles.
Edit Profile export	"Edit" button in the Collect → Export Profiles → Profile of an export consultation Page.
See the history of the export profile	"History" tab page in the Collect → Export Profiles → Editing an export.profile>page.
See the list of export profiles	Access to collect input export Profiles
Launch export profile	"Start an export" shortcut in grid profiles 'exports + button "start" on the comment page of the export profiles ..
Delete export profile	"Delete" shortcut in each row of the grid Collecting> Export Profiles + the "Delete" button in the edit page of an export profile.
See the export profile	"View" shortcut in the grid profiles of exports + Click on the lines of the grid export profiles The + "button to see the profile "in the implementation report of export.
Manage permissions by export profiles	"Permissions" tab in the edit page of an export profile. /! \ EE functionality.
Product assets	
Consult the categories of an asset	"Categories" tab in the edit page of an asset.
Create an asset	Button "Create Asset" in Enrich > Assets page.
Enrich an asset	Go to to the Asset edit page.
Delete an asset	Button "Delete" in the Asset Edition Page.

Mass-upload assets	Access to the menu entry “Collect > Mass-upload assets”.
Asset categories	
Create an asset category	Button “Create” in the Categories management page.
Edit an asset category	Allows to access to the asset category edit page.
View asset category history	“History” tab of the Asset category form.
List asset categories	Use Asset categories as a filter for asset grid (In Enrich > Assets & Assets picker in the product form).
Manage asset category permissions	“Permissions” tab of the asset category form.
Remove an asset category	Button “Delete” of an asset category.
Products	
Add an attribute to a product	Button “Add Attributes” in the edit page of a product.
Add product to groups	Show “Products” tab in the edit form of a group.
Add the product to a group of variants	Show “Products” tab in the edit form of a variant group.
See the types of association of a product	Go to “Settings”→ Types of associations .
Look at the categories of a product	Go to the tab “Categories” of the publishing of a product form.
Change Product Family	Button “modify family” in the header of the page of a product.
Change product status	Button “enable” or “disable” in the header of the page of a product.
Comment on the products	“Comments” tab in the edit page of a product.

Create a product	“Create product” button in the Enrich page → Products.
Download product PDF	“PDF” button in the edit page of a product.
Edit product attributes	“Attributes” tab in the edit page of a product.
Show product history	tab “History” in the edit page of a productPIM.
List Products	Show Grid products throughout the Enrich → Products in the “Associations” tab of a page product edition in the “Products” tab groups, etc ...
Mass edit on products	Show mass edit button above the grid of products.
Delete a product	“Delete” button the edit page of a product.
To delete an attribute of a product	“cross” icon next optional attributes added to the product.
List asset categories in the asset picker (EE)	“Manage assets” button to open the asset picker and list the asset categories
Restore product (EE)	Display the button “restore” in the grid versions of a product.
Manage published products (EE)	Go to the “Enrich” menu → Published Products.
Locale	
List of locale	View Menu Settings → Local.
Manage permissions by locale (EE)	See the “Permissions” tab in the consultation page locale.
Group Types	
List group types	Go to “Settings” → Group types.
Create a group type	button “Create a group type” in the Settings → Group types.

Modify a group type	“Save” button on the edit page of a type of group + shortcut on the grid of the types of group.
Delete a group type of	“Delete” button on the edit page of a group type + Shortcut on grid types of group.
Variant groups	
List variants groups	Go to the “Enrich” menu → variants Groups.
Create a variant group	“Create Group variant” button in the page Enhance → variations Groups.
Edit a variant group	“Save” button on the editing of a group + page shortcut to grid variations groups.
Adding attributes variant group	“Add Attributes” button tab in the” Attributes “variant groups.
Delete attributes from variant groups	“Cross” icon next attributes to remove the attribute for the form of a group of variants.
Edit attributes of variant group	Attributes added to the variant group are editable.
View variant group history	Go to “History” tab in the variant group.
Delete a variant group	“Delete” button on the edit page of a group + shortcut to grid variations groups.
Groups	
List of groups	Go to the “Enrich” menu → Groups.
Create group	“Create Group” button in the page Enrich → Groups.
Edit a group	“Save” button on the edit page of a group + shortcut on the grid groups.
Display groups history	Go to “History” tab in the groups.
Delete group	“Delete” button on the edit page of a group + shortcut on the grid groups.

Family	
Create a Family	"Create a family" button in the Settings> Families.
Edit the attributes of a family	Go to the "Attributes" tab of families.
Edit the properties of a family	Go to the "Properties" tab of families.
Display History of Family	Go to the "History" tab of families.
Family List	Go to "Settings" → Families.
Delete family	"Delete" button on the edit page of a family + shortcut on the grid families.
Currencies	
List Currency	Go to "Settings" → Currency.
Activate / turn off currencies	Button on the currency grid.
Channels	
Create channel	"Create a channel" button in the Settings → Channels.
Modify a channel	"Save" button on the edit page a shortcut canal + channels on the grid.
View history of a channel	"History" tab of a publishingof a channel page.
List channel	Go to "Settings" → Channels
Delete channel	"Delete" button onthe edit page of a shortcut + channel on the grid of channels.
Categories	
Create a category	"Create a category" or "Create a new tree" button in Enriching page> Categories.
Edit category	In the edit form Access categories.

View the history of category	Go to “History” tab categories.
List Categories	Go to “Enrich” → Categories.
Delete a category	“Delete” button in the edit form categories.
Manage permissions by category (EE)	Go to the “Permissions” tab categories.
Attribute Groups	
Add the attribute to a group	“Add attributes” button in the “Attributes” tab of the edit page attribute groups .
Create a group attribute	“Create an attribute group” button in the Settings → Attribute Groups.
Edit attribute group	Go to “edit” form attribute groups.
View the history of the group Attribute	Go to “History” tab attribute groups.
List of group of attributes	Go to “Settings” → Attribute Groups.
Delete a group of attributes	“Remove” button in the edit page an attribute group.
Delete the attribute of a group	Icon “Trash” next to the attributes in the “Attributes” tab of the edit page attribute groups.
Sort attribute groups	Icon “drag and drop” next attribute groups in the left panel.
Manage permissions for attribute groups (EE)	Go to the “Permissions” tab on attribute groups.
Attributes	
Create attribute	“Create a attribute” button on the Settings → Attributes.
Edit attribute	Go to “edit” form of an attribute.
View attribute history	Go to “History” tab attributes.
Attribute List	Go to “Settings” → attributes.

Delete attribute	“Delete” button on the edit page of a + shortcut attribute in the grid attributes.
Sort out attributes within an attribute group	Icon “drag and drop” next attributes in Attributes tab of the groups of attributes.
Types of associations	
Create a type of combination	“Create a type of association” button in the Settings →Types association of
Edit a type of association	Access to the edit page of a type of association.
View the history of the association type	Accessing the “History” tab of the page publishing a type of association.
List the types of association	Go to “Settings” → Types of association”.
Delete a type of association	“Delete” button on the page of “editing a type association.
Rules	
Delete rules	Delete button in the tab rules of an attribute and in the list of rules
View rules	View rules in the tab rules of an attribute and in the list of rules

Configuring Roles

A role in Akeneo PIM is a way to manage sets of users. Users can be part of a multiple roles. Roles are used in the PIM to define the rights of actions and visibility in the PIM.

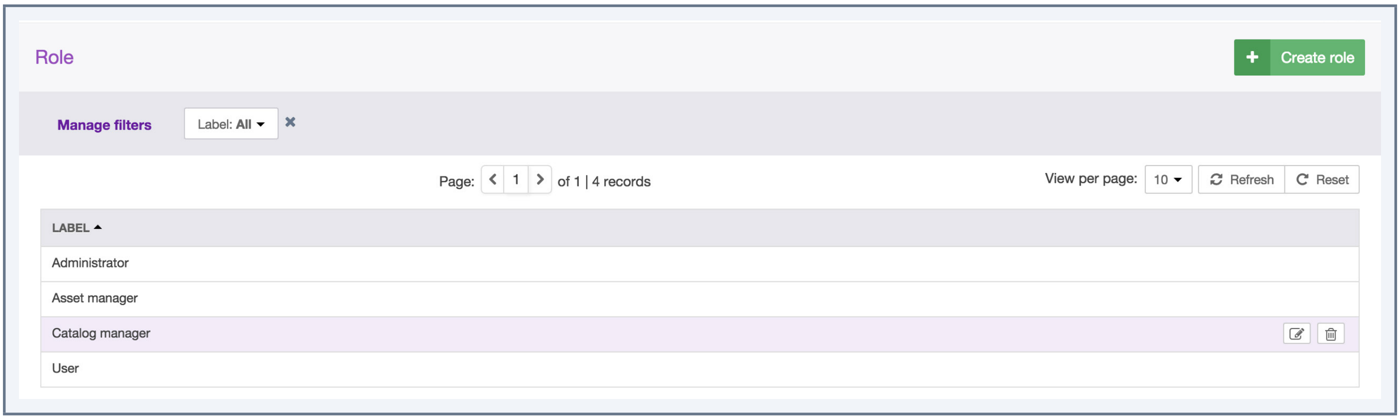
Note

Roles are similar to groups, they also enable & define rights on the product catalog. The main difference is that the groups entitle rights on the catalog in the PIM (in short, product information managed in the PIM).

Listing roles

To view the roles:

1. Log in with a user account with the rights to see roles (System: List of roles).
2. Go to System → Users Management → Roles.
3. To view the details of a role, click on one of the lines to review the information available for the role.



Creating Role

To create a new role:

1. Log in with a user account with rights to create a role (System: Create a role).
2. Go to System → Users Management → Roles.
3. Click on the “create role” button.
4. Fill the form to give a role name.

5. Click the “save” button to add the new role.

Editing the name of a role

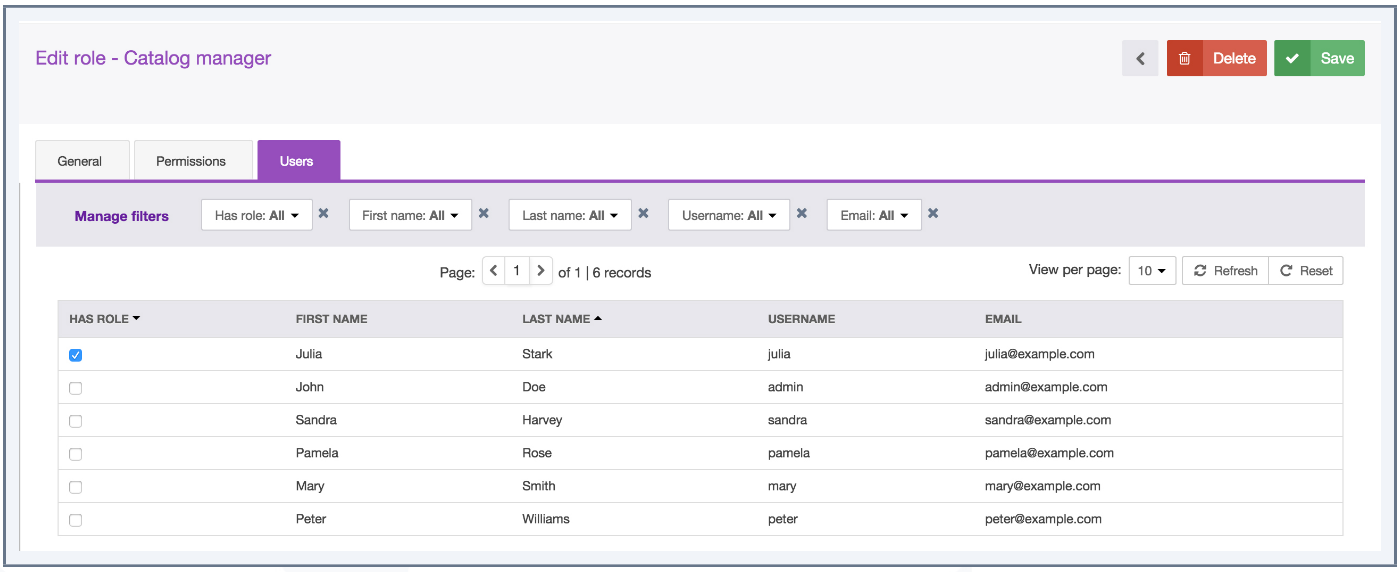
To edit the name of a role:

1. Log in with a user account with rights to edit a role (System: Edit Role).
2. Go to System → Users Management → Roles.
3. Click on the role you want to modify.
4. Change the role name.
5. Click on "Save" button to update the role.

Changing users in a role

To edit the users associated with a role:

1. Log in with a user account with rights to edit a role (System: Editing roles).
2. Go to System → Users Management → Roles.
3. Click on the role to edit and the "Users" tab from the menu.



4. A grid of users is displayed with the users belonging to the respective initial role they have been associated to. They can be easily identified by the check box in the first column "has role".
5. Look for the users and check the boxes to add users to the role. And the other way around, uncheck the boxes for users to be removed from the role.
6. Click the "save" button to update the page.

The rights which have been granted to or removed from users (addition to / removal from a role) are automatically applied. The user can still continue to be connected to the PIM: the change on rights will be updated on the next loading of a page in the PIM.

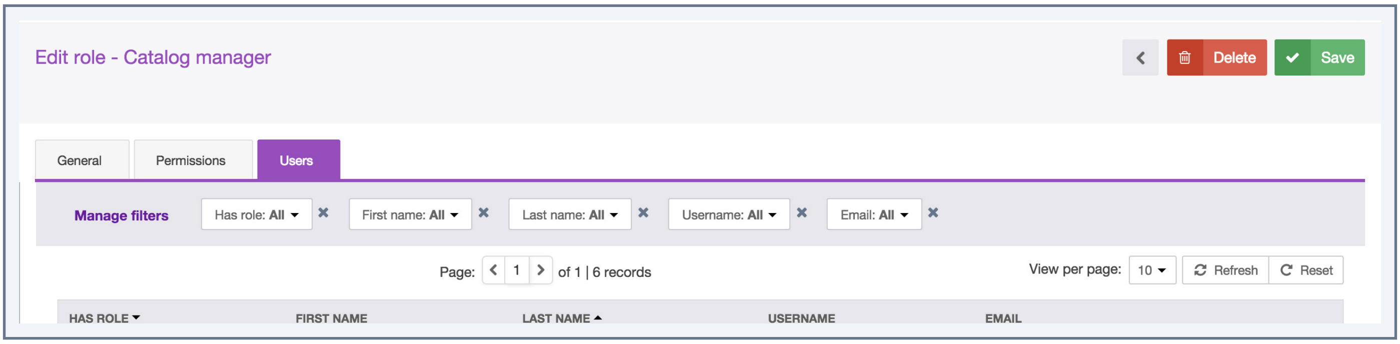
Deleting Role

Before deleting a role, you should check if that role is already used to assign rights to user.

To delete a role:

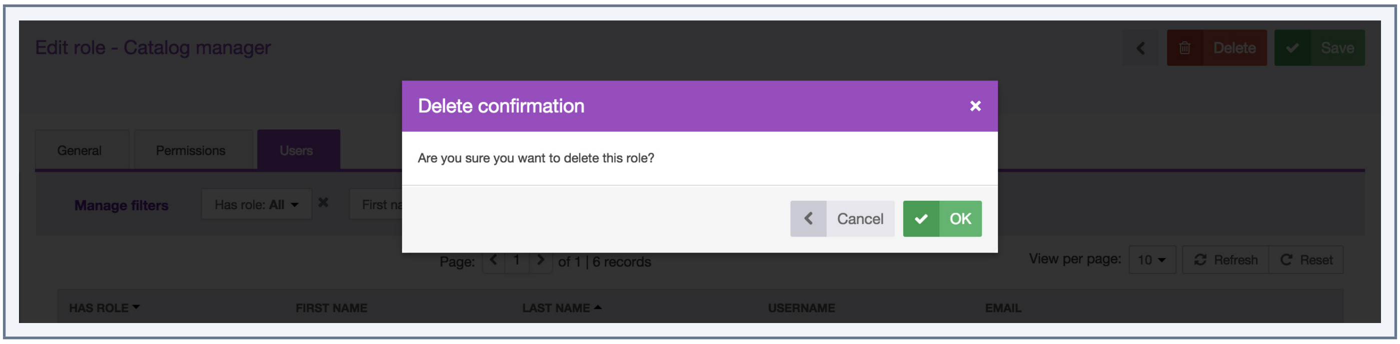
1. Log in with a user account with rights to edit a role (System: Remove Roles).
2. Go to System → Users Management → Roles.
3. You have two way to proceed:

- Click on the role to be deleted and click on the “delete”button on the top right.



- Or click on the “delete” button straight away from the grid dragging the mouse on the role you want to delete.

4. Then confirm the message for the suppression of the role.



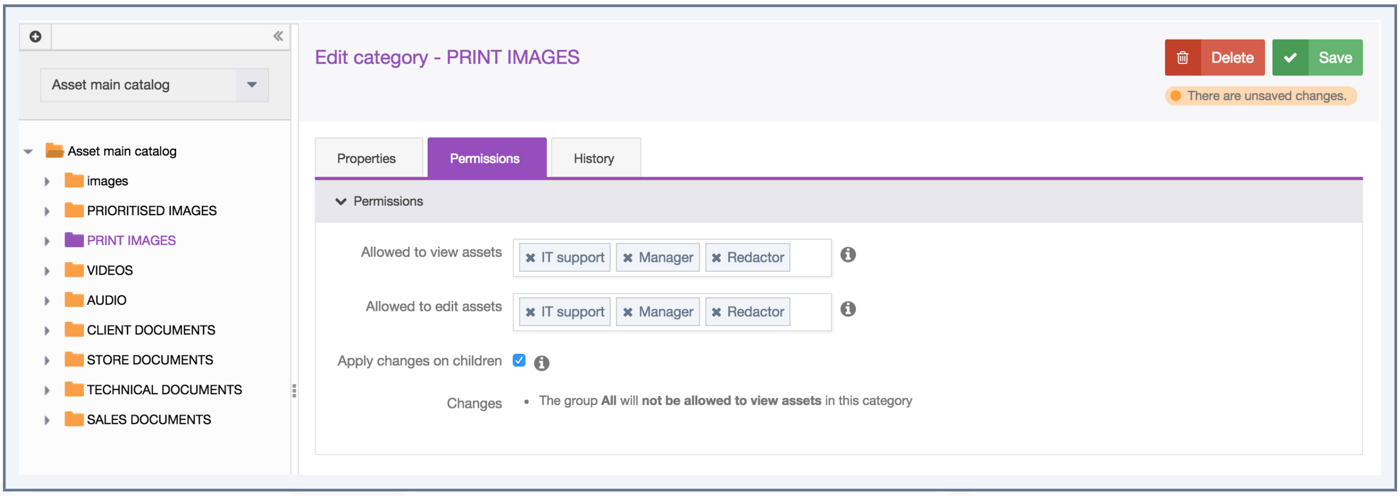
Please check first the potential impact of the removal of a role on which users have been associated to. For instance, if the role job was the only way for the user to have a specific right, then due to the role suppression, the user will have no longer his access right in the PIM.

Configuring rights to the catalog (Enterprise Edition)

Scope of access rights to assets

Access rights enable to configure the scope of role and visibility of users to the assets in the PIM. The scope of role and visibility is set on 1 axis:

- It is possible to define for each user, which assets can be viewed and / or edited, depending on the classification of assets in the different categories.



Setting the level of access rights to assets according to categories

Setting the level of access to the assets according to Categories:

1. Go to “Enrich → Asset Categories”

2. Select the category for which you want to set permissions in the left panel.
3. Click on “Permissions”
4. Click in the fields to select the user to whom the specific permissions will be granted
5. Click on the “Save” button.
6. Permissions are immediately applied to users.

By default, all users are entitled to all the rights to the created categories through the group “All”. Refining permissions to user group, the group “all” will need to be removed.

In which case, the highest right on categories of an asset is applied?

If an asset is in multiple categories of one or more trees and a user has at least a view permission to its categories, so the user can see the asset.

Option “Apply changes to the subcategories”

When changes are applied, they are displayed & listed in the list at the bottom of the “Permissions” form.

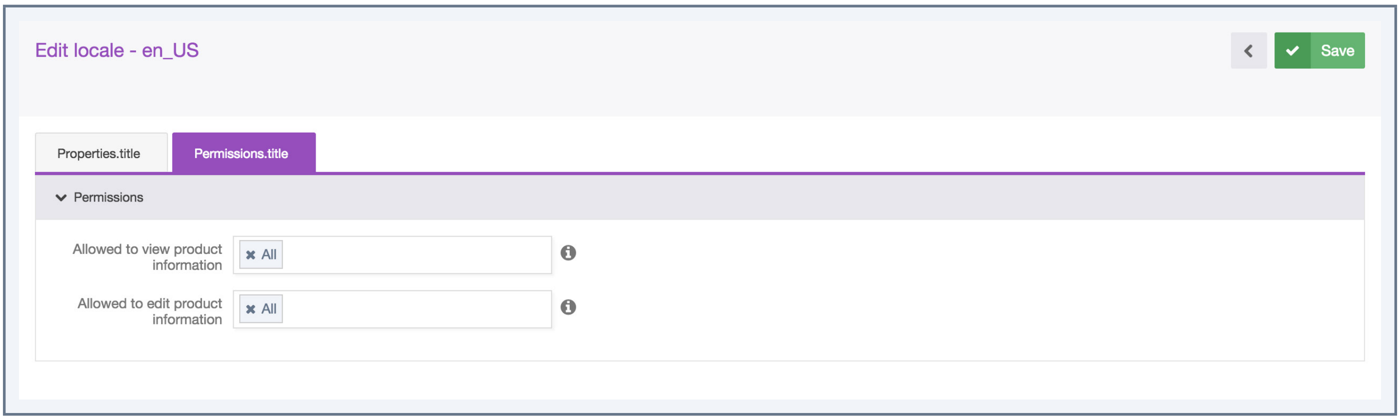
Below the list, there is an option to “apply changes to the sub-categories”. This option is checked by default and can apply to all sub-categories of the edited category (apply changes on the last sub-category tab), to apply the changes on the list.

In the example above, all sub-categories will have no longer the “All” group in any of the permission category, but they will keep their own configurations.

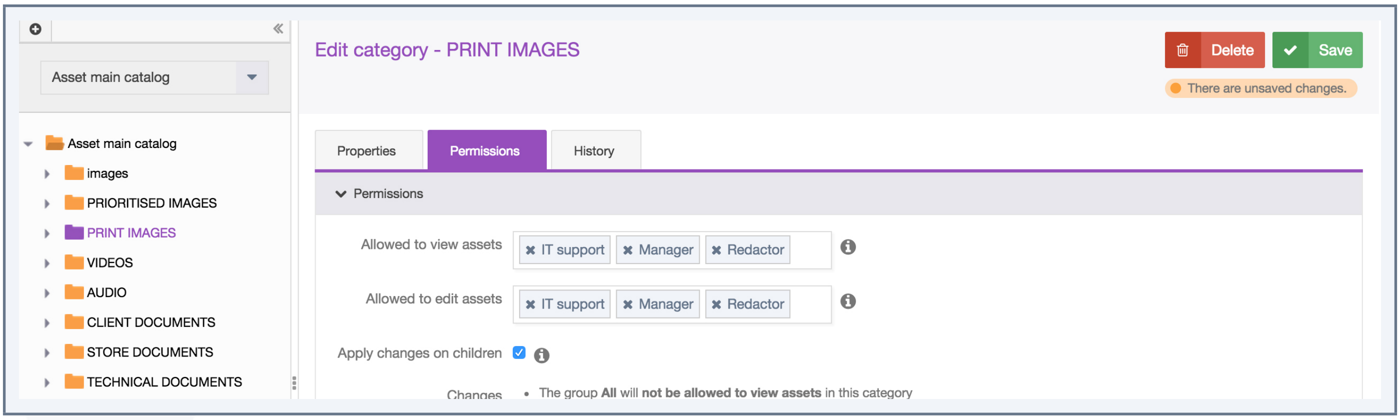
Scope of access rights to product information

Access rights enable to configure the scope of role and visibility of users to the product catalog in the PIM. The scope of role and visibility sets out 3 axes:

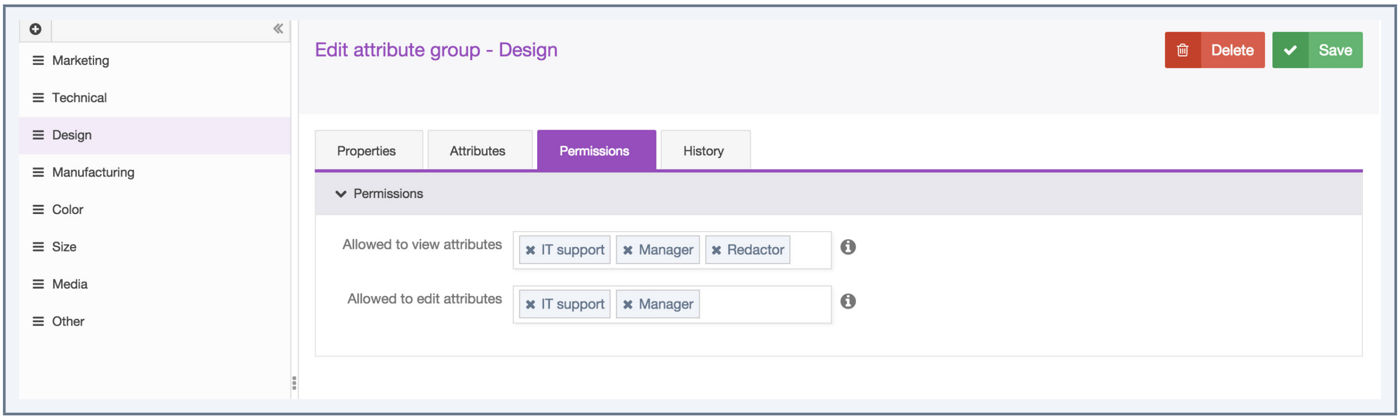
- Locales: if a product catalog is available in several locales, it is possible to define for each user which local can be viewed and / or edited.



- Categories: If a product catalog uses the class tree in the PIM system, it is possible to define for each user, which products can be viewed and / or edited, depending on the classification of products in the different categories.



- Attribute groups: if a product catalog uses the attribute group in the PIM system, it is possible to define for each user, which attributes can be viewed and / or edited, depending on the attribute group in which they are positioned.



Hierarchy of access rights for product information

For each axis there are 3 levels of access:

- Permission to edit information
- Permission to view information.
- No rights: the information is hidden to the user

As rights are subject to 3 axes, hierarchy prevents any conflicts defining permissions for each user. The axes of the hierarchy is as follows:

1. Locale
    - Category
        - Attributes Group

How to apply the rule of hierarchy? It requires at least one access right to view on the parent axis to apply the rule to the child axis.

You will find below a couple of examples to illustrate how the rule of hierarchy applies to each user:

A user has been granted with the following rights

1. Locale “de_DE”: No right
    - Category “Shoes”: edit permission
        - Attributes Group “General”: edit permission

This user will never see the products in the category Shoes, nor edit the attributes in the "General" group in the local "de_DE" because the user cannot select the "de_DE" locale in the user interface preferences.

Let's give the permission to the same user to view the locale "en_US":

1. Locale "de_DE" No rights & Locale "en_US": allowed to view products
   - Category "Shoes": publish permission
     - Attributes Group "General": edit permission

Then, the user can see the products in the category Shoes and can see the attributes in the "General" group in the locale "en_US", but cannot edit them because the product has a read permission only for local "en_US".

Let's give the permission to the same user to edit the locale "fr_FR", you will see:

1. Locale "de_DE": no rights & locale "en_US": allowed to view products & locale "fr_FR": edit permission
   - Category "Shoes": edit permission
     - Group of attributes "General": edit permission

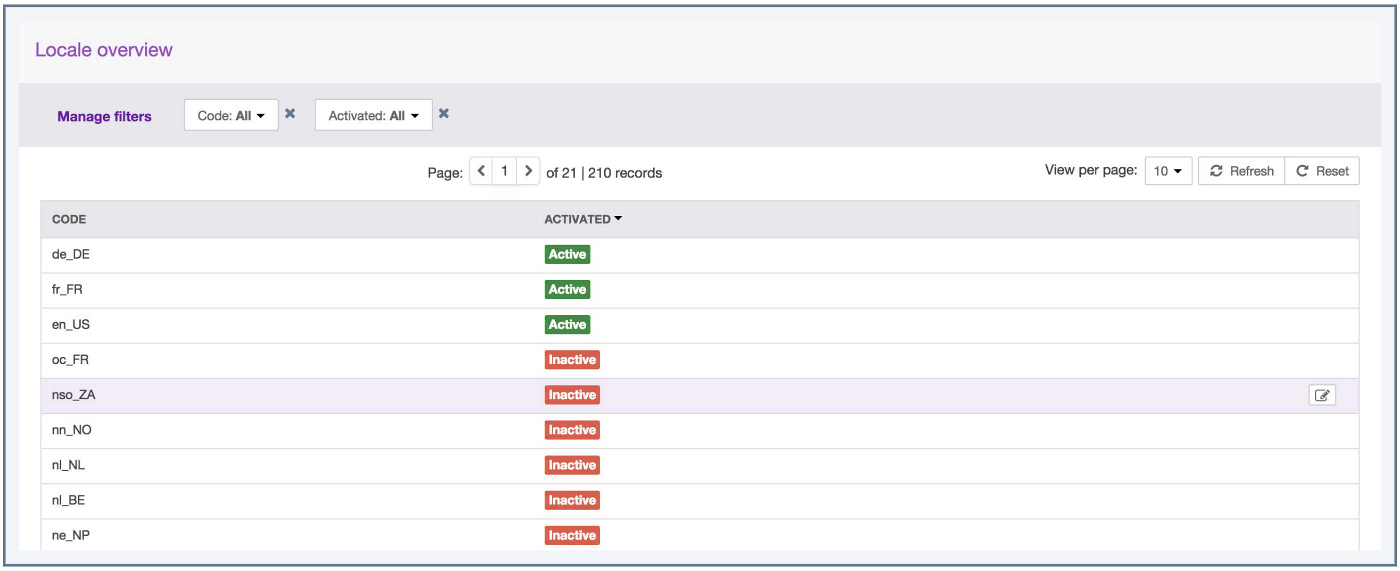
The user can edit the products in the category Shoes and can edit the attributes in the "General" group in the locale "fr_FR".

The hierarchy is thus applied to each individual axis of the rules.

Defining the level of access to products according to locales

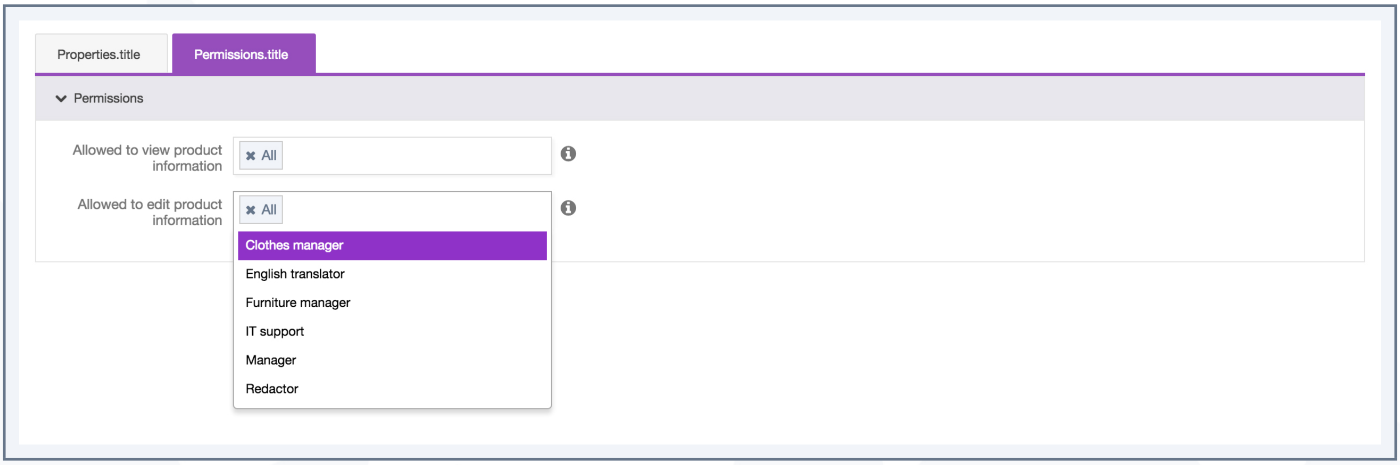
Setting the level of access to products according to locales

1. Go to Settings → Locales.
2. Select the locale from the locale overview grid.



3. Click on the “Permissions.title” tab from the menu.

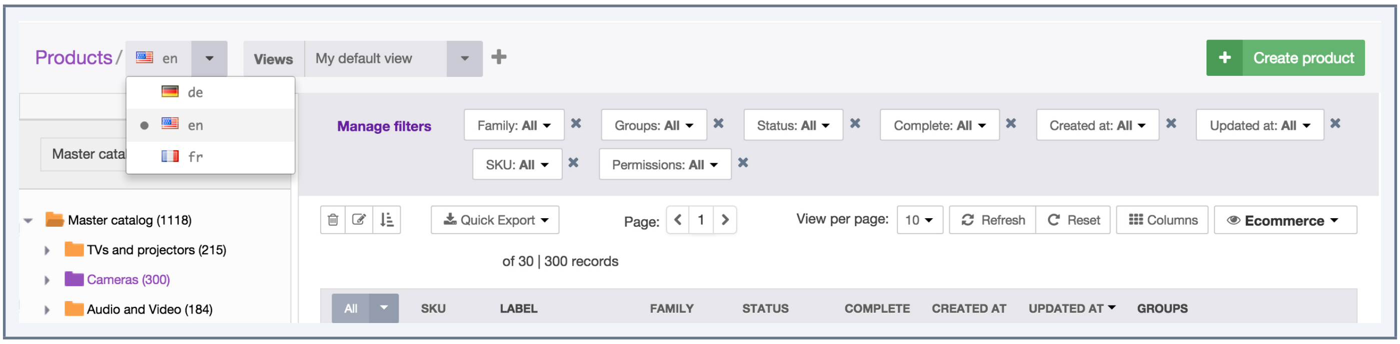
4. Click in the fields to select the user groups to which you will grant the appropriate permissions.



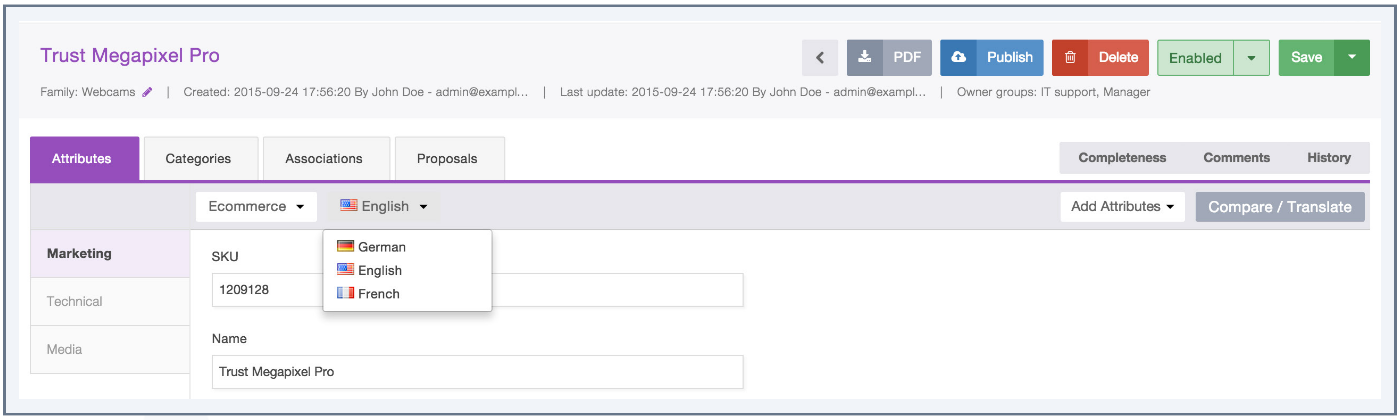
5. Click on the “Save” button.
6. Permissions are immediately applied to users.

Impacts on rights to edit product information in a locale

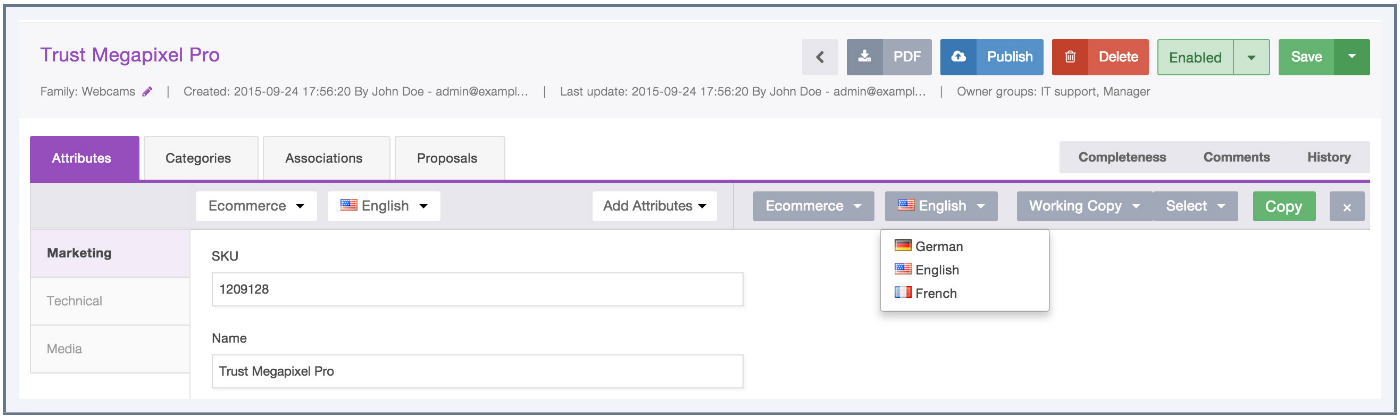
- The specific locale is displayed in the drop down menu for the available locales
  - From the product grid



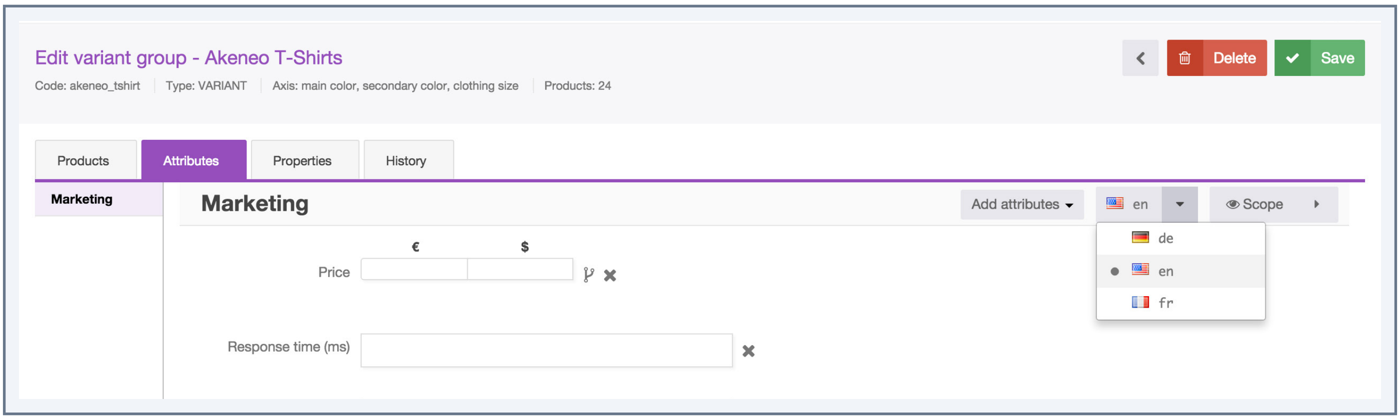
  - From the published product grid
  - From the editing product form



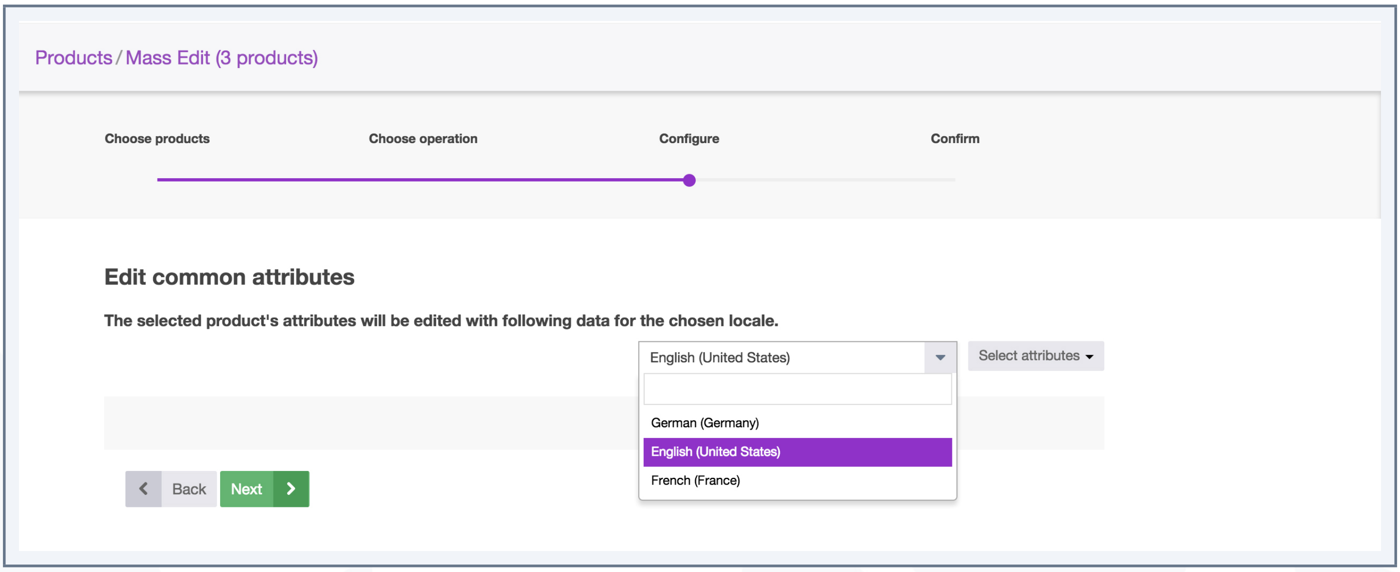
  - When translating product information (product edit form)



- From the variant groups edit form



- From the bulk edit form for common attributes of the selected products.



Impacts on rights to product information in a locale

Restrictions against the edit permission products information in a locale:

- The concerned locale is not displayed in the drop down list of locales available
    - In the edit variant groups form

Impacts on no right to see product information in a locale

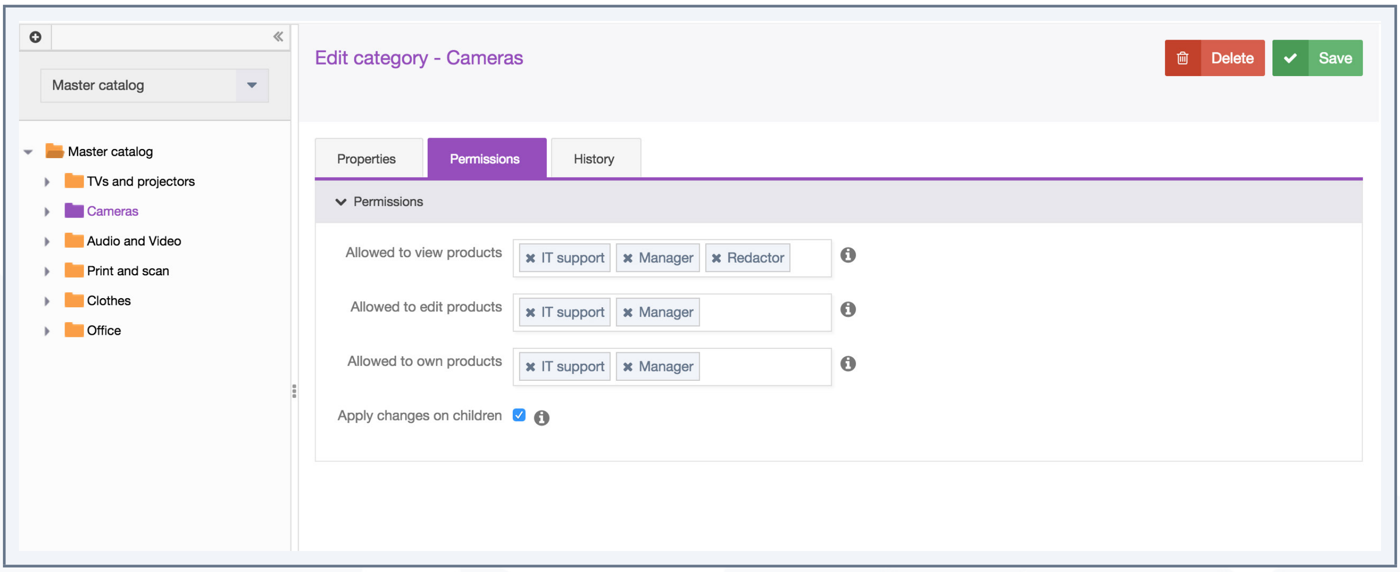
Additional restrictions against the view permission of product information in a locale

- The concerned locale is not displayed in the drop down list of available locales
    - In the product grid
    - In the published product grid
    - In the publishing product form,
    - To translate product information (edit product form).

Setting the level of access rights to products according to categories

Setting the level of access to the products according to Categorie:

1. Go to “Enrich → Categories”.
2. Select the category for which you want to set permissions on the left panel.
3. Click on “Permissions”.
4. Click in the fields to select the user to whom the specific permissions will be granted.



5. Click on the “Save” button.
6. Permissions are immediately applied to users.

By default, all users are entitled to all the rights to the created categories through the group “All”. Refining permissions to user group, the group “All” will need to be removed.

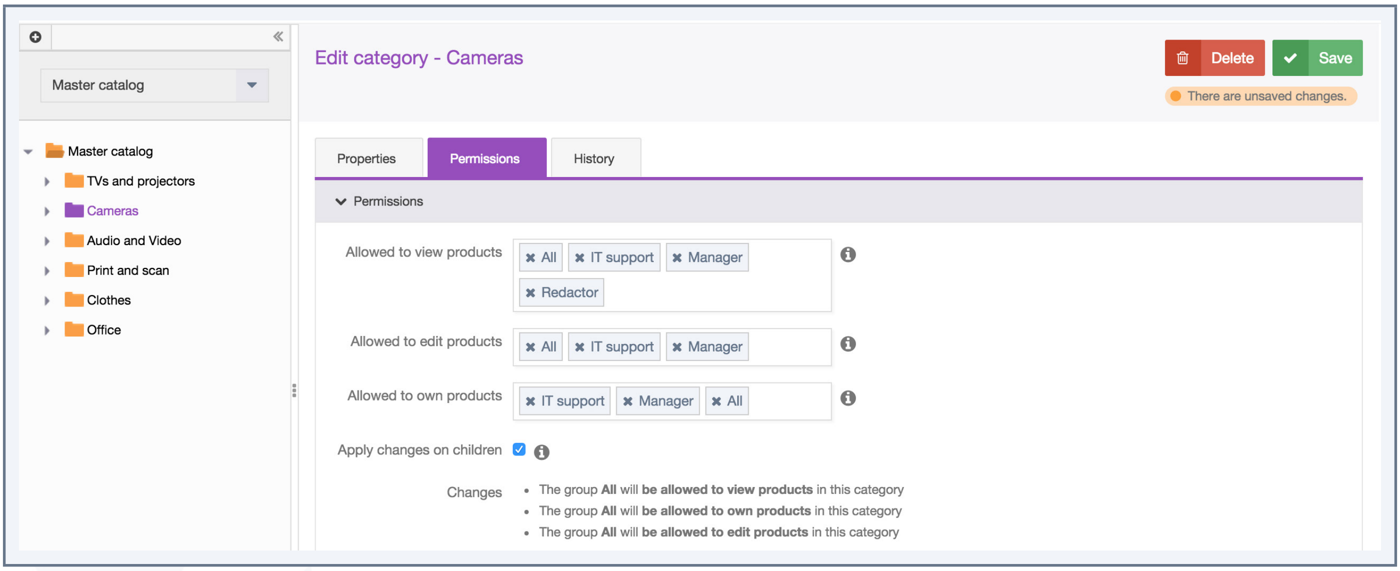
In which case, the highest right on categories of a product is applied?

If a product is in multiple categories of one or more trees and a user has at least a view permission to its categories, so the user can see the product.

Option “Apply changes to the subcategories”

When changes are applied, they are displayed & listed in the list at the bottom of the “Permissions” form.

Below the list, there is an option to “apply changes to the sub-categories”. This option, checked by default, can apply to all sub-categories of the edited category (apply changes on the last sub-category tab), to apply the changes on the list.



In the example above, all sub-categories will have no longer the “All” group in any of the permission set the category, but they will keep their own configurations.

Specific rights on categories: Ownership & classification as multi-products

Additional right is available per category: “Ownership” permission (litteral translation for the product “Owner”). This right allows to define for each user, who is responsible for product information according to the product classification in the different categories. For more information on the user role scope with the “Ownership” permission, please refer to the user guide.

A product can be classified into several categories. The most permissive rights are then applied to the product. For instance, a product is classified in 3 different categories: a first category for which the user has no rights, a second category for which the user is entitled to see the products, and a third category for which the user is entitled to edit products. Thus the user has the edit permission on the product.

The allocation of rights impacts the user behavior and what is displayed when connecting to the PIM. Below, you will find the description of the possible impacts for each right:

Be responsible for product information in a category

Extended rights to the edit permission for product information in a category:

- Edit the product information directly rather than going through the workflow of proposal approval.
- View / review the current proposals of product values
- Approve proposals of values that needs to be reviewed
- Reject proposals of values that needs to be reviewed
- Publish a product version
- Unpublish a product version

Publish product information in a category

- Edit a product contribution that needs to be approved by the product manager.
- Generate a proposal that will be processed by the product manager
- Send the proposal for review by the Product manager

View product information in a category

Further restrictions on product publish permission in a category:

- Cannot edit a product contribution
- Cannot generate a product proposal
- Cannot send contributions for review by the product managers

Cannot see products in a category

Further restrictions on the product information view permission in a category:

- In the case of a tree:
  - Do not show the tree from the tree list on the left panel of the categories
    - On the page “Enrich” → Products
    - On the page “Enrich” → Published Products.

- Do not show products only belonging to the tree in the product grid, regardless of the filters applied, in any context:
    - Associations,
    - Groups,
    - Variant groups.
- In the case of a category:
  - Do not show the category in the tree on the left panel of the categories
    - On the page “Enrich” → Products
    - On the page “Enrich” → Published Products.
  - Do not show the category in the tree on the configuration page by mass edit “Classify products”
  - Do not show the products belonging to this category from the product grid, regardless of the filter applied in any context:
    - Associations,
    - Groups,
    - Variant groups.
- In both cases
  - Do not display views using the category or the tree as a filter.

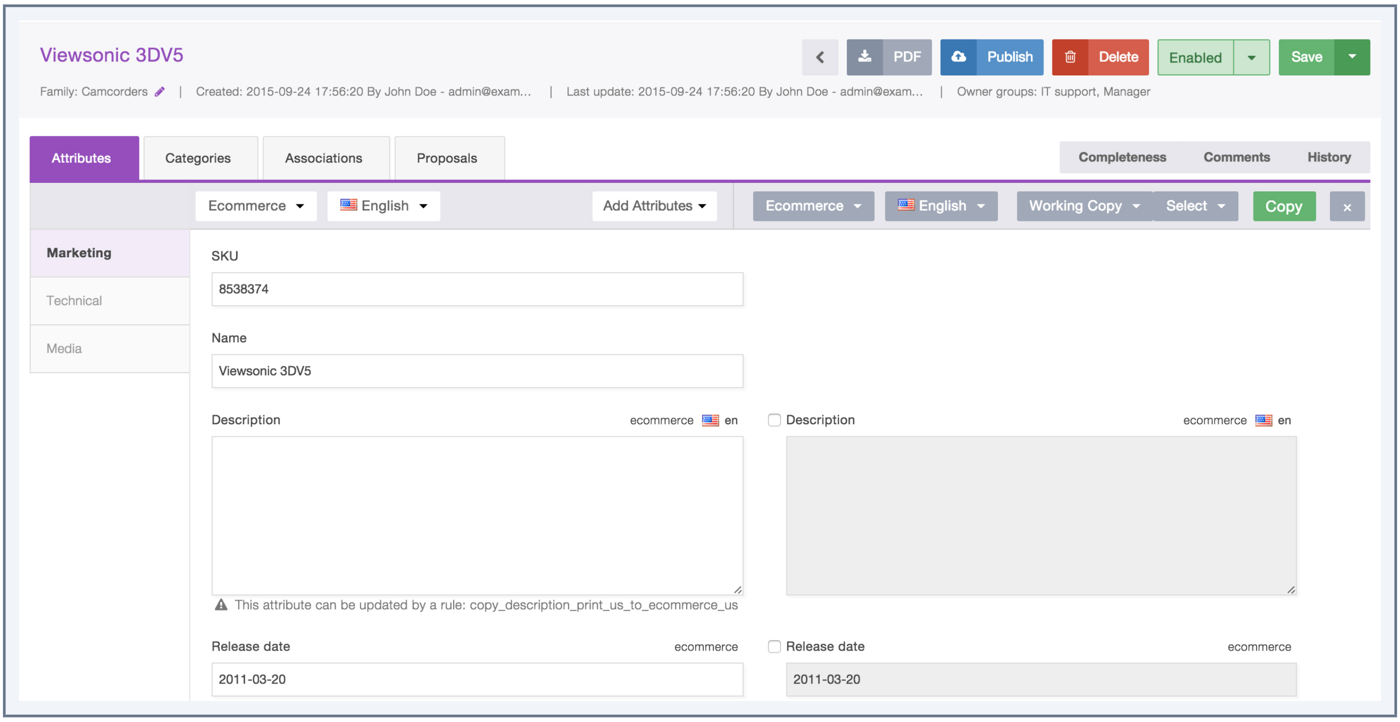
Setting the level of access to the attributes according to the groups of attributes

To do so:

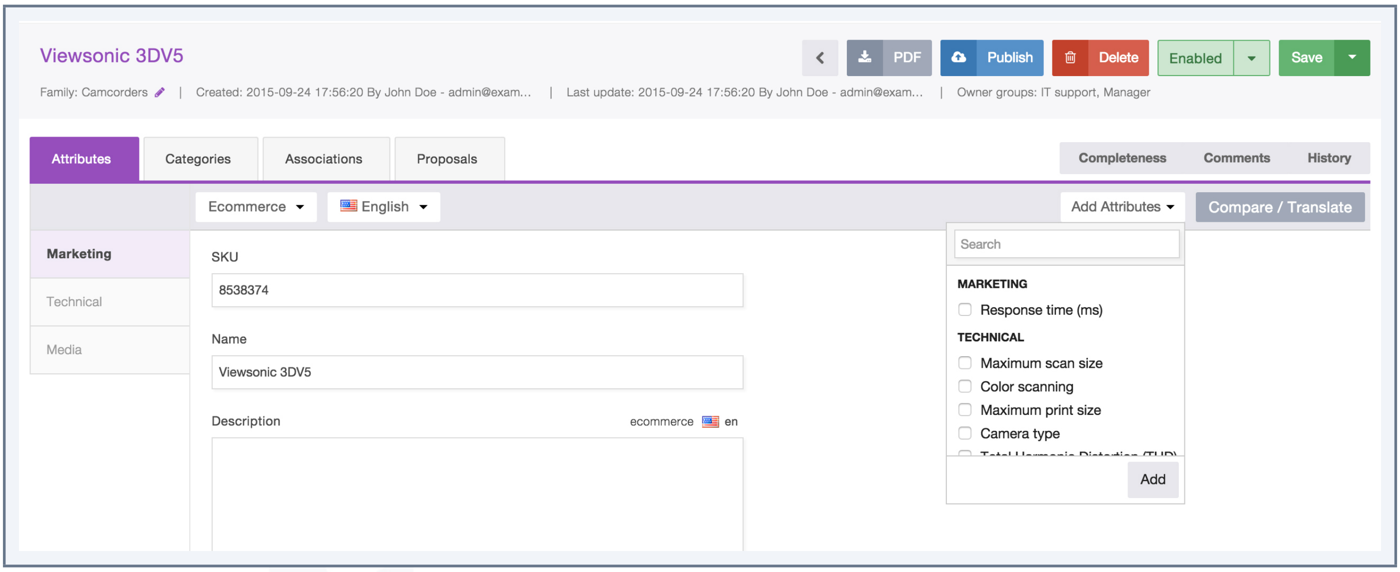
1. Got to “Settings → Attribute Groups”.
2. Select the attribute group in the left panel.
3. Click on the “Permissions” tab.
4. Click on the fields to select the user groups entitled to the appropriate rights.
5. Click on the “Save” button.
6. The rights are immediately applied.

Publishing product information in attribute group

- All the attributes of the group are enabled and they can be edited from the edit product page.
- On the right side of the panel, the tab can be selected (checkbox) and use the “copy” button for the translation mode in the edit product page.



- The attribute groups are also available in the “add attributes” option in the product edit page



- The attribute groups are though not exported by the “quick export”.

Cannot view product information in attribute groups

What are the restrictions on the view permission of the attribute groups:

- All attribute groups are disabled and cannot be edited in the edit product page.

- There are no check box near the “copy” button in the translation mode in the edit product page.
- The attribute groups are not offered in the “add attributes” in the product edit page.
- The attribute groups are not exported by the “quick export” button.

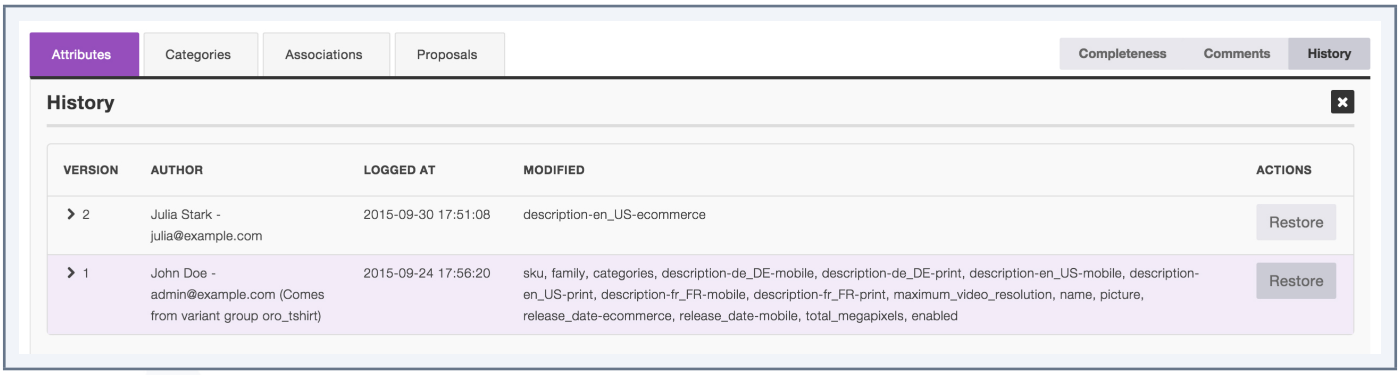
Cannot see the product information in a group of attributes

What are the restrictions on the view permission of the attribute groups:

- The attribute group is not visible in the edit product page nor in the view product page
- The attribute groups are not displayed in the configuration of the pop in columns in the product grid.
- The attribute groups are not displayed in the list of available filters in the product grid
- The attribute groups are not exported by the “quick export” button.
- The attribute groups are available in the “add attributes” option in the product edit page.
- The views using the attribute groups (columns or filter) are not displayed in the list of views.

Restoring a product version

This permission allows to give the right to restore a product version. If this permission is entitled, the user will see the “Restore” button in the grid versions.



Note

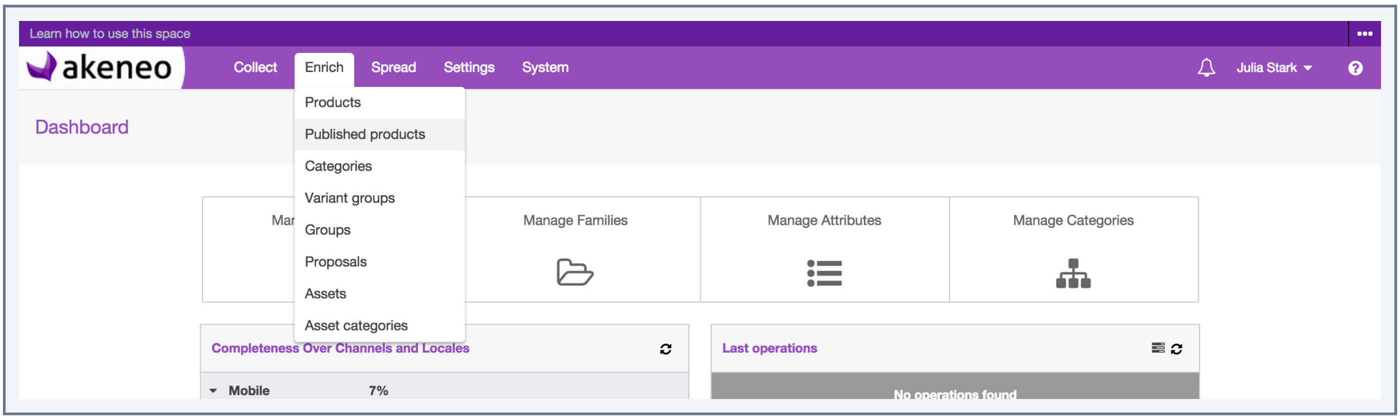
This permission is only relevant if the user has access to the “History” tab of the products, which matches another permission: “Show product history.”

Note

This permission is given by role.

Access to published product tab

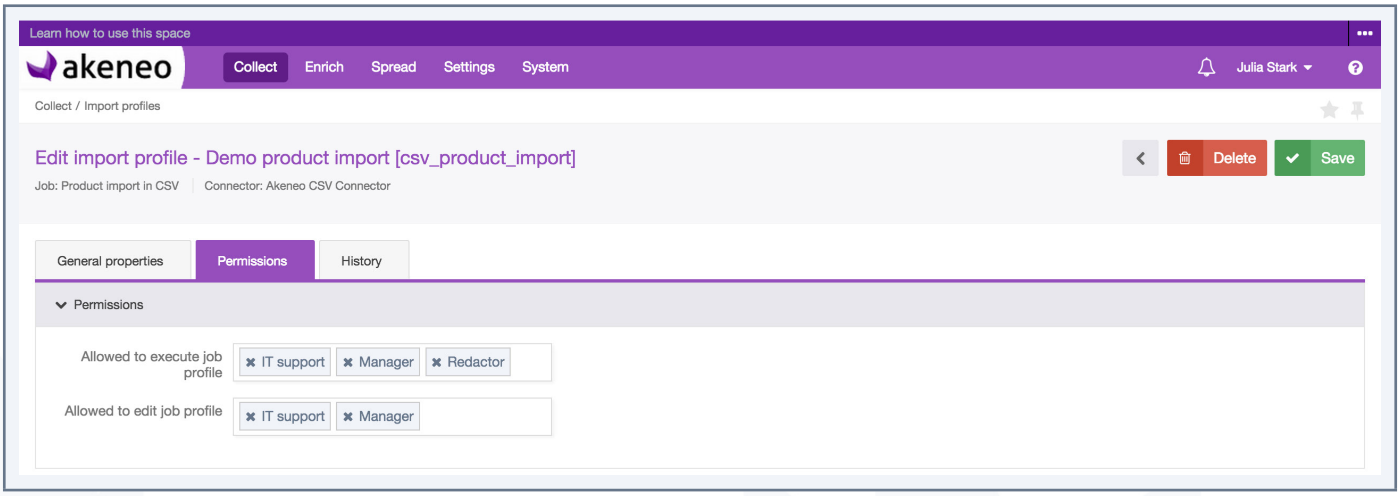
This permission enable access to the list of published products. If this right is granted, the user will see a sub-tab in the "Enrich menu → Published Products".



Setting the access level on the import and export profiles

To do so:

1. Go to "Collect" → "Import Profiles" or "Spread" → Profiles of export
2. Select the profile to be configured in the grid.
3. Click on the "Edit" button.
4. Click on Permissions.
5. Click on the fields to select the user groups to allow to execute the appropriate job.



6. Click on the "Save" button
7. Permissions are immediately applied.

CONFIGURING IMPORTS / EXPORTS

This is available and can be done only if the rights have been granted to the user.

In the Enterprise version, the permission to execute the job for the imports and exports can be customized for each import and export profile.

What is a import or export profile?

An import or export profile allows to perform imports or exports in the PIM. For each, the profile format is based on:

- A code to identify the import or export profile.
- A job with a connector to define what will make the import or export when executing.
  E.g, product import in CSV file, category export in CSV to a Magento platform.
- A set of configuration items, available as a form in the PIM. Each job has its own configuration. Thus the job configuration form “product import” in CSV connector in Akeneo will be different from the job configuration form “product import” in CSV connector of a partner.

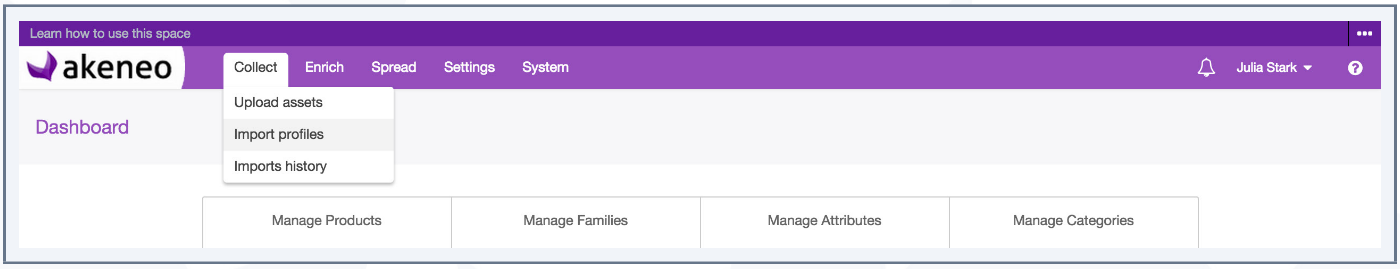
Some service applications are directly provided in the PIM to execute imports and exports:

- The property “Allow send file to the server Yes / No” can be used by all job imports of any connector requiring a file as a data source to process.
- Selecting channels is strongly recommended for use by all job export of any connectors, applying the rules of product selection implemented in the Akeneo PIM to export. However, the use of a channel to run a job export of products is not mandatory in the PIM.

Browsing profiles of imports / exports

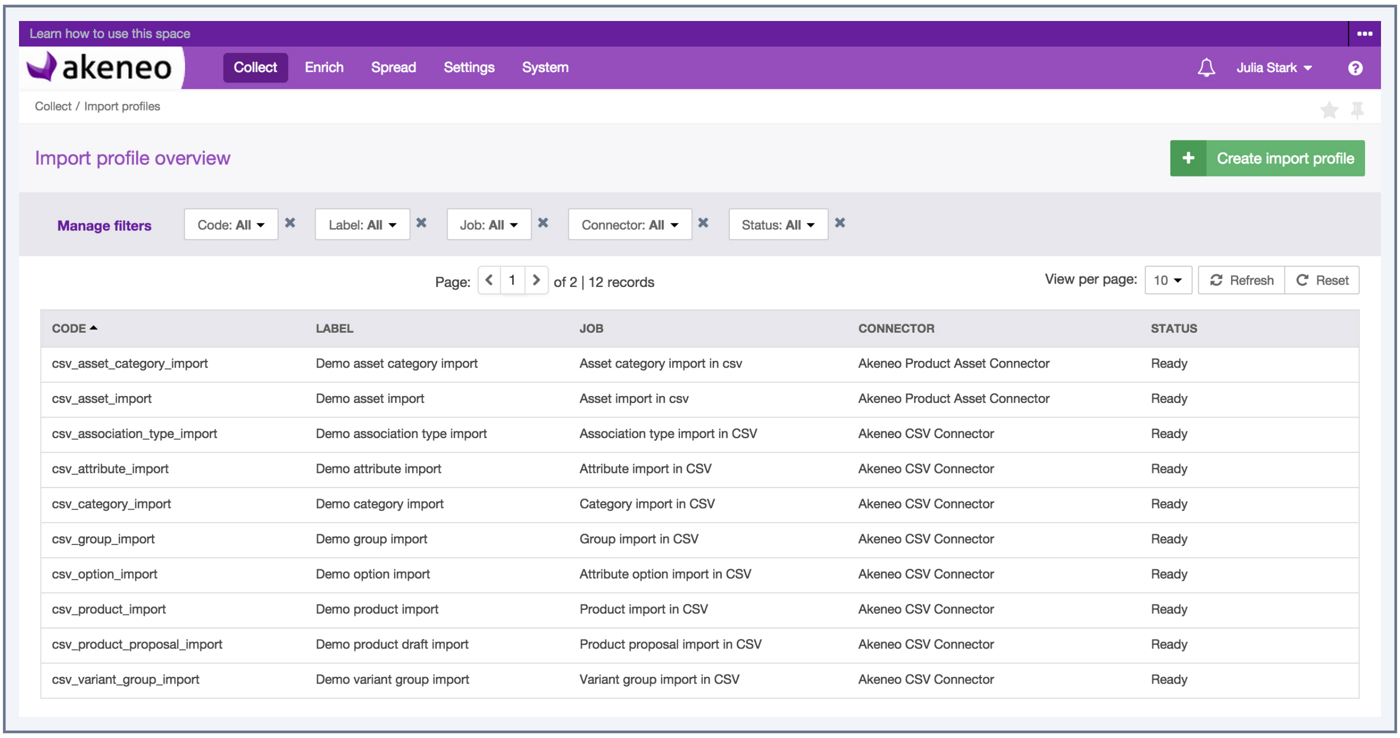
To view the available profiles of imports in the PIM:

1. Log in with a user account with permissions to “View the list of profiles” for imports.
2. Go to “Collect → Import Profiles”.



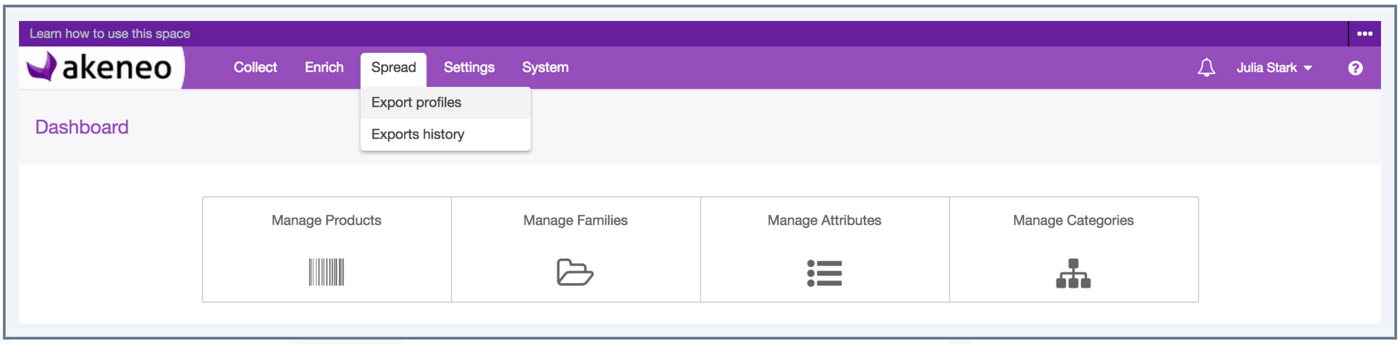
3. To narrow down the list of imports displayed, use the available filters above the grid of Import profiles

To see the information on an import profile, click on the row in the grid.



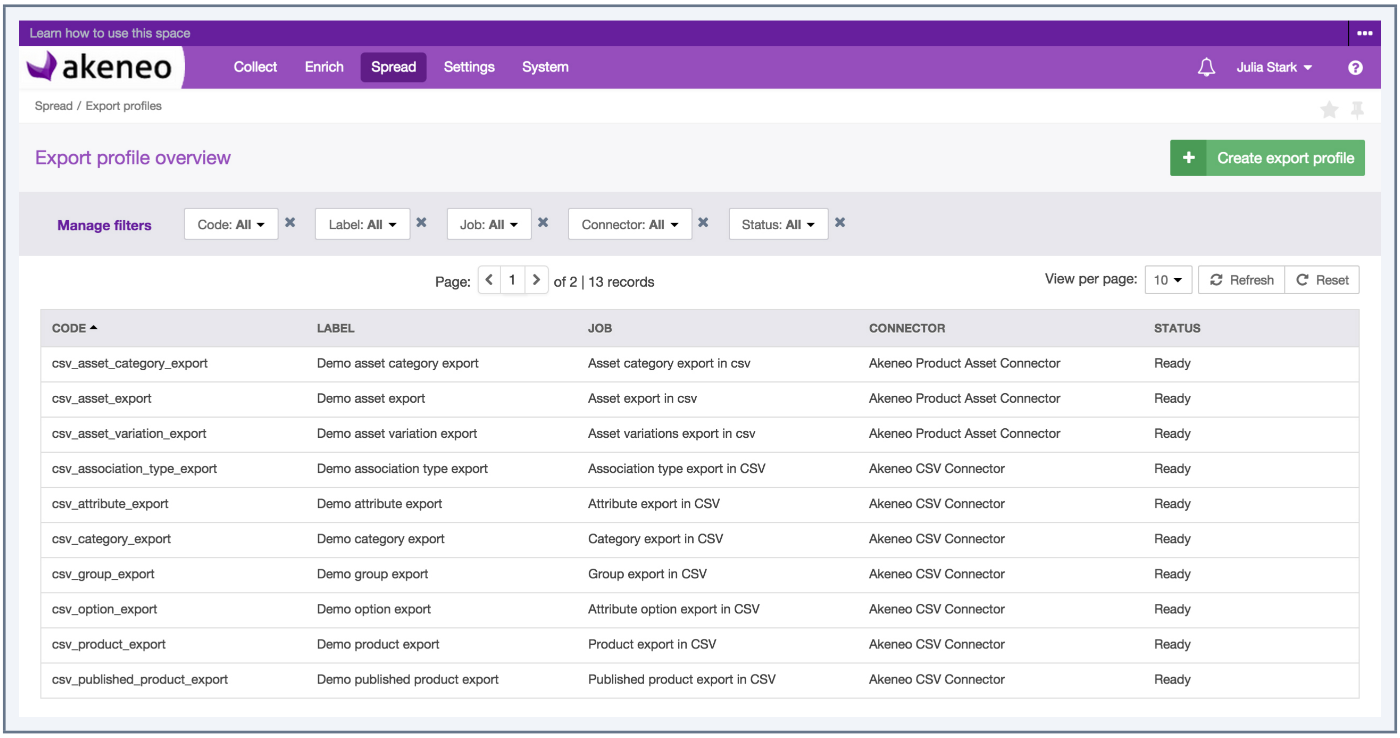
To view the available profiles of export in the PIM:

1. Log in with a user account with permissions for the "View the list of profiles" for export.
2. Go to "Spread→ Export Profiles".



3. To narrow down the list of export displayed, use the available filters above the grid of Export profiles.

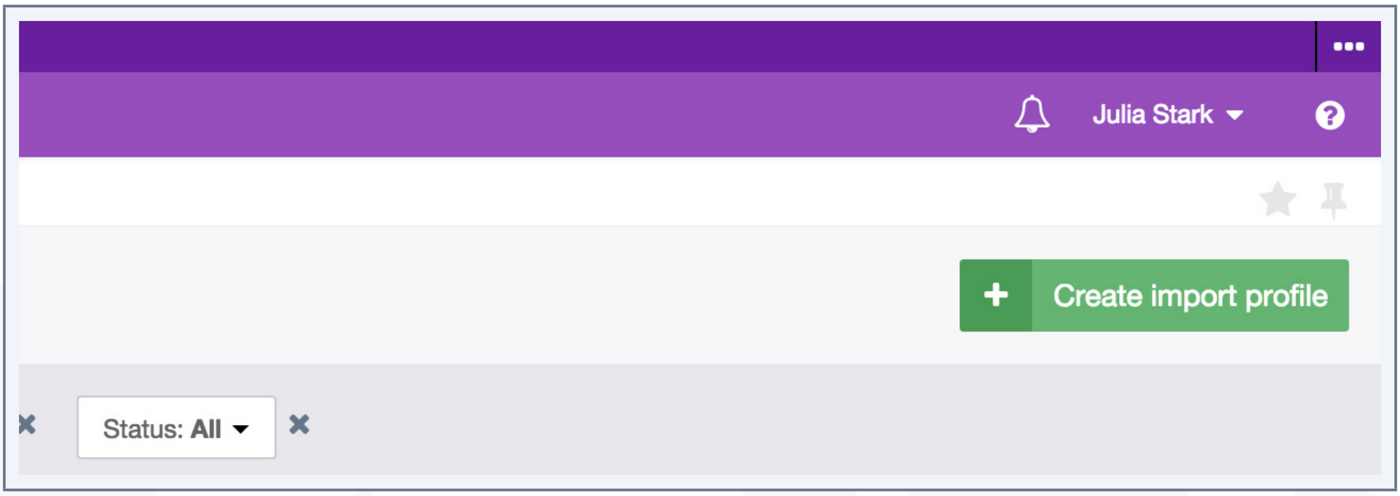
To view the information of an export profile, click on the line in the grid



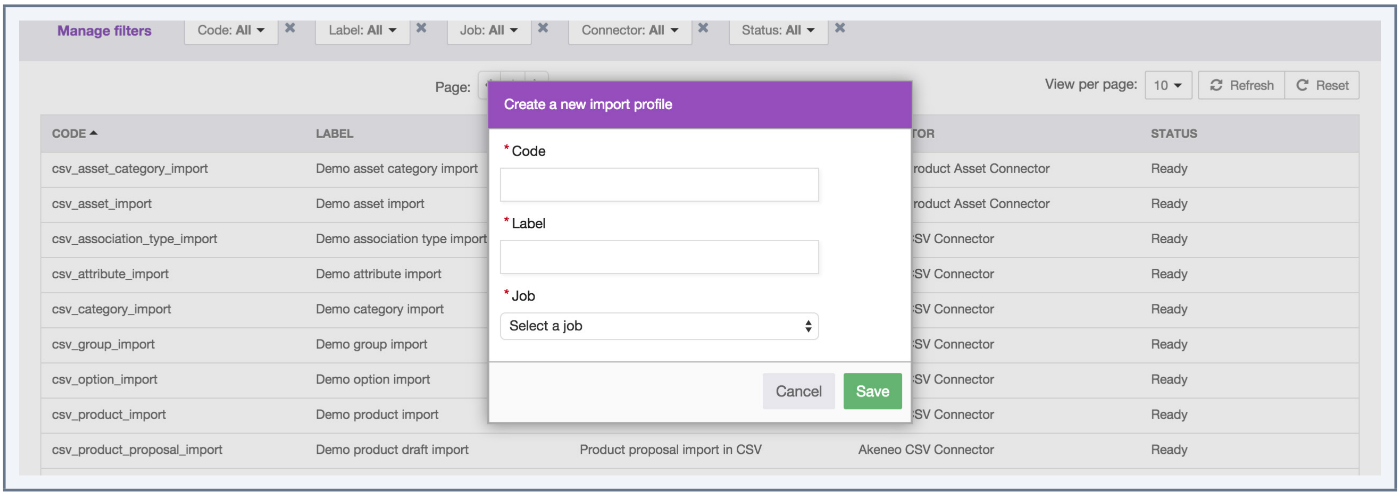
Creating a new profile import or export

To create a new profile import:

1. Log in with a user account with “Create an import profile” permissions.
2. Go to the “Collect→ Import Profiles” menu.
3. Click on the top right button.



4. All fields in the pop-up window must be filled out.



- A unique code
- A name for the label to identify the profile more easily in the PIM
- A job to execute the task.

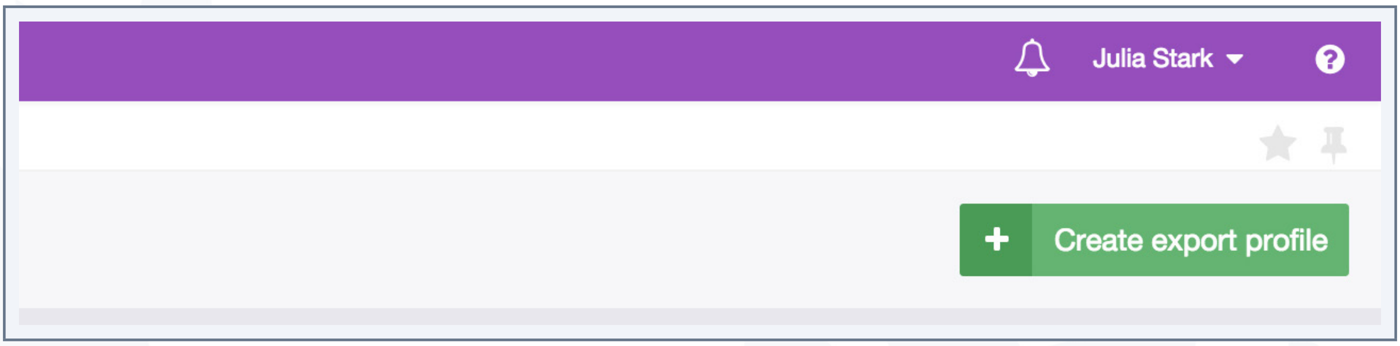
The list of jobs matches all the jobs available to perform imports, for all installed and configured connectors with Akeneo PIM.

5. Click on the "Save" button and the import profile is created

The profile page screen is displayed. It is possible to configure the job import.

To create a new profile for export:

1. Log in with a user account with "Create export profile" permissions.
2. Go to the "Spread → Export Profiles" menu.
3. Click on the top right button.



4. All fields in the pop-up window must be filled out.

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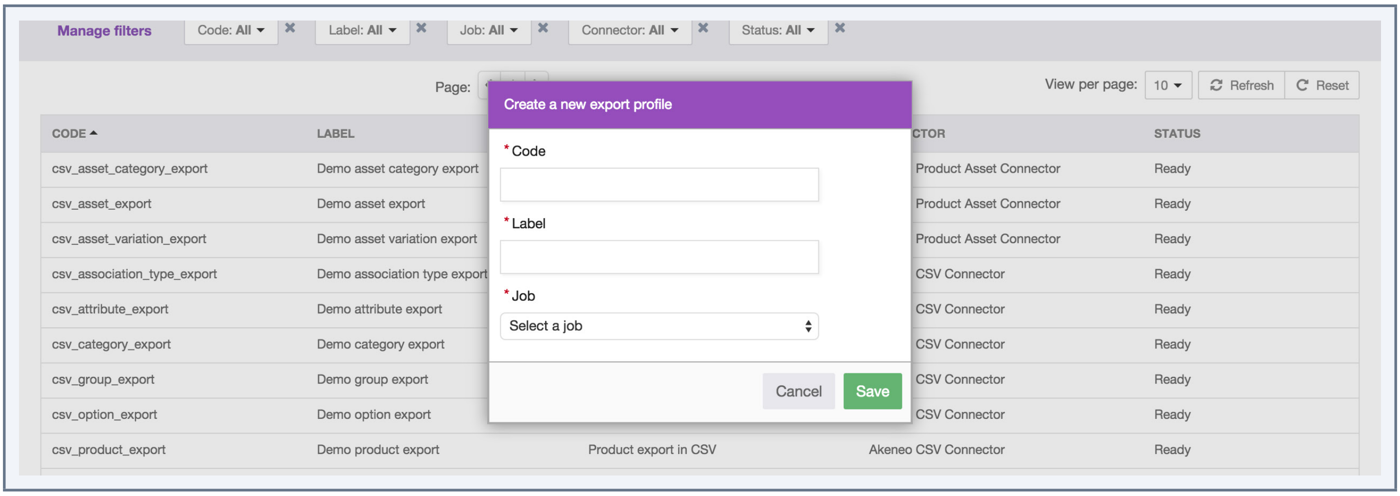


- A unique code
- A name for the label to identify the profile more easily in the PIM
- A job to execute the task.

The list of jobs matches all the jobs available to perform exports, for all installed and configured connectors with Akeneo PIM.

5. Click on the “Save” button and the export profile is created.

The profile page screen is displayed. It is possible to configure the job export:.

Modifying an import or an export

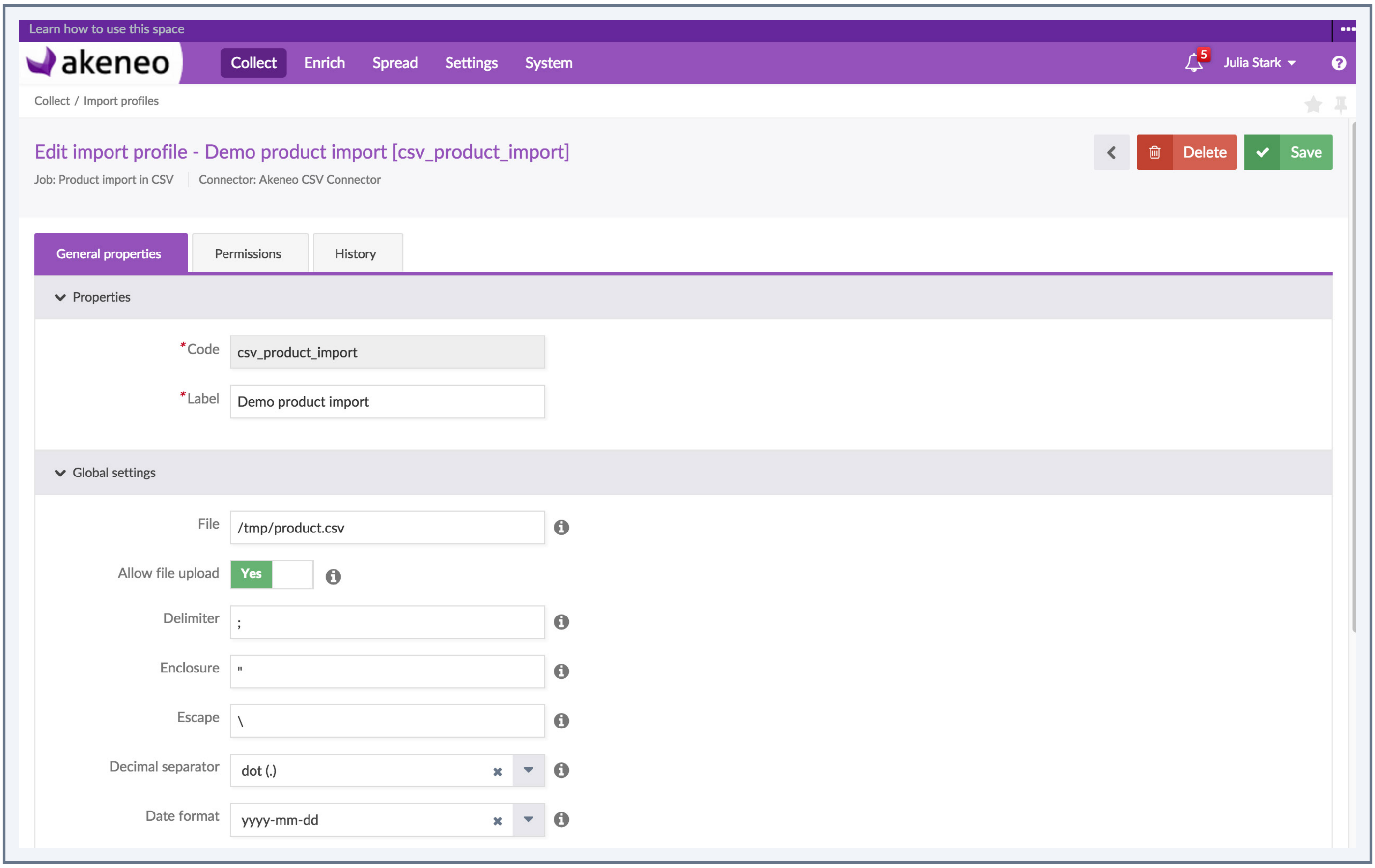
If a user has no right granted to modify an import or export profile due to his role membership (Community Edition rights), then the permissions which he may benefit due to his group membership (Enterprise Edition rights) will not be applied. For instance, if a user does not have the “edit profiles of imports” permission, his Enterprise Edition rights to edit a specific import profile is ignored.

To modify an import profile:

1. Log in with Account user with edit import profile permission.
2. Go to the “Collect → Import Profiles” menu.
3. Click on the import profile that needs to be modified.
4. Click on the “Edit” button. In the tab “General properties”, the properties code and label are available for all import profiles, the properties in global settings depend of the import job. For example for the CSV product import:

Property	**Details**
File	Defines the path for the CSV file to import
Allow file upload	Allows a file upload from the specified path
Delimiter	Defines the character to delimit the fields in the CSV file
Enclosure	Defines the character for the field enclosure in the CSV file
Escape	Defines the escape character in the CSV file
Decimal separator	Defines the character used as decimal separator in the imported file
Date format	Defines the format used for dates in the imported file
Enable the product	Defines the default status to create a product in Akeneo: - status "enabled" if yes - status "disabled" if no
Categories column	Defines the column name for categories in the imported file
Family column	Defines the column name for family in the imported file
Groups column	Defines the column name for groups in the imported file
Compare values	Enables the comparison between original values and imported values It can speed up the the import if imported values are very similar to original values
Real time history update	Enables the update of the product history It can be switched off to improve performances

5. Make your changes.
6. Click on the "save" button to update the import profile.



Note

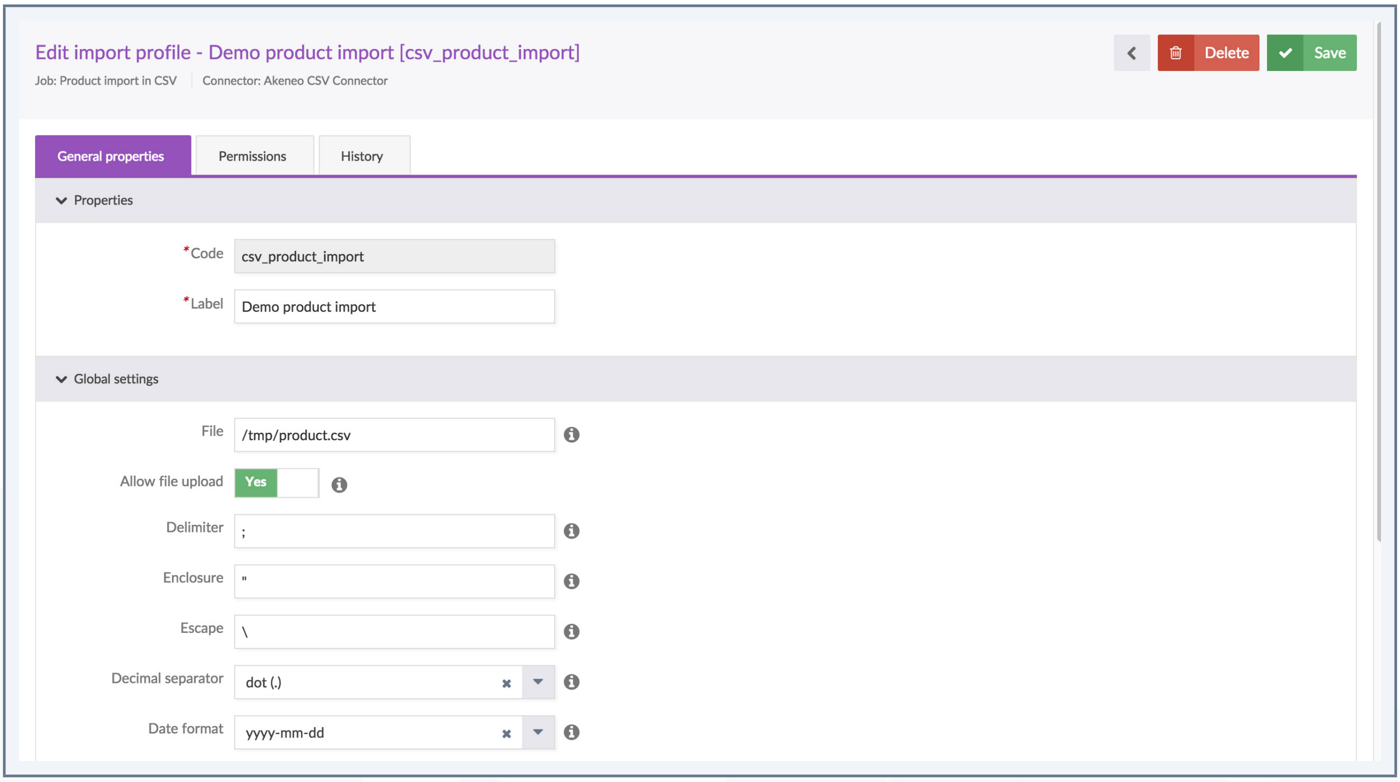
For other import jobs properties, refer to the contextual help or the connector documentation.

To edit an export profile:

1. Connect with a user account with edit permission for an export profile.
2. Go to the “Spread → Export Profiles”.
3. Click on the Export profile that needs to be modified.
4. Click on the “Edit” button. In the tab “General properties”, the properties code and label are available for all export profiles, the properties in global settings depend of the export job. For example for the CSV product export:

Property	Details
Channel	Defines the channel to export
Decimal separator	Defines the character used as decimal separator in the exported file
Date format	Defines the format used for dates in the exported file
File path	Defines the path for the CSV file generated by the export
Delimiter	Defines the character to delimit the fields in the CSV file
Enclosure	Defines the character for the field enclosure in the CSV file
With header	Defines if the first line of the exported file contains the columns names

5. Make your changes.
6. Click on the “Save” button to update the export profile.



Note

For other export jobs properties, refer to the contextual help ℹ or the connector documentation.

VIEWING REPORTS OF IMPORTS / EXPORTS

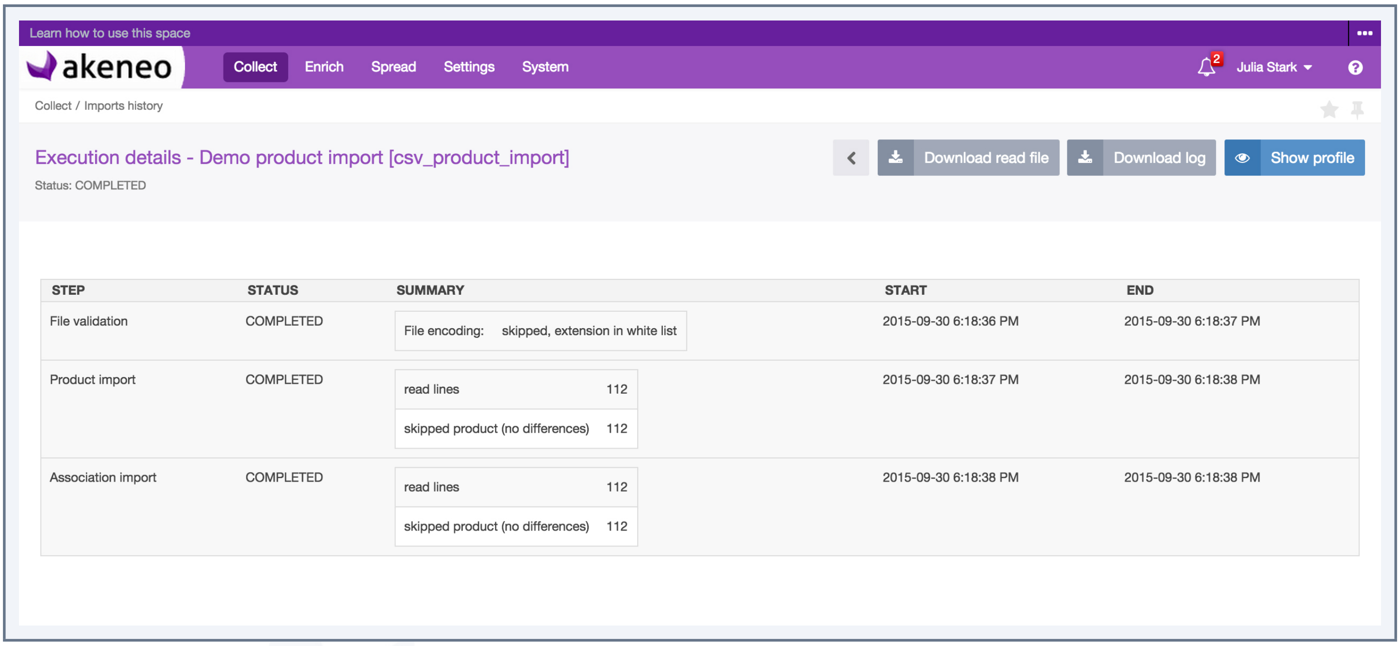
Viewing an import report

There are three options to view an import report:

- From the completion notification of the import,
- From the Akeneo menu,
- From the email notification for the completion of the import job.

To review an import report:

1. Go to “Collect → Import history”
2. Click on the notification of the complete import or select your import executed displayed in the grid.
3. The page of the import job appears:.



Example of an implementation report on import

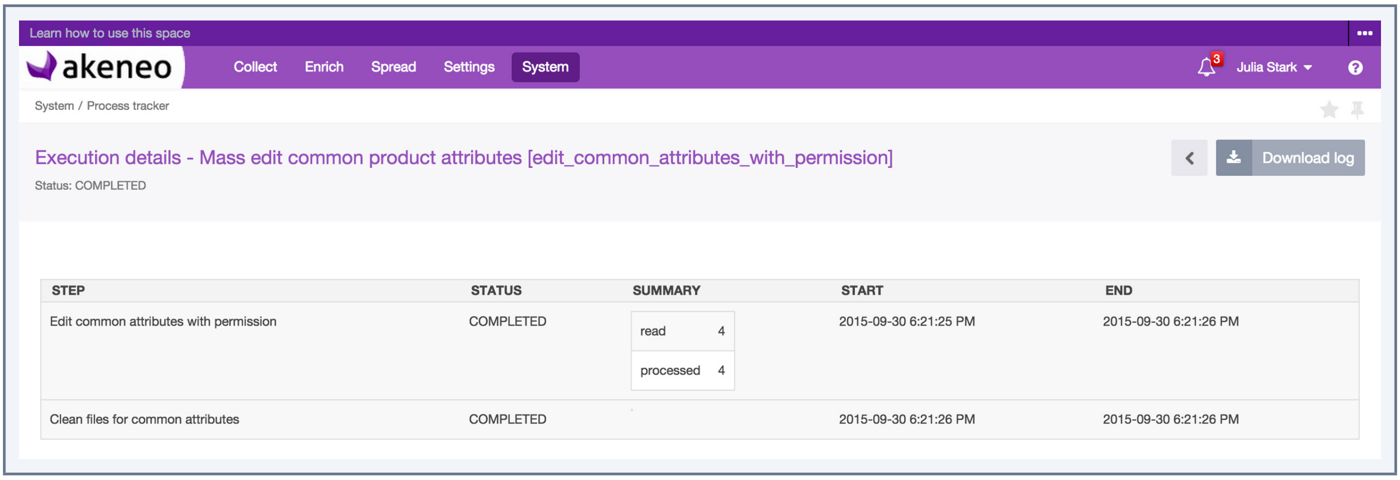
The details of the executing import job are shown on the page. The details are related to each executed import/export profile. For more detailed information, please refer to the documentation of the used Akeneo connector for the execution.

VIEWING REPORTS OF BULK ACTIONS

Viewing a report of a bulk action

To review a report of a bulk action:

1. Two ways to display a report:
    - Go to “System > Process Tracker”.
    - Click on the notification of the completed action or select your executed action displayed in the grid.
2. The page of the report is then displayed:



The details of the executing bulk action are shown on the page. The details are related to each executed action.

DEFINE ASSET TRANSFORMATION FOR CHANNELS

To define the assets transformation for each channel, you have to import a YML file by executing the job "Asset channel configuration import in YML".

For more details about the format of the file, please refer to our technical documentation.

For more details about how to execute an import, please refer to the user guide "User", section "Launch an import".

The assets transformation for each channel can be exported to a YML file by executing the export job "Asset channel configuration export in YML".

For more details about how to execute an export, please refer to the user guide "user", section "Launch an export".

GET YOUR SYSTEM INFORMATION

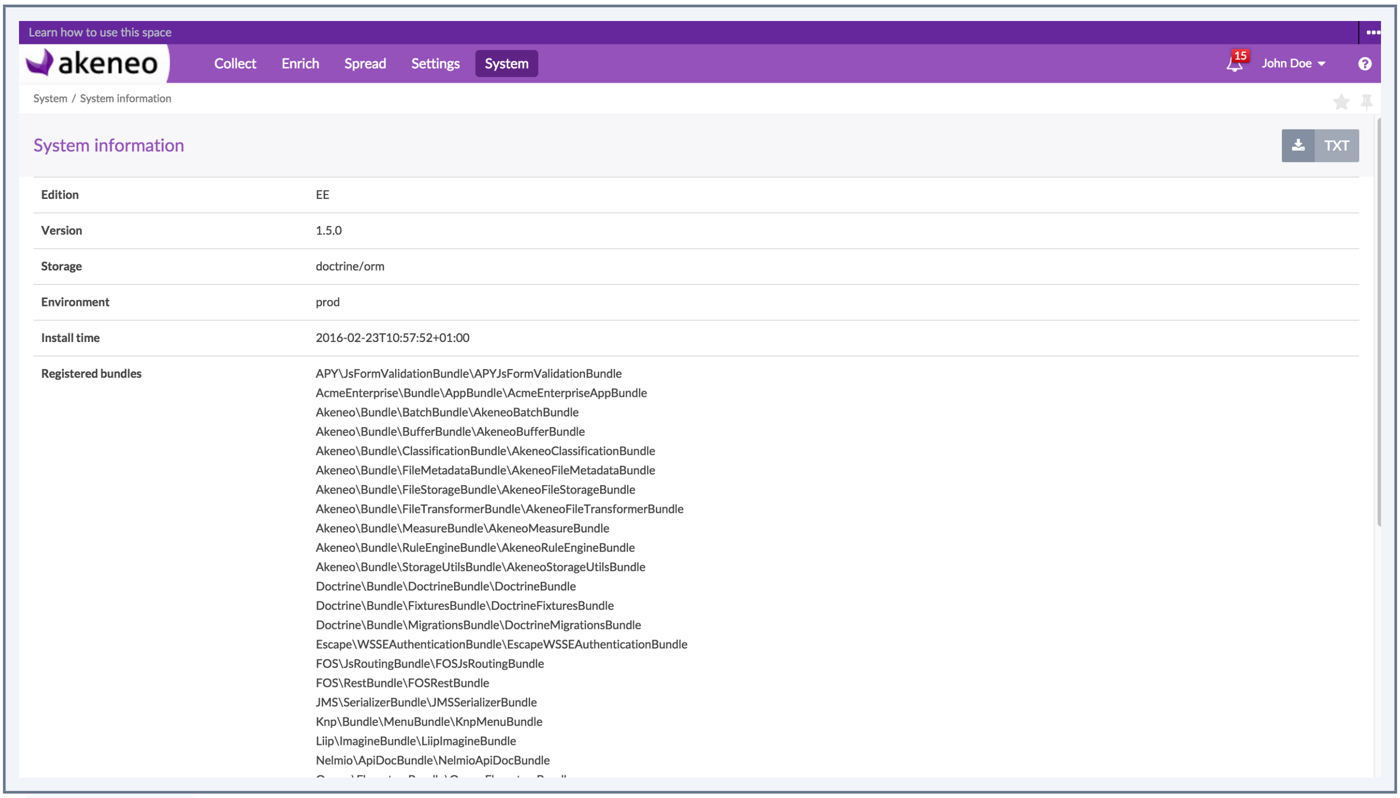
View your system information and download them

To view your system information:

Go to your System Information: System/System Information.

(screenshot new button System/System Information?)

On this page, you will have a sum up of all technical information that could be very helpful when raising a ticket: Edition version, Storage, Environment, Activated bundles…



Once you land on this page, click on "TXT" button on the right hand corner to download a text file containing all this information.

This page has been developed in order to gather most of the information you need to raise tickets through our Helpdesk.

If you're raising a ticket, please attach the text file downloaded to your ticket (Attachment field).

THANK YOU.

akeneo