Get started

userXpress documentation

Applies to userXpress 2.0.0.0

Get started with SAP account and role administration: connect clients, find accounts and choose a task.

Use userXpress to create accounts, manage passwords and assign roles across SAP systems and clients. The shared workspace lets you find accounts in several clients and select them for the same administration task.

For installation, workstation requirements and SAP access, start with the Technical Documentation.

Start here

On first use, complete First start and license. On later starts, open **userXpress** from the Windows Start menu, enter your passphrase and choose **Unlock**. Saved AutoStart connections open automatically when AutoStart is on.

1. To connect another client, choose **Add** in **Control Panel → Connected Systems** and enter the SAP logon details. Your SAP account needs authorization for the tasks you will perform.
2. In the **Global User Table**, enter the user ID in the filter row beneath **User**. Add a **Client** filter to narrow the list to one client. The table shows the matching accounts from the loaded data.
3. Select the accounts for your task using their row checkboxes. Each row identifies a specific system, client and user ID.
4. Open the task you need from the grouped table menus or follow its guide below. For example, set an initial password when a user needs a new password to sign in.

Find and select users explains additional filters, range selection and exporting the resulting list. For saved filters and conditions such as “client 100 and either surname Smith or Jones,” see My Queries.

Understand the workspace

The three main windows have different starting points:

- **Control Panel**: choose the SAP clients to connect, save regular connections for AutoStart and disconnect clients when finished.
- **Global User Table**: start with accounts to change their details, passwords, assignments or sessions.
- **Global Role Table**: start with roles to find their assigned users, inspect their content or assign them to accounts. Roles load when role management is enabled.

An account belongs to one system and client. For example, `DEMO_USER` in client `100` and `DEMO_USER` in client `200` are separate accounts. Select both rows when the task should affect both accounts.

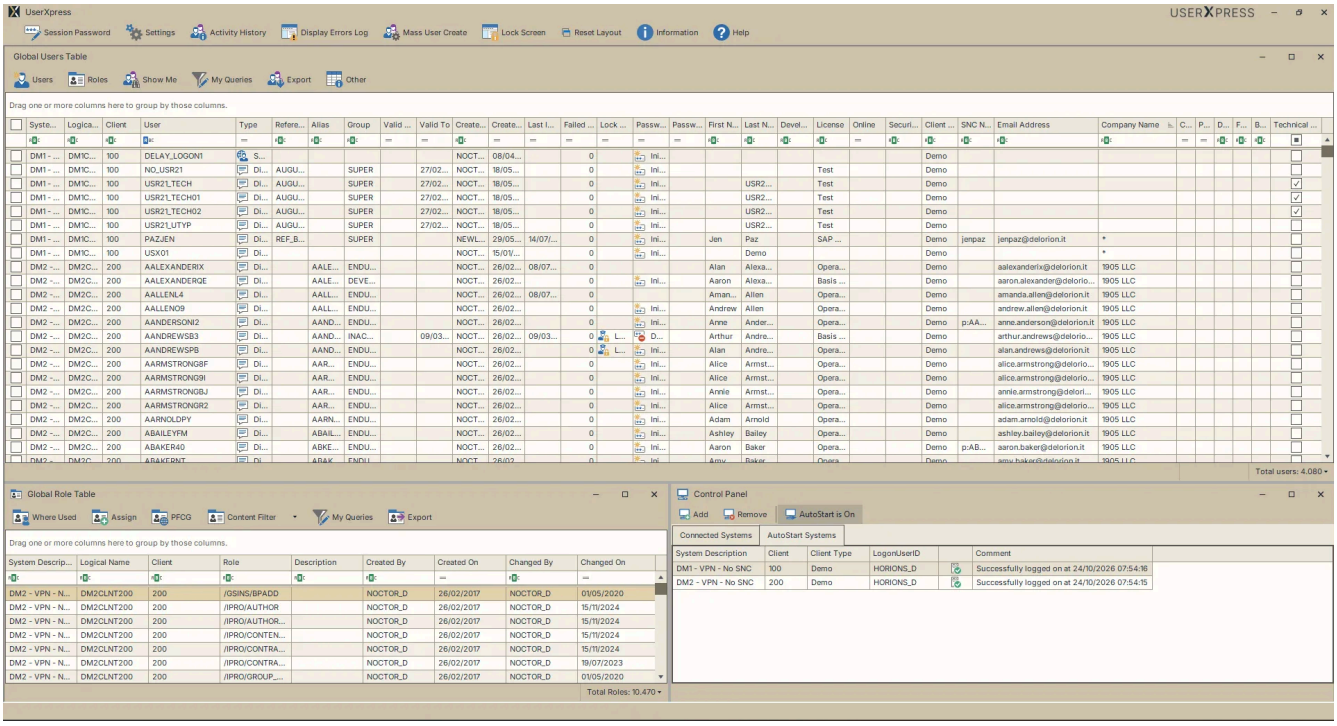
A filter narrows the rows you see. Row checkboxes select the accounts for account actions. Table **Export** uses the filtered list, including unchecked rows. Each task guide explains its selection scope.

Arrange the windows

Use **Reset Layout** on the main toolbar to choose the workspace for your task:

- **Default** shows the Global User Table above the Global Role Table and Control Panel.
- **User** maximizes the Global User Table and minimizes the other two windows.
- **Role** maximizes the Global Role Table and minimizes the other two windows.

Choose **Reset Layout** → **Default** to bring all three windows back into view.



Choose the right task

- Restore access: unlock an account or manage its password.
- Create accounts: enter a new user's details or copy an existing account.
- Create a batch: use an account list to copy each account from a source user, or Mass User Create when a spreadsheet defines account details, roles and parameters.
- Update accounts: change account details, apply the same combination of changes with Multiple Changes, or edit different values per account with Mass Changes.
- Manage access assignments: view or change role assignments or assign SNC names for single sign-on identities.
- Work with active sessions: message online users or log them off.

- Resolve a problem: read Activity History, follow Troubleshooting, measure performance or create a support request.

Table guides

- Global User Table: menu and tasks follows **Users**, **Roles**, **Show Me**, **My Queries**, **Export** and **Other**.
- My Queries explains how to build and save user filters, from one condition to nested AND/OR groups.
- Global Role Table: menu and tasks covers role selection, **Where Used**, **Assign**, **PFCG** and **Export**.
- Search role content finds roles by their maintained authorizations and transactions. Use filter workbooks to share query definitions.

Open help while working

Choose **Help** on the main toolbar to open this manual in your browser. In **Mass User Create**, **Help → View Help** opens its task guide. In **Assign SNC → Advanced**, **?** opens the variable reference.

Terms used in these guides

- **System**: a SAP installation.
- **SID**: the SAP system identifier.
- **Client**: an area within a SAP system with its own user accounts.
- **Source user**: an existing account whose details are copied to create another account.
- **Role**: a set of authorizations assigned to a user.
- **SNC**: Secure Network Communications. An SNC name identifies the user for SNC sign-on.

See Terms and status messages for account, role and query terminology and links to status explanations. Use Templates and downloads to choose a workbook, save the Word template or obtain the SAP role package.

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