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First time clicking on **Start Streamline Server**, the program will ask you to set up a root user. Fill in the Create root user dialog and make sure to memorize a created password.

Root user is a user with full access to a company catalog, user list, and roles.

Create root user			\times
Username	admin		
Full name	John Doe		
Email	johndoe@company.com		
Password	•••••		
		ОК	

You're also able to Reset root user by clicking on a server controller and choosing the option.

When the first user is created open Streamline and click on Connect to Server in the Start Tab. The program will ask you to fill up User credentials, IP address, and Port. Press OK and you'll be successfully connected.

Server conne	ection					
IP address	localhost Port 9980					
Username	admin	admin				
Password	•••••					
Save pas	sword					
	ОК	Cancel				

Another way to Connect to Server is by clicking File > New > Server connection or press Alt + F2

2.4. Server: Users and Permissions

Creating additional users

After connecting to Server, you'll notice two more tabs appeared which are **Changes** and **Users**. When you click on Users Tab you'll see a *Root user*, which was created when you were activating a server for the first time. By default, this user has an Administrator Role and Full access to catalogs of the project.

To create another user, click on **User Tab** > **New User** and fill up all required information.

Nev	w server user		\times
	Username	test	
	Password	•••••	
	Full name	Jane	
	Email	jane@company.com	
	Catalogue access	Full access \sim	
	Role	Administrator \vee	
		OK Cancel	

Next to a new user, you'll see additional settings available:

2	Edit user info (Name and email)
e.	Reset password
	Delete user

Also, you're able to assign a **Role** and a **Catalogue Access** to each created user.

Creating a role

To create a new role for a user, click on **Roles** > **New Role**. Give it a name and description.

New -	Dpen 🗎 Save	C Update data Users onlin	Last updated on Oct 1, 2020	
Start	Users	♥ New role Role		Description
Demand	Roles	Administrator		
Tinventory	Catalogue access	No role	S Create	×
Reports			Name Test Role Description Role description OK	Cancel
Dashboard				
Changes				
≗ ∰ Users				

After you click OK, you'll be able to set which Tabs are available for the Role as well as set whether it's available for editing or viewing only. After all settings are done, click Accept.

New 🔻	🚰 Open 💾 Save 🔹	Cupdate data • Users online Last updated on Oct 1, 2020		
Start	Users	Back to roles < Test Role Role of	description	🗶 Edit
Demand	Roles	Role Pemand		
© Inventory	Catalogue access	read only editable		
Reports		Inventory read only editable DC		
Dashboard		read only editable Interstore read only editable		
≜ ≡ Users		Reports read only editable		
Output Control of C			+ Accept	

Creating a catalogue access

Catalogue gives you an option to allow access to particular items/locations/channels inside of your project.

To create one, click **Catalogue access** > **New catalogue**. Give it a name and description.

New -	🚰 Open 💾 Save 🔹	C Update data Voers online Last updated on Oct 1, 2020			
Start	Users	Back to catalogues < Test Catalogue Catalogue description			
<u>~</u>	Roles	Bems			
Demand		✓ All Items	2		×
Ð	Catalogue access	> Consumer goods	2		×
Inventory		> Fashion	2	•	×
Ð		> Food/Beverages	2	•	×
Reports		> Pharmacies	2		×
Lili Dashboard					
E Changes					
≗ ⊞ Users					
Oser Guide		+ Accept			

After you click OK, set which categories/locations/channels are available, and similar to creating a Role, choose what is available for editing and what is for viewing only. Press Accept after.

By default all Items, Locations and Channels are disabled for a New Catalogue.

Back to catalogues <	Test catalogue	Catalogue	e descr	iption
 Items Locations Channels 				
✓ All Items		∠		×
> Consumer goods		∠		×
> Fashion		_	0	×
> Food/Beverages		_	o	×
> Pharmacies		_		×
	+	Accept		

If **Locations** and **Channels** are available in the project, make sure to make a selection throughout all the Tabs.

Assigning Roles and Catalogue Access

To assign Role and Catalogue Access to the Users tab, simply double-click a needed slot lined up with a needed user.

New 🔻	🚰 Open 💾 Save	• C Update data • U	sers online Last updated on 0	let 1, 2020					
Start	Users	♣• New user Full name	Usemame	Email	Role	Catalogue access			
⊡ Demand	Roles	John Doe	admin	0	Administrator	Full access	2	θ_0	
(The second seco	Catalogue access	Jane Doe	Test	◎ double-	Test Role 🛛 🗸	Test Catalogue	2	θ_0	Π.
Reports Reports Dashboard Changes Users					Administrator No role Test Role				

Changes Tab

Changes Tab is designed for tracking all users actions in a project. Date and time, Username and Description of each operation is listed in this Tab.

New 👻	2	Open 🗎 Sav	e 🔻	C Update data Users online Last updated on Oct 1, 2020
		Date	User	Description
Start	1	2021-10-27 13:34:04	admin	Updated user: Test.
<u>~</u>	2	2021-10-27 13:33:56	admin	Updated user: Test.
Demand	3	2021-10-27 13:33:53	admin	Updated user: Test.
Rentory	4	2021-10-27 13:33:52	admin	Updated user: Test.
_	5	2021-10-27 13:33:51	admin	Updated user: Test.
Reports	6	2021-10-27 13:33:51	admin	Updated user: Test.
	7	2021-10-27 13:33:25	admin	Updated user: Test.
Dashboard	8	2021-10-27 13:33:15	admin	Added catalogue: Test Catalogue.
蔵	9	2021-10-27 13:31:24	admin	Added role: Test Role.
Changes	10	2021-10-27 13:28:59	admin	Deleted role: Test Role.
1	11	2021-10-27 13:28:53	admin	Added role: Test Role.
Users	12	2021-10-27 13:19:01	admin	Added user: Test, role: Administrator.

Next: Automatic update and data export

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