



## Coffee Break & Learn: Tip of the Week – November 9, 2017

### New User? Copy Form Settings

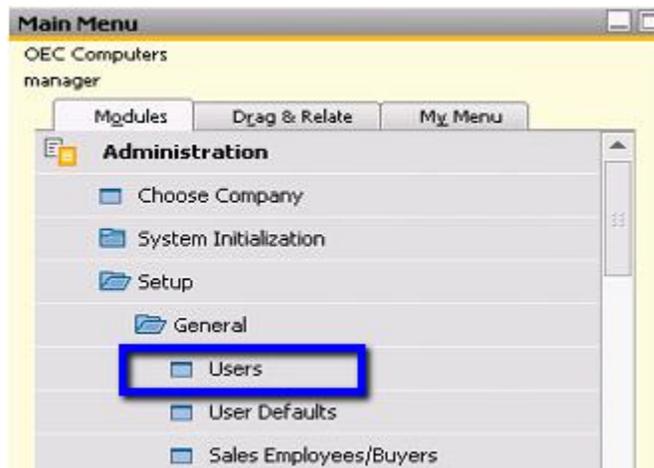
Available On All Softengine-Supported Versions

#### Background

You may already know that when hiring new employees as SAP users, you must assign them the proper licenses and authorizations in order to access their functions. However, you may have customized the placement and visibility of fields in various forms. SAP Business One allows you to copy the form settings from one user to another.

#### Copy Form Settings -

To copy form settings from one user to another, you must have Administration rights and first ensure that the target users (whose form settings will be changed) are logged off from SAP Business One. You must then navigate to the user setup window, which can be found under Administration > Setup > General > Users.



In the User – Setup window, navigate to the user whose form settings you would like to copy, and select Copy Form Settings.

**Users - Setup**

Superuser     Mobile User

User Code: manager

Bind with Microsoft Windows Account: [Empty]

User Name: manager

Employee: [Empty]

E-Mail: [Empty]

Mobile Phone: [Empty]

Mobile Device ID: [Empty]

Fax: [Empty]

Defaults: [Empty]

Branch: Main

Department: General

Authorization Groups: [Empty]

Language: [Empty]

Password: xxxx

Password Never Expires

Change Password at Next Logon

Locked

Enable Setting Integration Packages

OK    Cancel    **Copy Form Settings**

You will see the Copy Form Settings to Users window, which will allow you to select one or multiple target users whose form settings will be overwritten by the source user.

**Copy Form Settings to Users**

Find: [Empty]

#	User Code	User Name	Department	Branch	
1	manager	manager	General	Main	<input type="checkbox"/>
2	bill	Bill Levine	Sales	Main	<input type="checkbox"/>
3	sophie	Sophie Klogg	Sales	Main	<input checked="" type="checkbox"/>
4	brad	Brad Thomps	Sales	Main	<input type="checkbox"/>
5	jim	Jim Boswick	Sales	Main	<input type="checkbox"/>
6	bob	Bob Shone	Production		<input checked="" type="checkbox"/>
7	john	John Petersor	Logistic	Main	<input type="checkbox"/>
8	linda	Linda Hudson	Production	Main	<input type="checkbox"/>
9	donna	Donna Brown	Accounting	Main	<input checked="" type="checkbox"/>
10	tom	Tom Brady	Accounting	Main	<input checked="" type="checkbox"/>

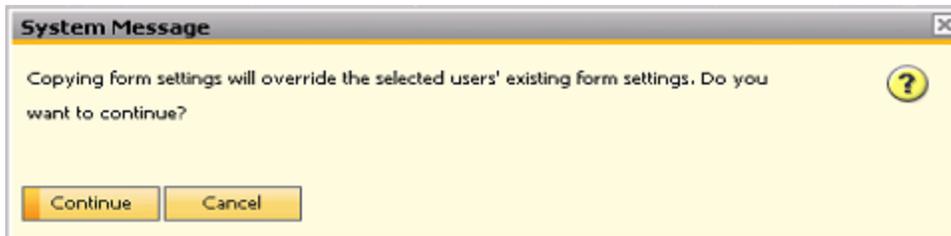
User Preferences

Message Preferences

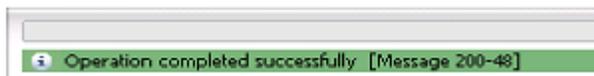
Tooltip Preview Preferences

Copy    Cancel

Note that you also have the option to copy user preferences, message preferences, and tooltip preview preferences. When you are satisfied with your selection, click Copy. You will then be prompted with the following system message:



Select Continue to copy. When the process has completed, you will see the following message in the System Messages bar:



## Summary

To copy form settings from a particular user, you must have Administration rights and ensure that the target users are logged off from SAP Business One. You have the option to copy user preferences, message preferences, and tooltip preview preferences in addition to the form settings. This feature may help reduce the required effort when you set up a group of users in the application or save time when you must add or remove columns for a group of users. You will also be:

- Standardizing the appearance of forms to improve workflow
- Facilitate training by insuring new users can locate fields
- Remove the guess work when replacing an existing user

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