Assign email addresses

Applies to userXpress 2.0.0.0

Generate and edit email proposals, replace a domain, assign a shared address or remove addresses from selected SAP accounts.

Update the email addresses of selected SAP accounts. Generate addresses using a naming convention, or replace the domain while keeping the rest of each address.

The **Assign E-Mail** window shows the existing and proposed address for each account. You can edit individual proposals and exclude accounts before applying the changes.

Open email assignment

1. In the **Global User Table**, select the accounts to update.
2. Choose **Users** → **Change** → **Assign** → **Email...**
3. Wait for userXpress to read the selected accounts' email addresses from SAP. The **Users** tab shows the selection.
4. Choose an **Action** under **E-Mail options**, then follow the corresponding procedure below.

The selection can span several systems and clients. Each row represents one account in its own client.

Generate addresses from account details

1. Leave **Action** set to **Generate from pattern**.
2. In **Pattern / address**, enter the complete pattern, including the domain. For example, `$first.$last@example.com` generates `alex.morgan@example.com` for Alex Morgan.
3. To insert an account field, place the cursor in the pattern, choose a token under **Fields** and choose **Insert field**.
4. Choose any required **Name formatting** options.
5. Choose **Review Changes**. The **Changes** tab shows the generated addresses beside the existing addresses.
6. Resolve or exclude proposals, then choose **Apply Changes**.

The suggested patterns end at `@`. Complete the domain before choosing **Review Changes**.

Pattern fields

Field	Value used
`$first`, `$last`	First name and last name.
`$firstinitial`, `$lastinitial`	First character of the first name or last name.
`$user`	SAP user ID.
`$alias`	Account alias.
`$email`	Complete existing email address.
`$local`	Text before `@` in the existing email address, preserving its case.
`$domain`	Text after `@` in the existing email address, preserving its case.

Token capitalization controls the result, except for `$local` and `$domain`. For example, `$first` produces `alex`, `$FIRST` produces `ALEX`, and `$First` produces `Alex`.

Examples:

- `$firstinitial.$last@example.com` produces `a.morgan@example.com`.
- `$user@example.com` uses each account's user ID.
- `$alias` copies an alias that already contains a complete email address.
- `$local@example.com` keeps each existing address's local part and changes its domain.

Patterns use the names and aliases loaded in the **Global User Table**. If those details have changed in SAP, refresh the accounts before opening email assignment.

A missing field value produces a message for that account. Enter a complete address in its **Proposed email** cell, or exclude the account.

Name formatting

All three options start clear and affect the first-name and last-name tokens, including their initials:

- **Remove spaces in names** joins name parts: `Mary Jane` becomes `MaryJane` before capitalization is applied.
- **Remove punctuation in names** removes punctuation such as apostrophes and hyphens: `O'Neil` becomes `ONeil`.
- **Remove accents in names** removes accent marks: `José` becomes `Jose`.

For example, `$first.$last@example.com` with all three options selected turns Mary Jane O'Neil into `maryjane.oneil@example.com`.

Replace an email domain

Use **Change domain only** to keep the part before `@` exactly as it is.

1. Set **Action** to **Change domain only**.
2. Enter the replacement in **New domain**, for example `example.com`.
3. To change addresses from one domain only, enter that domain in **Only replace domain**. Leave it empty to include all existing domains in the selection.
4. Choose **Review Changes**, then choose the proposals to apply.
5. Choose **Apply Changes**.

For example, replacing `old.example.com` with `example.com` changes `Alex.Morgan@old.example.com` to `Alex.Morgan@example.com`. Addresses from other domains remain unchanged when **Only replace domain** is filled in. Accounts without a valid existing address appear under **Messages**.

Set one specific address

Use **Set specific address** for an individual account or for accounts that share a mailbox.

1. Set **Action** to **Set specific address**.
2. Enter the complete address in **Pattern / address**.
3. Choose **Review Changes**.
4. Where sharing is intentional, select **Allow shared** for the affected proposals. Select their **Apply** checkboxes to include them.
5. Choose **Apply Changes**.

The entered address is used literally, including its capitalization.

Remove email addresses

1. Set **Action** to **Remove address**.
2. Choose **Review Changes**. **Proposed email** is empty for the selected accounts.
3. Clear **Apply** for accounts whose address must remain.
4. Choose **Apply Changes**, then **OK** in **Remove email addresses**.

Accounts whose email field is already empty are **Unchanged**.

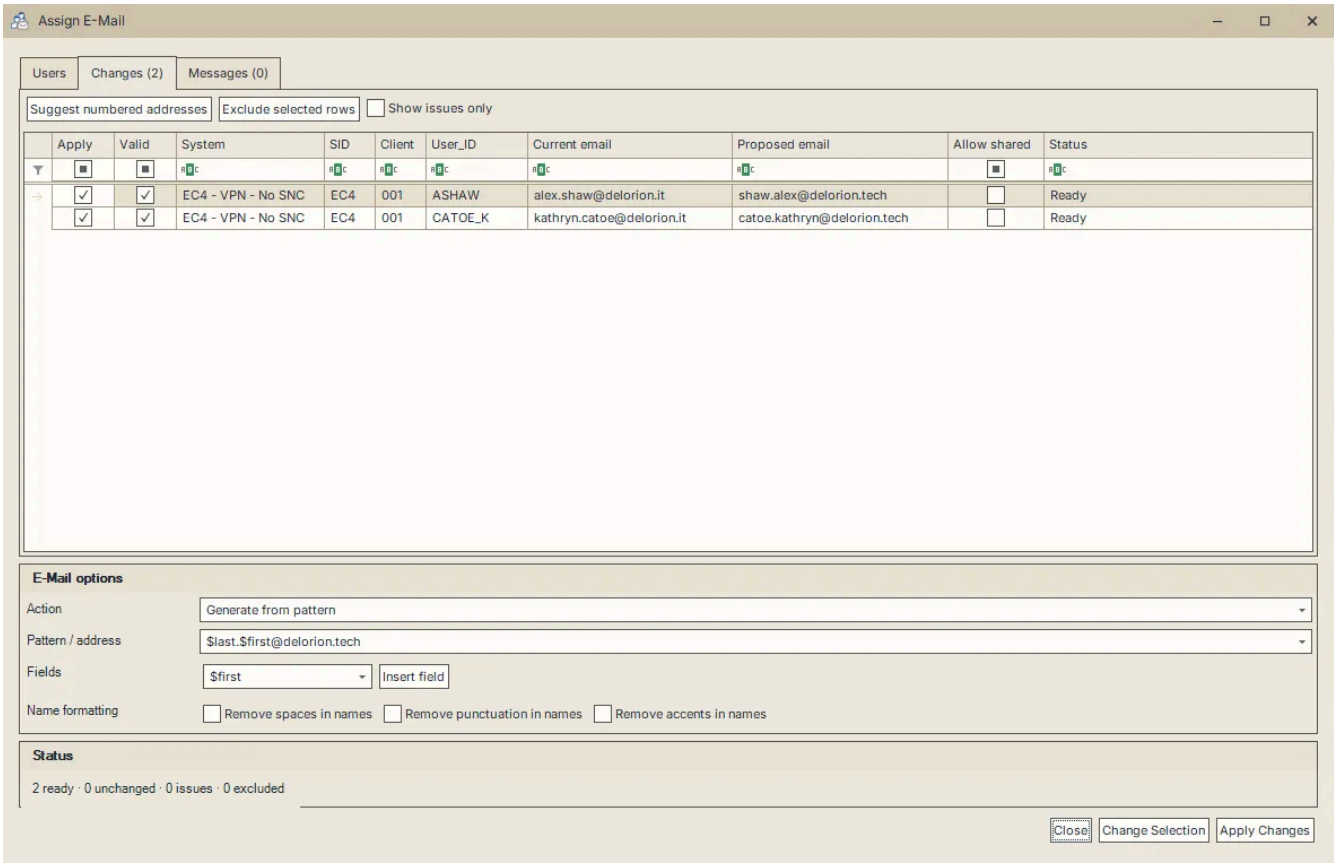
Choose the changes to apply

Review Changes prepares the proposal. **Apply Changes** sends the included changes to SAP.

Use the **Changes** tab to make the final choices:

- **Apply** includes that account. Rows with an issue start excluded. After correcting one, select **Apply** to include it.
- **Valid** indicates that the proposal passes the address and conflict checks.
- **Current email** is the address read from SAP when the window opened. **Proposed email** is editable.
- **Status** explains whether the row is **Ready**, **Unchanged**, **Excluded**, **Conflict** or **Shared address approved**, or gives the reason it cannot be applied.
- **Show issues only** filters the display to invalid proposals. **Messages** also lists their explanations.
- **Exclude selected rows** clears **Apply** for the highlighted rows.

Apply Changes becomes available when at least one included address changes and every included proposal is valid. Filtering the display does not change the **Apply** selections.



Both proposals are Ready and selected for application. The pattern puts the last name before the first name.

Resolve duplicate addresses

Conflict checking compares proposals and the accounts already loaded in the **Global User Table**, including rows hidden by its filters. It compares addresses without regard to capitalization, within each system/client. Load the relevant accounts before opening email assignment when you need them included in this comparison.

For a **Conflict**, choose the outcome you need:

- Edit **Proposed email** to use another address, then select **Apply**.
- Choose **Suggest numbered addresses** to find available proposals such as `alex.morgan2@example.com`. Suggestions use the same address for matching user IDs across the selected clients, so this command can also change other proposals. Explicitly excluded rows remain excluded.
- Select **Allow shared** when the accounts are meant to share the address, then select **Apply**.
- Leave **Apply** clear to keep that account's existing address.

Change the options again

Choose **Change Selection** to return to **Users** and the email options. Change the action or pattern, then choose **Review Changes** again. The accounts remain those selected when you opened the window.

Addresses you edited manually are retained when you generate another proposal. Select **Replace edited addresses** to regenerate those addresses too. **Remove address** clears the proposals regardless of manual edits.

Read the result or resolve an issue

After **Apply Changes**, the window closes and userXpress applies the changes, then refreshes the affected accounts in the **Global User Table**.

For SAP's messages about an account, select that account alone, right-click and choose **Full Message**. For a row marked with an error or warning, hover over an ordinary text cell to read its explanation. A failure for one account does not undo successful changes to other accounts.

If the display refresh fails after an assignment, use **Refresh** for the affected account before repeating the assignment.

Messages in the proposal window identify accounts that need a different action:

- **Multiple SAP email entries**: maintain those addresses in SAP. Email assignment handles accounts with at most one email entry.
- **Technical user**: email assignment is unavailable for that account.
- **Could not read current email from SAP**: close and reopen email assignment to retry the read.

Choose **Close** to discard a proposal. While the initial SAP reads are running, **Stop** waits for active reads to finish and closes the window.