pCon.login

Manual: Registration and setup for users of pCon.update

Document Version	1.3
Document Status	Released
Author	FBE
Date	24.07.2019

pCon.login (24-07-2019)

Manual: Registration and setup for users of pCon.update

Contents

The following document targets persons that are poised to set up and administrate (see chapter two for an overview on pCon.login administrator permissions) a pCon.login organization account for a company that already uses pCon.update.

1　pCon.login for your Company

pCon.login is your user account for a growing number of pCon services and applications, enabling centralized management of all users that are part of your organization.

> An individual pCon.login account will be assigned to every user. All user accounts of your company are summarized under one organization account[1].
>
> Most settings (e.g., manufacturer catalogs) are managed centrally for the entire organization.

With only little effort you can add further users. They just have to enter name, e-mail address and password. All other settings (like manufacturer catalogs) are centrally stored for the organization and can directly be used by new employees.

All the advantages:

- Access to many pCon services with just one login
- Centrally manage the accounts of all employees
- Request activation of manufacturer catalogs once and manage them centrally
- Centrally administer licenses for your whole company
- Assign catalogs and applications to departments
- Use the activation for manufacturer catalogs and the pCon.update dealer contract for your entire company

---

[1] If your organization has more than one subsidiaries, we offer the following options:
- Independent subsidiaries with own software assignments and manufacturer catalogs: One organization account per location.
- All subsidiaries have a central administration with common catalogs and applications: One organization account for whole institution.

2 Users and permissions

pCon.login differentiates between administrators and standard users. These are the permissions for both user types:

Administrator	Standard user
• Invites additional colleagues • Creates and manages user groups as well as channels • Manages members and permissions • Requests manufacturer catalogs • Maintains organization settings • Appoints new administrators	• Uses licenses • Uses manufacturer catalogs • Manages personal data
The member registering the organization on pCon.update automatically becomes administrator. Further members can be appointed administrator if needed.	Invited members of an organization are standard-users by default.

The following chapters deal with the setup and administration of pCon.login and do therefore targed administrators.

They are also interesting for standard users who want to get a first impression of pCon.login.

3 Setup of pCon.login for users of pCon.update

From now on, all your settings are made in pCon.login instead of on the pCon.update page. Your pCon.update password as well as your settings for pCon.update remain unchanged. The pCon.update DataClient and DataPool work as usual.

To set up pCon.login, please follow the instructions in the following two sections. Your path depends on the current status in your company:

Case 1: Up until now, all members of your company have been using a common pCon.update user account. In this case, please read chapter 3.1.

Case 2: Your colleagues use individual user accounts for pCon.update. Please read chapter 3.2.

3.1   Assigning individual user accounts on pCon.login

If your colleagues are currently using a common user account on pCon.update, please proceed as follows:

> In a first step, the colleague managing the common user account on pCon.update registers for pCon.login. By creating the organizational account on pCon.login, this colleague automatically becomes an administrator in your new organization.

1. The future administrator visits the website https://login.pcon-solutions.com/.
2. He logs into pCon.login with his pCon.update user name and pCon.update password.
3. The administrator invites the other members to join pCon.login. To learn how to add new users, see Chapter 4: Invite users.
4. The colleagues accept the invitation.

The employees receive an individual account under the umbrella of the pCon.login organization account. All employees use the same manufacturer catalogs and can log in to all services supported by pCon.login with their e-mail address and pCon.login password.

3.2   Integration of individual accounts into an organization

In case your colleagues do use individual accounts for pCon.update, please proceed as follows:

1. Please use the account that grants access to the manufacturer catalogs that are suited best for your organization's needs. The colleague using that account will be the first to register for pCon.login.
2. The future administrator visits the website https://login.pcon-solutions.com/.
3. He logs into pCon.login with his pCon.update user name and pCon.update password.
4. The administrator invites the other members to join pCon.login. To learn how to add new users, see Chapter 4: Invite users.
5. The colleagues accept the invitation.

The employees receive an individual account under the umbrella of your pCon.login organization account. All employees use the same manufacturer catalogs and can log in to all services that are supported by pCon.login with their e-mail address and pCon.login password.

> **The members do no longer have access to the manufacturer catalogs from their former individual accounts. The manufacturer catalogs of the individual accounts are replaced by the organization's catalogs. Missing manufacturer catalogs are requested by an administrator of your organization loging into pCon.login and sending a request for the catalogs on the *Manufacturer catalogs* page.**
>
> **If some departments of your organization need an individual set of catalogs, your administrator set up channels and requests the manufacturer catalogs under question. See also Chapter 6: using channels to distribute catalogs and applications.**
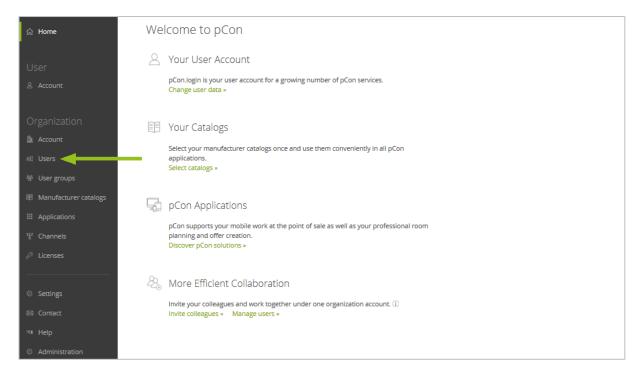
To keep the catalogs you use together with desktop applications (like pCon.planner PRO) up-to-date, you will need the pCon.update DataClient (and for some use cases the pCon.update DataPool, as well). Further information **here**.
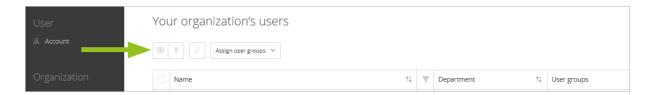
4 Invite Users

The colleague that was the first to register for your organization on pCon.login is initially administrator and can invite the other members of your organisazation.

The registration process is identical for new pCon users and users of pCon.update. pCon.update members use their login data also for pCon.login.

1. Please log in on https://login.pcon-solutions.com/.
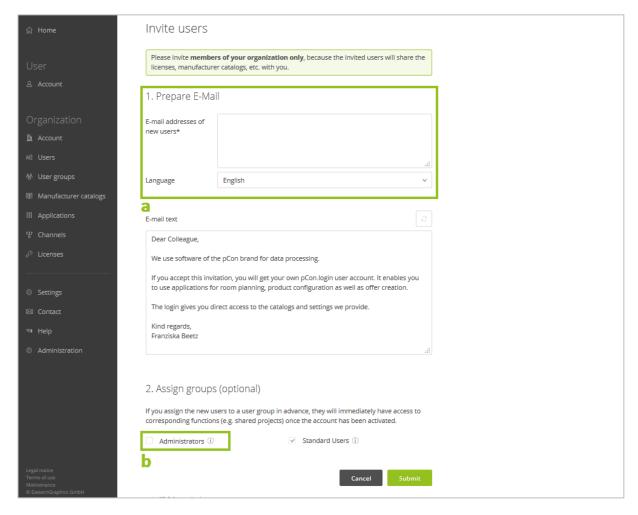2. Click on *Users* in the menu on the left side.

3. This opens the user overview, which contains a table of all users in your organization. Click the **+** symbol above the table.

4. The Invite *users* screen appears. Enter the data of the users you would like to invite. Either enter the organizational e-mail address of a single user (**field a in the following picture**) or click *List input* (**field b in the following picture**) to enter the mail addresses of several members at the same time. By placing a **check mark in field c**, you appoint the invitees directly to administrators.

6. Click *Submit*.

7. The invitees receive an e-mail with an invitation link via which they can join pCon.login.

The invitees will automatically become members of your organization. All newly invited users are initially created as standard users, unless you check the box c in the following image.

4.1 Assign Users to Groups

Groups sort organization members according to their tasks (for example back office, sales, project groups, user of a certain pCon application etc.). Groups can for example be used do restrict the access to licenses to a certain team.

In order to create a new group, log in as an administrator and click *User groups* in the menu on the right. Use the + symbol on the page *Your organization's user groups* to create a group and give it a name and description.
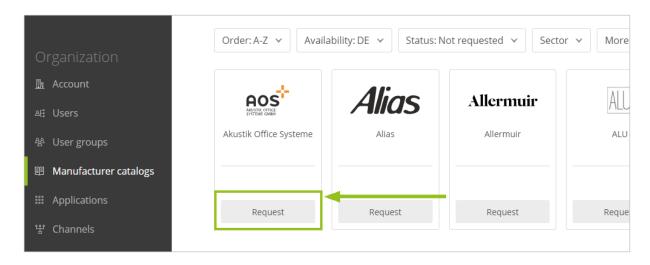
Upon inviting new members, you can directly assign them to groups (see *Assign groups* function in the image above). The groups can later be changed by means of the table on the *Users* page.

5 Using Catalogs

The catalog selection is either taken from the previous shared account at pCon.update (for the procedure see section 3.1) or from the previous pCon.update single account of a member (see section 3.2 for more information on how to do this).

Administrators can request access to new catalogs directly via pCon.login:

1. Log into pCon.login.
2. Click on *Manufacturer catalogs* (menu on the left).
3. This will open a list of all available manufacturers.
4. Chose all manufacturers whose data you want to request. Click the *Request* button directly under the manufacturer.
5. The manufacturer will check your request and send you an e-mail as soon as your request is processed.

As soon as the manufacturers have activated the catalogs under question, you can use them in pCon.basket Online, with pCon.update, pCon.facts as well as in the pCon.box. Use your pCon.login user data to access your catalogs in these applications.

6 Using Channels to distribute Catalogs and Applications

In most organizations, all members are using the same catalogs and applications. In this case, all users in an organisation use the automatically predefinded *Standard* channel and there is no need to create additional channels.

It might be, however, that some departments or teams need different catalog data. In these cases, the organization should create additional channels. This chapter lays out how channels are set up and how they are used to control user access:

A channel is a specific combination of manufacturer catalogs and pCon desktop applications. Each channel contains the users who work with these catalogs and applications.

Follow the steps listed below to identify the need for additional channels in your organization and prepare the creation of these:

1. List the departments of your organization that need separate manufacturer catalogs and their own pCon applications. It is necessary to create separate channels for every department that uses its own catalogs or pCon applications. If several departments or teams use the same catalogs and applications, you can group them into one channel.
2. Check if every member of your organization is assigned to exactly one department. **Each user can only be assigned to one channel.**
3. Define one or more persons responsible for every channel (channel administrators). These users control the channel approvals. Administrators can maintain different channels.

If all members of your organization use the same manufacturer catalogs and desktop applications, you can work with the predefined channel *Standard*.
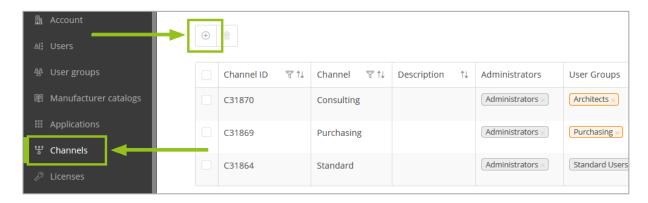
In this case you will not have to create additional channels.
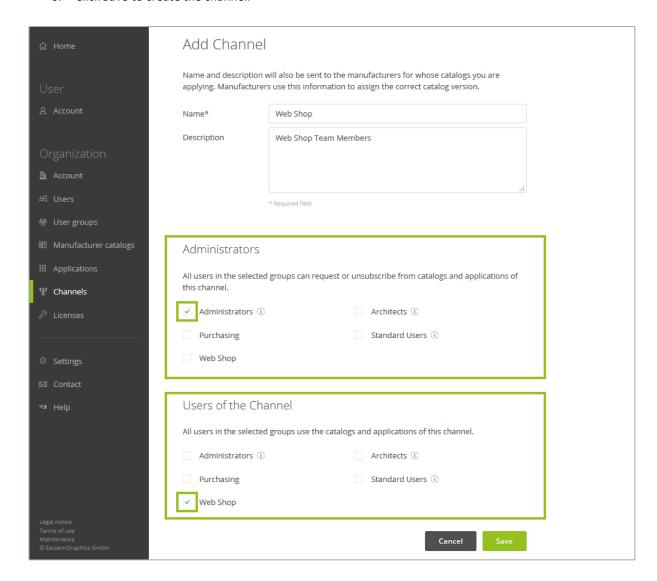
6.1 Create Channels

If different areas or teams in an organization need different permissions, additional channels have to be set up. This is how to generate new channels and assign users:

1. Click *User groups* in the menu. Create a new user group for every channel and assign the members of the corresponding department (also see chapter 4.1). Create an additional group for the channel administrators.
2. In the pCon.login menu, click *Channels*.

3. Click the + symbol on the *Channel* page to open the *Add channel* page.

4. Insert a name and a description for the new channel. Please note that name and description are also forwarded to the manufacturers when catalogs are requested.

5. Add *Administrators* and *Users* of the channel by selecting the corresponding groups on the *Add channel* page.
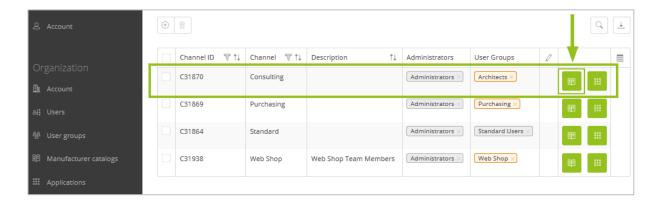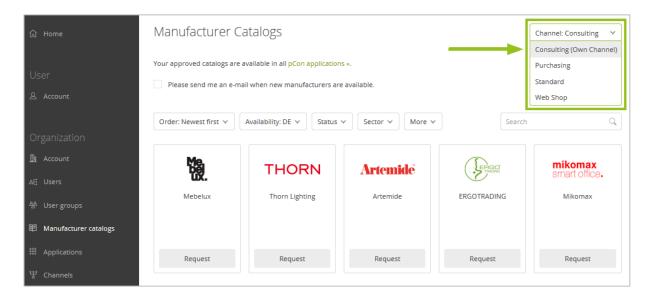
6. Click *Save* to create the channel.

6.2   Request Catalogs for a Channel

You have two possibilities to request the catalogs for a channel.

- Via the *Channels* page: Click the catalog symbol in the row of the channel under question. This opens the *Manufacturer catalogs* page. On this page, choose the catalogs you want to distribute through the channel.

- Via the *Manufacturer catalogs* page: Open the drop-down menu in the upper right corner, select a channel and then request the catalogs for this channel (see also 5).

6.3   Setting Applications for a Channel

Channels can also be used to determine which groups of users get access to certain desktop applications[2].
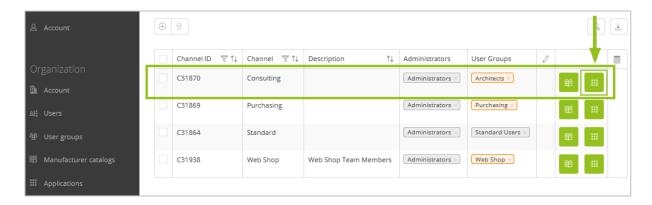
---

[2] If users of a channel need different applications, it is usually not necessary to set up another channel. Instead, all applications required in the channel should be activated. Afterwards, the individual users can permanently deselect the unneeded applications when setting up the pCon.update DataClient.
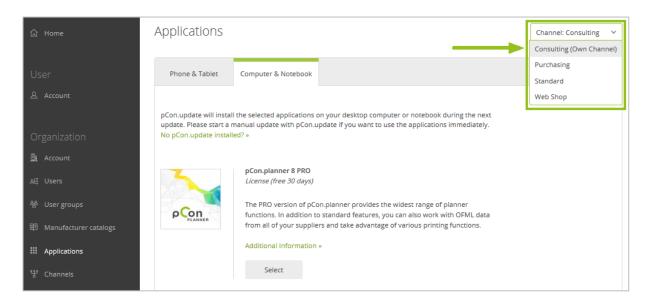
Assigning programs to channels is only possible for desktop applications. Users of smartphone apps and web applications do not need additional settings or assignments.

You have two possibilities to assign applications to a channel.

- Via the *Channels* page: Click the applications symbol in the row of the channel under question. This opens the *Applications* page. On this page, choose the applications you want to use in the channel.

- Via the *Applications* page: Open the drop-down menu in the upper right corner, select a channel and then select the matching applications.

It is only possible to select applications for some sales regions. If the *Applications* page does not contain selection functions, please get in touch with the contact person displayed on the page.

7   pCon.login and pCon.update

> Most pCon applications and services are managed with pCon.login. For our desktop applications, you also need pCon.update. pCon.update installs these pCon applications and the manufacturer catalogs onto your Windows workstations.
>
> This section explains which programs use pCon.update in addition to pCon.login and how to set up pCon.update.

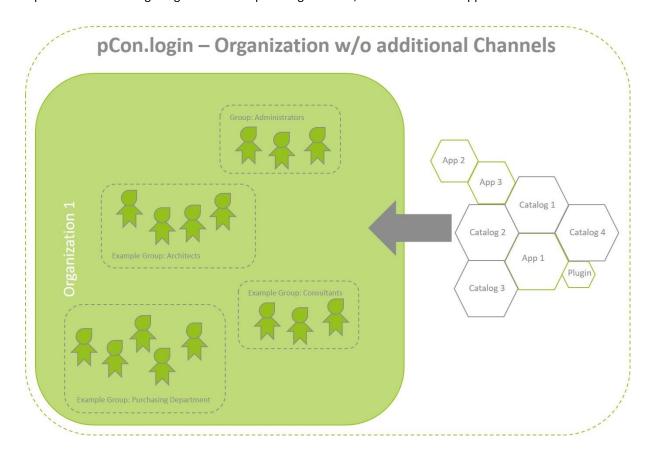## 7.1   Overview: Which application needs which service?

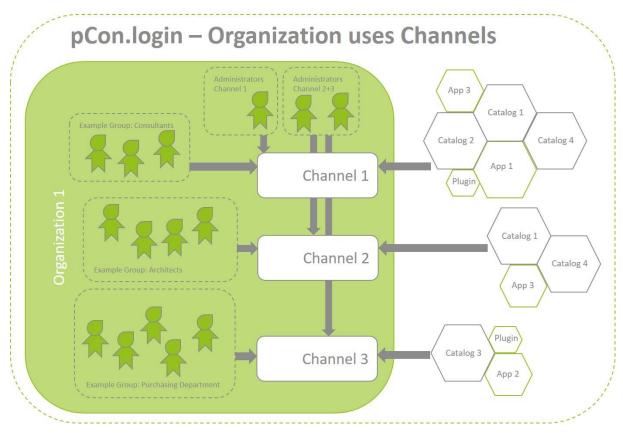| Application	License via pCon.login	Catalogs via pCon.login	Catalogs via pCon.update
pCon.planner PRO 8			X
EGR-BatchRendering	X		
pCon.basket (Desktop-Version)			X
pCon.basket Online	X	X	
pCon.configurator			X
pCon.xcad			X
pCon.update DataClient		X	
pCon.update DataPool		X	
pCon.facts		X	
pCon.box		X	

8   pCon.login in a Nutshell

The following images illustrate the functionality of pCon.login depending on size and complexity of the respective organization.

Option 1: Same catalog assignment in complete organization, same licenses and applications for all members:

Option 2: Complex organization structure. Some departments of the organization – e.g. teams that are in charge of a certain sales region – need their own selection of catalogs:

Visit our FAQ for more information on pCon.login: https://login.pcon-solutions.com/doc/faq/

Legal remarks

© EasternGraphics GmbH | Albert-Einstein-Straße 1 | 98693 Ilmenau | GERMANY

This work (whether as text, file, book or in other form) is copyright. All rights are reserved by EasternGraphics GmbH. Translation, reproduction or distribution of the whole or parts thereof is permitted only with the prior agreement in writing of EasternGraphics GmbH.

EasternGraphics GmbH accepts no liability for the completeness, freedom from errors, topicality or continuity of this work or for its suitability to the intended purposes of the user. All liability except in the case of malicious intent, gross negligence or harm to life and limb is excluded.

All names or descriptions contained in this work may be the trademarks of the relevant copyright owner and as such legally protected. The fact that such trademarks appear in this work entitles no-one to assume that they are for the free use of all and sundry.