

3. Switch User functionality

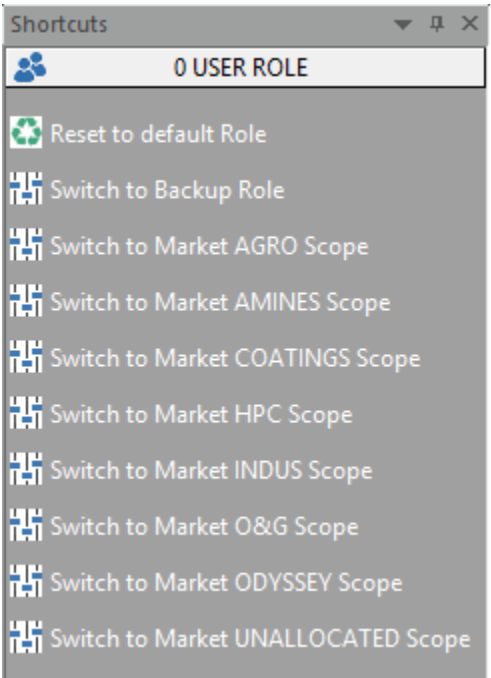
- [Switch user feature for user](#)
- [Switch user feature set-up](#)

Switch user feature for user

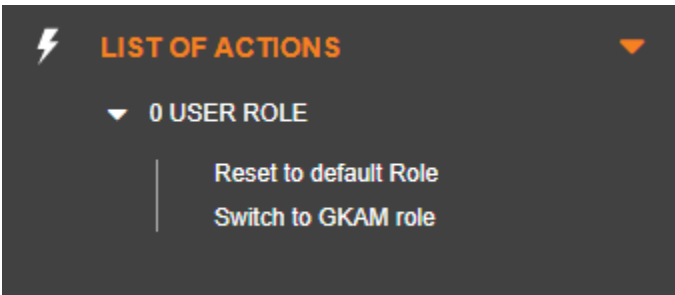
This feature allows a user to switch to an other scope.

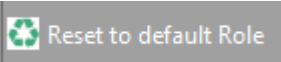
For example for a Sales Manager who is also a Global Key Account or a S&OP Planner who have different roles in the process.

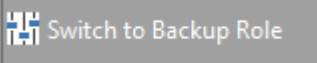
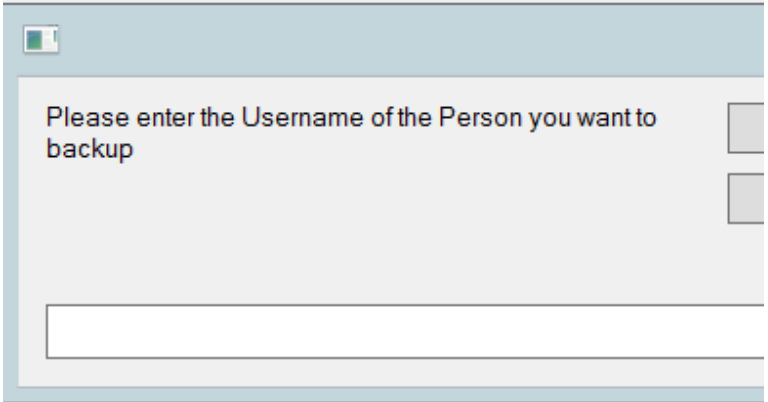
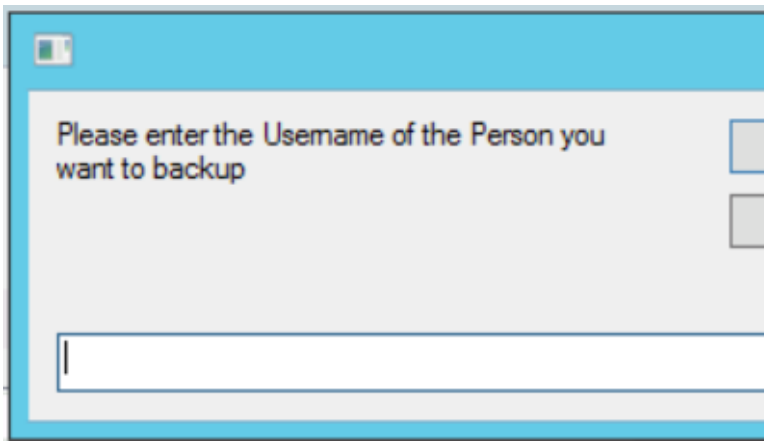
On the opening page, the user is able to go on the shortcut session in order to change his role. You may not have the authorization to use this shortcut they are only for some users.



The option is also available on the Web portal :

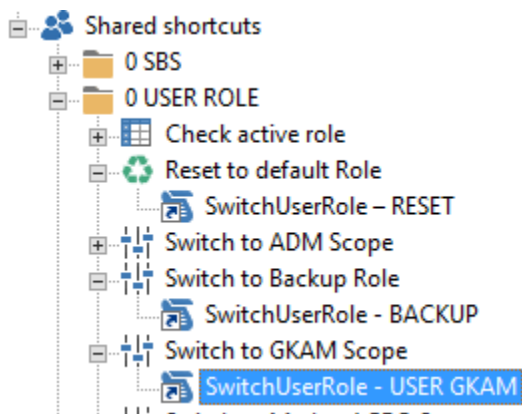


Shortcut	Screenshot	Who ?	Actions
Reset to default role		ALL	Permits to reset to the connexion settings. To go back to your original role.

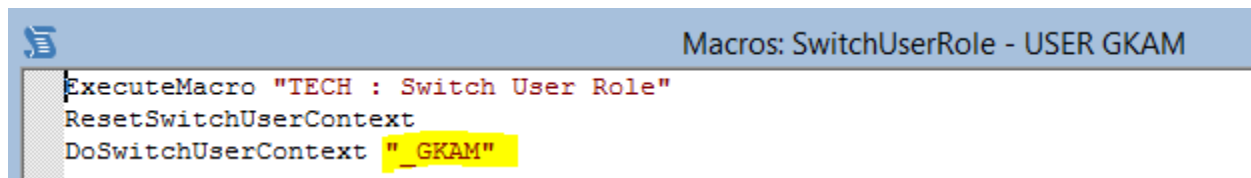
Switch to Backup Role		Special Chem Demand Planner Novecare S&OP Manager	Permits to have access to the profil of another user in case of backup. The user only have to put the username of the person he wants to backup on the windows below  
Switch to GKAM		Special Chem Sales Manager Aroma Sales Manager (in progress)	Permits to a Sales Manager to switch from his portfolio to an extended portfolio (Customer Group Product range...)
Switch to Market xxx		Novecare S&OP Manager	Permits to user who are S&OP Planner and who are also S&OP Manager Referent for a Market S&OP Manager role to his S&OP Manager Referent.

Switch user feature set-up

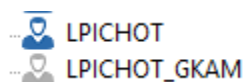
Macros/Shortcut are available to manage the different cases :



The extension to be added to the user is defined in the macro :



When launching the macro, the macro will look for the user with the extension :



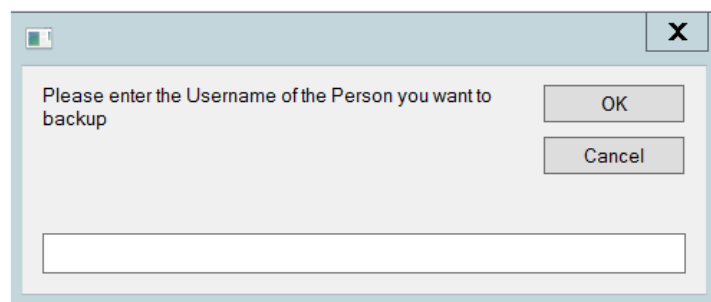
Note : For the Switch to Back-up, the user will be the user to switch to with the extension

To activate the feature for a new user :

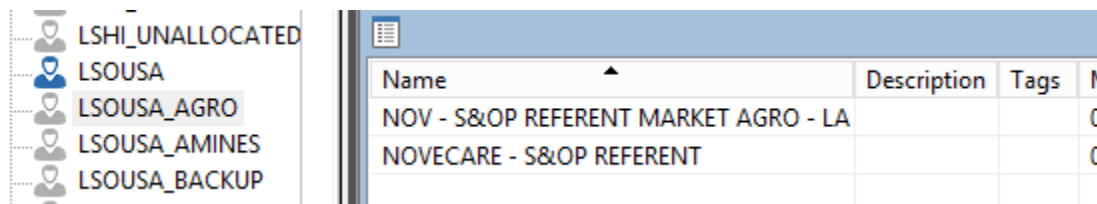
1) Create a new user (as deactivated) with the corresponding extension

For the Switch to Back-up, the new user should be the back-up user.

Note : if USER1 needs to access to USER2 for back-up, the user to be created is : USER2_BACKUP, then USER1 will have to enter "USER2" when switching to back-up to access USER2 profile



2) Update the User group of the new user to reflect the new scope(s)/role(s) he will have access when switching



For the Switch to Back-up, the new user should have the same User groups as the back-up user.

(USER2_BACKUP should have the same User groups as USER2)

3) Check that the user who need to have access to the Switch user have access to the corresponding shortcut