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Operating Instructions KERN EasyTouch

EasyTouch Roles & users User manual

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GB



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1.0 Introduction to role management

A role is a way to group permissions and to control other forms of access within Easy Touch. A user in Easy Touch may be assigned permissions through a role.

2.0 Permissions for managing roles

The following permissions are required for you to be able to perform the relevant management actions on roles:

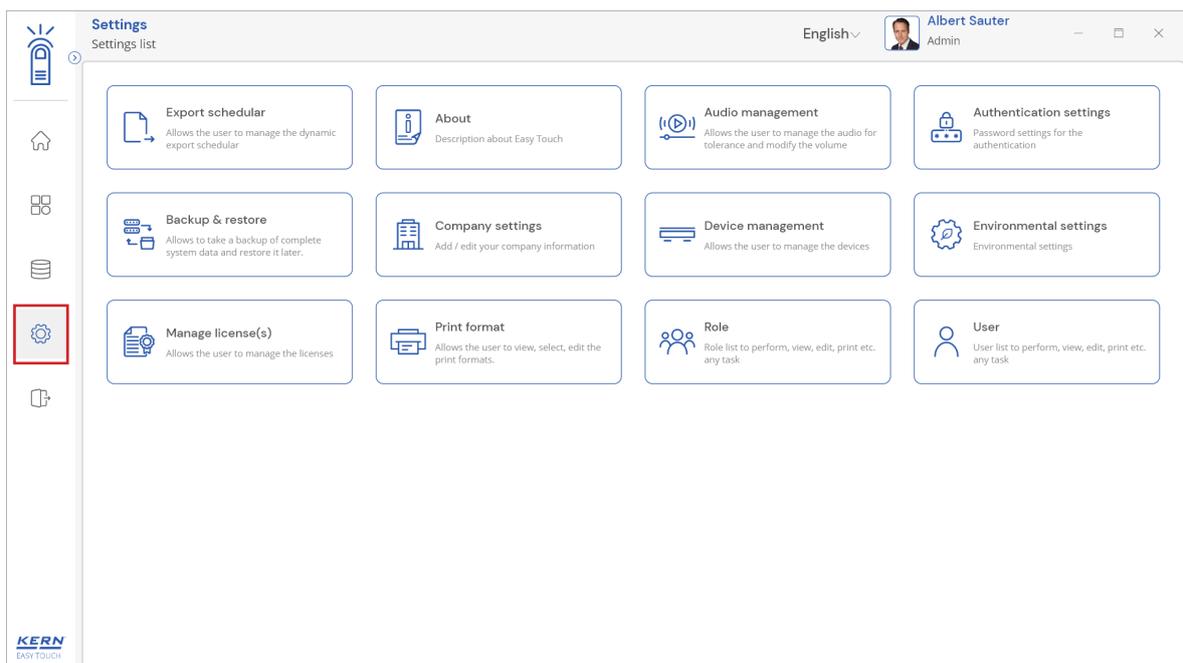
- View roles
- Create roles
- Edit roles
- Delete roles

You must have at least one of the above permissions which will enable to see the roles under settings of Easy Touch.

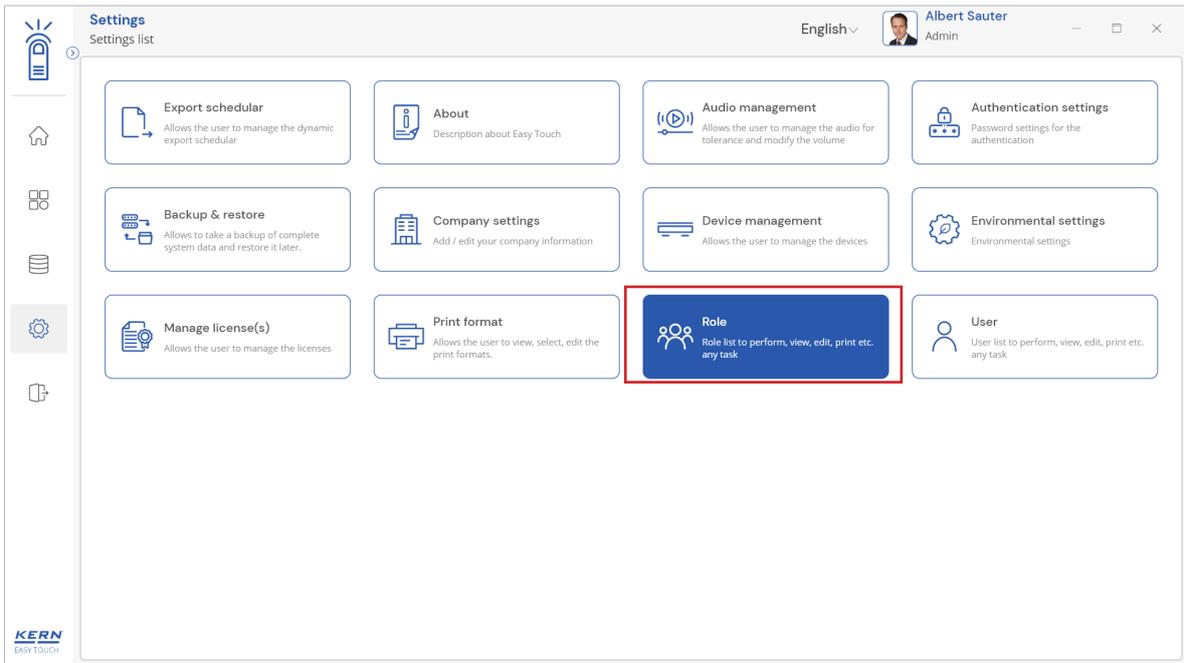
2.1 Creating a role:

To create a new role,

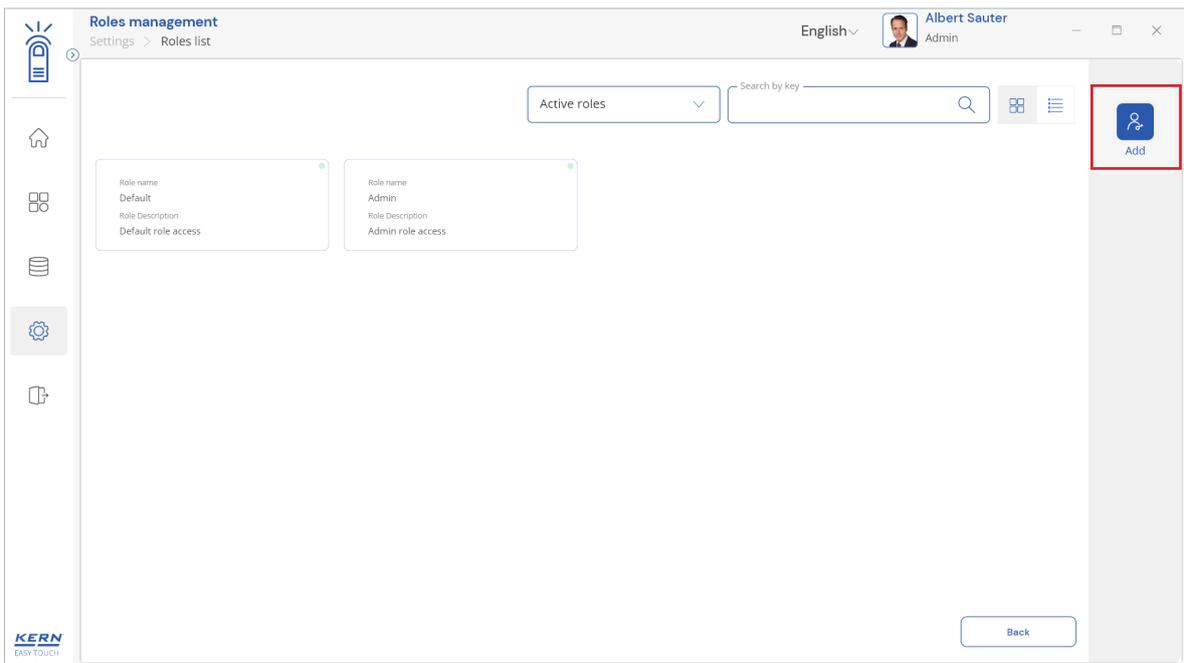
1. On the main menu, go to settings > role



2. Select the role

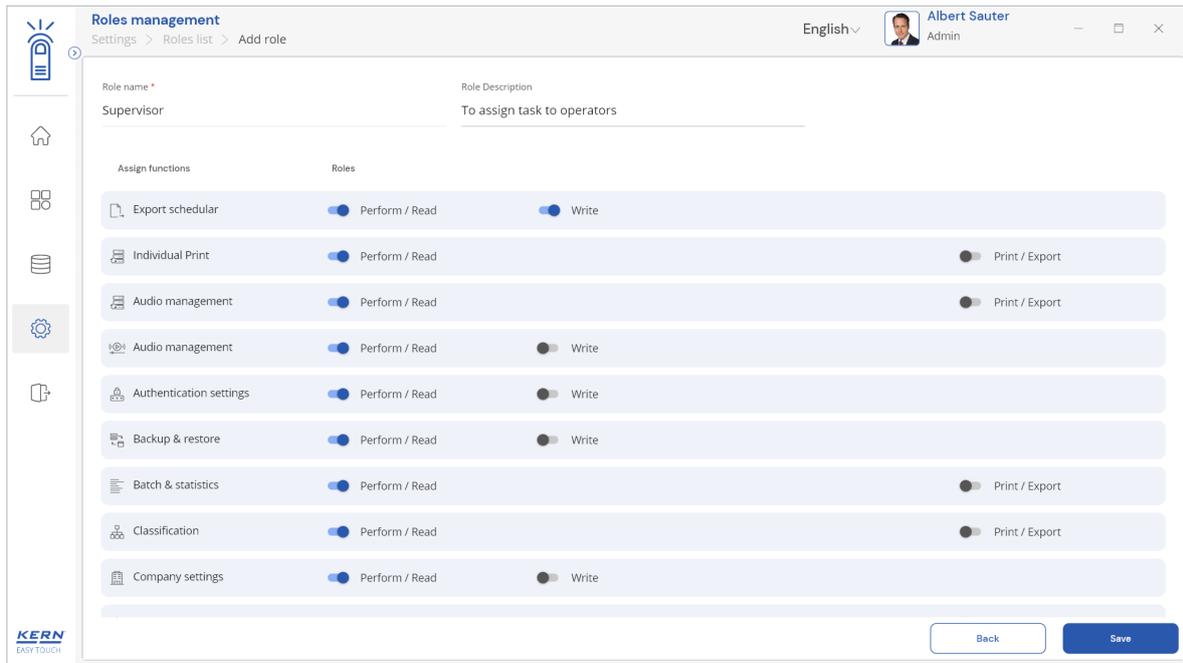


3. Click on the add icon

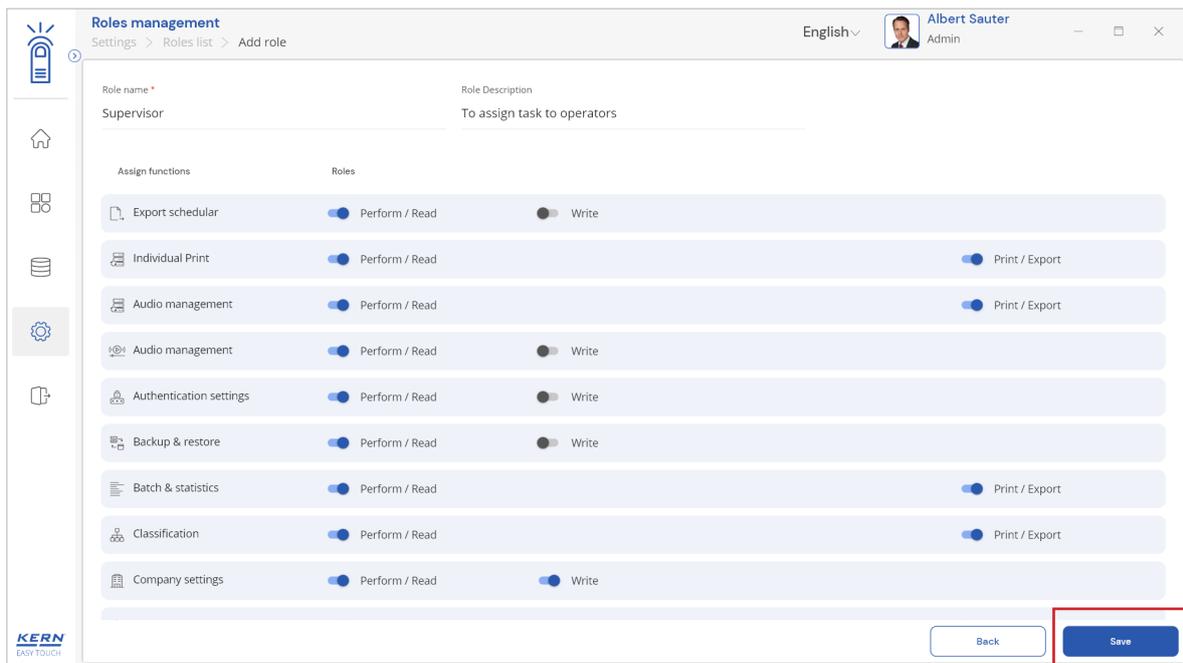


4. Enter and choose all the necessary information and access.

English



5. Click on the “save” button.



English

2.1.1 Fields for user roles

Role name: The name for the role and it must be unique.

Description: Rights and responsibilities of the role can be shortly described. Additional notes or information can also be entered.

Access (read / perform): The permission will enable the user to view the settings and data or perform the transactions against the functions.

Write: The permission will allow the user to modify the respective data

Approve: The permission will allow the user to approve the respective planning or

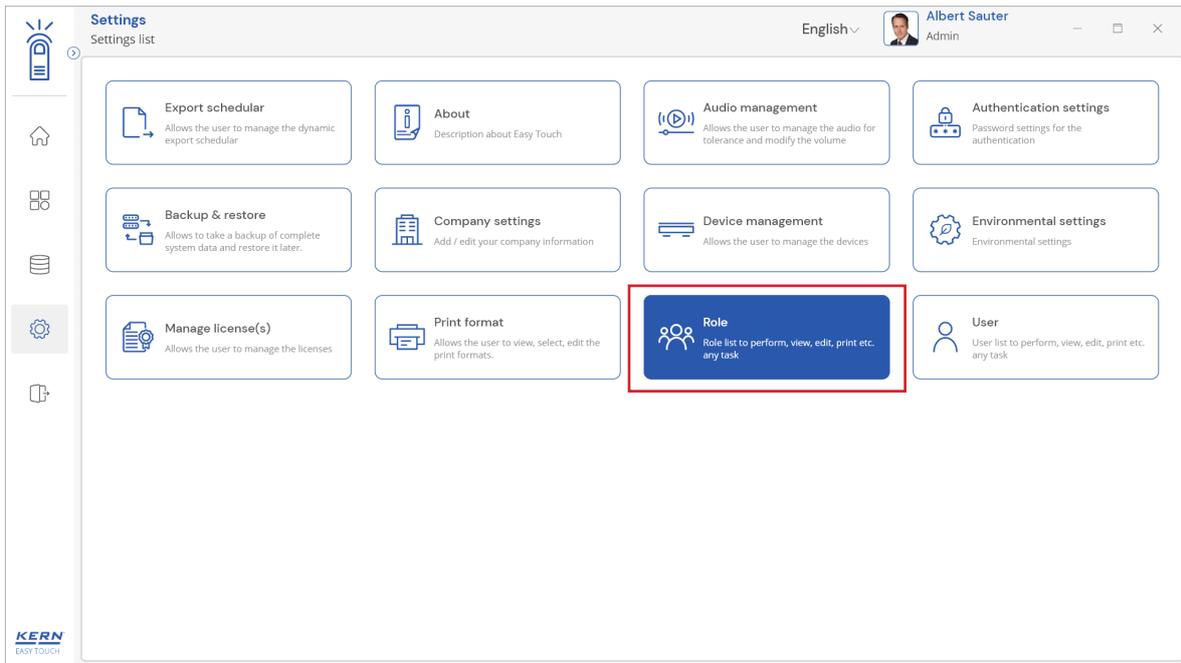
executions against the functions

Print / export: The permission will allow the user to print or export the data inform of pdf and excel

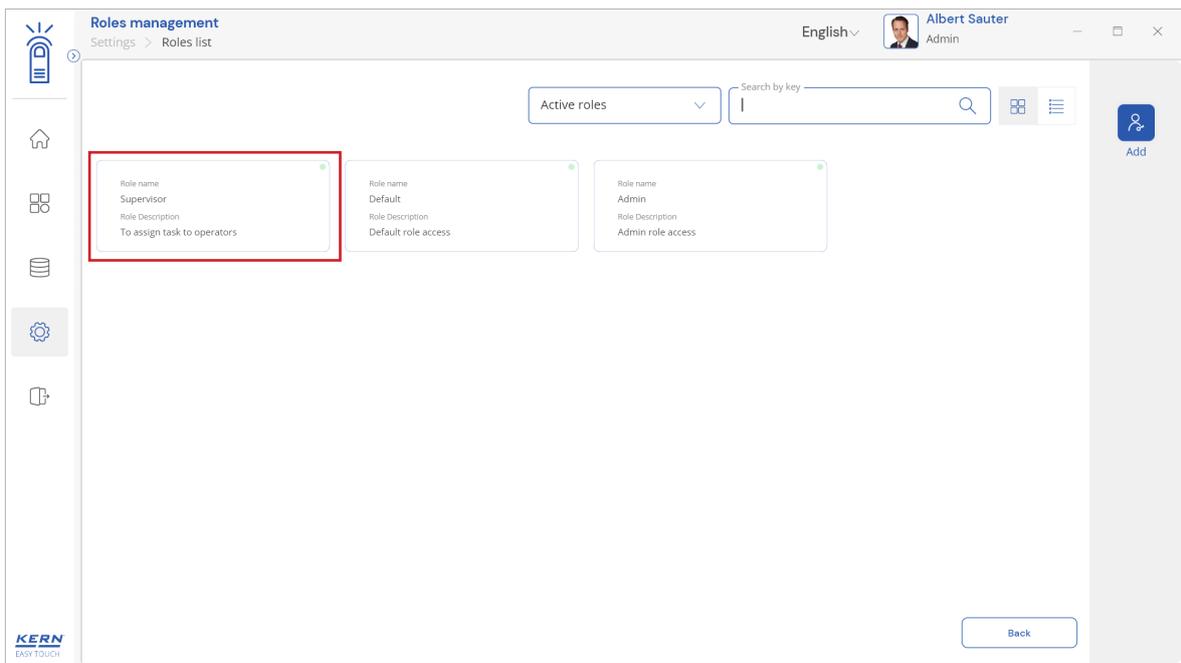
2.2 Editing a role

You can edit a role to update the name or permissions associated with that role.

1. On the main menu, go to settings > role

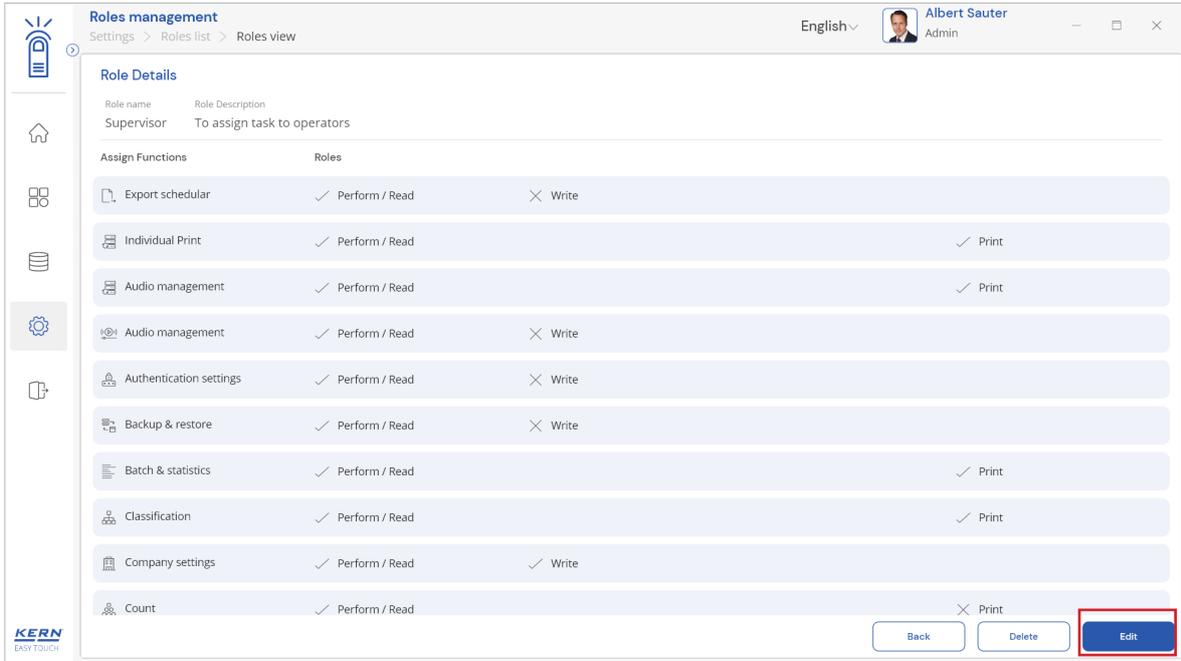


2. Locate the role you wanted to edit

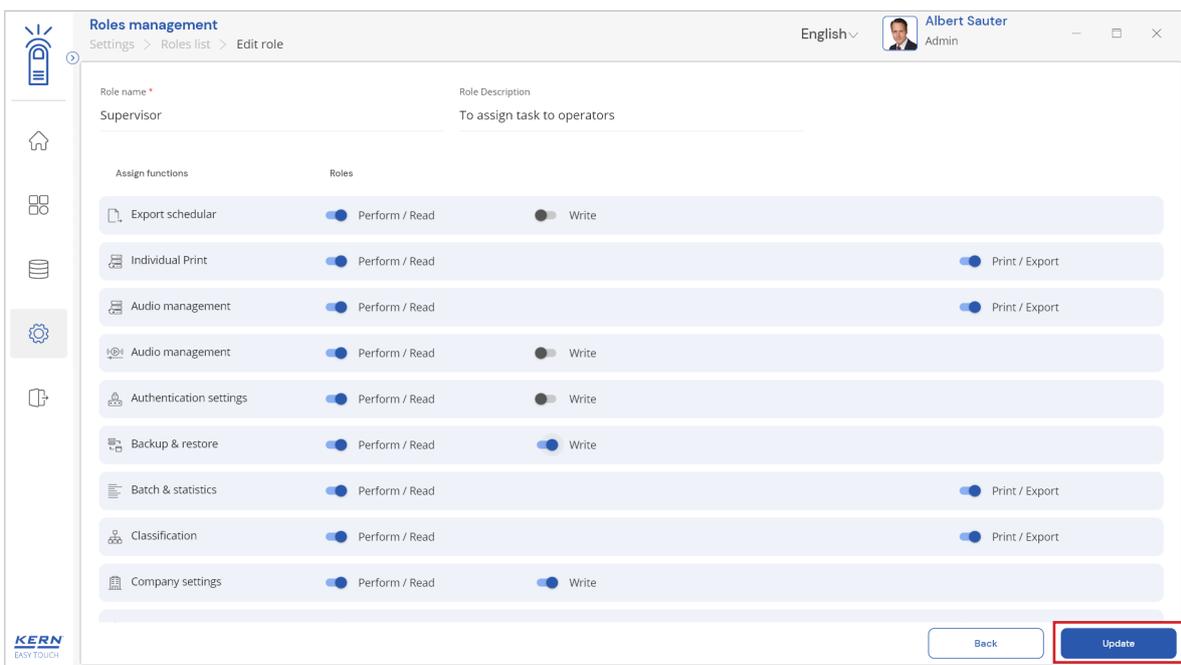


3. Click on the respective role and edit button

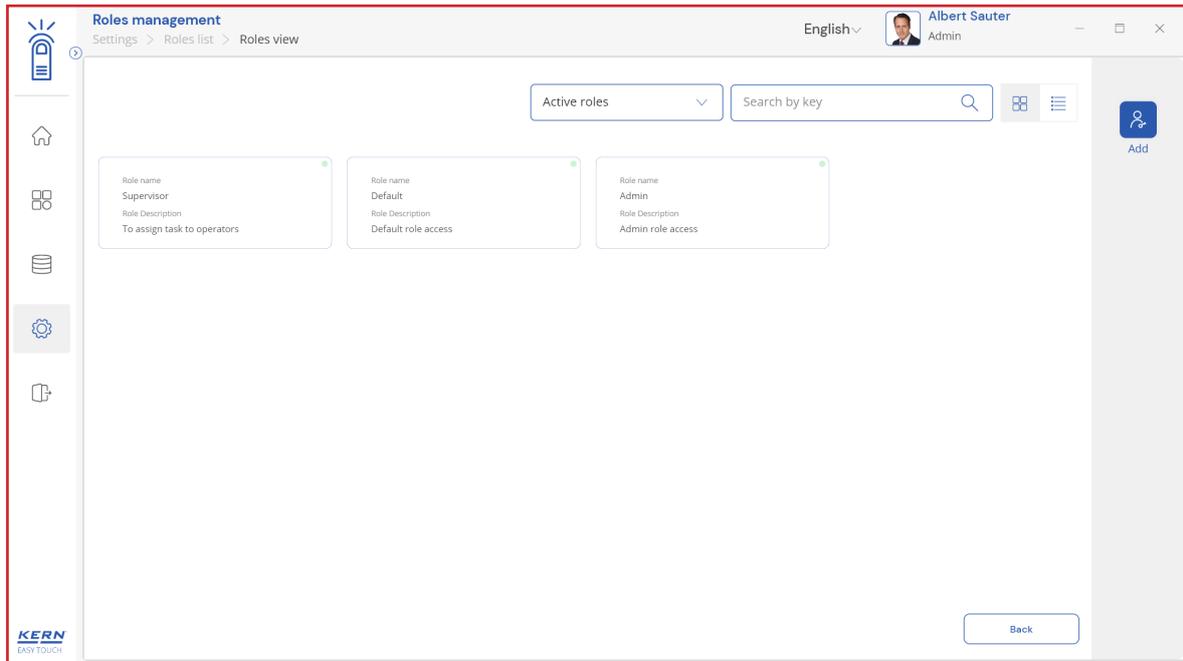
English



4. Modify all the necessary changes.



5. Click on the “update” button.



Please note, whenever a role is updated, any users assigned to it will have their permissions updated as well.

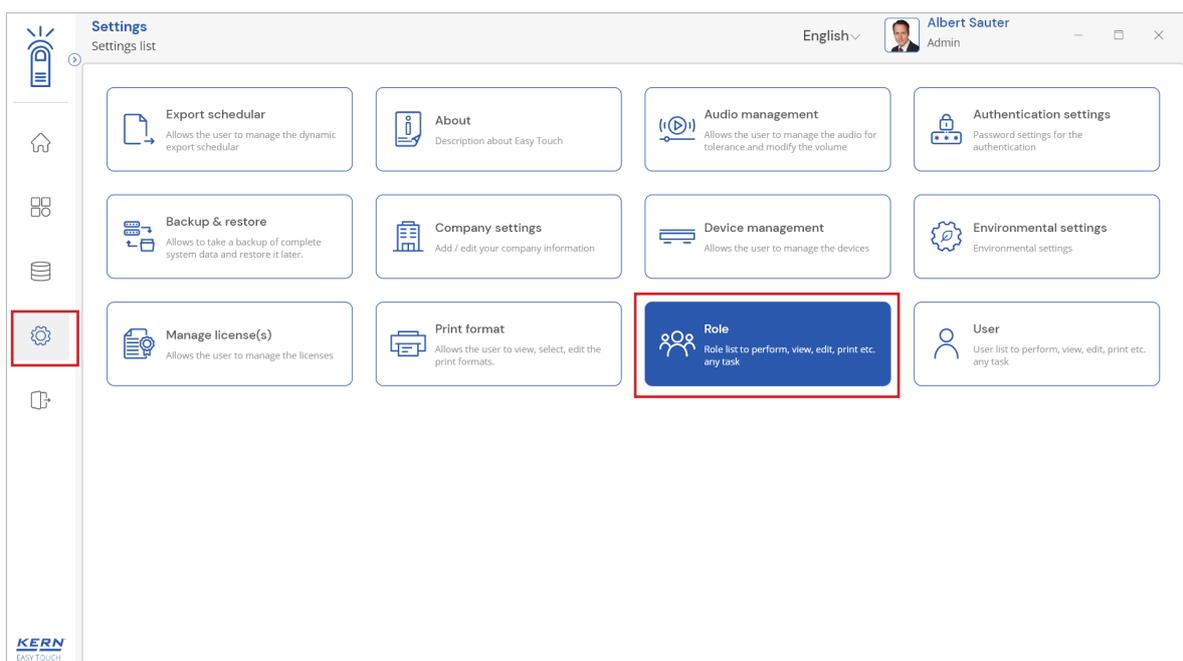
2.3 Deleting a role

You might want to delete the roles if you created a role that is no longer applicable. However, there are some types of roles that you can't delete,

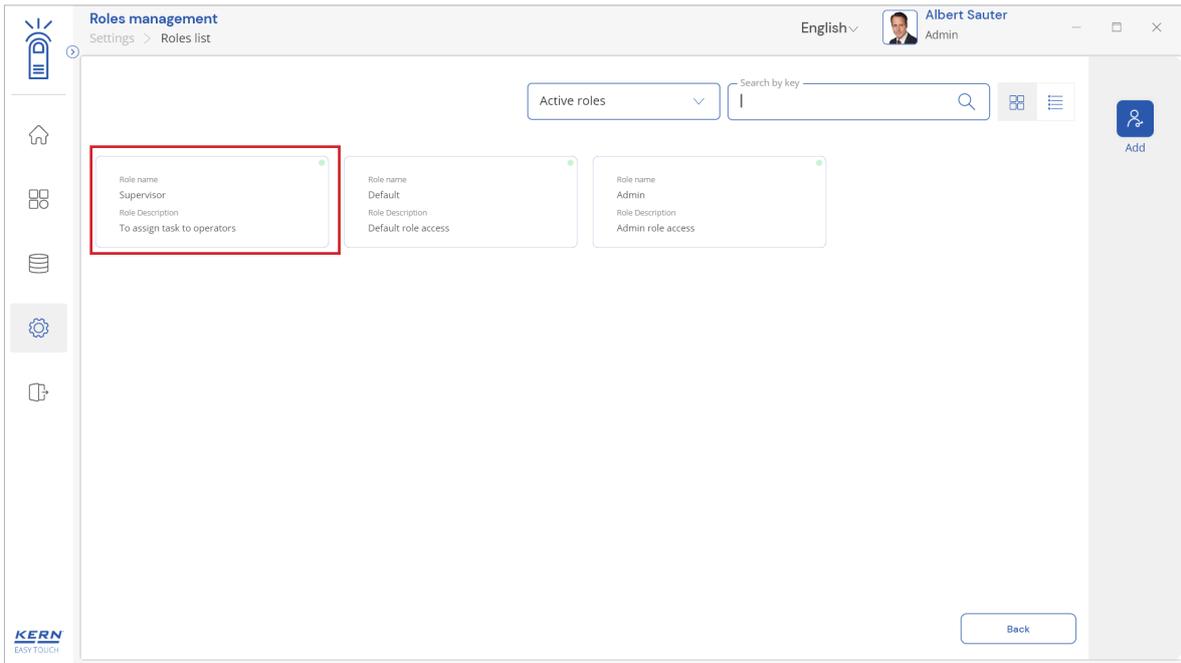
- You can't delete the preconfigured built-in roles Admin and Default.
- You can't delete roles that are currently assigned to one or more users. You must first remove the role from the relevant users and will have the provision to delete.

To delete a role,

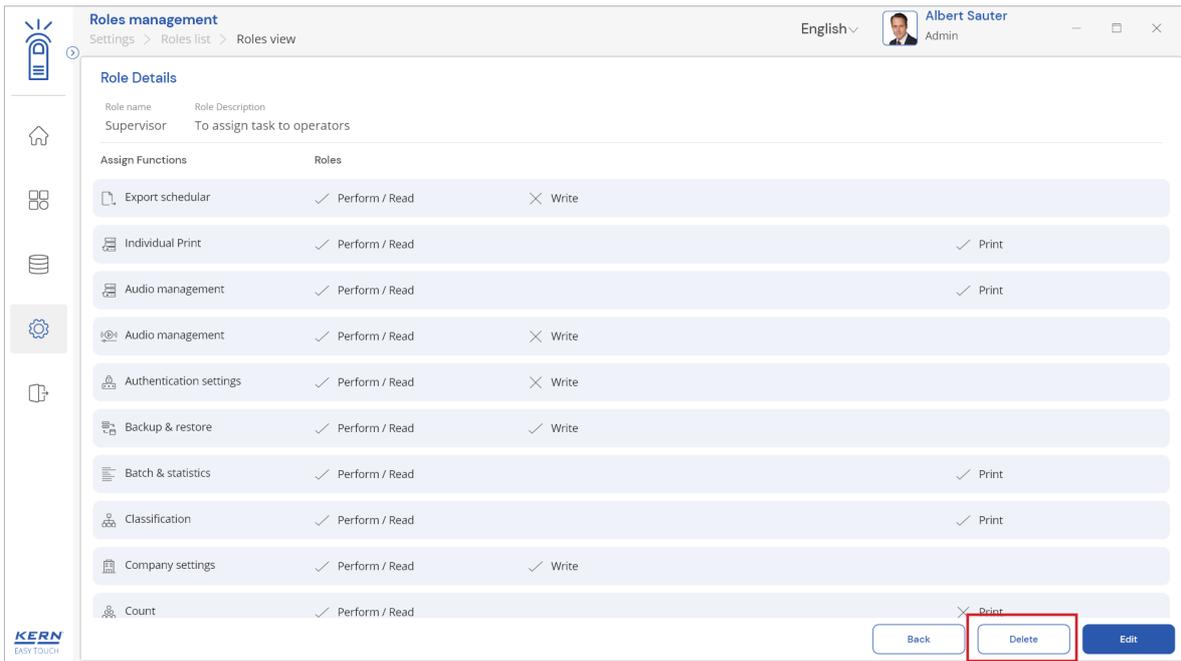
1. On the main menu, go to settings > role



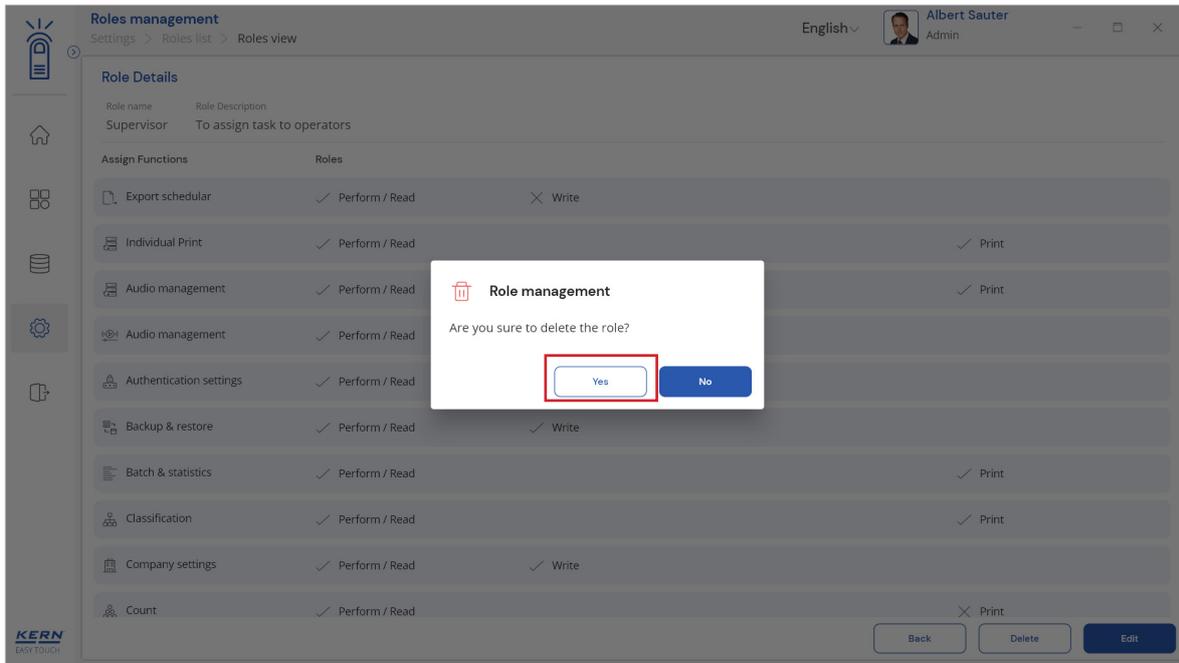
2. Locate the role you wanted to delete



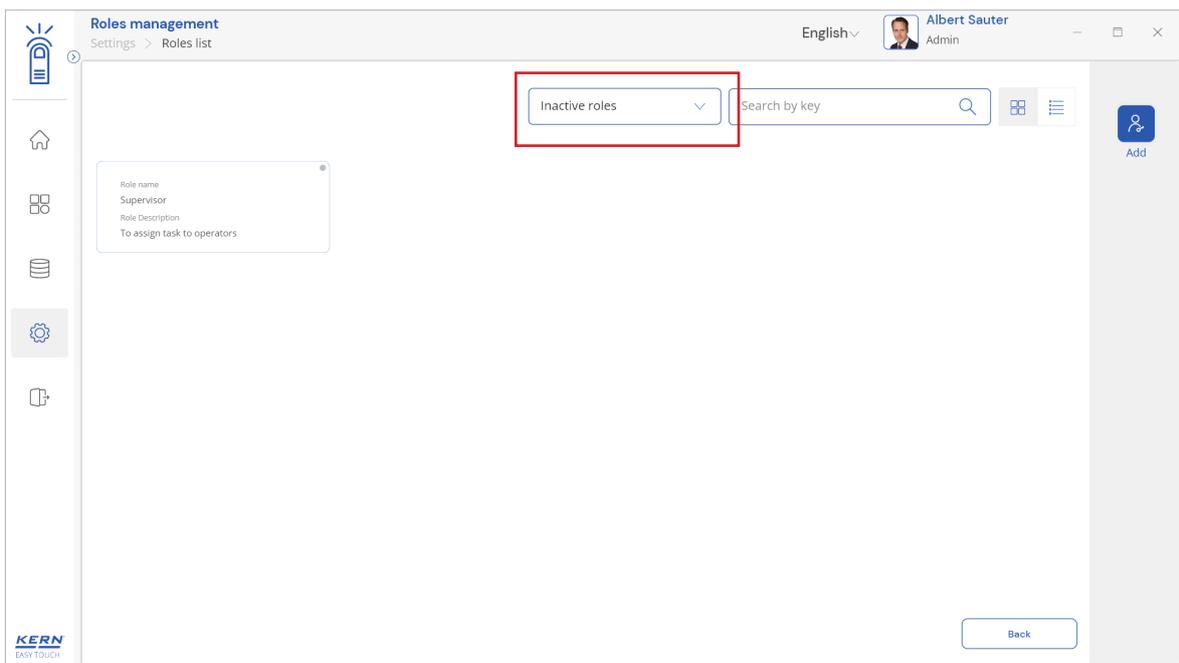
3. Click on the respective role and delete button



4. Click on the "yes" button confirming to delete the role.



Please note, the deleted role will be found in the inactive state, and you will be able to activate the role whenever required.



3.0 Introduction to the user management

A user is anyone who accesses and uses Easy Touch. Each user has a user account that stores the access credentials, the details of the person using the system, the role, and other details.

- A list of users can be found at settings > user. Please be aware, the user settings will only be visible if your user has the appropriate role assigned to them. For more information, see the role section.

4.0 Permissions for managing users

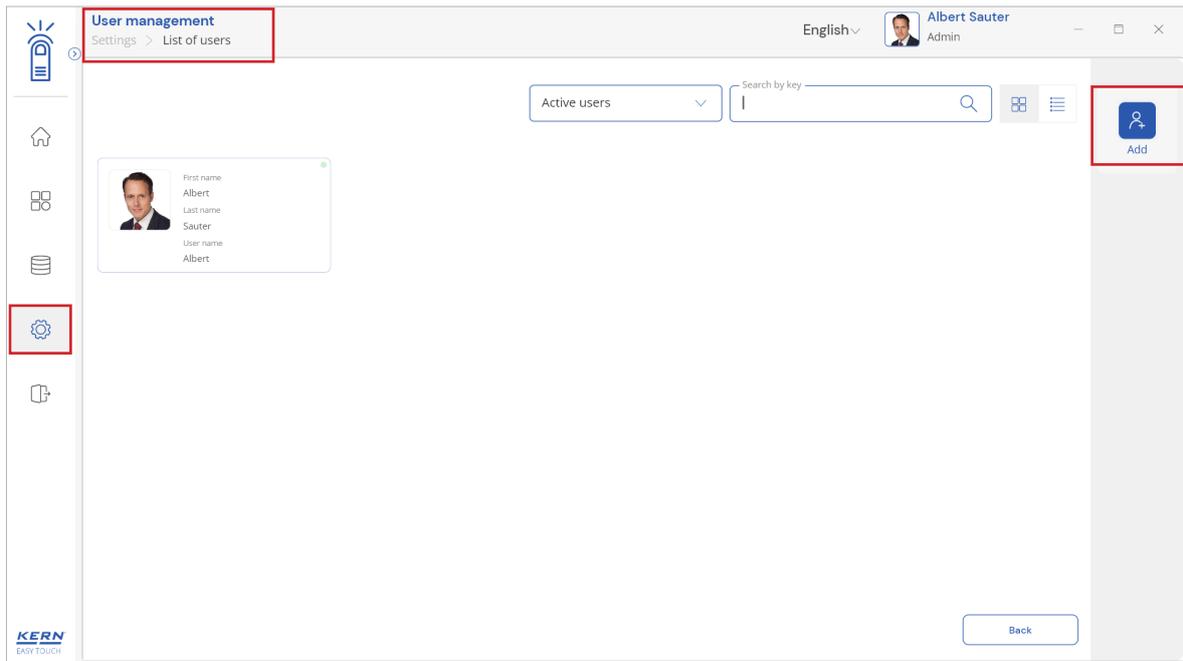
The following permissions are required to perform the relevant user management actions,

- Create users
- Edit users
- View users
- Delete users

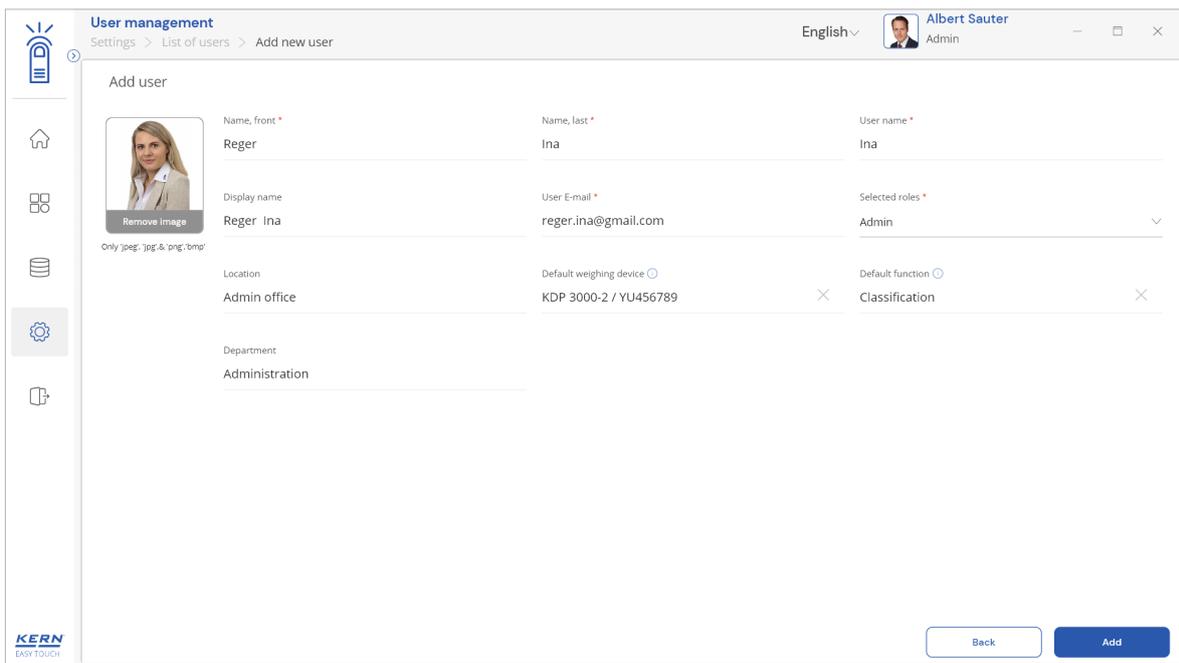
4.1 Creating a user

To create a user,

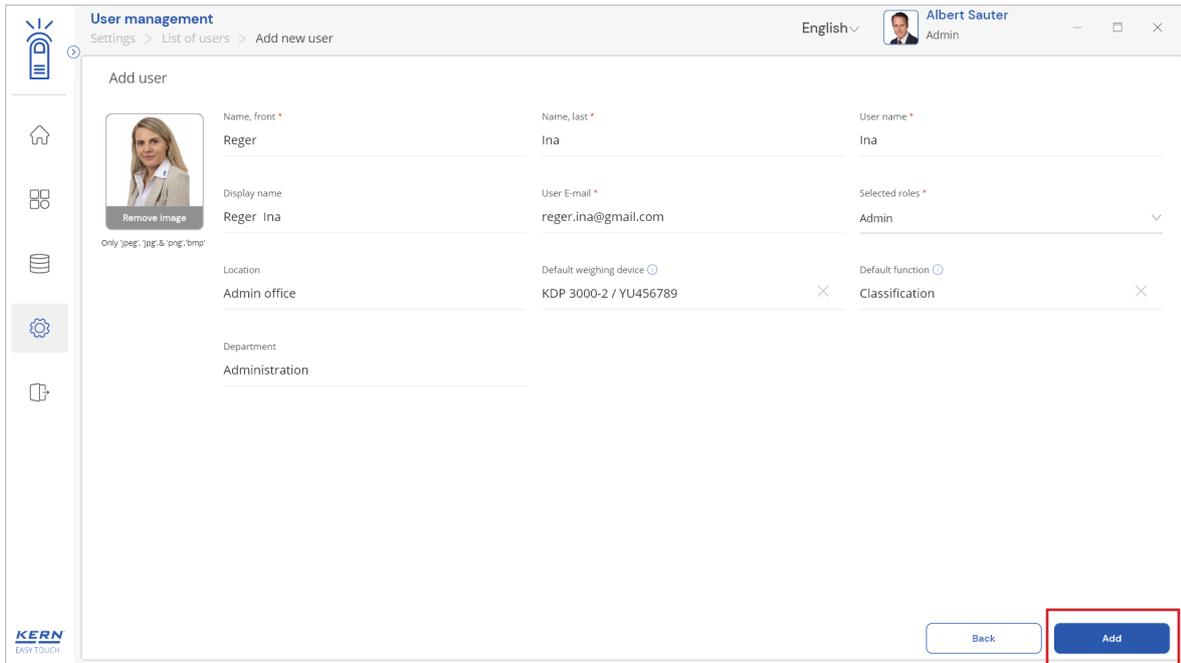
1. Click on the main menu and navigate to settings> user and select create user icon.



2. Enter all the necessary information.

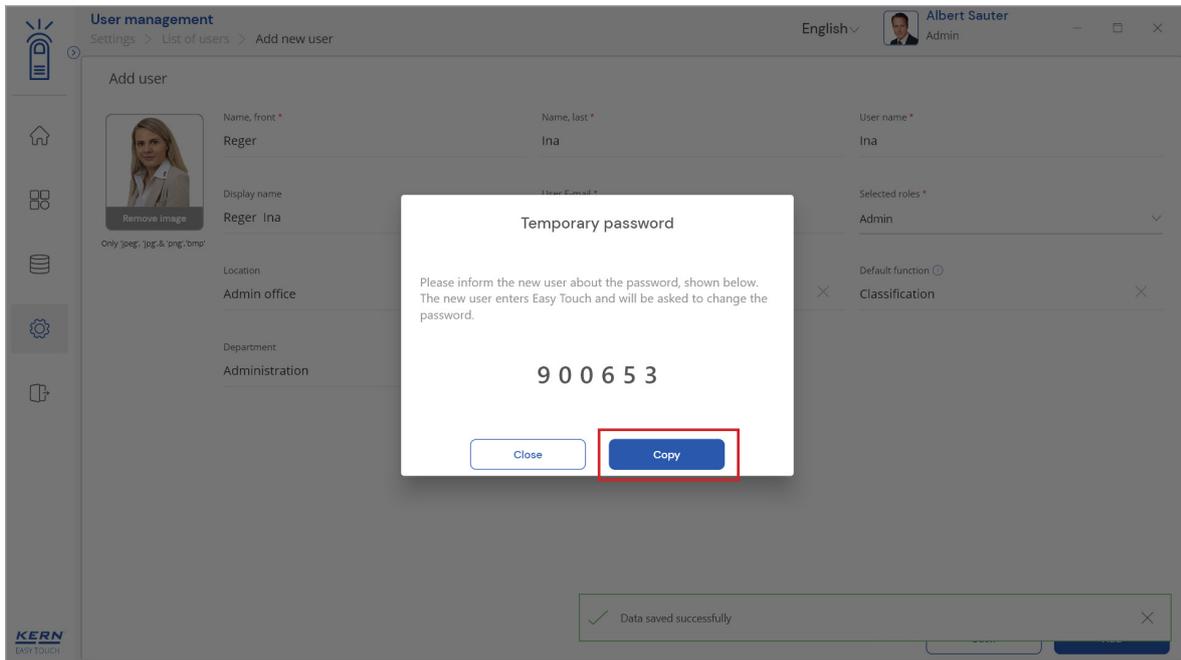


3. Click on the "save" user.

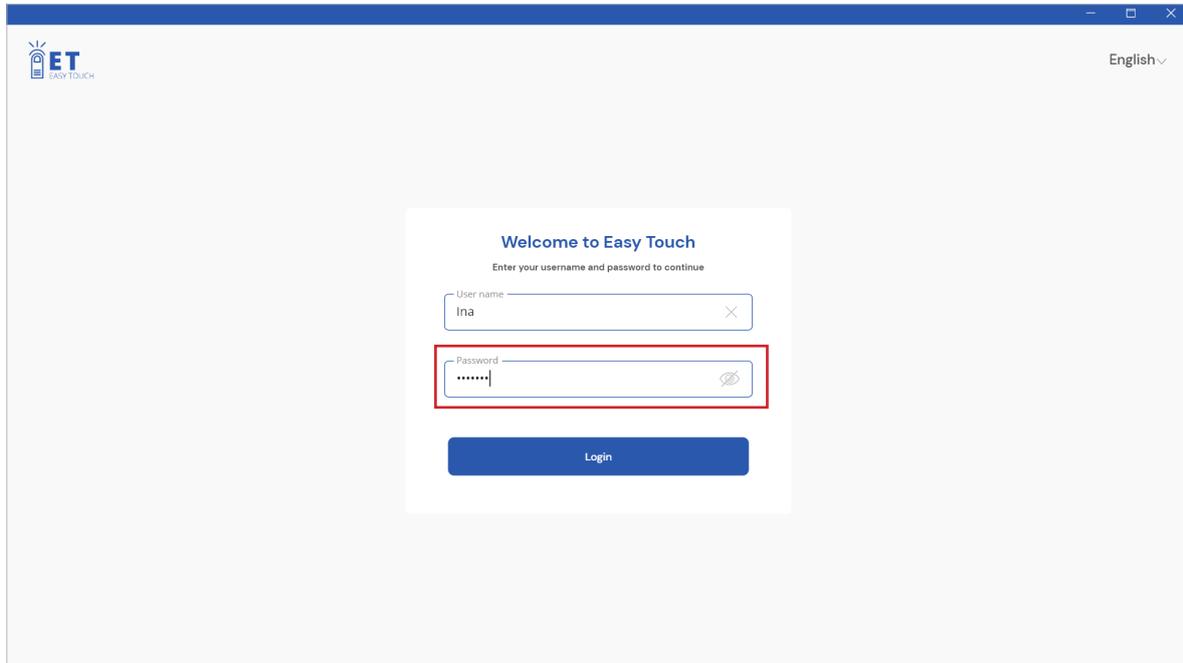


Please note, only users with “Easy Touch” access rights can log in to the Easy Touch using the OTP generated upon saving the user.

- Click on save and user will be displayed with the OTP.



- Admin users can share the OTP to the respective user and the respective user can change the password using the OTP and can login to the system.



Other users: There are a couple users that our team creates to assist you with onboarding and support cases.

4.1.1 Fields for the user

Name, front: First name of the user and no unique validation.

Name, last: Last name of the user and no unique validation.

Username: The identification name of the user and this must be unique and is used during the login. Usernames cannot be changed.

Role: Assigning the roles will enable the user's permissions and rights based on the settings of the role, and you will no longer be able to manually edit here. For more information, visit roles section.

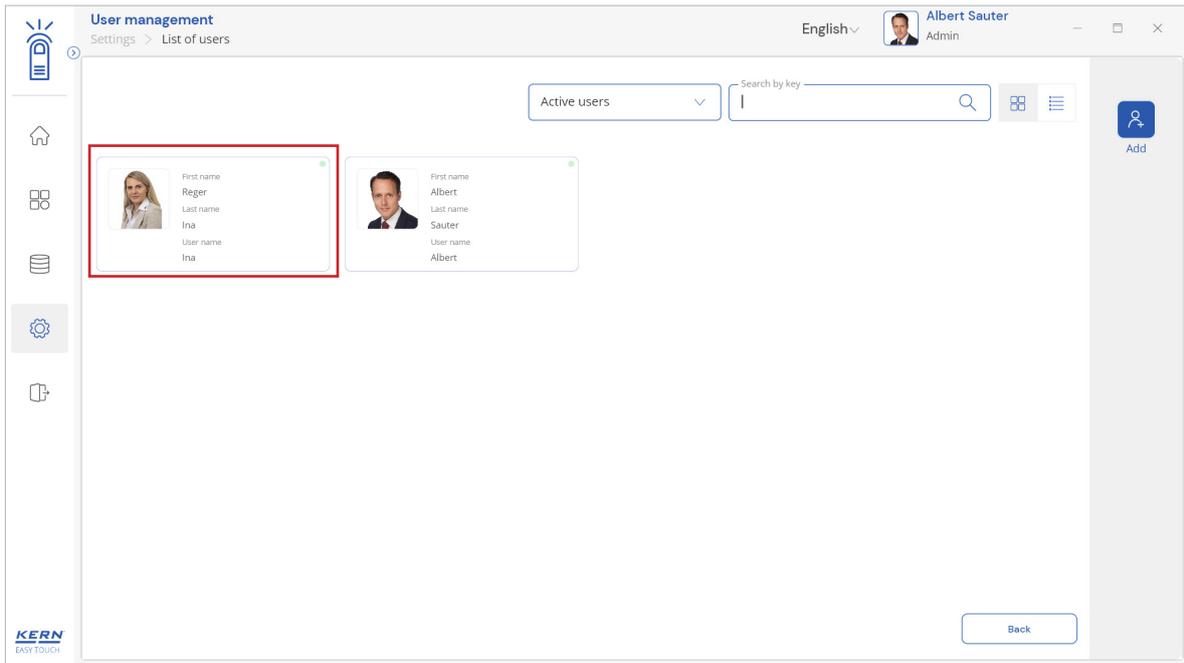
Email: The email address is required for sending the mails from Easy Touch system as per the configurations, and for using the "forgot your password?" link in the login screen. The password recovery email will be sent to this address.

Location: The situated location or the office location or cabin address of the user can be entered for the organisation's purpose

Default weighing device: The weighing devices created in the system will displayed and the user might be able to choose the respective default weighing device. The default weighing device would be automatically connected once the user login. (In case if it is connected to the laptop or computer or tablet physically or through Bluetooth or Wi - Fi)

Default function: The list of accessible functions for the user would be displayed based on the roles chosen. Picking up the function will land the user to the respective function upon login

Department: The department of the user can be entered

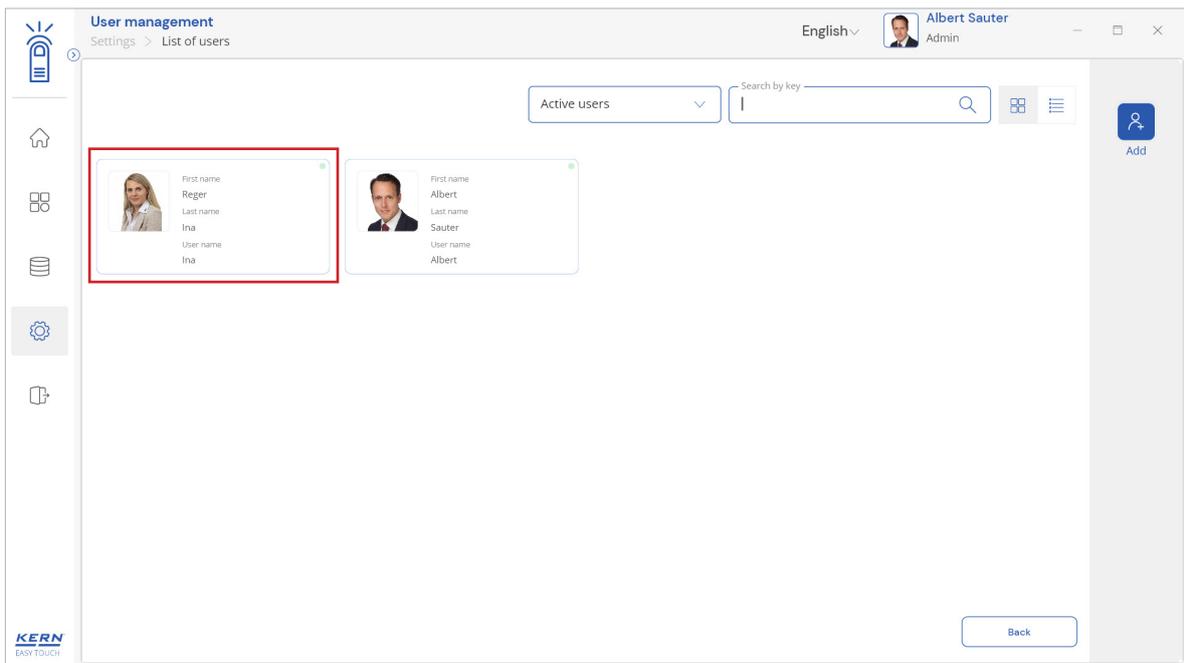


4.2 Editing a user

You can edit a user to update the information associated with that user.

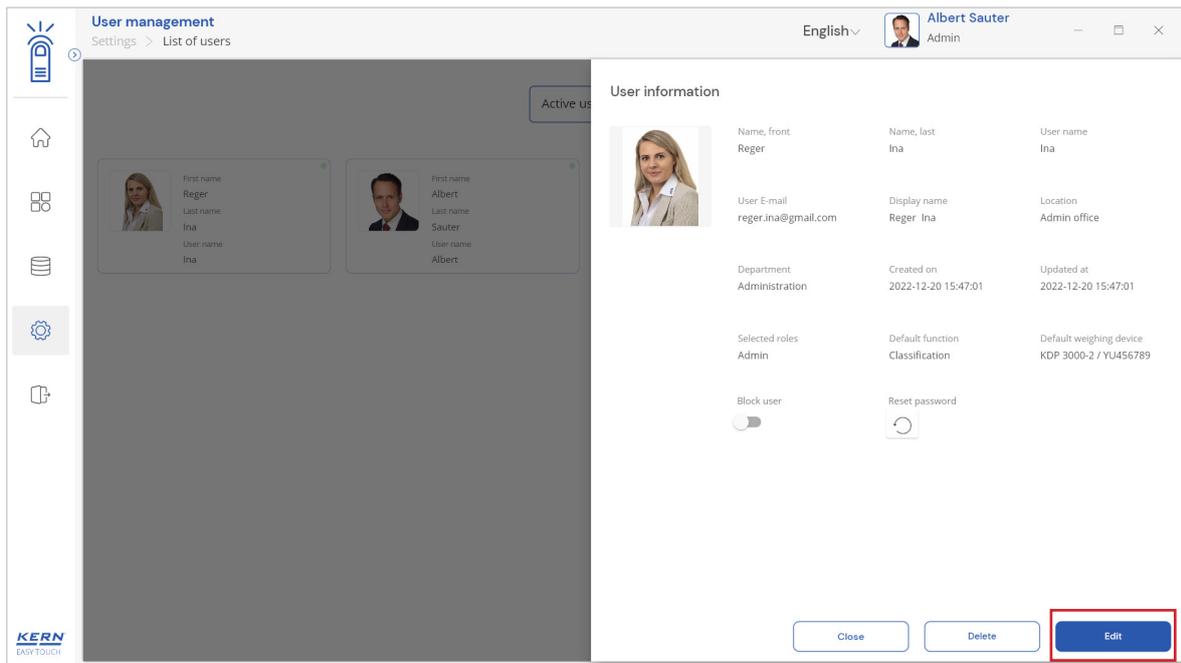
To edit a user,

1. On the main menu, go to settings > user
2. Locate the user you wanted to edit

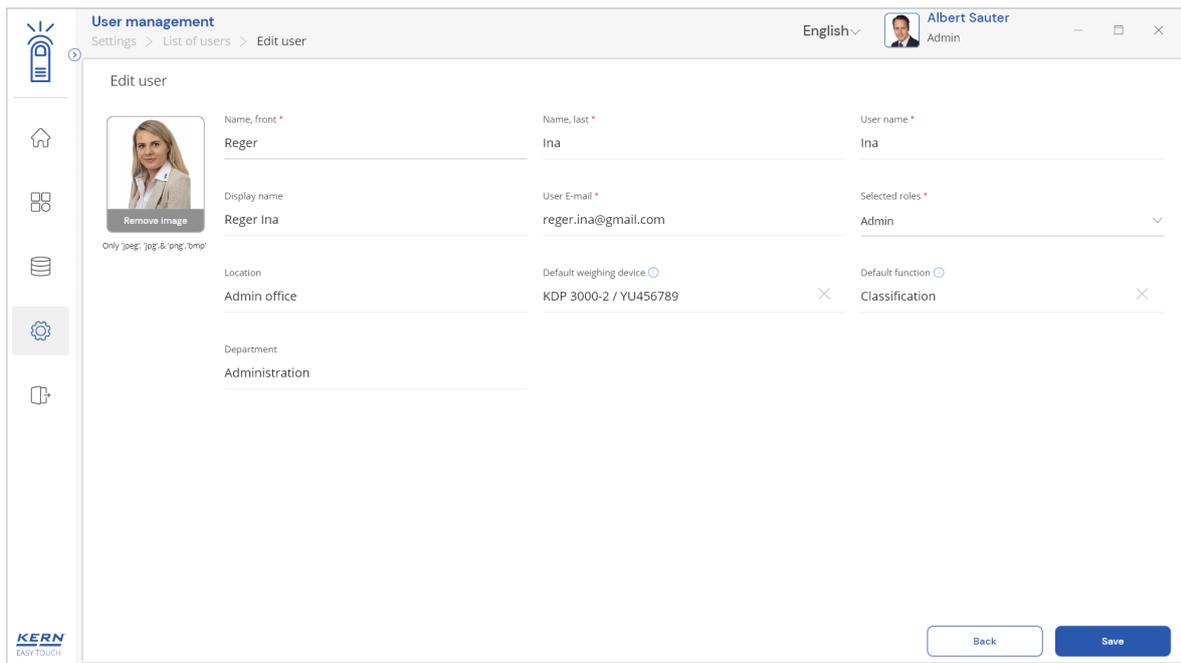


English

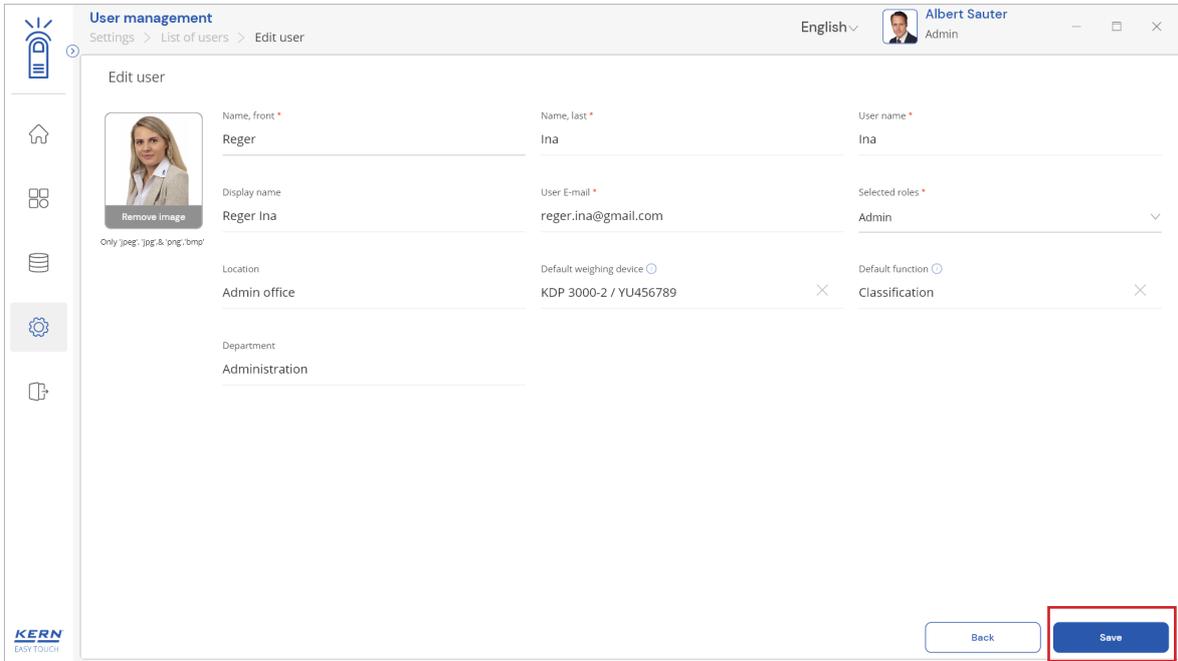
3. Click on the respective user and edit button



4. Modify all the necessary information.



5. Click on the "update" button.



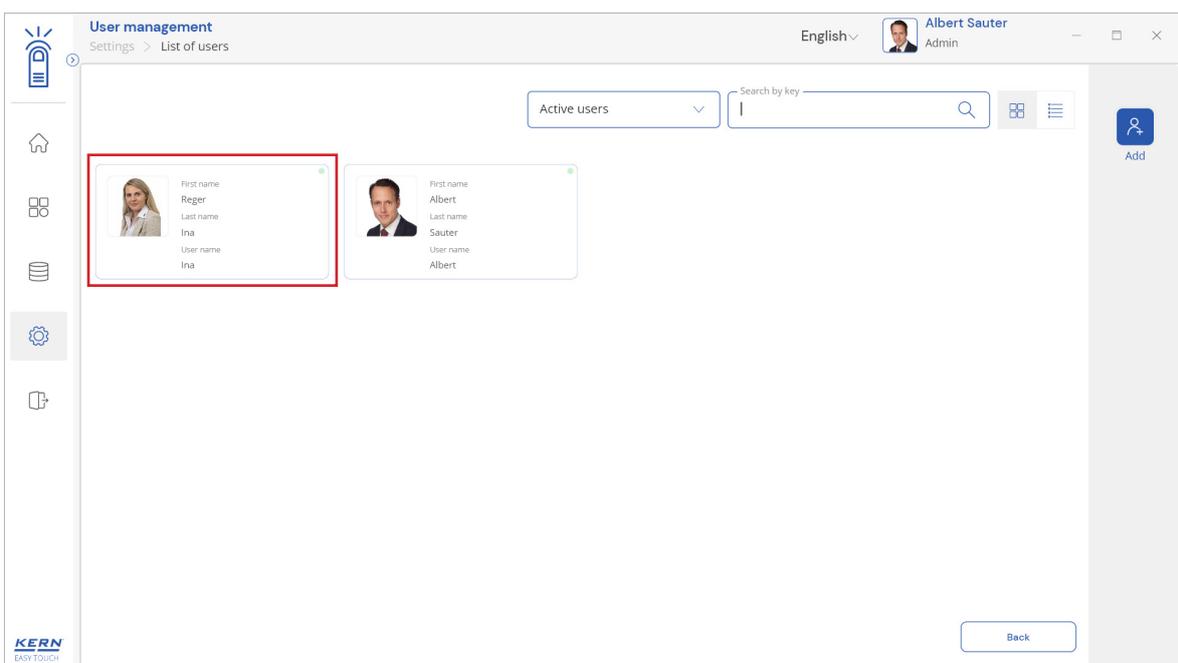
4.3 Deleting a user

You might want to delete the users if you have created a user who is no longer together in the organisation or for some other reasons. However, there are some users that you can't delete,

- You can't delete the preconfigured built-in users Admin and Default.

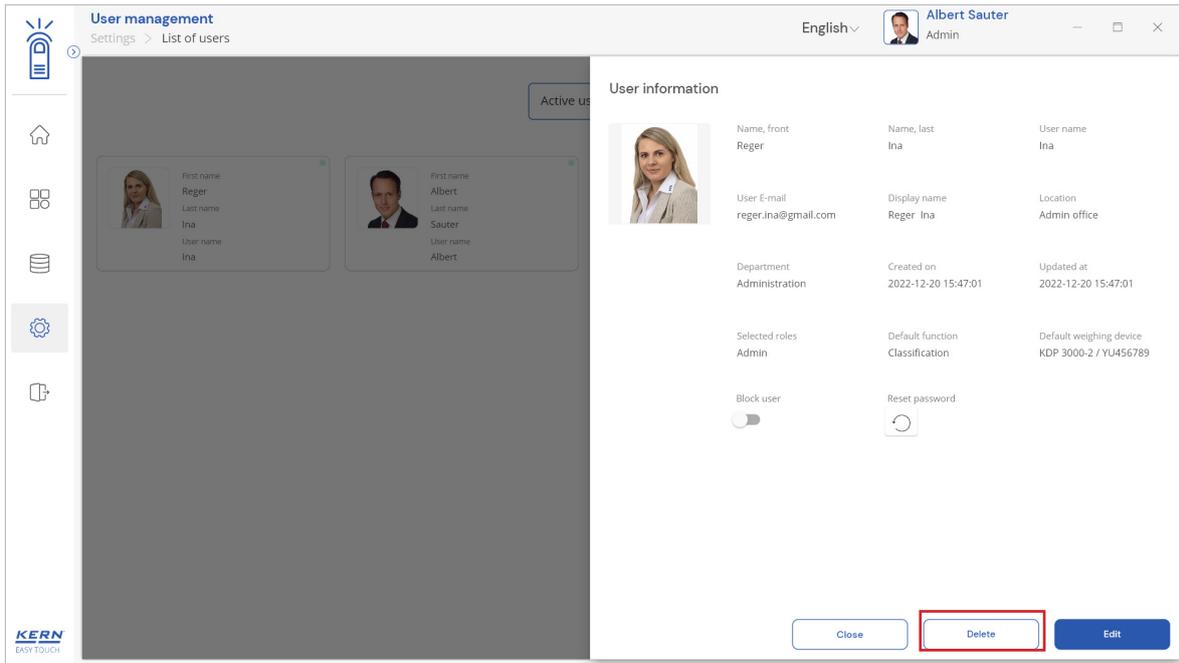
To delete a user,

1. On the main menu, go to settings > user
2. Locate the user you wanted to delete

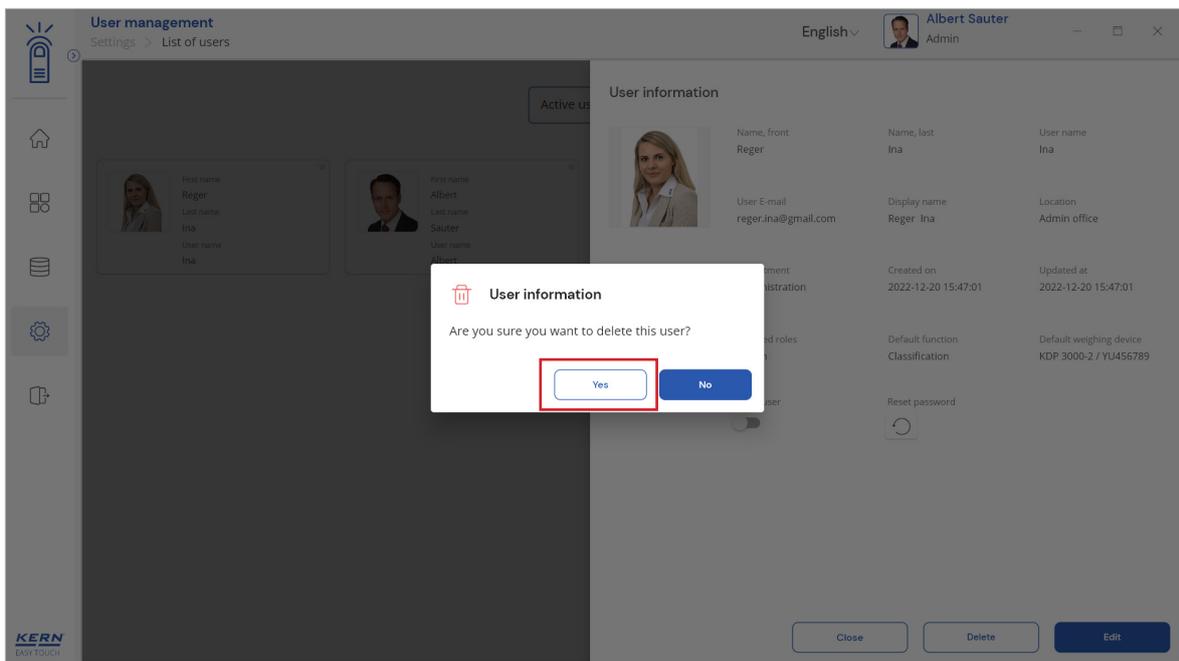


English

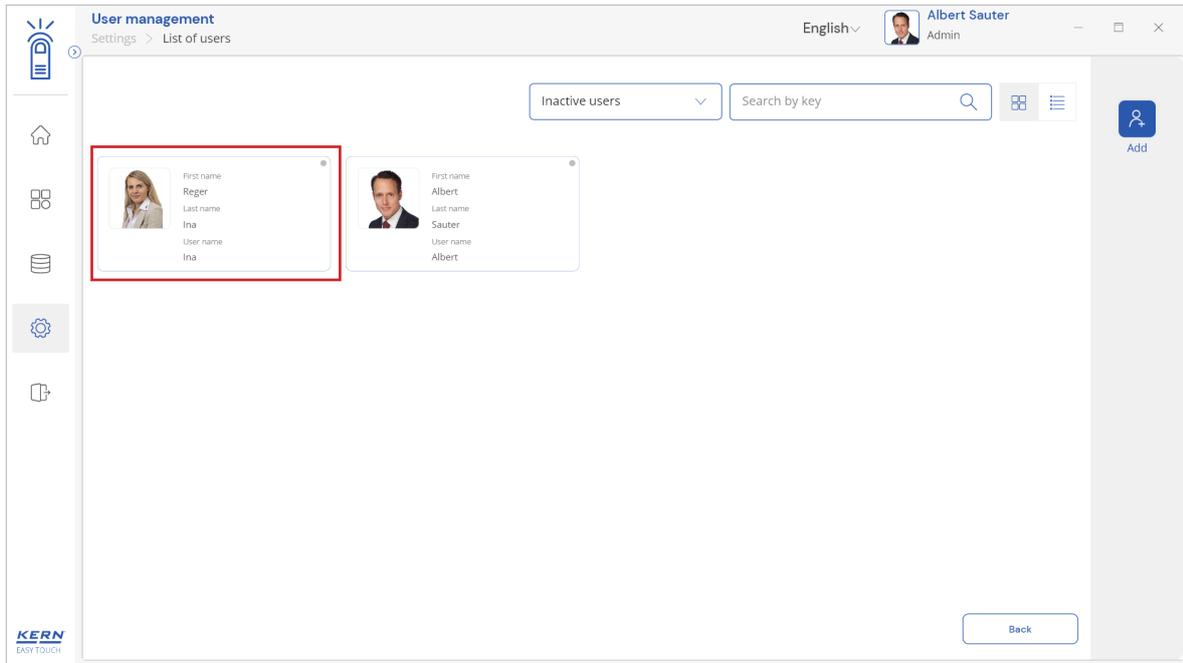
3. Click on the respective user and delete button



4. Click on the “yes” button, confirming to delete the user.



5. Please note, the deleted user will be found in the inactive state, and you will be able to activate the user whenever required.

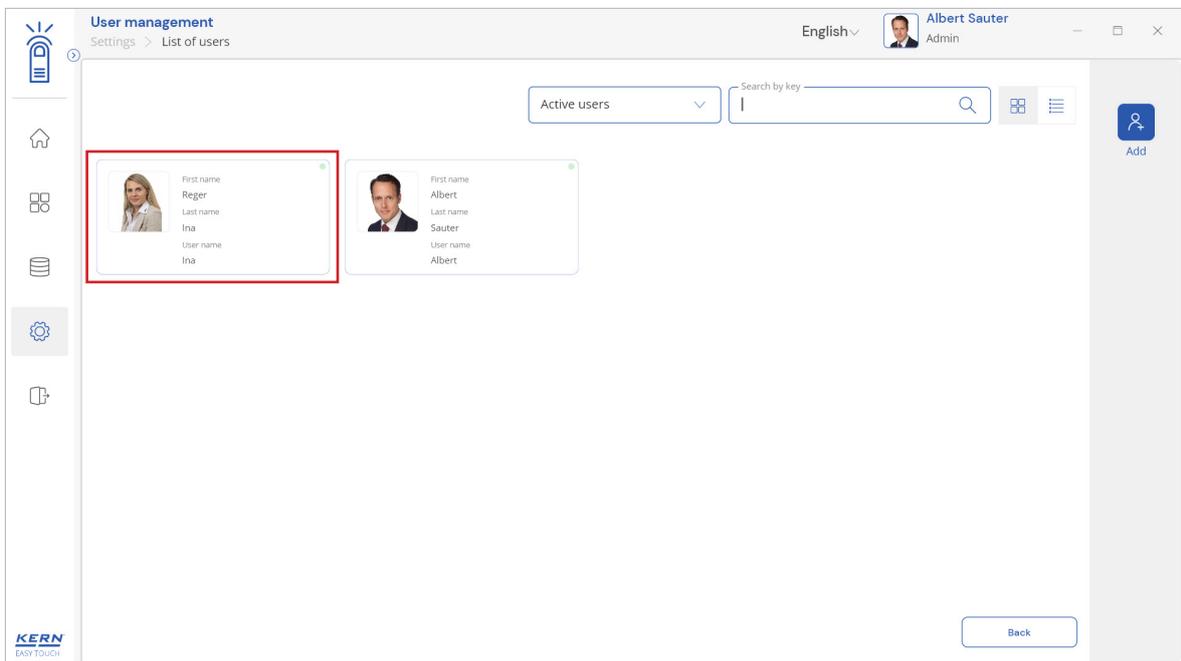


4.4 Block user

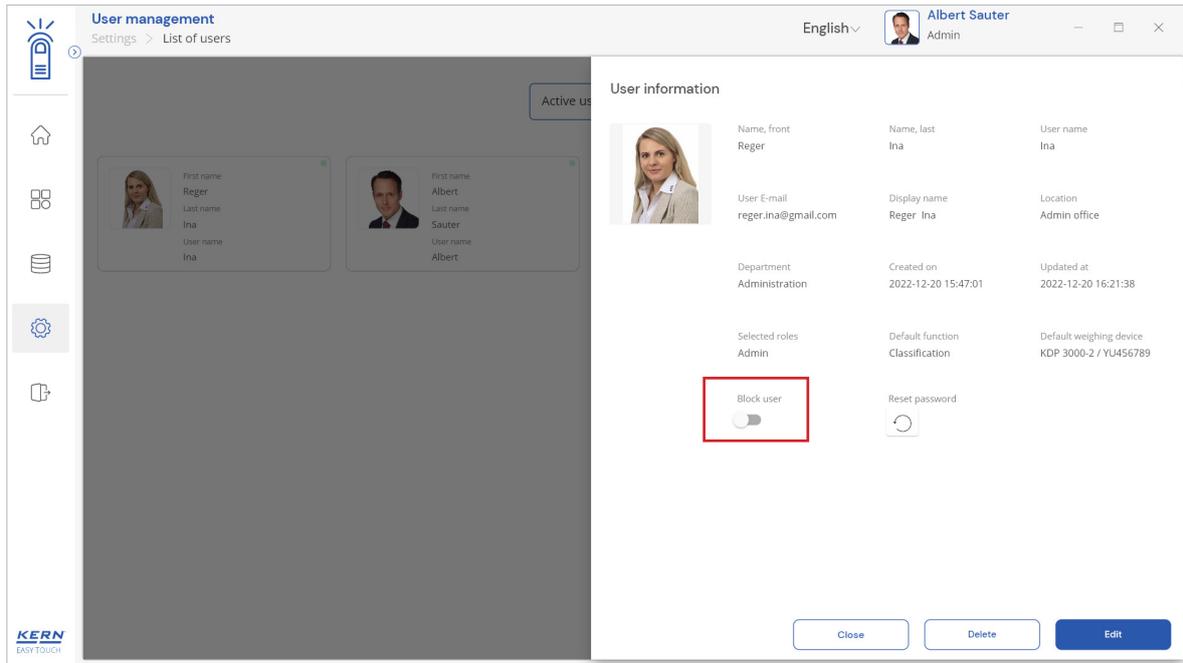
The admin users might want to block some users for many reasons.

To block the user,

1. Locate the user you wanted to block and enable the block user. The blocked user will not be having the provision to login the Easy Touch unless you unblock them.



English



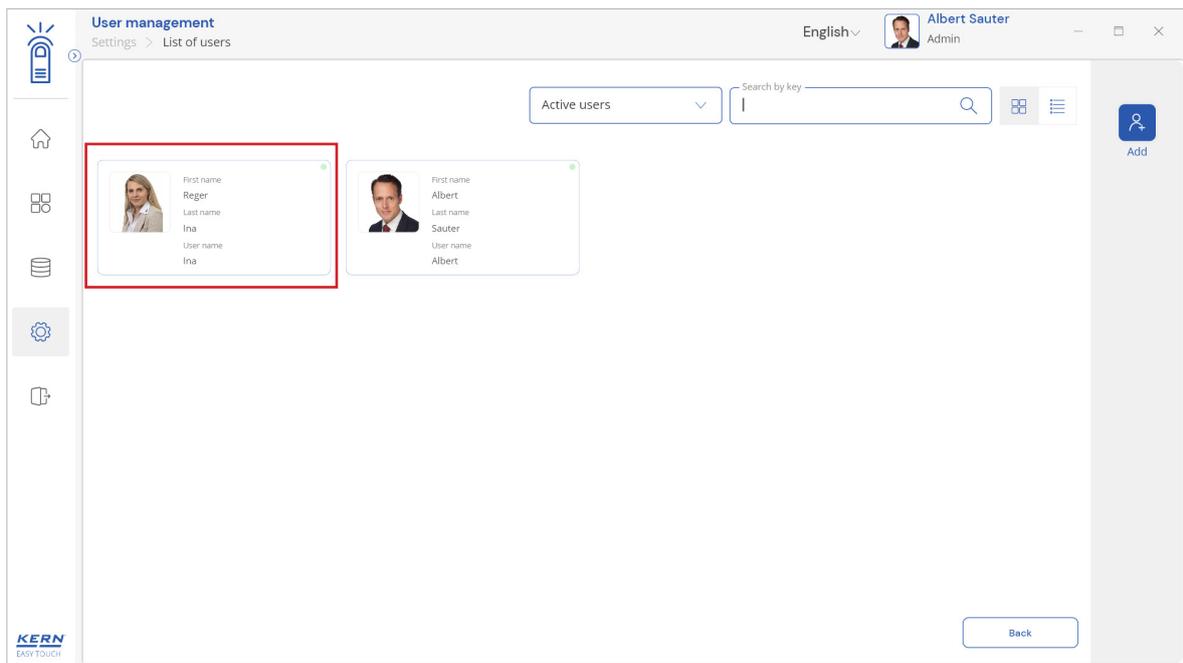
Kindly note, the users with write provision for user management will be having the access to block users.

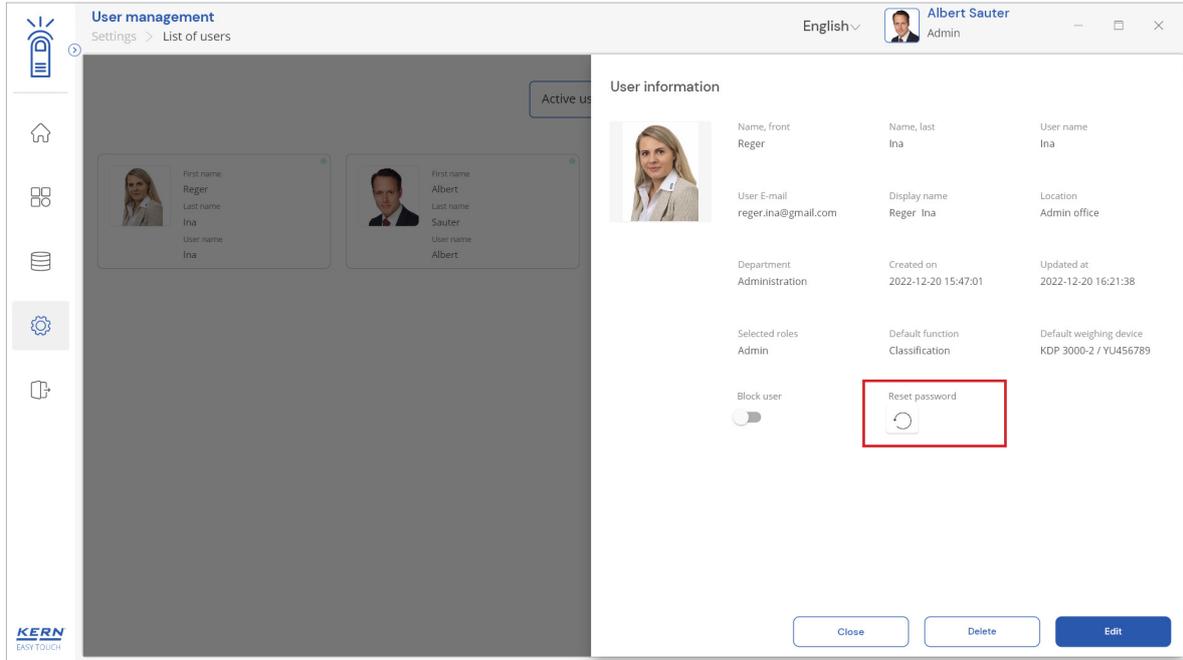
4.5 Reset password

The admin users can reset the password for many some security reasons or owing to any threat.

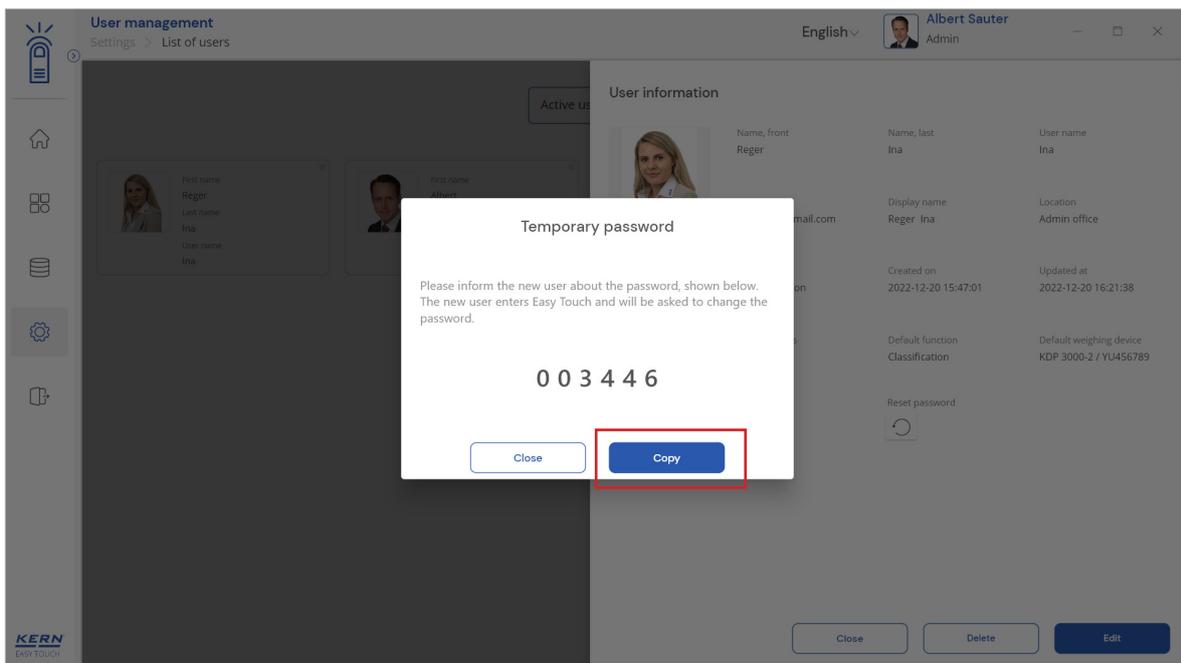
To reset the password of the user,

1. Locate the user you wanted to rest the password and click on the rest password and the user will be displayed with the OTP.





- Admin users can share the OTP to the respective user and the respective user can change the password using the OTP and can login to the system with the new password.



The end