USERXPRESS

BY DELORION

Full manual

userXpress documentation

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Contents

Get started

- userXpress documentation
- Connect to SAP
- Settings and session tools

Control Panel

- Control Panel
- Loading systems

Global User Table

- Global User Table: menu and tasks
- User table columns: account details
- User table columns: activity and status
- Find and select users
- Show Me: predefined user filters
- My Queries: build and save user filters

Users

- Lock accounts and manage passwords
- Change user details
- Assign email addresses
- Make several account changes together
- Assign SNC names
- Manage user groups
- Manage parameter IDs
- Update accounts from a workbook
- Mass Changes workbook fields
- Delete accounts
- Copy users between clients
- Create users
- Create From
- Fast Copy
- Message and log off users

Roles

- Manage roles
- Assign roles from the Global Role Table

- View users' role assignments
- Update role assignments
- Find and remove expired role assignments
- Copy role assignments between users
- Copy roles between clients

Bulk creation

- Create users from an account list
- Mass User Create
- Recover a mass-creation run

Reference

- Workbook fields and formats

Global Role Table

- Global Role Table: menu and tasks
- Role table columns
- Search role content
- Role content comparisons and values
- Role queries and search results
- Import and export role filters

Help

- Activity History
- Troubleshooting
- Measure performance
- Create a support request

Reference and downloads

- Terms and status messages
- Templates and downloads

Technical Documentation

- Architecture
- System requirements and compatibility
- Audit
- Storage

Technical procedures

- Installation and enterprise deployment

- Network connectivity and authentication
- Required SAP access
- SAP roles and assignment
- Diagnostics for customer IT

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.

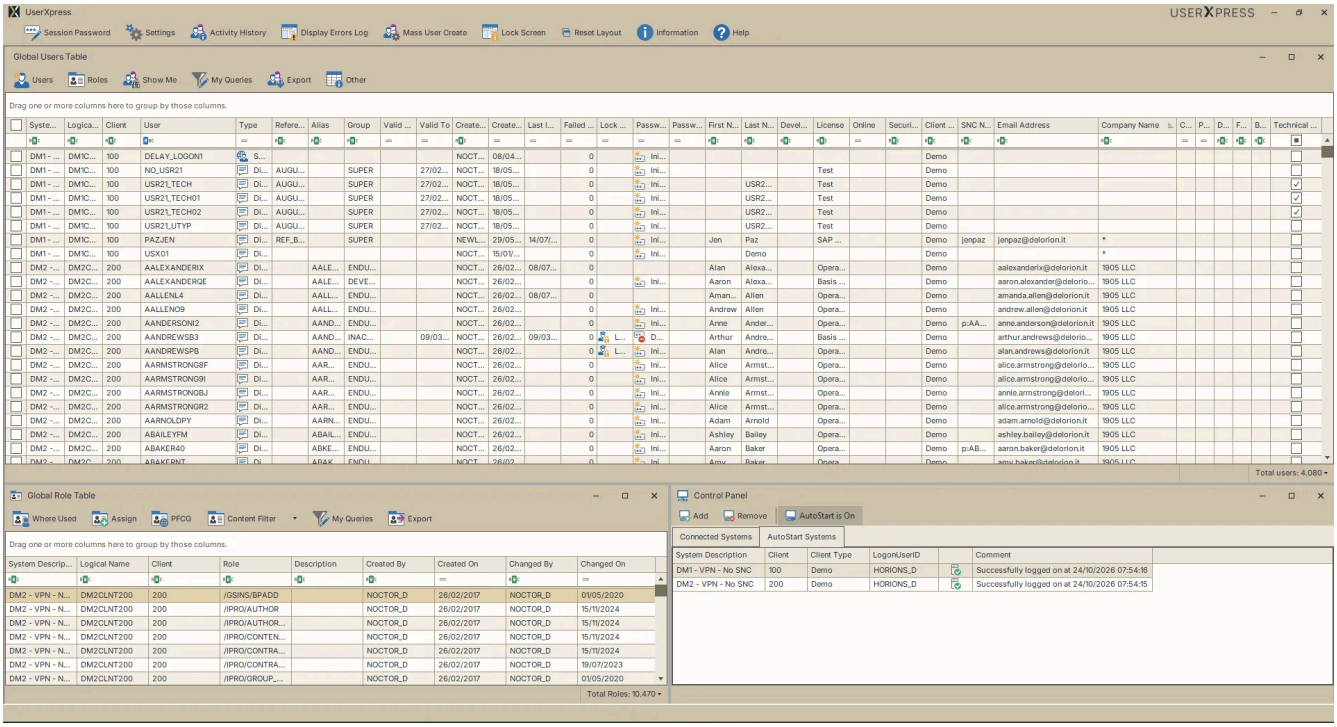
A filter narrows the rows you see. Row checkboxes select the accounts for account actions. Table **Export** uses the filtered list, including unchecked rows. Each task guide explains its selection scope.

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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Connect to SAP

Applies to userXpress 2.0.0.0

Connect a SAP client, save a logon for AutoStart, update saved credentials and disconnect from the workspace.

Connect each SAP client you want to work with. The **Global User Table** combines their accounts, and the **Global Role Table** combines their roles.

Use **Connected Systems** in the **Control Panel** for a connection you need now. Save a connection in **AutoStart Systems** when you work with the same client regularly.

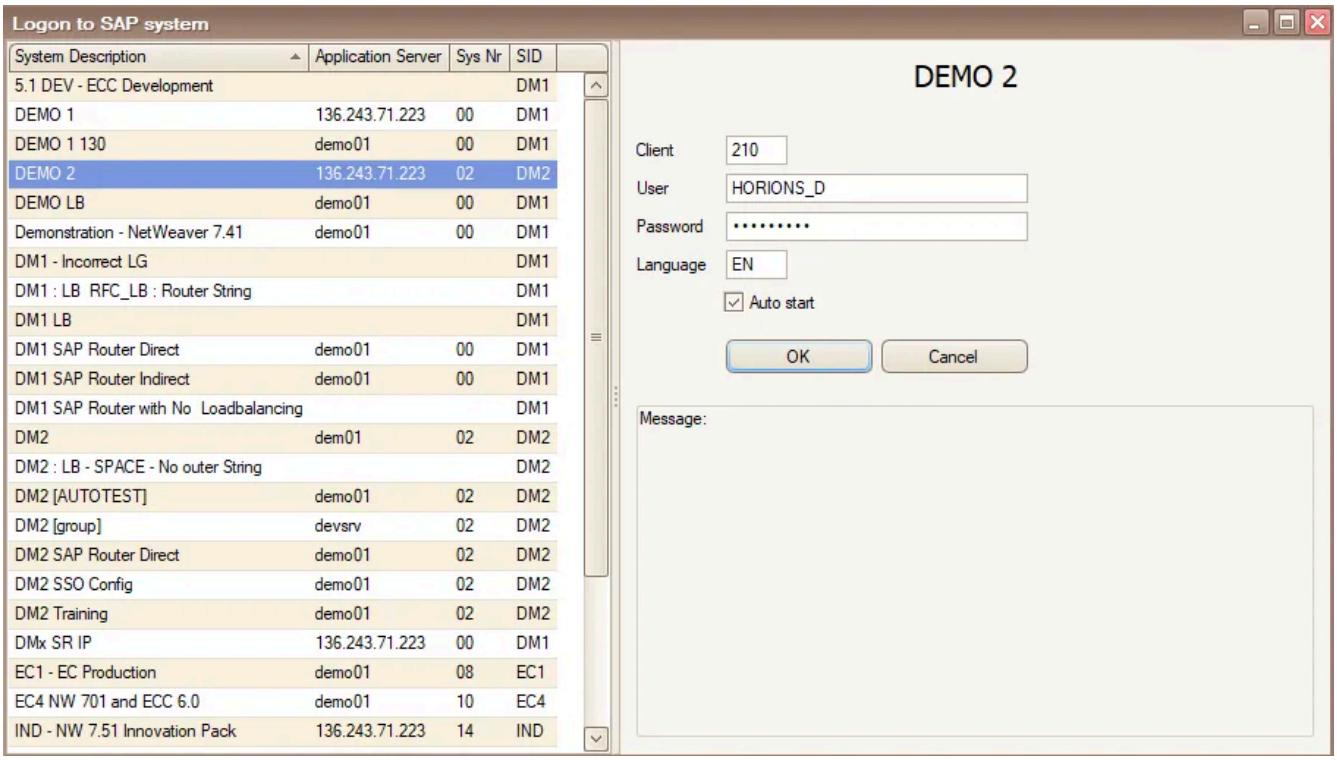
userXpress detects the SAP Logon connection file automatically. If you use a different connection list, select that file in Settings.

Connect a system

1. In **Control Panel**, open **Connected Systems** and choose **Add**.
2. Select the SAP system from the list.
3. Enter the three-digit **Client**. Keep the displayed **Language** or enter the logon language you need.
4. For password authentication, enter your SAP **User** and **Password**. For a system configured for SNC single sign-on, userXpress uses your sign-on identity.
5. Select **Auto start** to save the connection for future sessions. Leave it clear for a connection you need only for this session.
6. Choose **OK**. userXpress connects and loads the client's data.

The connection appears in **Connected Systems**. Its accounts appear in the Global User Table. With role management enabled, its roles appear in the Global Role Table.

For example, to work with clients `100` and `200` in the same system, add each client separately. Each connection uses the SAP user you supplied for that client.



For the connection lists and their status columns, see Control Panel.

Manage AutoStart

AutoStart reconnects your saved clients when you start userXpress. The loading window shows progress for each client. The toolbar shows **AutoStart is On** or **AutoStart is Off** for the whole saved list.

Save another connection

1. Open **Control Panel** → **AutoStart Systems** and choose **Add**.
2. Select the system and enter the client, language and logon details as described above.
3. Select **Auto start**.
4. Choose **OK** to save the entry and connect.

To use the saved list at startup, turn on AutoStart as described below.

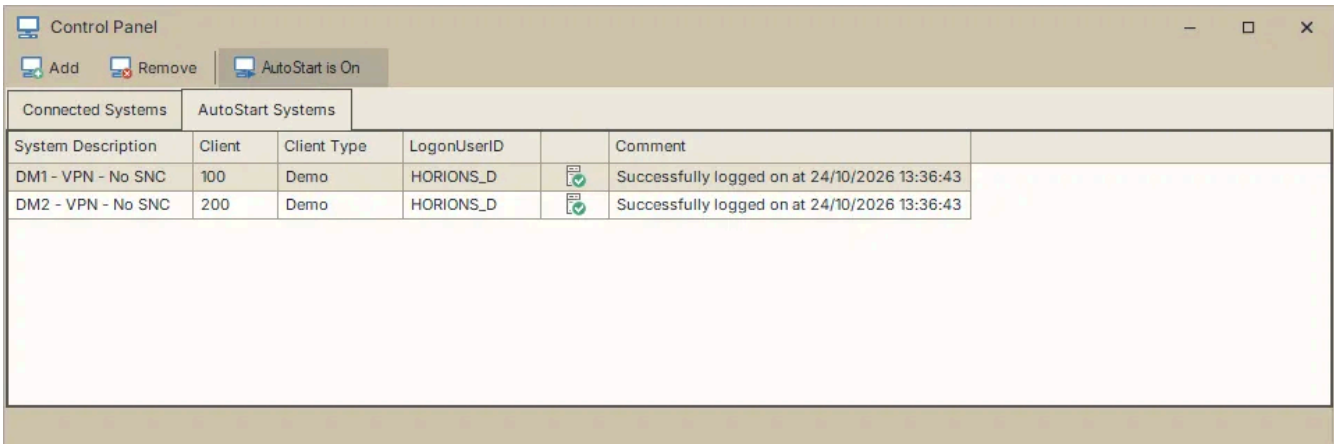
Turn AutoStart on or off

Choose **AutoStart is Off** to turn it on. In the prompt that follows:

- Choose **Yes** to connect the saved clients now.
- Choose **No** to leave automatic connection until the next application start.

Choose **AutoStart is On** to turn it off. The saved entries and connections already open remain available. This is useful when you want to choose a smaller set of clients for your next session.

With AutoStart off, double-click a saved entry to connect that client. For password authentication, choose **OK** in **AutoStart Logon**. For SNC single sign-on, choose **Yes** in the connection prompt.



Update a saved logon

Use this procedure after changing your SAP password or when you need to connect with a different SAP user.

1. If the client is connected, select it in **Connected Systems** and choose **Remove**.
2. Open **AutoStart Systems** and double-click the saved entry.
3. In **AutoStart Logon**, update **User**, **Password** or **Language**.
4. Choose **OK**. userXpress saves the logon details and connects.

For SNC single sign-on, double-clicking the entry offers to connect using your sign-on identity. Manage that authentication through the SNC configuration.

Remove a saved startup entry

1. In **AutoStart Systems**, select the entry and choose **Remove**.
2. Choose **Yes** in the confirmation naming the system and client.

The entry leaves the AutoStart list. An open connection stays in **Connected Systems** until you disconnect it.

Disconnect

Disconnect a client when you have finished working with it or want to reconnect under a different SAP user.

In **Control Panel** → **Connected Systems**, select the connection and choose **Remove**. userXpress closes the connection and removes that client's data from the global tables. Other connected clients remain available.

A saved AutoStart entry remains available for the next session. To stop opening that connection at startup, also remove its saved entry.

If a connection fails

The logon dialog displays rejected logon details. For an AutoStart attempt, read the row's **Comment** in **AutoStart Systems**.

Message or symptom	What to do
The saved password is rejected after a password change	Update the saved logon.
A saved system cannot be found in the SAP Logon connection file	Remove its AutoStart entry. Choose **Add** and select the system under its new name.
The connection file cannot be found	Select the connection file used by SAP Logon.
The SNC library is missing	Set **Settings** → **Connections** → **SNC library** as described in Configure SNC.
SAP reports missing authorization while loading data	Follow the authorization troubleshooting procedure.
The client remains unavailable	Include the system, client and exact connection message in a support request.

Settings and session tools

Applies to userXpress 2.0.0.0

Choose workspace and connection preferences, save password defaults, change your passphrase and open activity or support information.

Open **Settings** on the main toolbar to choose how userXpress looks, loads connections and remembers your workspace.

1. Select the tab for the settings you want to change.
2. Change the options described below.
3. Choose **Apply** to save and keep Settings open, or **OK** to save and close it.

Cancel closes Settings without applying unsaved edits. Changes already saved with **Apply** remain saved. The grouped-menu switch and **Set Application Defaults** take effect immediately, as described below.

General

Use **Settings** → **General** to change the application theme and status colours.

- **Select Application Theme**: Choose an appearance. Selecting a theme previews it immediately. Choose **Apply** or **OK** to keep it. **Cancel** restores the last saved theme.
- **Warning text** and **Warning background**: Choose the colours for warning rows in the Global User Table. Save, then restart userXpress to use the new colours.
- **Error text** and **Error background**: Choose the colours for error rows in the Global User Table. Save, then restart userXpress to use the new colours.

Restore application defaults

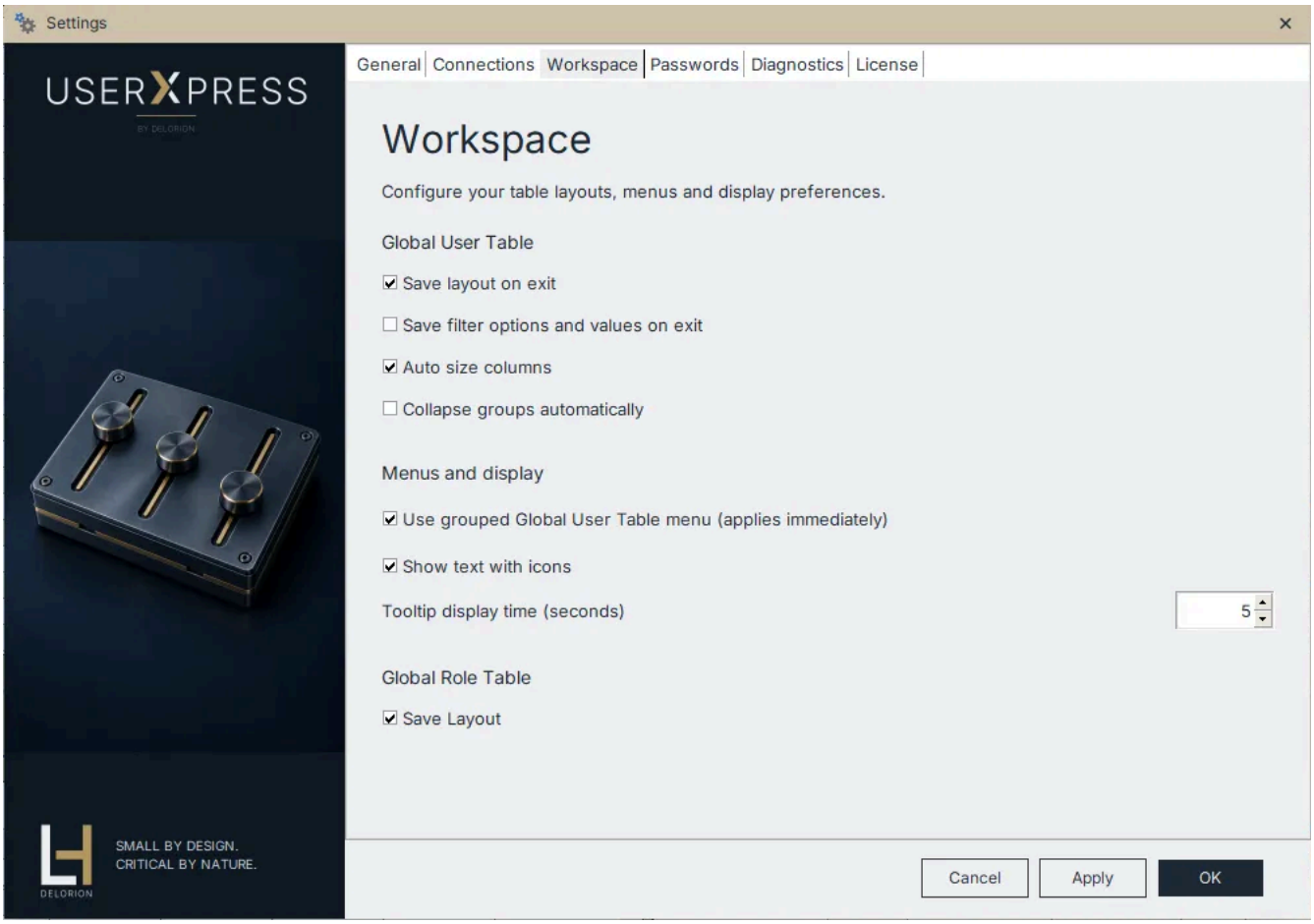
Use **Settings** → **General** → **Set Application Defaults** to return application preferences to their defaults. The reset includes the theme, table preferences, startup loading, connection monitoring, activity recording and password-dialog settings. It also clears saved initial and productive password defaults and the SNC library override.

1. Choose **Yes** in the confirmation. The default preferences are saved immediately.
2. Close Settings with **Cancel**. This leaves the reset preferences saved.
3. Restart userXpress to use the reset display and connection preferences.

To keep your preferences, choose **No** in the reset confirmation.

Appearance and table behavior

Open **Settings** → **Workspace** when you want to keep your column arrangement, return to the same filter next time or change the Global User Table menu.



Global User Table

- **Save layout on exit**: Saves the table's column arrangement, widths, sorting and grouping when userXpress closes. Use it to keep a layout suited to your work. Clearing it stops subsequent layout changes from replacing the saved layout.
- **Save filter options and values on exit**: Includes the active column filter in the saved user-table layout. Select **Save layout on exit** as well. Clear the filter-saving option to save the layout without those filter conditions. Use My Queries to keep several named filters.
- **Auto size columns**: Fits columns to their contents when the user and role tables open. Clear it to allow the tables to extend horizontally. Save and restart userXpress after changing this option.
- **Collapse groups automatically**: Opens grouped user and role tables with their groups collapsed. Clear it to expand groups automatically. Save and restart userXpress after changing this option.

Menus and display

- **Use grouped Global User Table menu (applies immediately)**: Groups commands under **Users**, **Roles**, **Show Me**, **My Queries**, **Export** and **Other**. The guides use this arrangement. Clearing it restores the ungrouped menu. Switching this option applies and saves it immediately, including when you later choose **Cancel**.
- **Show text with icons**: Adds names such as **Dialog** and **System** beside the user-type icons. Save and restart userXpress after changing this option.
- **Tooltip display time (seconds)**: Sets how long a user-table message remains visible when you point to a text cell. Increase it when you need more time to read a message.

Global Role Table

Select **Save Layout** to save the role table's column arrangement, widths, sorting and grouping when userXpress closes. Clear it to leave the previously saved layout unchanged.

Arrange the workspace windows

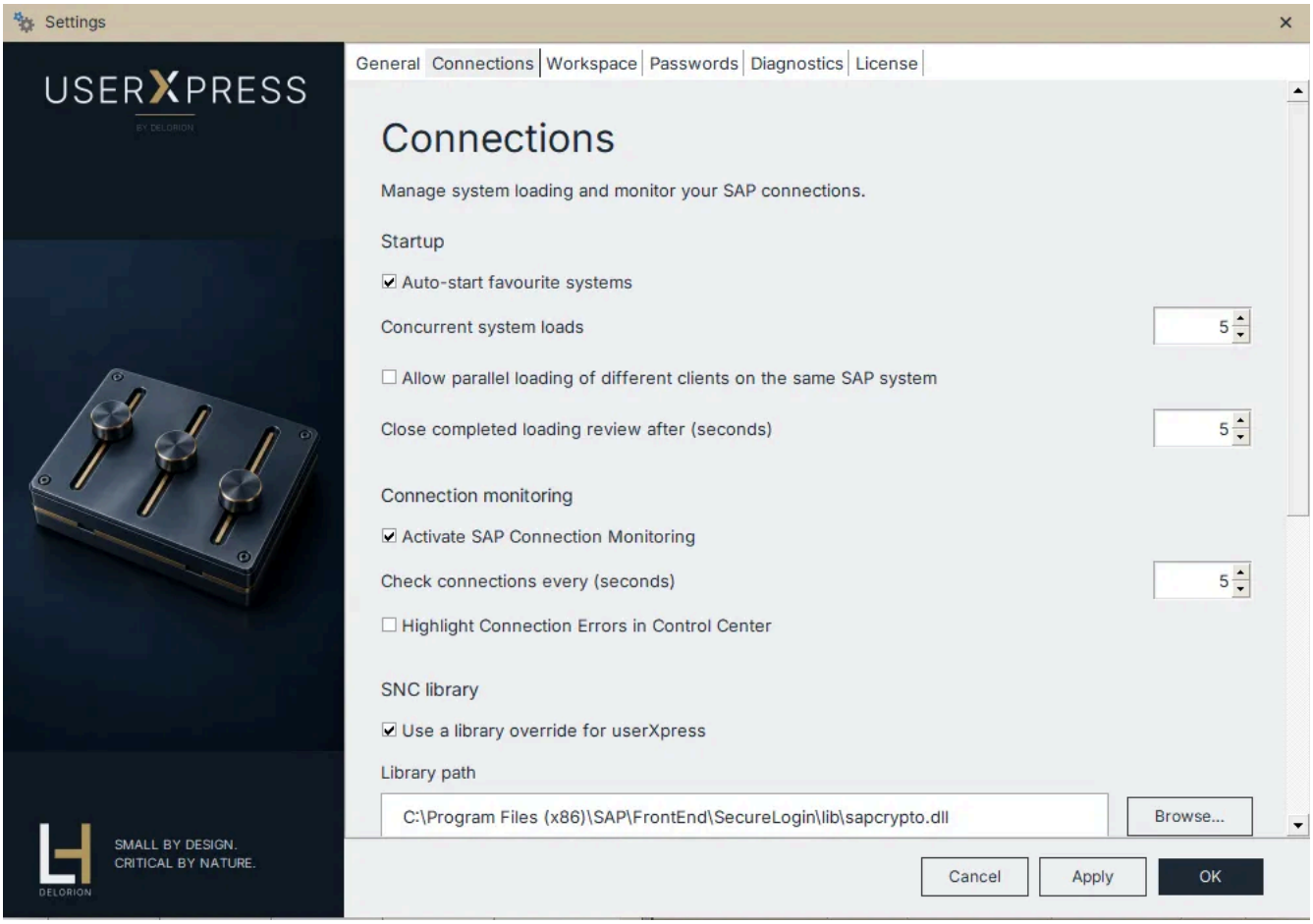
Use **Reset Layout** on the main toolbar to choose how much space each window uses:

- **Default** places the Global User Table across the top, with the Global Role Table and Control Panel below it.
- **User** maximizes the Global User Table and minimizes the other two windows.
- **Role** maximizes the Global Role Table and minimizes the other two windows.

Use **Default** to return to all three windows after working with one table maximized.

Connections

Open **Settings → Connections** to control automatic loading, SAP GUI windows and connection monitoring. For saved logons, use Control Panel → AutoStart Systems.



Startup

- **Auto-start favourite systems**: Loads the saved AutoStart connections when userXpress starts. Clear it when you want to connect clients individually.
- **Concurrent system loads**: Limits how many clients AutoStart loads at once. Lower it to reduce simultaneous loading against SAP. A value of **1** loads clients one at a time.
- **Allow parallel loading of different clients on the same SAP system**: Allows clients on the same SAP system to load together, within the concurrent-load limit. With this option cleared, clients on the same system wait for one another while different systems can load together.
- **Close completed loading review after (seconds)**: Sets how long the completed Loading systems review remains open without keyboard or mouse interaction. Increase it to allow more reading time.

The three loading controls become available when **Auto-start favourite systems** is selected. Save the settings for the next AutoStart run.

SAP GUI

Maximum SAP GUI windows sets how many SU01 and PFCG windows can be open or opening from userXpress at once. The default is **5**, shared across both tables and all connected clients.

1. Open **Settings** → **Connections** → **SAP GUI**.
2. Enter a whole number of at least **1** in **Maximum SAP GUI windows**.

3. Choose **Apply** or **OK**.

The saved limit applies to the next launch without restarting userXpress. Lowering it keeps existing windows open. Close enough windows to make room before opening more.

For example, with a limit of five and two windows already open, you can open three more records. Selecting four opens none of that selection. Select three or fewer and try again.

A record already open or opening must be deselected before launching another selection that contains it.

SU01 windows opened through a **SAP logon ticket** connection count only while userXpress starts them. SAP GUI takes over those windows after launch.

Connection monitoring

Select **Activate SAP Connection Monitoring** to have userXpress check open SAP connections periodically. Set the interval in **Check connections every (seconds)**.

Select **Highlight Connection Errors in Control Center** to highlight interrupted connections in the Control Panel. Save and restart userXpress after enabling or disabling monitoring or its highlighting. For the displayed states and reconnection steps, see Connection status icons.

SAP Logon configuration and SNC

userXpress detects the SAP Logon configuration file automatically. Use **SAP Logon configuration → Configuration file (INI / XML)** when you need a different connection list. Follow Use a different connection file.

Use **SNC library** to select the installed provider for SNC connections. The SNC configuration procedure explains library selection and the restart required after a change.

Passwords

Open **Settings → Passwords** to save a default initial or productive password and choose whether the password command opens a dialog.

1. Under **Initial password** or **Productive password**, fill in **Enter** and **Re-Enter** with the same value. **Show password** reveals the entries.
2. Keep **Show Initial Password dialog window** or **Show Production Password dialog window** selected to open the corresponding dialog with that value filled in.
3. To apply the saved password immediately when choosing the command, clear its show-dialog option.
4. Choose **Apply** or **OK**.

The two defaults are independent. If both entries for a default are blank, userXpress enables its dialog so you can enter a password for each operation. See Lock accounts and manage passwords for the account-selection and reset procedures.

Under **Productive clients**, **Display confirmation when user belongs to productive client** adds a confirmation to user-table commands such as **Lock**, **Unlock**, **Delete** and password changes. The warning checks the first client in the selection. To receive a separate confirmation for each productive client, select and process one client at a time.

Excel exports

Use these options in **Settings** to require a password when opening an exported Excel workbook. Export protection is off by default.

1. Select **Protect Excel exports**.
2. Enter the password in **Default Excel password** and confirm it. Password entries are masked.
3. Select **Let me choose on each export** to choose protection or a different password for individual files. Leave it cleared to use the default automatically.
4. Choose **Apply** or **OK**.

The settings work together as follows:

- **Protect Excel exports** cleared: Excel exports are saved without password protection, and **Let me choose on each export** is unavailable.
- **Protect Excel exports** selected and **Let me choose on each export** cleared: Excel exports use the saved default password automatically.
- Both options selected: the export window shows protection controls, initially using the saved default.

Choose protection for one export

With **Let me choose on each export** selected, make the choice in the export window before starting the export:

- Keep **Password protect this file** selected to use the default password.
- Choose **Change...** to enter a different password for this file.
- Clear **Password protect this file** to save this file without password protection.
- If protection is selected and no default is available, enter the password in the export window.

These choices apply to that file only. The saved default stays unchanged. If protection is selected without a usable password, the export window explains what is needed before export can start. Cancelling stops the export and leaves the destination unchanged.

Open a protected workbook

Give the recipient the password used for that file. Excel asks for it when opening the workbook. The recipient uses the export password, not your userXpress passphrase.

When opening a protected workbook in userXpress, the saved default can be used if it matches the file. Enter the file's password when prompted, including when the file used a one-export override or a different default. If the password is rejected, enter the correct password before importing. Cancelling

stops the import.

Changing the default affects future exports. Previously exported workbooks keep their original passwords. Resetting a forgotten userXpress passphrase clears the saved default Excel password, so retain the passwords needed to open those files.

For encryption and profile storage details, see Excel export protection.

Diagnostics

Use **Settings** → **Diagnostics** to choose activity recording and connection logging.

- **Record user activity** records account-operation results for **Activity History**.
- **Activate ERPConnect Logging** enables detailed SAP connection logs for investigating connection problems. When support asks for these logs, enable the option, save and restart userXpress before repeating the affected connection. Clear the option and restart when the capture is finished.

To measure loading time, use **Information** → **Diagnostics** on the main toolbar and follow Measure loading performance.

License

Open **Settings** → **License** to view the installed product, license type, issue date and registered organisation's contact details. For obtaining and entering a license, see Installation and licensing.

Session password

Use **Session Password** on the main toolbar to change the passphrase used to open and unlock userXpress.

1. Enter **Current passphrase**.
2. Enter a passphrase of at least 12 characters in **New passphrase** and **Confirm new passphrase**.
3. To add a reminder, enter it in **Passphrase hint**.
4. Choose **Change passphrase**.

userXpress confirms the change. Saved logons and the default Excel password remain available. Use the new passphrase the next time you start or unlock the application.

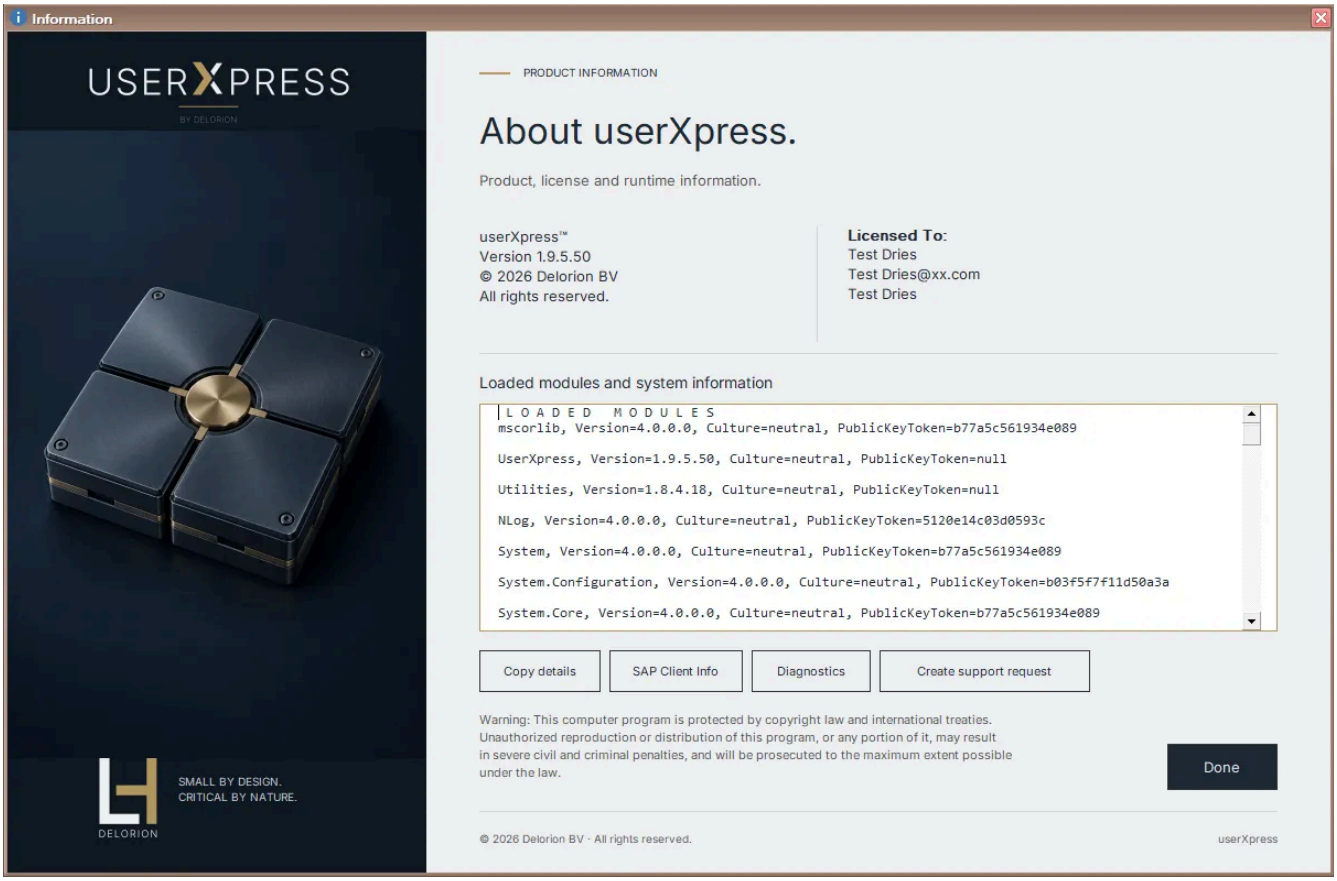
Lock the workspace

Choose **Lock Screen** on the main toolbar when you want to lock userXpress while keeping your workspace open. To return, enter **Session passphrase** and choose **Unlock session**.

Activity and diagnostic information

Choose the main-toolbar command that matches the information you need:

- **Activity History** shows recorded account-operation results from this session. A number beside the command indicates unseen entries. Selecting the window marks those entries as viewed. An **Updates failed** notification opens the history when clicked. See Activity History for its columns and outcome meanings.
- **Display Errors Log** opens the application log. Choose **Refresh Display** to load the latest entries while investigating a reported error.
- **Information** shows the application version and runtime details. **Copy details** copies the displayed technical information. **SAP Client Info** shows information about the installed SAP client software.



In **Information**, choose **Create support request** to describe a problem and select files to attach. Follow Create a support request for the sign-in, attachment and submission steps.

Control Panel

Applies to userXpress 2.0.0.0

Choose between connected clients and saved AutoStart entries, and understand connection details and status.

Use the **Control Panel** to choose the SAP clients in your workspace. It has two lists:

- **Connected Systems** contains the connections open for this session.
- **AutoStart Systems** contains saved connections that userXpress can open at startup.

A client can appear in both lists. Removing it from one list has a different purpose from removing it from the other.

Commands

Location and command	When to use it
Connected Systems → Add	Connect a client you want to work with now. You can also save it for AutoStart in the logon dialog.
Connected Systems → Remove	Disconnect the selected client and remove its data from the global tables.
AutoStart Systems → Add	Save another startup connection and connect it now.
Double-click an **AutoStart Systems** entry	Open a saved connection, or update its password logon details before connecting.
AutoStart Systems → Remove	Remove the selected entry from the saved startup list. An open connection remains available in Connected Systems.
AutoStart is On / AutoStart is Off	Enable or disable automatic connection for the whole saved list.

See Connect to SAP for the procedures and Loading systems for AutoStart progress and results.

Connected Systems columns

The list identifies each open connection and shows information read from SAP when it was opened.

- **Destination**: The description of the entry selected from the SAP Logon connection list. Use it to recognize the system by the name your organization uses.
- **Name**: The system ID and client combined into a connection name. For example, `DEVCLNT100` identifies system `DEV`, client `100`.
- **System**: The SAP system ID, such as `DEV`.

- **Client Type**: The client's purpose recorded in SAP: Production, Test, Customizing, Demo, Training/Education or SAP reference. A blank means no recognized client role was returned.
- **Product**: The installed SAP product description. A blank means product information was unavailable.
- **CUA**: An icon identifying a Central User Administration central or child system. Point to the icon for its description. A blank means CUA is not reported as active for this connection.
- **DB Host**: The database host reported by SAP.
- **DB Type**: The database system used by SAP.
- **IP**: The application server's IP address returned by SAP.
- **Kernel**: The SAP kernel release reported by the server.
- **OS**: The application server's operating system.

Destination names come from SAP Logon. To use a renamed entry, select it through **Add**. The combined **Name** is built by userXpress from the system and client.

SAP's client classification is maintained through transaction **SCC4**, in the **Client Role** field. The labels in userXpress describe that SAP setting. See SAP's client-role reference.

To display the CUA relationship in SAP, open **SCUA** → **Distribution Model** → **Display Structure**. CUA configuration is maintained in the central system. SAP's CUA structure documentation describes this view.

Additional connection columns

These columns are hidden in the default layout. **User ID**, **App Server** and **RFC Destination** help identify the account and server behind a connection.

- **User ID**: The SAP account used by this connection, including the account resolved by SNC single sign-on. Operations on the connection use this account's authorizations.
- **App Server**: The host name of the application server handling the connection.
- **RFC Destination**: The server-side destination identifier returned by SAP. **Destination** instead shows the entry name from your SAP Logon list.
- **Timezone**: The application server's time difference from UTC, expressed in seconds.
- **DST**: The daylight-saving indicator returned by the application server.

The following columns contain low-level server information that support can use when investigating a connection problem:

- **Char Set**: The RFC protocol value returned by SAP. Despite the heading, this value does not identify the server's character encoding.
- **Floating Point**: SAP's code for the server's floating-point number format.
- **Integer Format**: SAP's code for the server's integer number format.
- **Machine ID**: The machine identifier returned by SAP.

- **IPV6**: This column is empty in userXpress 2.0.0.0. Use **IP** for the address returned by the server.

Server details are read when the connection opens. An empty field means that value was not supplied to the table.

Connection interruption columns

Use **Error No** to identify a connection that userXpress is trying to restore:

- `0`: The connection opened successfully, or reconnection succeeded.
- `3`: The connection monitor detected an interruption and is trying to reconnect.

Error Text remains empty for these connection-monitor states. For a saved AutoStart connection, read **Comment** in **AutoStart Systems** for the reconnect message and attempt number.

These two columns describe userXpress connection monitoring. They have no corresponding SAP account field.

View system information in SAP

For SAP system, host and database information, open **System → Status** in SAP GUI. **Other kernel info** shows the kernel details. These are display values supplied by the server. See SAP's system-status reference.

AutoStart Systems columns

Use this list to identify a saved connection and read its latest connection result.

- **System Description**: The saved SAP Logon entry name.
- **Client**: The three-digit client to connect.
- **Client Type**: The last client classification saved after connecting. It is blank until a recognized classification has been obtained.
- **LogonUserID**: The saved SAP user for password authentication. SNC single sign-on entries can have a blank user ID because SAP determines the account from the sign-on identity.
- **Status icon**: The connection result, explained below. Read it together with Comment.
- **Comment**: The latest connection message, including a connection time, error or disconnection message. It is blank before a message has been recorded in the session.

The list stores connection settings and results in userXpress. To change a saved logon, use the AutoStart Logon dialog.

Connection status icons

- **Server icon without a result marker**: No successful connection is recorded for this entry in the session, or it has been disconnected. Comment distinguishes these cases.
- **Success marker**: The last connection attempt succeeded.

- **Error marker**: The connection attempt failed. Comment contains the error.
- **Reconnection marker**: The connection was unexpectedly lost and userXpress is trying to reconnect. Comment describes that attempt.

For the clients available to work with now, open **Connected Systems**. For a failed saved connection, follow If a connection fails.

Loading systems

Applies to userXpress 2.0.0.0

Follow AutoStart progress, interpret each client's result, stop loading and reconnect a client that failed.

The **Loading systems** window opens when AutoStart connects your saved clients. Use it to follow progress across several clients or find the reason one client did not load.

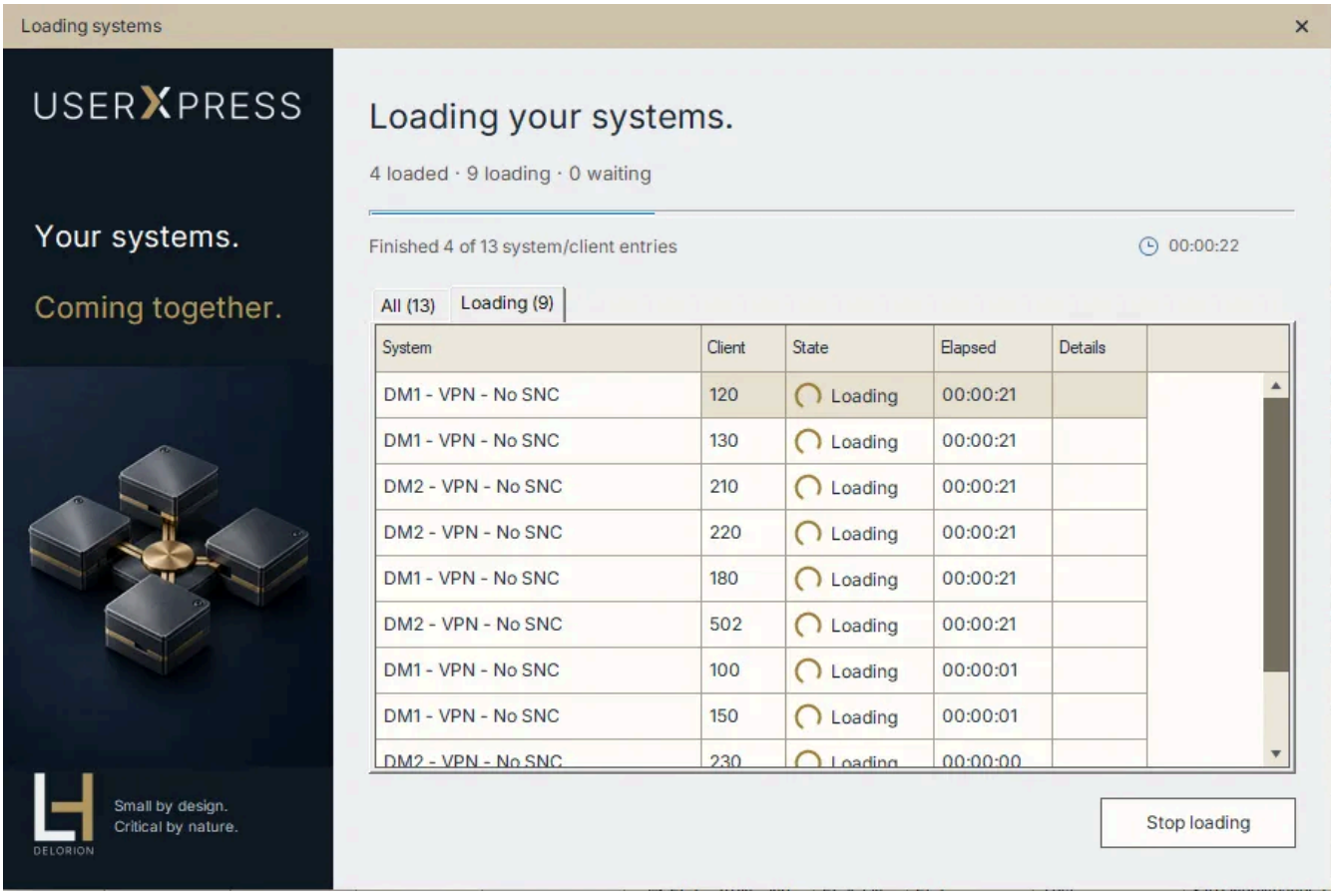
Each completed client becomes available in the workspace. A failure in another client leaves those completed connections available.

Follow loading progress

The window starts on **Loading**, which lists the clients being loaded. Choose a tab to change what you see:

- **All** shows every client in this AutoStart run, including waiting and completed entries.
- **Loading** shows clients whose loading is in progress. While a stop is being processed, the tab changes to **Stopping**.
- **Needs attention** shows clients with a warning or failure. The tab appears when there is a problem to report.

The number beside each tab shows its entry count. Changing tabs changes the displayed list while loading continues.



The Loading tab lists the nine clients still loading. Four of the thirteen clients have finished.

For each row:

- **System** and **Client** identify the connection.
- **State** shows progress or the final result, as explained below.
- **Elapsed** shows how long that client has been loading. After loading finishes, it shows the duration for that client.
- **Details** opens the explanation for a warning or failure.

The total elapsed time covers the whole run. The finished count includes successful, failed and stopped entries. Use **State** to distinguish those results.

Understand the result

- **Waiting:** This client is queued to load.
- **Loading:** userXpress is connecting or retrieving data.
- **Completed:** The client is available in the workspace.
- **Warning:** The client loaded, but an additional read or part of its preparation produced a warning. Open **Details** to see which information is affected.
- **Failed:** Loading could not complete. Open **Details** for the cause.

- **Stopping:** A stop was requested while this client was loading. userXpress is waiting for active SAP calls to finish.
- **Cancelled:** Loading this client stopped before completion. Connect it again when you need it.
- **Not started:** This client remained in the queue when the run stopped or ended. Connect it when you need it.

When all clients finish successfully, the window closes automatically. After a warning, failure or stop, it stays open to show the results. Choose **Close** to continue to the workspace.

Read a warning or failure

1. Open **Needs attention**.
2. Find the system and client, then choose its **Details** button.
3. Read the message identifying the failed read or connection problem.
4. Choose **Back to systems** to return to the list.

An installed-product warning, for example, means the connection loaded but its product information is unavailable. A rejected logon requires correcting that client's saved credentials. See connection problems for the corresponding action.

An error affecting the whole run has a **Loading error details** button below the list.

The completed-results window closes after a period without keyboard or mouse interaction. To allow more reading time, open **Settings** → **Connections**. Under **Startup**, increase **Close completed loading review after (seconds)** and choose **OK**.

Stop loading

Choose **Stop loading** when you want to end the run before all clients have loaded. userXpress stops starting queued clients and waits for active SAP calls to finish.

Completed clients remain connected. An active client that finishes before the stop takes effect also remains available. The final list identifies cancelled clients and entries that never started.

When the button changes to **Close**, choose it to return to the workspace.

Connect a client after a failed or stopped run

1. Resolve the problem described in **Details** for a failed client.
2. Close the loading window.
3. In **Control Panel** → **AutoStart Systems**, double-click that client's saved entry.
4. For password authentication, correct the logon details if necessary and choose **OK**. For SNC single sign-on, choose **Yes** to connect.

userXpress loads that client and adds it to the workspace. The saved-logon procedure explains how to change the credentials.

Global User Table: menu and tasks

Applies to userXpress 2.0.0.0

Choose user administration, role, query and export commands from the grouped Global User Table menu.

Use the Global User Table to find and administer accounts across your connected SAP clients. Each row identifies an account by its system, client and user ID. The same user ID in two clients represents two separate accounts.

Filter the table to find the accounts you need, then select their row checkboxes before opening an account action. The grouped menu puts the commands under **Users**, **Roles**, **Show Me**, **My Queries**, **Export** and **Other**.

For field meanings, column layout and the corresponding SAP fields, see Account details and Activity and status.

Users

Lock, Unlock and Password

Command	When to use it
Lock	Prevent new logons to the selected accounts while retaining their account data.
Unlock	Remove the applicable lock from accounts that should be available again.
Password → Initial Password	Give users a password intended for their next logon and password change. The dialog also offers unlocking.
Password → Productive Password	Set a productive password when that password behavior is required for the selected accounts.
Password → Deactivate Password	Disable password-based logon for accounts using another permitted authentication method.

Follow Passwords and locks for the dialogs, options and SAP results.

Refresh

Choose **Users → Refresh** when you need up-to-date information about selected accounts, for example after another administrator has changed them in SAP.

1. Select the accounts in the Global User Table.
2. Choose **Users → Refresh**.
3. Read the updated rows and any reported refresh errors.

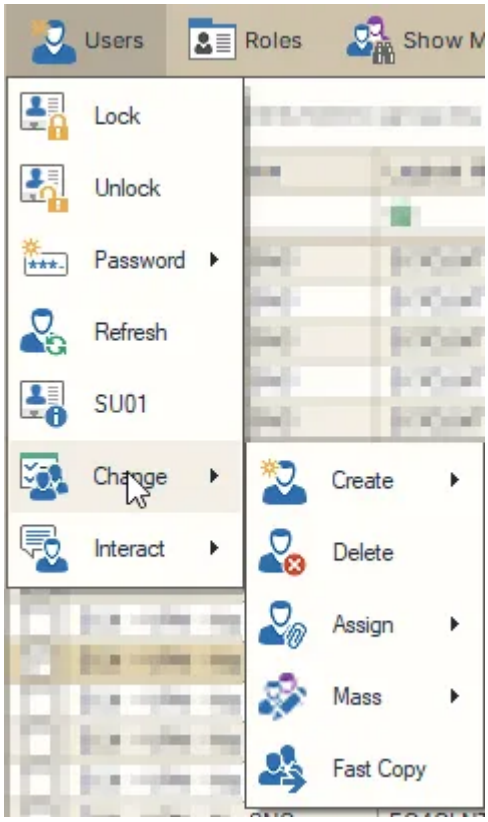
The refresh reads the selected accounts from their respective clients. A refresh error means the table could not retrieve the new values for that account.

SU01

Choose **Users → SU01** to open an account in SAP user maintenance. Select one row for the account you want to open. The command uses the first selected account when several rows are selected.

The workstation needs SAP GUI and a dialog-capable SAP logon for that client. See Open the user in SAP.

Change → Create



Command	When to use it
Create User	Enter account details and choose the clients in which to create the account. See Create users.
Create Ranged User..	Create a numbered series from an ID pattern, such as training accounts. See Create a numbered range.
Create From	Start a new account from an existing user's data and choose what to copy. See Create From.

Change → Delete

Use **Users → Change → Delete** when the selected SAP accounts are to be removed. The deletion dialog lists the targets and requires confirmation. See Delete accounts.

Change → Assign

Use these commands when one kind of detail needs updating for the selected accounts.

Command	Purpose and procedure
Alias..	Set an alternative account identifier. Assign an alias.
Email..	Generate, edit, replace or remove email addresses. Assign email addresses.
Reference User..	Assign a reference user available in the target clients. Reference users.
Security Policy..	Apply a policy available in the selected clients. Security policies.
SNC Name..	Assign an SNC identity directly or construct it from account details. SNC names.
Company Name	Set the company in the account's address information. Company name.
Work Center..	Update work-center information such as department or location. Work center.
Name Information..	Update person and name fields. Name details.
Parameter ID	Maintain default parameter values for SAP transactions. Parameter IDs and update modes.
Usergroups...	Set the authorization-check group or change general memberships. Manage user groups.

Change → Mass

Choose **Multiple Change..** when the selected accounts need the same combination of changes, such as an unlock and a validity-date extension. See Make several account changes together for the steps and option meanings.

Use **Mass Changes** when you want to prepare different changes for different accounts in a workbook:

- **Export Selected Users** creates the update workbook from the selected accounts.
- **Import User Updates** opens the prepared workbook for validation and review before applying the updates.

Follow Update accounts from a workbook for the export, editing and review procedure. The workbook reference explains empty cells, fields and complete role/parameter lists.

Change → Fast Copy

Use **Fast Copy** to create a new user ID in the clients of selected source accounts. See Fast Copy for the source selection, copied properties and results.

Interact

- **Send Message** sends a message to selected users' SAP sessions, for example before planned maintenance.

- **Log User Off** ends the selected users' sessions. Use it when those sessions must be closed. Unsaved work in the affected sessions can be lost.

See Online users and messages for the recipient and session controls.

Roles

Command	When to use it
Role Assignment	View and export the selected users' assignments, including validity periods and composite-role indicators.
Expired Roles	Find assignments by their end dates across selected clients and remove roles that users no longer need.
Update Role Assignment	Add or remove assignments for selected users, with common or client-specific scope and validity dates.
Copy Roles..	Copy role definitions between clients.

The role assignment guide explains these workflows. To search the contents of role definitions, use the Global Role Table.

Show Me

Choose a ready-made filter for account status, inactivity or developer/license details. Show Me: predefined user filters explains every choice, including date cutoffs and the difference between **Everyone** and **Clear All Filters**.

My Queries

Save a filter when you need the same selection criteria regularly. Build and save user queries walks through **Edit Filter**, AND/OR groups, saving, reuse and **Maintain Queries**.

Export

- **Export** saves the filtered table as a report, including visible rows that are not selected. Use it to share or work with a user list. See Export the table.
- **Export User Objects** prepares selected users as input for Mass User Create. Use it when existing users are the starting point for a new creation workbook. See Start from exported user objects.

Other

Clear Errors

Choose **Other** → **Clear Errors** after reading operation messages when you want to clear those messages from the table before the next task.

Column Chooser

Choose **Other** → **Column Chooser** to show the available columns. Drag a column into the table header to display it, or drag a displayed header into the chooser to hide it. Use this to keep fields needed for the current task together.

Summary Info..

Choose **Other** → **Summary Info..** for the loaded table's total user-record count and distinct user-ID count. An ID present in several clients contributes several records but one distinct ID.

Copy To.. (right-click menu)

Right-click selected accounts and choose **Copy To..**, then a connected system and client, to create those user IDs in the destination. The dialog offers the source users' roles and profiles or those of an existing target-client account. See Copy users between clients for the choices, copied details and results.

Copy and paste role assignments (right-click menu)

Select one source account, right-click its row and choose **Copy Roles from user**. Then select the destination accounts and use the right-click **Paste Roles** command. See Copy role assignments for the assignment choices.

User table columns: account details

Applies to userXpress 2.0.0.0

Understand account, logon and address fields in the Global User Table and find their corresponding SAP fields.

Use the account-detail columns to find users by name, group, client or department, and compare their settings across SAP clients. For example, filter **Group** to find the accounts your team administers, then show **Valid To** to see their account end dates.

The table displays loaded account information. Use the user commands to change it, or select an account and choose **Users** → **SU01** to open SAP user maintenance.

For creation dates, logon activity, locks, CUA and licensing, see Activity and status columns.

Choose which columns to show

1. Right-click a cell in the Global User Table and choose **Show Column Chooser**. The **Available Columns** window opens.
2. Drag a field from that window to the heading row to show it.
3. To hide a column, drag its heading into **Available Columns**.
4. Drag headings along the heading row to put them in the order you need.

To keep the arrangement for later sessions, select **Settings** → **Workspace** → **Global User Table** → **Save layout on exit** and choose **Apply** or **OK**. The **Type** column is always shown when the table opens.

Use the filter row to narrow the displayed accounts. Save a frequently used set of conditions under My Queries.

Account and client

System Description

The description of the SAP Logon connection from which the account was loaded. Use it with **Client** and **User** to distinguish accounts across systems.

The description comes from the SAP Logon entry. It is connection information rather than a field in the SAP user record.

Logical Name

The connection identifier generated by userXpress from the SAP system ID and client. For example, `DEMCLNT100` identifies system `DEM`, client `100`.

This identifier helps you recognize which connection supplies a row. It is generated locally and has no SAP user field to maintain.

Client

The SAP client containing the account. `DEMO_USER` in client `100` and `DEMO_USER` in client `200` are separate accounts.

When opening SAP GUI manually, enter this number in the logon screen's **Client** field. See SAP's logon instructions.

User

The SAP user ID. Use it to select the account for a change or enter it in the **User** field on the initial **SU01** screen.

Client Type

The client's purpose recorded in SAP. The values are **Production**, **Test**, **Customizing**, **Demo**, **Training/Education** and **SAP reference**. A blank means no recognized client classification was loaded.

Use this column to distinguish production accounts from accounts in other environments. The classification belongs to the whole client. It is maintained in **SCC4** → **Client Role**, as described in SAP's client-role reference.

Logon and authorization settings

Type

The SAP user type determines how an account can be used:

- **Dialog (A)**: An individual user's interactive SAP logon.
- **System (B)**: Background processing and system communication without an interactive SAP GUI logon.
- **Communications Data (C)**: Communication between systems without an interactive SAP GUI logon.
- **Service (S)**: Interactive access shared by a group of users, such as an anonymous service account.
- **Reference (L)**: An account whose authorizations supplement another user's authorizations. A reference user cannot log on.

To display the type names beside their icons, select **Settings** → **Workspace** → **Show text with icons**, save and restart userXpress.

In SAP, view or change **SU01** → **Logon Data** → **User Type**. SAP's user-maintenance guide explains these types.

Alias

An alternative name assigned to the SAP user. Search this column when someone gives you their alias instead of their user ID. A blank means no alias was loaded.

View or change **SU01 → Logon Data → Alias**. Applications that support aliases can use this name for logon. See SAP's logon-data reference, or assign an alias in userXpress.

Reference ID

The reference user assigned to the account for additional authorizations. Filter this column to find accounts that share the same reference user. A blank means no reference-user assignment was loaded.

In **SU01 → Roles**, use **Reference User for Additional Authorizations** to view or maintain the assignment. See SAP's Roles tab reference. In userXpress, follow Assign a reference user.

Group

The user group used for SAP authorization checks on user administration. Use it to find accounts within an administration group's scope. A blank means no group was loaded for that account.

View or maintain **SU01 → Logon Data → User Group for Authorization Check**. The separate **Groups** tab contains groups for mass maintenance, which are not the value shown here. SAP user-group reference.

Use Usergroup Management to assign this group to selected accounts in userXpress.

Valid From and Valid To

The beginning and end of the account's validity period. Use these dates to find accounts prepared for a future start or approaching their end date.

On a newly loaded row, a blank **Valid From** means SAP supplied no starting date. A blank **Valid To** means it supplied no ending date.

View or maintain the dates in **SU01 → Logon Data → Valid from / Valid to**. Some SAP versions label the ending field **Valid through**. These dates belong to the account. Role assignments have their own validity dates. See SAP's validity-field reference.

Security Policy

The security policy assigned to the account for its logon and password rules. Use it to find accounts that share a policy or need a different one.

In **SU01 → Logon Data → Security Policy**, view or change the assignment. With no assigned policy, SAP uses its standard logon and password policy. See SAP's security-policy instructions.

A blank cell also occurs when the connected SAP system does not supply this field. To assign a policy in userXpress, follow Assign a security policy.

SNC Name

The account's Secure Network Communications identity. Use it to find the SAP account associated with an SNC identity or compare mappings across clients. A blank means no SNC name was loaded.

View or change **SU01 → SNC → SNC name**. The value is case-sensitive. See SAP's SNC mapping instructions, or Assign SNC names in userXpress.

Names and address details

Use these columns to find a person or a group of colleagues when their SAP user IDs are unfamiliar.

For users with a classic address, the corresponding fields are maintained on **SU01 → Address**. For SAP business users, some fields are supplied by Business Partner or HR data and are read-only in SU01. SAP's Address tab reference describes this distinction.

First Name and Last Name

The person's name returned by SAP. A blank means no value was loaded for that part of the name.

In **SU01 → Address → Person**, the fields are **First name** and **Last name**.

Email Address

An email address from the account's SAP address data. Use it to locate an account by email address. Where SAP holds several addresses, this column shows one address.

In **SU01 → Address → Communication**, use **E-Mail Address** to view or maintain the address. In userXpress, follow Assign email addresses.

A blank can mean no address was retrieved or that address data was omitted during connection loading. Select the account and choose **Users → Refresh** to retrieve its address details.

Company Name

The company entry assigned to the account. Filter it to find accounts assigned to the same company.

In **SU01 → Address → Company**, view the assignment or choose **Assign Other Company Address** to replace it. Company address records themselves are maintained in **SUCOMP**. See SAP's company-address instructions.

A blank means no company value was loaded. The initial connection load leaves **Company Name**, **Email Address** and work-center details empty for technical identities and business-user identities. For an account with an address assignment, **Users → Refresh** retrieves its company entry.

Department, Function and Building

- **Department**: The department recorded in the user's work-center address. Use it to find a team.
- **Function**: The person's job function recorded in that address. Use it to distinguish responsibilities within a department.
- **Building**: The building code recorded in that address. Use it to find users at the same workplace location.

In **SU01** → **Address** → **Work Center**, the fields are **Department**, **Function** and **Building code**. The SAP user-maintenance illustration shows these fields alongside the name and communication fields.

Work-center details are omitted from the initial connection load by default. To retrieve them, select the accounts and choose **Users** → **Refresh**. A blank after loading means no value was retrieved for that field.

Technical User

Use this column to distinguish technical SAP identities from accounts with personal address data.

- **Checked**: A technical SAP identity without a physical address.
- **Unchecked**: userXpress did not identify the account as a technical identity. Classic users and business users appear unchecked. This also applies when SAP supplies no identity classification.
- **Blank value**: Classification has not been loaded for that row. Reconnect the client to load it.

This is separate from **Type**: a technical identity can have a Dialog, System or other logon type. In SAP releases with identity types, **SU01** shows the identity description beside **User**. See SAP's identity address types. The column reports that identity classification rather than an editable checkbox in SAP.

Retrieve updated details

Select accounts and choose **Users** → **Refresh** to retrieve their logon and address details after a change in SAP. Refresh also reads email and work-center information omitted from the initial load.

To reload the complete account list, including **Client Type** and **Technical User**, disconnect and reconnect the client. Use this reload after removing a validity date or an entire work-center address in SAP, because a selected-user refresh can retain the previously displayed value when that SAP value is empty.

For a reported refresh failure, follow Troubleshooting.

User table columns: activity and status

Applies to userXpress 2.0.0.0

Read account activity, locks, CUA distribution, license assignments and developer keys in the Global User Table.

Use these columns to investigate a logon problem, find recently created accounts or identify where a CUA-managed account can be changed.

To display a hidden field, use Show Column Chooser. To show text beside the lock and online icons, enable **Settings → Workspace → Show text with icons**, save and restart userXpress.

Creation and logon activity

Created By and Created On

Created By identifies the SAP user that created the account. **Created On** is the creation date. Filter these columns to find accounts created by a particular administrator or during a particular period.

Both values come from the account's SAP creation record. A blank means no value was loaded. For the account's subsequent changes, use SAP user change documents.

Last logged in

The logon date and time recorded by SAP for the account. Use it when looking for accounts with older logon activity. A blank means SAP supplied no logon date.

SAP's logon timestamp has exceptions that matter when deciding whether an account is still used:

- Background job execution does not always update it.
- For an account locked after failed password attempts, it can contain the time the lock was applied.

For SAP's logon analysis, open **SUIM → Users → By Logon Date and Password Change** and read **Date of Last Logon**. The SAP report documentation explains these cases and the additional job-log evaluation.

Password Logon Date

The date SAP recorded for the account's last logon using a password. Use it when investigating password use for an account that also uses single sign-on.

On a newly loaded row, a blank means SAP supplied no password-logon date or the connected system does not provide this field.

Failed Attempts

SAP's counter of unsuccessful password logons. Filter for values greater than zero to find accounts with recorded failures, then read **Lock Status** to see whether SAP has locked them. A blank means the counter has not been loaded for that row.

To retrieve an updated counter, disconnect and reconnect the client. **Users** → **Refresh** leaves this counter unchanged.

In SAP, open **SUIM** → **Users** → **With Unsuccessful Logons** to investigate failed-password locks. SAP documents the report and its results.

Online

An **Online** icon means a session was found for the account when its session information was loaded. A blank means the row is not marked online.

Select the account and choose **Users** → **Refresh** to retrieve its session status. Use Send Message or Log User Off to contact users or end their sessions.

In SAP, **AL08** displays users logged on across the system's application servers. The same list is available through **SM04** → **System-Wide List**. See SAP's session-list reference.

Account locks

Lock Status

Use the lock indication to distinguish an administrator's lock from a lock caused by failed password attempts.

Displayed status	Meaning
Local Administrator	An administrator locked the account in this client.
Incorrect Login	SAP locked password logon after failed attempts.
Locked Globally by Administrator	The account has a global CUA lock.
Globally and Locally locked	Both the global CUA lock and a local administrator lock are set.
Locked by Administrator and Incorrect Logons	A local administrator lock and a failed-password lock are both set.

An unlocked account has no lock icon. To change a lock in userXpress, follow Lock or unlock users. That procedure explains how the selected accounts determine whether the action changes a local or global lock.

SAP's **SUIM** → **Users** → **With Unsuccessful Logons** report identifies administrator locks and failed-password locks, including CUA local and global combinations. See SAP's user-report reference.

Password Lock On

The date SAP recorded for the account's password lock. Use it with **Lock Status** and **Failed Attempts** when investigating a failed-password lock.

On a newly loaded row, a blank means SAP supplied no password-lock date or the connected system does not provide this field. Use **Lock Status** to determine the loaded lock state.

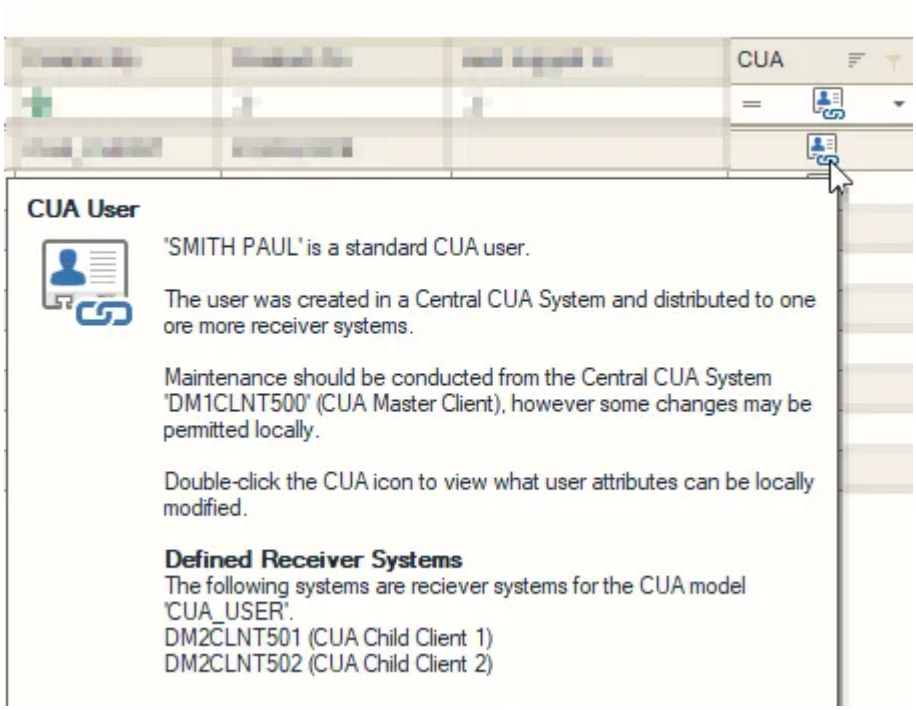
CUA

Central User Administration (CUA) distributes user data from a central SAP system to child systems. The **CUA** column identifies the account's place in that arrangement and any distribution warning or error.

Point to the icon to read its explanation for the account:

- **Template user**: The account distributes user data to receiving systems and cannot log on to the central client.
- **Standard CUA user in a child system**: The account is managed through the central system. Field-distribution settings determine which changes can be made locally.
- **CUA-controlled user in the central system**: Changes made here are distributed according to the CUA settings.
- **Distribution warning or error**: SAP reported a problem when distributing the account. Open **SCUL** in the central system for the detailed message.
- **Local user in a CUA system**: The account is maintained in this client and is outside CUA distribution.
- **Undefined**: A usable CUA status was not retrieved. Open the account's Full Message for any reported error.

A blank CUA cell means no CUA classification was loaded. Accounts in clients without active CUA have a blank cell.



The tooltip identifies the account's central system, distribution model and receiving systems.

Find where an account field is maintained

Use the distribution view before changing a CUA-managed account when you need to identify the responsible system.

1. Double-click the account's **CUA** icon while its client is connected. **CUA Field Distribution** opens.
2. Read **Central System**, **Receiving Systems** and **Client Role** to identify the connected client's place in the CUA model.
3. In **CUA Field Distribution Settings**, find the field by **Description** or **Technical Name**. The marked column identifies its distribution rule.

Field Group groups related fields, and **CUA Model** identifies the distribution model.

- **Global**: Maintain it centrally. SAP distributes the value to child systems.
- **Local**: Maintain it in the child system. The change stays there.
- **Proposal**: The central system supplies the value when creating the account. Subsequent maintenance is local.
- **Redistribute**: Maintain it centrally or locally. A local change returns to the central system for distribution to the other child systems.
- **Everywhere**: Local changes stay in the child system. Central maintenance offers distribution to selected systems through SU01.

This window displays the settings. They are maintained in **SCUM → User Distribution Field Selection** in the central system. See SAP's field-distribution reference for the SAP settings and distribution behavior.

For a distribution warning or error, open **SCUL → Users** in the central system and select the affected user and receiving system. The distribution log provides the result for the affected account data, roles and profiles.

License and development registration

License

The description of the contractual user type assigned directly to the SAP account. Use it to compare those assignments across accounts. userXpress displays the English description. A blank means no assignment or matching English description was loaded.

View or maintain the assignment in **SU01 → License Data → Contractual User Type**. The tab is abbreviated **Lic. Data** in some SAP interfaces. See SAP's classification procedure.

For system measurement, open **USMM → User Classification** in SAP. The resulting classification includes values derived from reference users, roles or defaults, beyond the direct assignment shown in this column. SAP user-classification reference.

Developer Key

The developer registration key stored for the user in SAP. Use it when reviewing registered development accounts in systems that use SAP Software Change Registration (SSCR). A blank means no developer key was loaded.

For systems using SSCR, SAP accepts the developer key in the **Access key** dialog at first development use. The registration applies to that user in that system. See SAP's developer-registration instructions.

Refresh and row messages

Select accounts and choose **Users → Refresh** to update their locks, dates, online status, CUA information and license descriptions.

To reload **Created By** and **Failed Attempts**, disconnect and reconnect the client. Reconnect after a date or developer key has been cleared in SAP, because a selected-user refresh can retain the previous value when SAP returns an empty value.

Rows with an operation error or warning use the colors configured in Settings. Point to a text cell, such as **Last Name**, to read the message. For one account's detailed messages, select it alone and open **Full Message** from its right-click menu.

A gray row indicates an interrupted connection. Restore the connection before using that row for an account operation. For a reported connection or refresh failure, follow Troubleshooting.

Find and select users

Applies to userXpress 2.0.0.0

Filter the Global User Table, select accounts, save and reuse queries, and export a user list.

Start with the users loaded from your connected SAP clients. Before changing an account, check its **System Description** and **Client** values: the same user ID can exist in several clients.

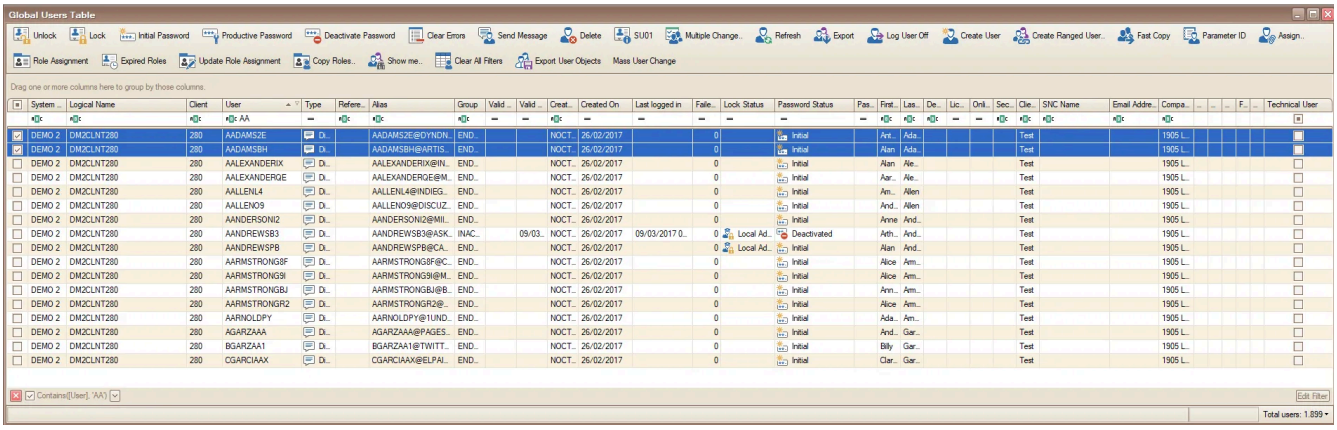
See User table columns: account details for column meanings and how to show optional fields.

Filter and select

1. In the Global User Table, enter a complete or partial value in the filter row beneath the column heading.
2. Enter values beneath other headings to narrow the list further.
3. Select the accounts to act on using their row checkboxes. You can also hold Shift to select a range of rows.
4. Check the selected rows and their **System Description** and **Client** values before opening an action.

Filtering narrows the displayed list. It does not select all matching accounts. Open an action from the table toolbar or by right-clicking a selected row.

If the table selects individual cells instead of account rows, right-click in the table and turn off **Cell Selection** to return to row checkboxes.



The checked rows identify the accounts selected for an action.

Use a built-in query

1. Open **Show Me** and choose the condition you need, such as users who have not logged on within a chosen period.

2. Review the accounts in the filtered table.
3. Select the accounts before opening an administration action.

See Show Me: predefined user filters for each choice and its exact criterion.

A built-in query replaces the current table filter. To display all loaded users again, choose **Show Me** → **Everyone**. Clearing a filter does not undo a completed SAP operation.

Create an advanced query

Use **Edit Filter** when a column filter is not enough. The My Queries guide explains how to add conditions, combine them with AND or OR, group alternatives and save the result. Its examples start with one surname and build up to a client restriction with two alternative surnames.

Save a query

Save a query when you need to use the same filters again. It stores the filter conditions. The matching accounts depend on the data loaded when you use it.

1. Apply the filters you want to keep.
2. Choose **My Queries** → **Save the current query...**
3. Enter a name in **Query Description** and choose **OK**.
4. If that name already exists, confirm replacement only if you want to replace its saved filter conditions. Otherwise, decline replacement and enter a different name.

The saved query appears under **My Queries**. Choose its name to apply it, then select the accounts you want to act on.

To rename or remove a query:

1. Open **My Queries** → **Maintain Queries**.
2. Edit its description to rename it, or select its row and choose **Delete** to remove it.
3. Choose **Save**, then **Close** to return to the table with the updated query menu.

Removing a saved query removes the filter definition, not the SAP accounts.

Export the table

Export uses the rows in the filtered table, including rows whose checkboxes are clear. Filter the list to the accounts you want in the report before starting the export.

1. Choose **Export** in the Global User Table.
2. In the export dialog, select the required **Export Format**.
3. Use **Save As** to choose the destination and filename.
4. Choose **OK** and wait for the export completion message.

5. Open the saved file. Check that it contains the intended users, systems and clients, and review the included columns before sharing it.

Exports can contain account and personal information. Store and share the file according to your organization's access rules. If the export reports an error, read the message and check the destination and filename before trying again.

Export user objects for creation

Choose **Export User Objects** for selected users to create a workbook for Mass User Create. This is a separate action from exporting the visible table.

In userXpress 2.0.0.0, the workbook's target cells start blank and offer System, SID and Client drop-down lists. Fill each intended target once for the batch: every listed destination applies to every user in that batch, regardless of the user's source system.

Open the user in SAP

Use **SU01** to open selected accounts in SAP user maintenance. SAP GUI must be installed, and the connection must use a SAP **Dialog** user authorized for SU01 in the selected client.

1. Select the account rows using their checkboxes.
2. Choose **Users** → **SU01**.
3. For several accounts, the confirmation lists each user ID, system and client. Choose **Open N windows**, where N is the number of selected accounts, to continue. Choose **Cancel** to return to the table.

Each selected account opens in a separate SAP GUI window. You can continue working in userXpress while those windows are open.

To open one account directly, double-click its user ID. This opens the clicked account even when other rows are selected.

With a **SAP logon ticket** connection, SU01 opens at its initial screen. Enter the selected user ID there to continue.

The default SAP GUI window limit is five, shared with PFCG. If the selection exceeds the available capacity, userXpress reports how many records you can open and leaves the selection unopened. Select fewer accounts or close existing windows, then choose **SU01** again.

For opening errors, use SU01 or PFCG does not open.

Show Me: predefined user filters

Applies to userXpress 2.0.0.0

Find inactive, expired, technical and license-related accounts with the Global User Table's predefined filters.

Use **Show Me** to start a review of a familiar account condition without building a query yourself. Each choice filters the Global User Table using the loaded account information.

1. In the Global User Table, open **Show Me** and choose a filter.
2. Select the account rows you want to act on.
3. Open the appropriate user or role command.

A **Show Me** choice replaces the table criteria. To combine its condition with a system, client or user group, open **Edit Filter** afterwards and add the condition. You can save the combined query for the next review.

Users not logged on in last..

Choose a period when reviewing accounts with an old recorded logon. The filter includes accounts whose last-logon date is earlier than the cutoff. Accounts with no last-logon date have their own filter below.

Menu choice	Cutoff
30 Days	Today minus 30 days.
60 Days	Today minus 60 days.
3 Months	Today minus 90 days.
4 Months	Today minus 120 days.
5 Months	Today minus 150 days.
6 Months	Today minus 180 days.
1 Year	Today minus 365 days.

The month and year choices use those fixed day counts. A logon exactly on the cutoff date is excluded.

Account status and details

Menu choice	What it finds and when to use it
Users that never logged on	Accounts with no recorded last-logon date in the loaded data. Use this to review accounts that may still be awaiting their first logon.
Users without a license assigned	Accounts whose displayed license value is empty. Use it to prepare a review of missing license classifications.
Deactivated Users	Accounts with a deactivated password. Use it when reviewing password-based logon. For locked accounts, filter the lock status instead.
Technical Users	Accounts marked as technical users by SAP's address classification. Use it to distinguish these accounts when working with address and person details. This is a different classification from the logon user type.
Users that are expired	Accounts whose validity end date is earlier than yesterday. Blank dates are excluded. For example, on 23 October it includes 21 October and earlier, while 22 October is excluded.
Users with same User ID and Last Name	Accounts where the user ID and last-name values compare equal. Use it to review records where the ID may have been used as a name.
User ID's with non-printable characters	IDs containing a nonbreaking space. Use it when an ID appears to contain an ordinary space but behaves differently when copied or entered.

These filters use the data in the table. Refresh the selected accounts when you need updated values from SAP.

Developer classifications

Menu choice	What it finds
Developers with developer key and no license	A populated developer-key value together with an empty license value.
Developers with license and no developer key	An empty developer-key value together with the displayed license `SAP NetWeaver Developer`.

Use these lists to locate accounts whose developer key and license classification need review. The second filter specifically uses the SAP NetWeaver Developer description.

Everyone and Clear All Filters

Choose **Everyone** to remove the table criteria. Any text in the search box continues to limit the displayed rows.

Choose **Clear All Filters** to remove both the table criteria and the search text. This displays all accounts loaded in the table.

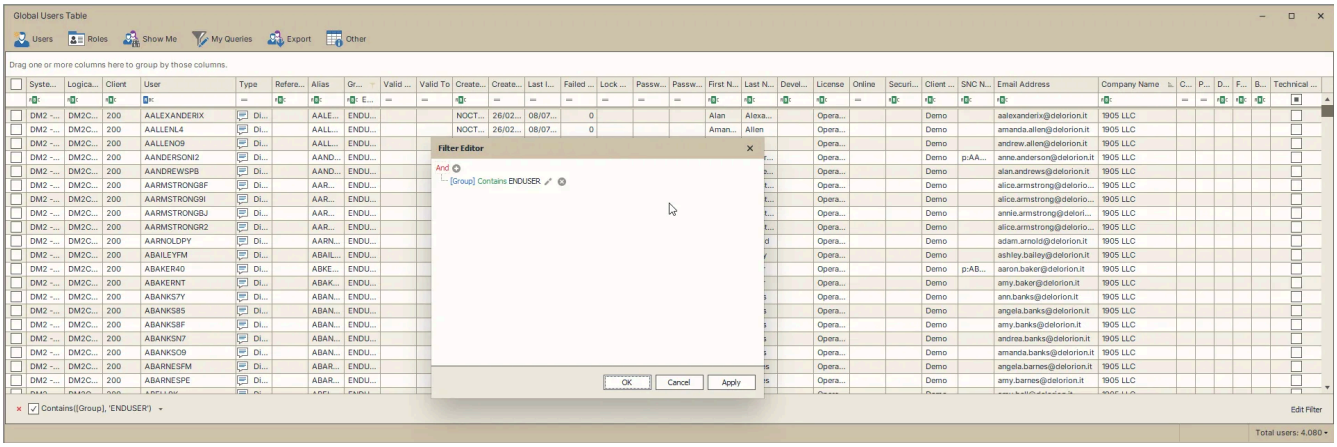
My Queries: build and save user filters

Applies to userXpress 2.0.0.0

Use Edit Filter to combine conditions, group alternatives and save filters for recurring user administration tasks.

Use **My Queries** for lists you need repeatedly, such as accounts in a particular client or people whose details need updating. Build the conditions with **Edit Filter**, then save them under a name you recognize.

A query applies to the accounts loaded in the Global User Table. It saves the conditions you choose. When you use it again, the table shows whichever loaded accounts match those conditions at that time.



Edit Filter opens the conditions shown in the filter panel. This example starts with Group containing ENDUSER.

Start with one condition

Suppose you want accounts whose last name is Smith.

1. In the Global User Table, click **Edit Filter** in the filter panel beneath the rows. To open the editor from a column, right-click its heading and choose **Filter Editor**.
2. Click the field name in the condition and choose **Last Name**.
3. Click the comparison beside it and choose **Equals**.
4. Click the value and enter `Smith`.
5. Choose **OK** to apply the condition and return to the table.

The table now shows accounts whose last name matches Smith. An account with the last name Jones does not match. Select the matching account rows when you are ready to use an account action.

To change the query, click **Edit Filter** again. Click a field, comparison or value to replace it. Use the remove button beside a condition to delete that condition.

Require two conditions with AND

Use **And** when every condition must be true for the same account. For example, find people named Smith in client 100.

1. Open **Edit Filter** with the last-name condition from the previous example.
2. Click the group's logical operator and choose **And**.
3. Choose **Add Condition** from that group's menu, or use its plus button.
4. Set the new condition to **Client**, **Equals**, `100`.
5. Choose **OK**.

A Smith account in client 100 matches. A Smith account in client 200 does not. A Jones account in client 100 does not match either, because both conditions must be true.

The same client number can exist in several SAP systems. Add a **System** condition when the list should be limited to one system as well.

Accept alternatives with OR

Use **Or** when any one condition is enough. For example, find people named Smith or Jones.

1. Open **Edit Filter**.
2. Remove the client condition from the previous example.
3. Click the top group's operator and choose **Or**.
4. Keep **Last Name**, **Equals**, `Smith` as the first condition.
5. Add a second condition: **Last Name**, **Equals**, `Jones`.
6. Choose **OK**.

Both surnames now match, across the loaded clients. **And** would require the same last-name field to equal Smith and Jones at once, so it would return no accounts for this example.

Keep alternatives together with a group

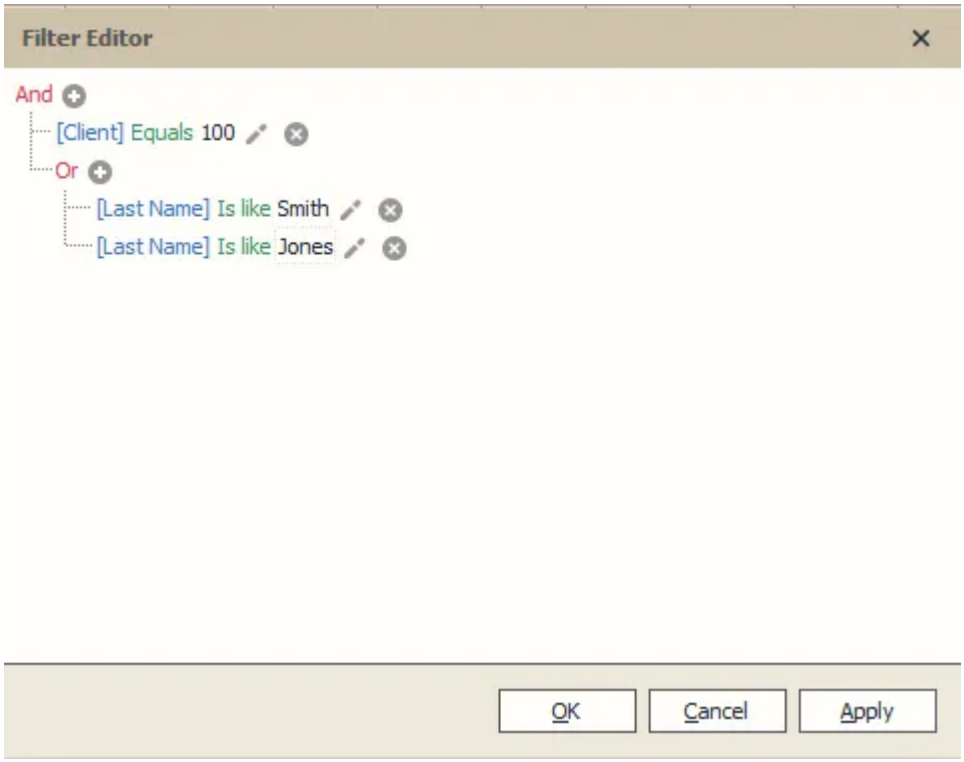
A group lets you combine alternatives with a requirement that applies to all of them. The following query means: "Client 100, and either Smith or Jones."

1. Open **Edit Filter** and choose **Clear All** from the top group's menu to start a new definition.
2. Set the top group to **And**.
3. Add a condition: **Client**, **Equals**, `100`.
4. Open the top **And** menu and choose **Add Group**.

5. Set the new group's operator to **Or**.
6. Inside that **Or** group, add **Last Name**, **Is like**, `Smith`.
7. Add another condition to the same **Or** group: **Last Name**, **Is like**, `Jones`.
8. Choose **OK**.

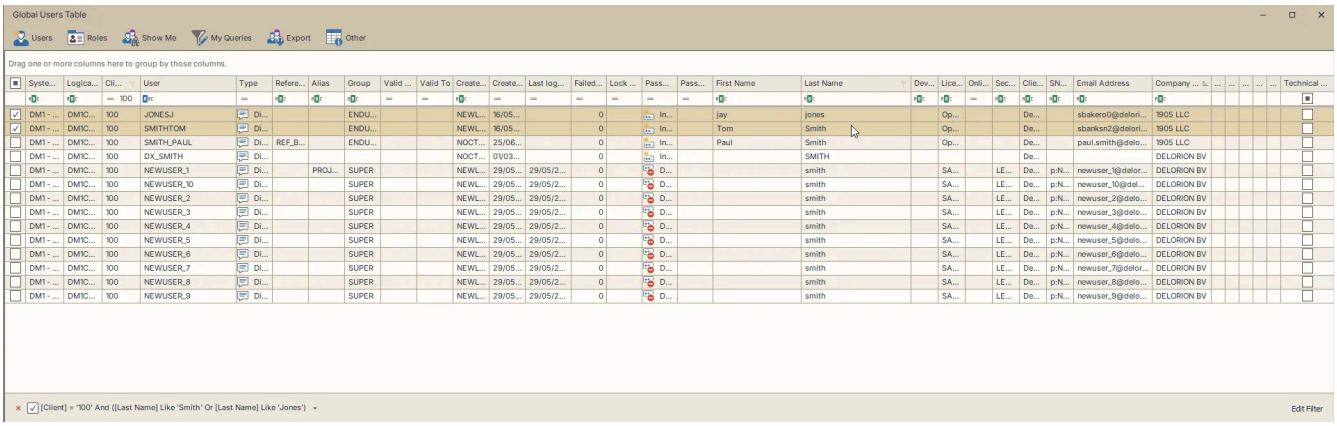
The indentation shows which conditions belong together:

```
And
  Client equals 100
  Or
    Last Name is like Smith
    Last Name is like Jones
```



Example account	Matches?	Reason
Smith in client 100	Yes	Client 100 and one of the two surnames.
Jones in client 100	Yes	Client 100 and one of the two surnames.
Smith in client 200	No	The client requirement is not met.
Brown in client 100	No	Neither surname condition is met.

Keep the client condition outside the **Or** group. Putting all three conditions under **Or** would also include every account in client 100, regardless of surname.



The filter includes Smith and Jones accounts in client 100. The two checked rows are selected for an account action.

Choose the comparison and value

Choose a field first. Its type determines which comparisons and value controls the editor offers.

Value you want to find	How to express it
A complete text value	Use **Equals**, for example Last Name equals `Smith`.
Text within a longer value	Use **Contains**, for example Last Name contains `mit`.
Text at the beginning	Use **Begins with**, for example User ID begins with `DEMO_`.
A date before a cutoff	Choose the date field, a less-than comparison and the cutoff date. A strict less-than condition excludes the cutoff date itself.
A yes/no state	Choose the checkbox field and its true or false value.
A missing date or value	Choose **Is null**. For text that can also be empty, use **Is null or empty**. These conditions do not need a value.

For recurring last-logon reviews, Show Me provides ready-made periods. Use **Edit Filter** when you need additional conditions or a different combination.

Apply or clear the query

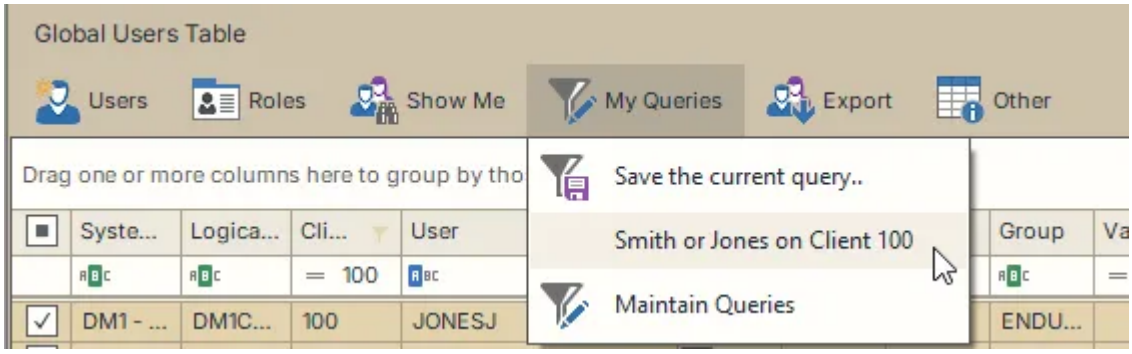
Apply updates the table while keeping the editor open. **OK** applies the query and closes the editor. Reopen **Edit Filter** to adjust a condition when the list is too broad or too narrow.

Choose **Show Me** → **Everyone** to remove the table criteria. Choose **Show Me** → **Clear All Filters** to remove both the criteria and the search text.

Save and reuse a query

1. Apply the conditions you want to keep.
2. Choose **My Queries → Save the current query...**
3. Enter a name in **Query Description**, such as `Smith or Jones on Client 100`, and choose **OK**.
4. If the name already exists, confirm replacement to update that saved query. To keep both versions, decline replacement and enter another name.

The name appears under **My Queries**. Choose it to apply the saved conditions. Then select the accounts for the task you want to perform.



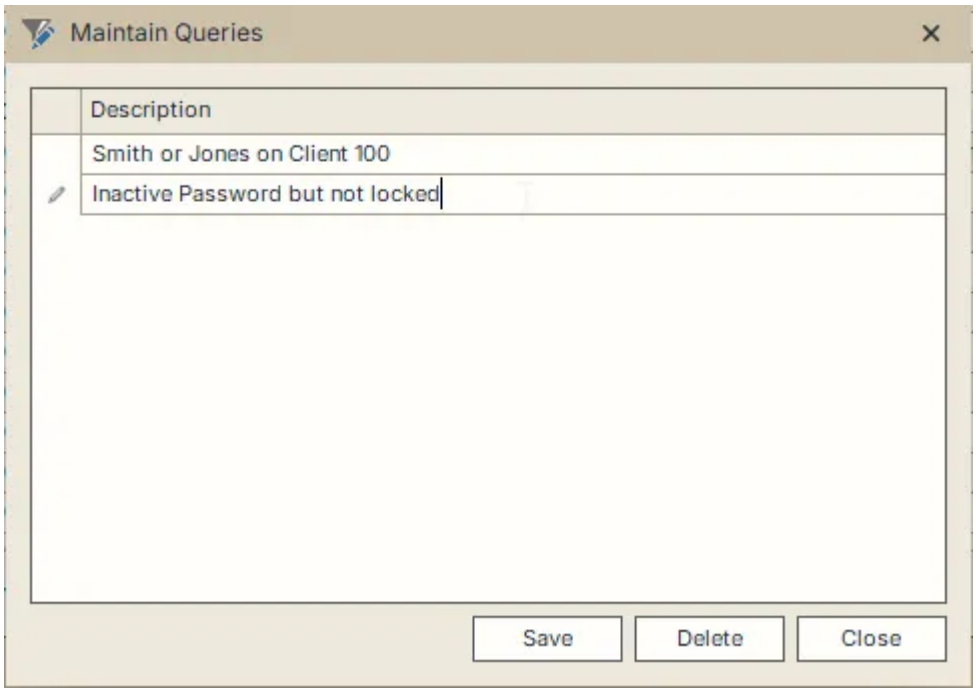
The saved definition contains the table criteria. Put conditions you want to reuse in **Edit Filter** rather than relying on text entered in the separate search box.

To change a saved query, choose its name, edit and apply its conditions, then save it again. Use the same name and confirm replacement to update it, or a different name to keep a second query.

Rename or delete a saved query

1. Open **My Queries → Maintain Queries**.
2. Edit a description to rename the query, or select its row and choose **Delete**.
3. Choose **Save**, then **Close**.

The **My Queries** menu reflects the saved changes.


Maintain Queries
Description
Smith or Jones on Client 100
Inactive Password but not locked
Save
Delete
Close

Lock accounts and manage passwords

Applies to userXpress 2.0.0.0

Choose a password reset, lock or unlock accounts, and read the result for each selected user.

Use the **Users** menu in the **Global User Table** to control logon access for selected accounts.

- **Lock** suspends access to an account. **Unlock** removes its lock when the user can resume work.
- **Initial Password** resets a forgotten password. A dialog user changes this password at the next password logon.
- **Productive Password** sets a password the account can continue using, for example for a technical connection.
- **Deactivate Password** disables password logon, for example for an account that uses SNC single sign-on.

Select the accounts before choosing an action. A password entered for several selected accounts is applied to all of them. Use separate selections when accounts need different passwords.

Lock or unlock users

1. Select the accounts in the **Global User Table**.
2. Choose **Users** → **Lock** or **Users** → **Unlock**.

userXpress refreshes the affected accounts after the operation. For a failure, open the account's Full Message.

When the selection contains only centrally managed accounts on a CUA central system, these actions set or remove the global CUA lock. Select central accounts separately when you intend to change that global lock. A selection that also contains child-system or non-CUA accounts uses the local lock action.

Locking an account prevents logon. To end an existing session, use Log User Off.

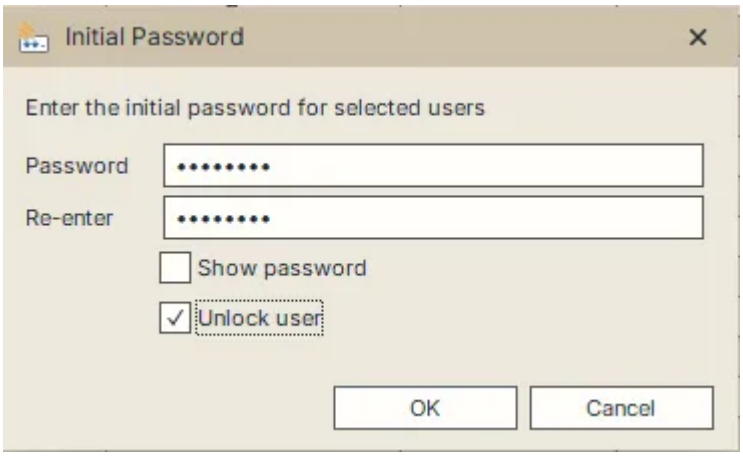
Set an initial password

Use an initial password when the user needs to choose a new password at the next logon.

When the initial-password dialog is disabled in Settings, the command applies the saved default immediately. Use **Users** → **Unlock** separately when unlocking is also required.

1. Select the accounts in the **Global User Table**.
2. Choose **Users** → **Password** → **Initial Password**.
3. Enter the password in **Password** and **Re-enter**. **Show password** reveals both entries.

4. Select **Unlock user** to unlock the accounts as part of the reset. Leave it cleared to reset the password while retaining the lock.
5. Choose **OK**.



If the entries differ, the dialog clears both fields and displays **The passwords do not match**. Enter the password again in both fields.

The password reset and the unlock have separate results. If the reset succeeds but unlocking a locked account fails, the account has the new password and remains locked. Resolve the unlock error and use **Users** → **Unlock** for that account.

Set a productive password

Use a productive password when the account needs a usable password without an initial-password change at its next logon.

When the productive-password dialog is disabled in Settings, the command applies the saved default immediately.

1. Select the accounts in the **Global User Table**.
2. Choose **Users** → **Password** → **Productive Password**.
3. Enter the password in **Password** and **Re-enter**. **Show password** reveals both entries.
4. Choose **OK**.

SAP's password policy applies to the new password. If a password is rejected, point to a text cell in the affected row to read the reason.

A productive-password change first resets the account to a temporary initial password, then sets the requested password. If the second step fails, the old password has already been replaced. Set a new **Initial Password** for the affected account to restore a known password.

Deactivate a password

Use this action to disable password logon while retaining the account's configured single sign-on access.

1. Select the accounts in the **Global User Table**.
2. Choose **Users → Password → Deactivate Password**.

The command deactivates their passwords and refreshes the account information. To allow password logon again, set an initial password or a productive password.

Set password defaults

Save defaults when you regularly use the same initial or productive password. The two defaults are independent.

1. Open **Settings → Passwords**.
2. In **Initial password** or **Productive password**, enter the default password twice.
3. Choose how the corresponding command uses it:
    - Keep **Show Initial Password dialog window** or **Show Production Password dialog window** selected to open a dialog with the saved value filled in. You can change it for that operation.
    - Clear the corresponding option to apply the saved value immediately when you choose the command.
4. Choose **OK** to save the settings.

When no default is saved, userXpress enables the corresponding dialog so you can enter a password. Changing a password in the operation dialog leaves the saved default unchanged.

Read the operation result

The status bar shows operation messages. A row with an error has a tooltip describing the failure. Point to a text cell in that row to read it.

For the SAP messages belonging to one account:

1. Select that account alone.
2. Right-click its row and choose **Full Message**.

Accounts are processed separately. A successful change remains in effect when another account fails. Resolve the reported problem and select only the affected accounts for a retry.

A display-refresh error means userXpress could not retrieve the updated account information. Use **Users → Refresh** to reload it. The refresh error does not undo a successful password or lock change.

Accounts managed through CUA

Central User Administration (CUA) determines which changes can be made in each connected system. When CUA prevents an action, userXpress lists the accounts it will omit and asks whether to continue.

- Choose **Yes** to process the remaining accounts.
- Choose **No** to cancel the operation.

For an omitted account, perform the change through the connection responsible for that setting in your CUA landscape.

Change user details

Applies to userXpress 2.0.0.0

Assign aliases, reference users and security policies, and update company, work-center and personal details for selected SAP accounts.

Use **Users → Change → Assign** in the **Global User Table** to update a particular kind of account detail. For example, assign a new department to a team, or update one person's name across several SAP clients.

Each command applies the values you enter to the selected accounts. To give different people different names or aliases, select and update them separately.

Change an individual attribute

1. Select the accounts in the **Global User Table**.
2. Open **Users → Change → Assign** and choose the command for the detail you want to change.
3. If **CUA Restriction** lists accounts that cannot be changed from their selected client, choose **Yes** to continue with the permitted accounts. Choose **No** to cancel and change the selection.
4. Enter or choose the value as described below, then choose **OK**.

After the operation, userXpress refreshes the affected accounts. The status bar shows operation messages. See Read the operation result for account-specific SAP messages and errors.

Assign an alias

An alias gives an account an alternative identifier. Use it when an application expects a recognizable name in addition to the SAP user ID. Applications that support alias logon can use it in place of the SAP user ID. See SAP's description of aliases.

1. Select the person's account, or their accounts across the required clients.
2. Choose **Users → Change → Assign → Alias...**.
3. Enter the new value under **Enter Alias**.
4. Choose **OK**.

The same alias is sent to every selected account. An alias already assigned to another account in that client causes SAP to reject the assignment for that account. Assigning one person's alias across separate clients avoids applying it to unrelated users in the same client.

To remove an alias, leave **Enter Alias** empty and choose **OK**. Choosing **Close** leaves the accounts unchanged.

Assign or remove email addresses

Use **Users** → **Change** → **Assign** → **Email..** to generate addresses from account fields, change a domain, set a specific address or remove addresses. The proposal shows each account's existing and resulting address before you apply it.

Follow Assign email addresses for patterns, editable proposals, duplicate-address choices and results.

Assign a reference user or security policy

Reference user

Assign a reference user when several accounts need authorizations maintained through the same reference account. Each account receives that reference user's authorizations in addition to its directly assigned access. See SAP's explanation of reference users.

1. Select the accounts that should use the reference user.
2. Choose **Users** → **Change** → **Assign** → **Reference User...**
3. Under **Select a Reference User**, choose the reference account. The list contains reference users present in every selected client.
4. Leave **Remove existing roles & profiles from user(s)** clear to retain the accounts' own role and profile assignments.
5. Choose **OK**.

If the reference user is available in only some clients, close the dialog and select accounts from those clients.

Select **Remove existing roles & profiles from user(s)** only when the operation should also remove the accounts' directly assigned roles and profiles. The reference assignment and removals are separate changes: removals can proceed even when SAP rejects the reference assignment. If an error is reported, open **Full Message** for the affected account to identify the results of each part before retrying.

To remove the reference-user assignment while retaining direct access, clear **Select a Reference User**, leave the removal checkbox clear and choose **OK**.

Security policy

Use a security policy when selected accounts need a particular set of password and logon rules. For example, a policy can define password length, password-change rules and logon restrictions. The policy's attributes govern those accounts' behavior as described in SAP's security-policy documentation.

1. Select the accounts that should receive the policy.
2. Choose **Users** → **Change** → **Assign** → **Security Policy...**
3. Choose an existing policy under **Select a Security Policy**.

4. Choose **OK**.

The list contains policy names common to the selected clients that support security policies. Accounts in systems without that support are skipped with the message **This system does not support Security Policy assignment.**

The dialog assigns a policy from the list. To use a policy offered in only some clients, select accounts from those clients and reopen the command.

Update organization and name details

Use these commands for a person's company, department, location or name. SAP shows these details on the **Address** tab in **SU01**, under **Company**, **Work Center** and **Person**. See SAP's Address tab reference.

userXpress skips accounts classified by SAP as technical users for these person/address updates.

Company name

Use **Company Name** when the selected accounts should be associated with an existing company, for example after employees move to another company in the organization.

1. Select the accounts to update.
2. Choose **Users** → **Change** → **Assign** → **Company Name**.
3. Choose the company under **Select a Company**.
4. Choose **OK**.

The same company name is assigned to each selected account. To create or edit the company address itself, use SAP transaction **SUCOMP**, as described in the Address tab reference.

Work center

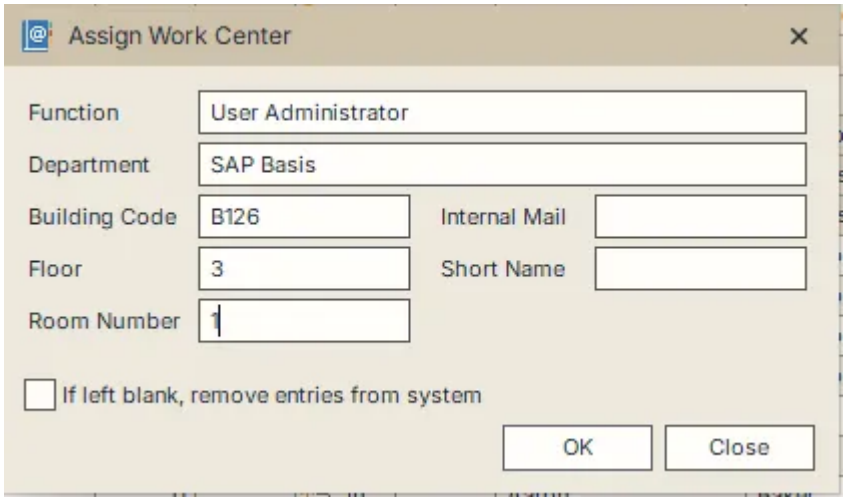
Use **Work Center..** to update organizational and location details, for example when a team moves to another department or building.

1. Select the accounts that need the same changes.
2. Choose **Users** → **Change** → **Assign** → **Work Center...**
3. Fill in the fields to update: **Function**, **Department**, **Building Code**, **Floor**, **Room Number**, **Internal Mail** or **Short Name**.
4. Leave **If left blank, remove entries from system** clear to retain the existing values in all fields you leave empty.
5. Choose **OK**. If the productive-client confirmation appears, choose **Yes** to apply the change there or **No** to cancel.

Function describes the person's job or function. **Internal Mail** is the internal postal code, and **Short Name** is the short name used for correspondence. SAP describes these in its workplace-address field reference.

For example, enter a new **Department** and leave the other fields empty with the checkbox clear. Each account receives the department, while its function and location details remain as they are.

To clear work-center fields, select **If left blank, remove entries from system**. Every empty field in this dialog is then cleared in every selected account. Fill in any other work-center values that must remain before choosing **OK**. If those retained values differ between accounts, update the accounts separately.



Internal Mail and Short Name are empty. With the removal checkbox clear, their existing values are retained.

Name information

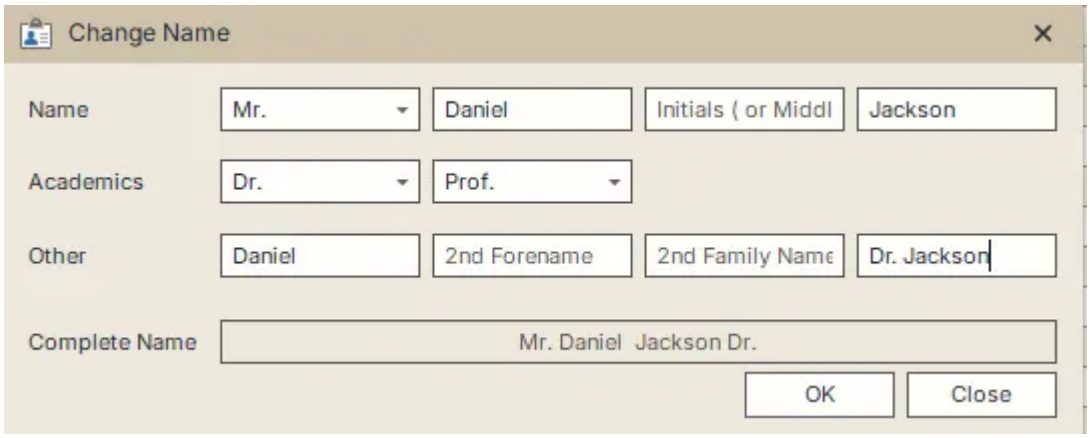
Use **Name Information..** to correct a person's name or apply a name change to their accounts in several clients.

1. Select that person's accounts.
2. Choose **Users** → **Change** → **Assign** → **Name Information...** The **Change Name** dialog opens.
3. Enter the name parts to change. Leave other fields empty to retain each account's existing values.
4. Choose **OK**.

The dialog groups the fields as follows:

- **Name**: **Title**, **First**, **Initials (or Middle)** and **Last**.
- **Academics**: **Academic Title** and **Second Title**.
- **Other**: **Name at Birth**, **2nd Forename**, **2nd Family Name** and **Nickname**.

The title lists offer values common to the selected clients. **Complete Name** is a read-only preview assembled from the title, first name, initials, last name and first academic title entered in the dialog.



For example, enter a new **Last** name and leave the other fields empty to change the surname while keeping each account's remaining name details. Every account selected for this command receives the same entered name parts.

Other account details

- Assign SNC names to associate accounts with their SNC identities.
- Manage user groups to change the authorization-check group or general group memberships.

Apply several changes together

Use **Users** → **Change** → **Mass** → **Multiple Change..** when the selected accounts need the same combination of changes. For example, extend their validity dates and unlock them together.

Follow Make several account changes together for the procedure and all option groups, including which empty fields retain or clear existing values.

Manage parameter IDs

Use **Users** → **Change** → **Assign** → **Parameter ID** to set default values used by SAP transactions. Follow Manage parameter IDs for the four update modes and their effects on existing parameters.

Read the operation result

For the SAP messages belonging to one account:

1. Select that account alone in the **Global User Table**.
2. Right-click its row and choose **Full Message**.

A marked row also has a tooltip describing its error or warning. Point to an ordinary text cell in that row to read it.

Accounts are processed separately. A successful change remains in effect if another account fails. Resolve the reported problem and select the affected accounts for another attempt.

A display-refresh error means the table could still show older values after a successful SAP change. Use **Refresh** for the affected accounts before repeating the change.

Delete users

Use **Users** → **Change** → **Delete** when the SAP accounts are to be removed. Follow Delete accounts for the confirmation list, CUA scope, cancellation and results.

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

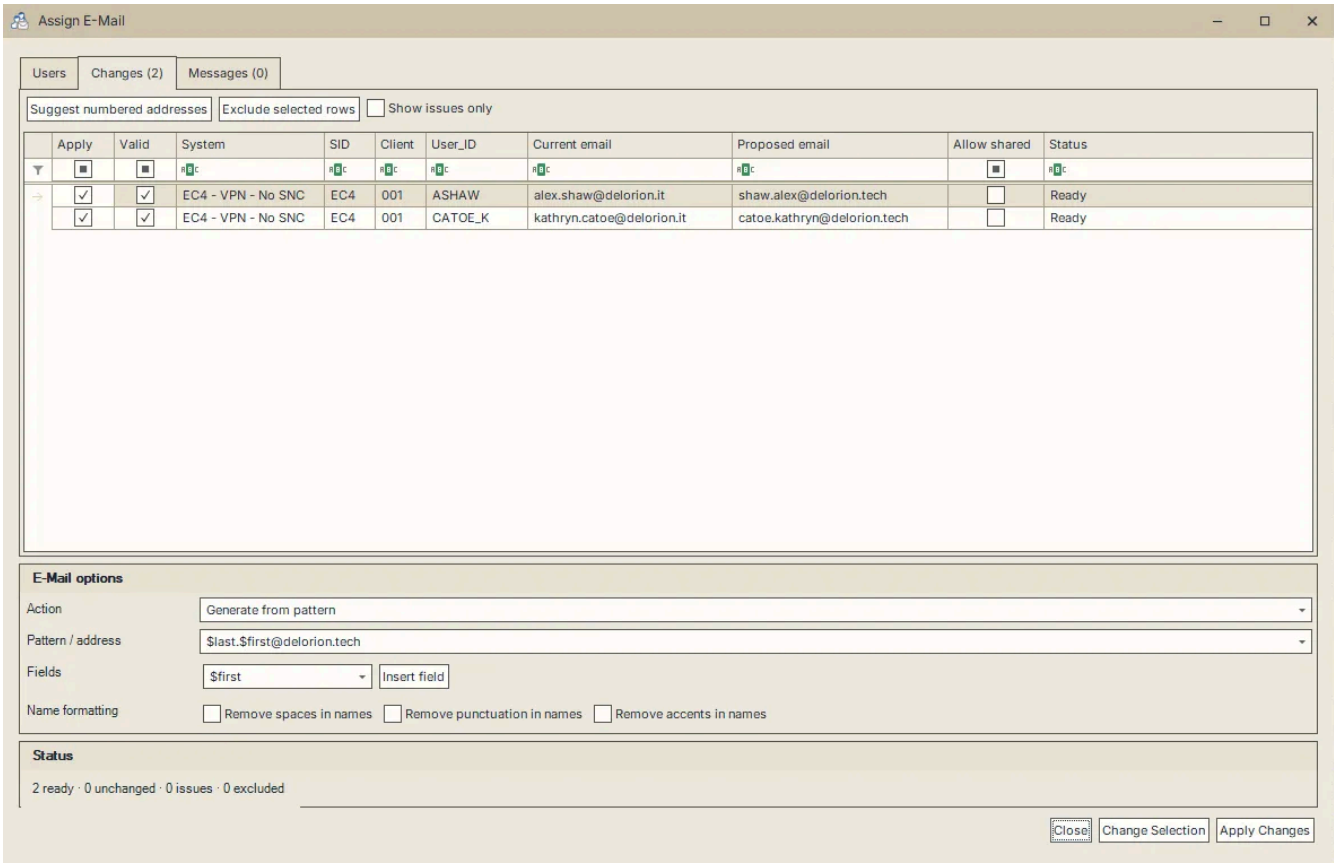
Review Changes prepares the proposal. **Apply Changes** sends the included changes to SAP.

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.

Make several account changes together

Applies to userXpress 2.0.0.0

Combine password, locking, validity, authorization and default-setting changes for selected SAP accounts.

Use **Multiple Change..** when selected accounts need the same combination of changes. For example, extend a contractor's validity date and unlock their accounts in several clients, or change a team's language and number formats.

Each enabled option applies to every selected account. For different values per account, prepare a Mass Changes workbook.

Apply a combination of changes

1. Select the accounts in the **Global User Table**.
2. Choose **Users** → **Change** → **Mass** → **Multiple Change...**
3. If **CUA Restriction** lists accounts that cannot be changed from their selected client, choose **Yes** to continue with the permitted accounts. Choose **No** to cancel and change the selection.
4. The **Multiple Changes** dialog opens after userXpress loads the common groups and licenses. Select the checkboxes for the changes to apply, then enter or choose their values.
5. Choose **OK** to apply the enabled changes. Choose **Close** to leave without applying them.

All change categories start unchecked. The dialog starts with blank fields and default choices rather than each account's existing values.

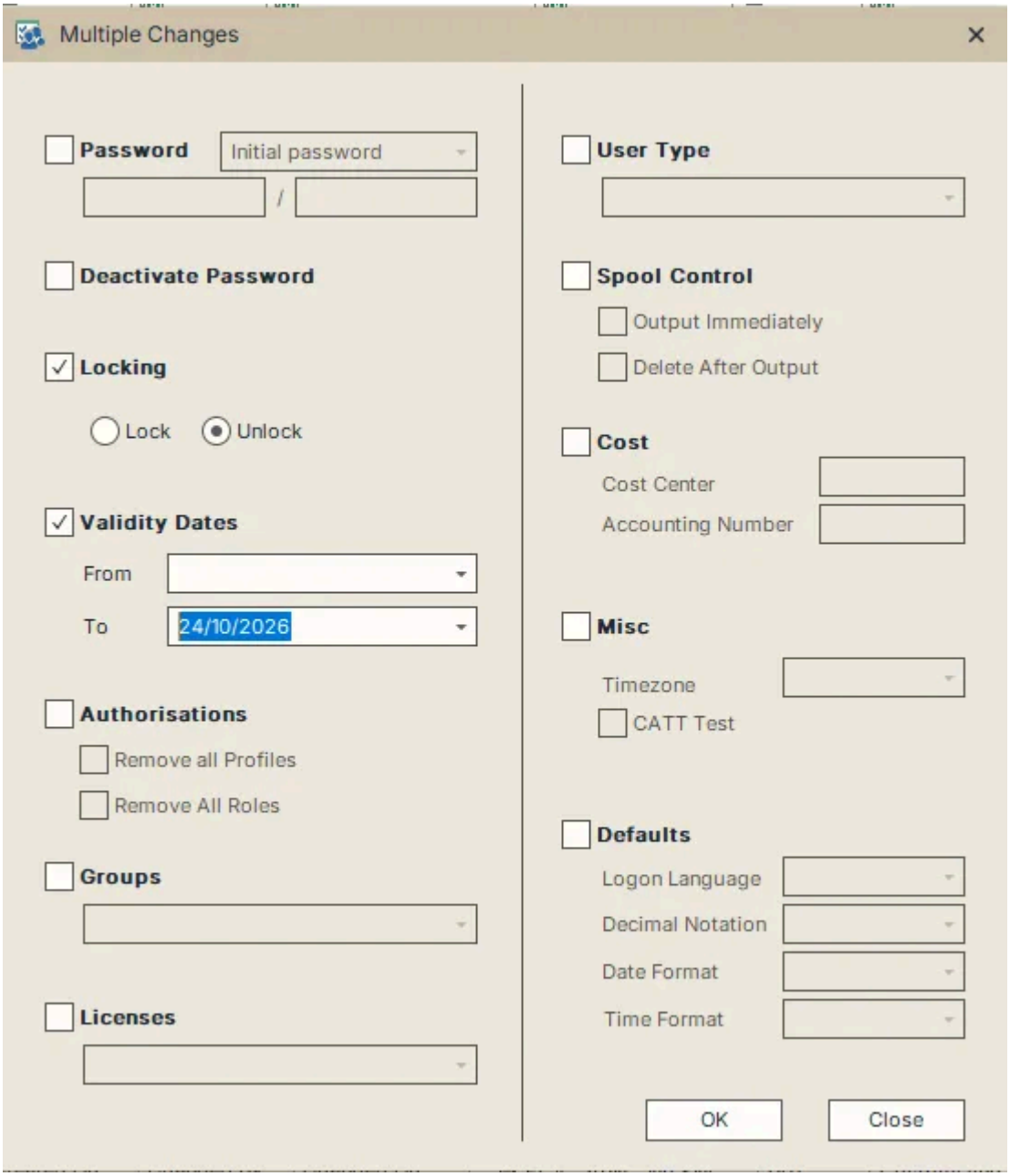
userXpress processes the accounts and refreshes their rows. The progress window shows **Changing users: n/total**. This counts processed accounts, including accounts with errors. See Read the results for the outcome of each requested change.

Example: extend validity and unlock

To restore access for a contractor whose engagement has been extended:

1. Select the contractor's accounts and open **Multiple Change...**
2. Select **Validity Dates** and enter the new **To** date. Leave **From** empty to retain each account's existing start date.
3. Select **Locking** and choose **Unlock**.
4. Choose **OK**.

Both changes are requested for each selected account. If SAP accepts one change and rejects another, the accepted change remains in effect.



Locking and Validity Dates are enabled. Unlock is selected, and only the validity end date is filled in.

Password and locking

Password

Select **Password**, choose a password type and enter the same password in both password fields. The chosen value is applied to all selected accounts.

- **Initial password** is selected by default. Use it to reset access so a dialog user changes the password at their next password logon.
- **Productive password** sets the password for continued use without the initial-password change prompt. Use it when you need to assign the usable password directly.

Changing the password type clears both password fields. SAP's password rules apply to each account. For the distinction between password types and the consequences of a failed productive-password reset, see Passwords, locks and access.

Deactivate Password

Select **Deactivate Password** to disable password-based logon for the selected accounts, for example when they use SNC single sign-on. Selecting it clears **Password**, and selecting **Password** clears **Deactivate Password**.

Locking

Select **Locking**, then choose **Lock** or **Unlock**. **Unlock** is the initial choice. Choose **Lock** to prevent account logon, or **Unlock** to remove the account lock as part of the combined change.

Validity Dates

Select **Validity Dates** to change when an account is valid:

- **From** sets the first valid date.
- **To** sets the last valid date.
- An empty date field retains that account's existing date.

For example, enter only **To** when extending several accounts that have different start dates. If you enter both dates, **From** must be on or before **To**.

Authorisations

Select **Authorisations**, then choose the assignments to remove:

- **Remove all Profiles** removes the account's assigned profiles.
- **Remove All Roles** removes the account's assigned roles.

Use these choices when the selected accounts' existing assignments are to be cleared. Each checked removal applies to all selected accounts. Leave a removal checkbox clear to retain that kind of assignment.

Removal is a separate part of the operation. A later failure to change another field does not restore assignments that SAP has already removed.

Groups

Select **Groups** and choose the user group for authorization checks, for example when moving accounts into another administration group. The list contains groups common to the selected clients.

This changes the group in the account's logon data. To combine, replace or remove general group memberships, use Usergroup Management.

User Type

Select **User Type**, then choose the type that matches the account's purpose:

- **Dialog**: a person signs in and works interactively.
- **System**: background processing or communication within a system.
- **Communication**: external RFC communication without interactive dialog logon.
- **Reference (Logon not possible)**: supplies additional authorizations to other users. The account cannot sign in.
- **Service**: interactive access shared by a larger, anonymous group of users.

These purposes follow SAP's user-type definitions. Selecting a different type changes how the account can be used. Leave the blank entry selected to retain each account's type.

Cost

Select **Cost** to set **Cost Center** and **Accounting Number**. SAP uses the accounting number to allocate usage costs to an individual or group account. See SAP's accounting-number explanation.

Enabling **Cost** replaces both values. An empty field clears the corresponding value in every selected account. Enter both values when both must be retained or set. If the accounts need different retained values, use separate selections or a Mass Changes workbook.

Defaults

Select **Defaults** to change the selected accounts' SAP language or display formats. Choose values only for the fields you want to change. A blank list entry retains the existing setting.

- **Logon Language** sets the default language for SAP logon. The user can choose another language on the logon screen.
- **Decimal Notation** chooses the decimal and thousands separators, such as `1,234,567.89` or `1.234.567,89`.
- **Date Format** chooses the date layout, such as `DD.MM.YYYY` or `YYYY-MM-DD`.
- **Time Format** chooses 24-hour or 12-hour display, including the AM/PM style.

For example, select **Defaults** and choose **Date Format** only to standardize dates while retaining each account's language and number format. SAP describes these settings in User defaults and options.

Spool Control

Select **Spool Control** to change the print defaults:

- **Output Immediately** selects immediate printing by default. Clear it to leave requests in the spool for later output.

- **Delete After Output** selects removal of the spool request after output. Clear it to retain the request.

Both checkbox states are applied when **Spool Control** is enabled. Set each to the required state, including a setting you want to retain. These are defaults for subsequent print requests. Users can change them in SAP's print dialog, as described in SAP print personalization.

Misc

Select **Misc** to change **CATT Test**, **Timezone**, or both.

- **CATT Test** makes CATT save management data for each test-case run. Use it for accounts that need this record. See SAP's CATT test-case reference.
- **Timezone** sets the account's personal time zone. Choose the zone from the list. The blank entry retains each account's existing zone.

Enabling **Misc** always applies the **CATT Test** checkbox state, including when you only choose a time zone. Set the checkbox to the required state for the selected accounts before choosing **OK**.

Licenses

Select **Licenses** and choose the SAP license classification to assign. Use this when the selected accounts need the same classification.

The list contains active license types common to the selected clients. Choose the intended named entry before applying the change. Leave **Licenses** unchecked to retain each account's classification.

If the common group or license lists could not be retrieved, userXpress displays a message before opening the dialog. The other change categories remain available. To assign a value that exists in only one client, select that client's accounts and open the dialog again.

Read the results

An account can have several results because role removal, locking and other changes are processed separately. To read its SAP messages:

1. Select that account alone in the **Global User Table**.
2. Right-click its row and choose **Full Message**.

Use the messages for the individual changes when deciding what to retry. The status bar shows the last reported message, which does not summarize every part of the operation. A row marked with an error also has a tooltip over its text cells.

Successful changes remain in effect when another change or account fails. Resolve the reported problem and repeat only the outstanding changes for the affected accounts.

If the display refresh fails after SAP changes finish, choose **Refresh** for the affected accounts to load their values before repeating a change.

Stop a running operation

Close the progress window to request cancellation. userXpress finishes work already started for an account and stops starting further accounts. Completed changes remain in effect.

Wait for the operation to finish. The status bar reports how many users were not started, or that cancellation was requested after all user changes had started. Unprocessed accounts can retain their earlier row messages. Refresh the intended accounts and use their values and **Full Message** results to choose any remaining changes.

Assign SNC names

Applies to userXpress 2.0.0.0

Assign SAP sign-on identities from user IDs, names or email addresses, and choose how to handle existing SNC assignments.

An SNC name links a SAP account to the user's identity in your single sign-on system. Use **SNC Name..** to assign these identities to new accounts or update accounts when your organization's naming format changes.

Use the SNC name format configured by your SAP administrator. The prefix, capitalization, punctuation and spaces form part of the name.

Assign a name

1. In the **Global User Table**, select the accounts to update.
2. Choose **Users** → **Change** → **Assign** → **SNC Name..**. The **Assign SNC** dialog opens.
3. Choose **Standard** for a prefix, SAP user ID and suffix. Choose **Advanced** to use names, email addresses, a different capitalization or a fixed name. Both modes are explained below.
4. Enter **Previous** and **Following** for **Standard**, or an expression in **Literal** for **Advanced**. The sections below give examples.
5. Set **Only change users without SNC assignment** and **Permit password logon for SAP GUI** as described below.
6. Read **Example** to see the generated name for the first selected account. userXpress uses each account's own details when applying the expression.
7. Choose **OK**. If the productive-client confirmation appears, choose **Yes** to apply the change there or **No** to cancel.

The progress window closes when processing finishes. userXpress refreshes the affected accounts in the Global User Table. Choose **Close** in **Assign SNC** to leave without applying the entered values.

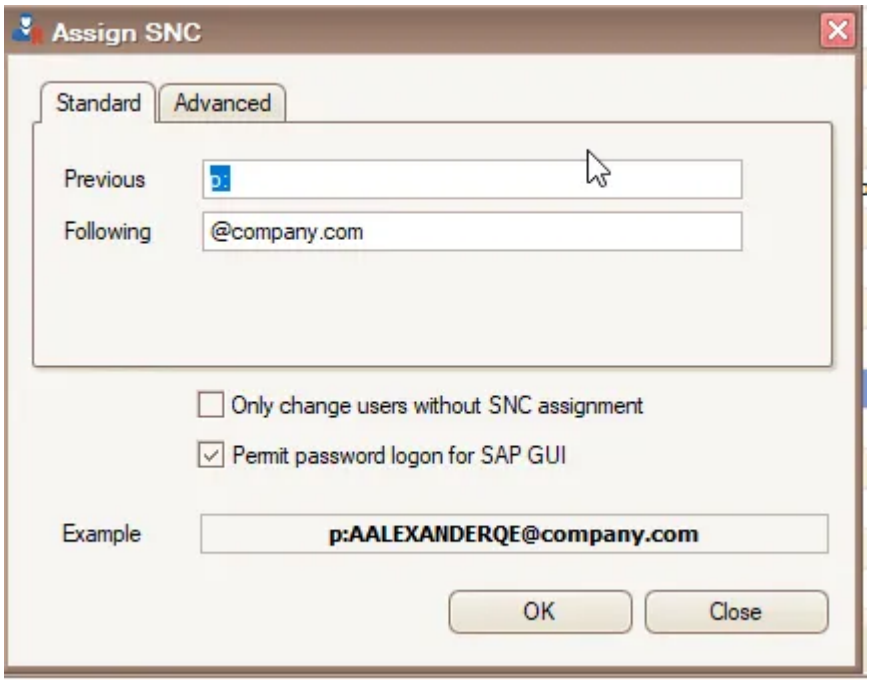
Standard: use the SAP user ID

Use **Standard** when the SNC name contains the SAP user ID exactly as it appears in the Global User Table.

- In **Previous**, enter the text before the user ID.
- In **Following**, enter the text after the user ID.

For example, **Previous** `p:` and **Following** `@example.com` produce `p:SMITH_J@example.com` for user `SMITH_J`.

You can leave either field empty. **Leaving both fields empty removes the SNC name.** To use only the user ID, choose **Advanced** and enter `$USER` instead.



Advanced: build a name from account details

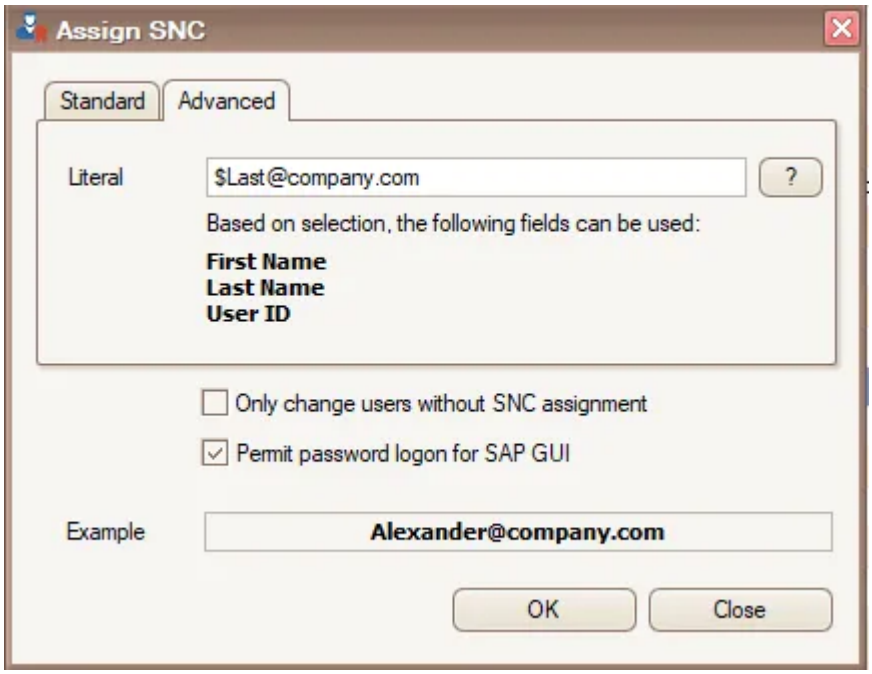
Use **Advanced** when the name contains an email address, combines name parts or requires a particular capitalization.

Enter the expression in **Literal**. Combine variables with the fixed text required by your naming format. For example, `p:$first.$last@example.com` produces `p:john.smith@example.com` for John Smith.

The field list under **Literal** shows which attributes are present for every selected account. Use those attributes in your expression. Email expressions also require a first name for every selected account.

For a single account, you can enter its complete SNC name as fixed text in **Literal**. Fixed text is assigned unchanged to every selected account, so select that account alone.

The **?** button opens the variable reference in your browser.



Existing assignments and password logon

Only change users without SNC assignment

Select this option when adding SNC names to accounts that do not yet have one. Accounts with an existing SNC name are skipped, preserving both their name and password-logon setting.

The option is clear by default. Leave it clear when you want to replace existing names or remove assignments.

Permit password logon for SAP GUI

This option is selected by default in userXpress. It sets the account's permission to use a SAP user ID and password in addition to SNC sign-on. Clear it when the account should use SNC sign-on only.

SAP applies this per-user choice when SNC is enabled and password logon is controlled per user: `snc/enable = 1` and `snc/accept_insecure_gui = U`. See SAP's SNC user settings for the relationship with the system settings.

Variable reference

Variable names are case-sensitive. Use one casing variant per attribute in an expression.

For each attribute, the variants below produce uppercase, initial-capital and lowercase values, in that order.

Attribute	Variables
First name	`$FIRST`, `$First`, `$first`
Last name	`$LAST`, `$Last`, `$last`

Attribute	Variables
Email	`$EMAIL`, `$Email`, `$email`
User ID	`$USER`, `$User`, `$user`

Initial capital uppercases the first character and lowercases the rest. For example, `$Last` changes `McDonald` to `Mcdonald`. Choose the variant required by the sign-on identity.

Examples

For user ID `SMITH_J`, first name `John`, last name `Smith` and email `john.smith@example.com`:

- `$First.$Last@example.com` becomes `John.Smith@example.com`.
- `p:$user@sales.example.com` becomes `p:smith_j@sales.example.com`.
- `p:$email` becomes `p:john.smith@example.com`.
- `p:CN=$user, O=example, C=US` becomes `p:CN=smith_j, O=example, C=US`.

Remove SNC names

1. Select the accounts and open **Users** → **Change** → **Assign** → **SNC Name...**.
2. On **Standard**, empty both **Previous** and **Following**. **Example** becomes empty.
3. Clear **Only change users without SNC assignment** so accounts with names are included.
4. Set **Permit password logon for SAP GUI** for those accounts, then choose **OK**.

This clears the SNC identity from each selected account and applies the password-logon choice.

Read the results

Select one account in the Global User Table, right-click its row and choose **Full Message** to read its SAP messages. Point to a text cell in a marked row to read its error or warning.

SNC already set. Skipped change (Skip user flag set). means the account was preserved by **Only change users without SNC assignment**.

Accounts are processed separately. If one fails, successful changes to other accounts remain applied. Follow the account's message to resolve the cause and select the affected accounts for another attempt. If a display-refresh error is reported, use **Refresh** to retrieve the account values before repeating the assignment.

To stop processing, close the progress window. userXpress finishes active work and reports how many users were not started. Completed changes remain applied.

If a variable is unavailable

- If an attribute is missing from the list under **Literal**, update the affected accounts' name information or email addresses, or select accounts with the required values. Reopen **Assign SNC** after updating the Global User Table.
- If an email expression reports missing data even though every account has an email address, supply the missing first names or select accounts that have them.
- If **Example** still contains a variable token, match its spelling and capitalization to the reference above. Use only one variant of each attribute, such as `$first` rather than both `$first` and `$FIRST` in the same expression.

Manage user groups

Applies to userXpress 2.0.0.0

Set the authorization-check group and combine, replace or remove general group memberships for selected SAP accounts.

Use **Usergroups...** when users move to another administration group or need different group memberships for mass maintenance. You can update selected accounts across several SAP clients in one window.

SAP has two group assignments with different purposes:

- **Logon Data: User group for authorization check** assigns one group to an account. SAP uses this group to determine which user administrators can maintain the account.
- **Groups: General user-group memberships** assigns one or more groups for organizing users, for example for mass maintenance in SAP transaction **SU10**.

These correspond to the **Logon Data** and **Groups** tabs in **SU01**. SAP explains the distinction in User Groups.

Open Usergroup Management

1. In the **Global User Table**, select the accounts to update.
2. Choose **Users** → **Change** → **Assign** → **Usergroups...**.
3. If **CUA Restriction** appears, choose **Yes** to continue with the permitted accounts, or **No** to cancel and change the selection.
4. Wait for **Usergroup Management** to load the available groups and the selected accounts' assignments.
5. Enable the section you want to change, then follow the corresponding procedure below. Enable both sections to change both assignments together.

The available groups are those that exist in every selected client. To use a group available in only some clients, close the window and select accounts from those clients.

With one account selected, its existing general memberships are checked in the group list. With several accounts selected, the group list starts unchecked. **Assigned users** shows how many selected accounts belong to each group.

Set the group for authorization checks

Use this section when an account should fall within a different user administrator's area of responsibility.

1. Select **Change Logon Data usergroup**.

2. Choose the group from the list under **Logon Data: User group for authorization check**.
3. In **Selected users: Preview and results**, **Logon Data** shows each account's existing group and **Proposed Logon Data** shows the new group.
4. Choose **OK** to apply the change.

The chosen group replaces the authorization-check group for every selected account. General group memberships stay as they are unless **Change Groups memberships** is also selected.

To remove the authorization-check group, select **Change Logon Data usergroup** and **Clear Logon Data usergroup**, then choose **OK**. An account without this group can be maintained by administrators authorized to maintain any user group. See SAP's explanation of the authorization-check group.

Change general group memberships

1. Select **Change Groups memberships**.
2. In the group list, use **Selected** to check the groups for the operation.
3. Choose the update mode described below.
4. The lower table shows the resulting membership for each selected account and group.
5. Choose **OK** to apply the changes.

Combine with existing groups

Use this default mode to add memberships while retaining each account's existing groups. A group already assigned to an account is retained once.

For example, combining `FINANCE` with an account's existing `PROJECT_A` membership leaves it in both groups.

Replace all existing groups with selected groups

Use this mode when all selected accounts should have the same complete set of general memberships. Groups outside the checked selection are removed from each account.

For example, replacing `PROJECT_A` and `PROJECT_B` with `FINANCE` leaves only `FINANCE`.

Choosing this mode with no groups checked removes all general memberships. The authorization-check group is controlled separately by **Change Logon Data usergroup**.

Remove selected groups

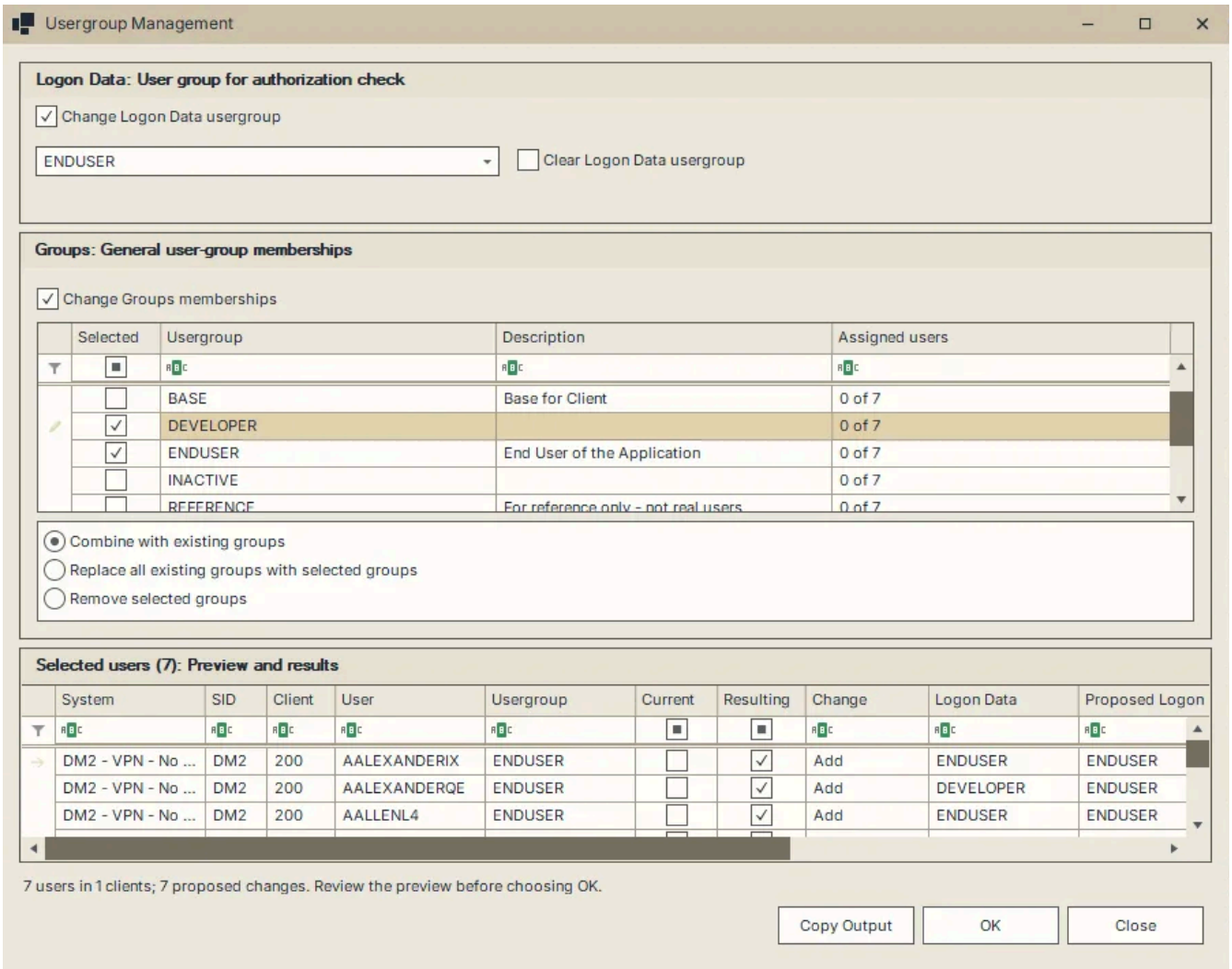
Use this mode to remove particular memberships and keep the others. Removing `PROJECT_A` from an account in `PROJECT_A` and `FINANCE` leaves `FINANCE`.

In **Combine with existing groups** or **Remove selected groups**, an empty group selection leaves general memberships unchanged.

Understand the preview and results

The lower table identifies each account by **System**, **SID**, **Client** and **User**. An account can have several rows, one for each existing or proposed general group:

- **Usergroup** identifies the general membership. A blank value accompanies **No memberships**.
- **Current** is checked when the account belongs to that group before the proposed change.
- **Resulting** is checked when the proposed change leaves the account in that group.
- **Change** shows **Add**, **Remove**, **Keep** or **No memberships**.
- **Logon Data** and **Proposed Logon Data** show the existing and proposed authorization-check group. An empty value means no group is assigned.
- **Result** shows **Pending** or **No change** before you apply the operation, then the account's result or error message.



The preview shows seven proposed account changes. ENDUSER is the proposed logon group, and selected memberships will be combined with existing groups.

OK is enabled when the chosen options produce at least one change. Filtering either table changes which rows you see. The operation still uses the original account selection and the group checkboxes.

After processing, the status area says **Usergroup changes finished.** or reports that the operation finished with errors. **Result** contains each account's outcome. Successful changes are reflected in the **Global User Table**. Choose **Copy Output** to copy the displayed preview/result rows to the clipboard.

Stop or resolve an interrupted change

Choose **Stop** while the operation is running. userXpress finishes active SAP work and refreshes, then reports completed accounts and those stopped before processing. Completed changes remain in SAP.

Use the message in **Result** to choose the next action:

- **The user's groups changed after loading**: close and reopen **Usergroup Management** to load the new assignments before choosing the change again.
- **Group readback failed** or **SAP's group readback differs from the requested assignments**: open the affected account in **SU01** to see its saved groups before repeating the change.
- **Display refresh failed**: use **Refresh** for the affected account in the **Global User Table**. The SAP change and the display refresh have separate results.
- **Assignments were not loaded**: close the window and reopen it after resolving the reported connection or SAP error.

Manage parameter IDs

Applies to userXpress 2.0.0.0

Set SAP user defaults for selected accounts, keeping, overwriting or removing their existing parameter values.

Parameter IDs store user-specific defaults that SAP transactions can use to fill fields. Use **Parameter ID** to apply the same defaults to several accounts, update an existing default or remove one that users no longer need.

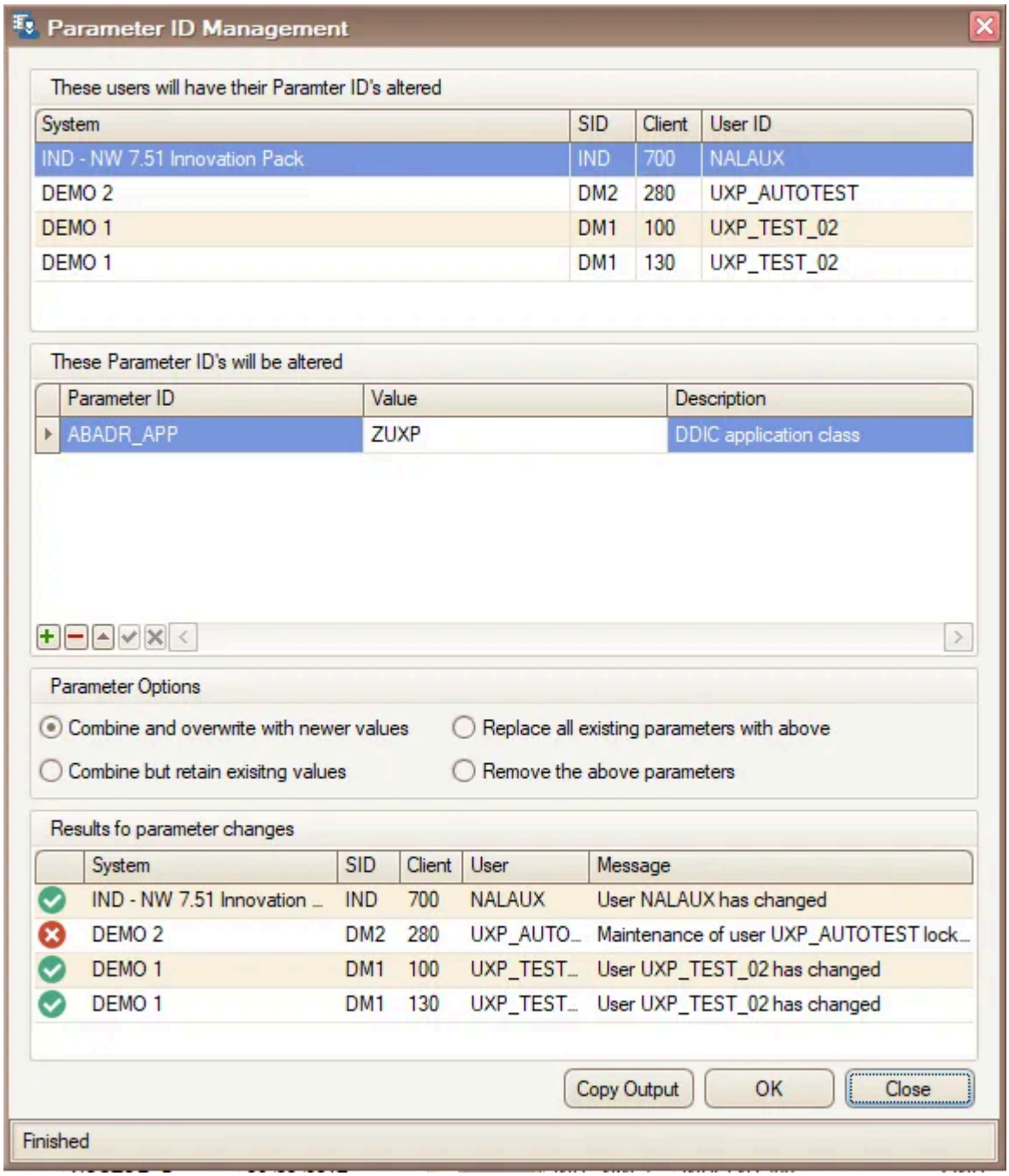
You prepare one list of parameter IDs and values. userXpress applies it to every selected account, using the update option you choose for each account's existing parameters.

Prepare the change

1. In the **Global User Table**, select the accounts to change.
2. Choose **Users** → **Change** → **Assign** → **Parameter ID**. **Parameter ID Management** opens with the selected users and their systems and clients in the upper list.
3. Wait for the parameter catalogue to load. **OK** becomes available when loading finishes.
4. Choose **+** below the parameter list to add a row. In **Parameter ID**, open the dropdown and choose the ID. Its **Description** appears beside it.
5. Enter the default in **Value**. Repeat for each parameter, listing each ID once. For **Remove the above parameters**, choose the IDs to remove and leave **Value** empty.
6. Under **Parameter Options**, choose how to handle existing parameters. The options are explained below. **Combine and overwrite with newer values** is selected by default.
7. Choose **OK** to apply the list to all accounts shown in the upper list. The result list fills with messages for each processed account.

The parameter dropdown uses catalogues loaded from the selected SAP clients.

Use **–** to remove an unwanted row from your proposed list before applying it. To change the target accounts, choose **Close**, select the accounts in the Global User Table and open **Parameter ID** again.



Choose how existing parameters are handled

Combine and overwrite with newer values

Use this option to set a common value for the listed IDs. userXpress adds missing IDs and replaces the values of IDs already assigned to each account. Other parameters keep their existing values.

For example, if an account has `Z_DEMO=A` and your list contains `Z_DEMO=B`, the account receives `Z_DEMO=B`.

Combine but retain exisitng values

Use this option to supply defaults where they are missing while keeping each user's existing choices. userXpress adds IDs that the account does not have. An existing ID keeps its value.

With the same example, the account keeps `Z_DEMO=A`. An account without `Z_DEMO` receives `Z_DEMO=B`.

The examples use an illustrative ID. Choose the actual ID and value required by your SAP transactions.

Replace all existing parameters with above

Use this option when every selected account needs the complete parameter list you have prepared. userXpress replaces each account's parameters with that list.

Include every parameter you want to keep before choosing OK. Unlisted parameters are removed. An empty list clears all parameters from the selected accounts.

Remove the above parameters

Use this option to withdraw particular defaults. userXpress removes the listed IDs from each account and keeps its other parameters. Removal matches the **Parameter ID**, regardless of its assigned value.

Read the results

The lower list identifies each account by **System**, **SID**, **Client** and **User**. **Message** contains SAP's response or the error that prevented processing. Results from further **OK** runs are added to the same list.

The status bar shows **Parameter changes finished.** when processing completes without reported errors. **Parameter changes finished with client errors.** means that some assignments failed. Successful changes to other accounts remain applied.

Use **Copy Output** to copy the entire result list to the clipboard. For a failed account, use its message to resolve the cause, then reopen **Parameter ID** with that account selected.

Stop a running change

Choose **Close** to stop further assignments. userXpress waits for active work to finish, then closes the window. Completed changes remain applied. To keep the result list available for **Copy Output**, let processing finish before closing the window.

Update accounts from a workbook

Applies to userXpress 2.0.0.0

Export existing SAP accounts, prepare individual changes in a workbook, compare them with SAP and apply the updates.

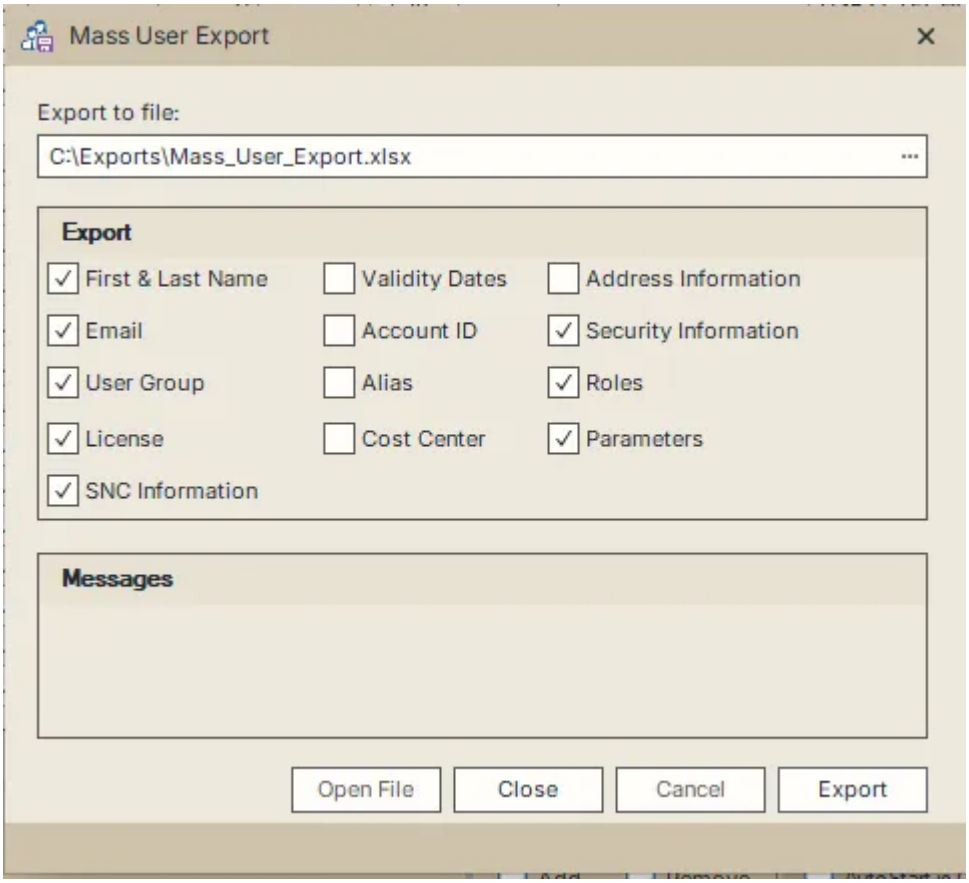
Use **Mass Changes** when each account needs different values. For example, extend contractors' accounts to different end dates, assign individual cost centers or replace each person's role assignments from a prepared list.

The workflow has three stages: export the accounts, edit the workbook, then review and apply its changes. **Review Changes** compares the workbook with SAP and shows the differences before **Apply Changes** becomes available.

For the same combination of values across all selected accounts, use Multiple Change.

Export the accounts

1. In the **Global User Table**, select the accounts to update.
2. Choose **Users** → **Change** → **Mass** → **Mass Changes** → **Export Selected Users**. The **Mass User Export** dialog opens.
3. Choose the properties to include. **Email**, **Alias** and **SNC Information** start selected. Clear any categories you do not need and select the ones you intend to update.
4. In **Export to file:**, use the proposed `Mass_User_Export.xlsx` file on your desktop or choose another path with the browse button.
5. Choose **Export**. userXpress reads the selected accounts from SAP and creates the workbook.
6. When **Messages** shows **Done**, choose **Open File** to open the workbook in the associated spreadsheet application.



The workbook contains a **MassUserExport** worksheet with one row per account. **Roles** and **Parameters** are added as separate worksheets when you select those export categories. Some fields have drop-down lists with choices for that row's SAP client.

See Workbook fields and assignment rules for the properties included by each category.

To stop an export, choose **Cancel** and confirm **Yes**. Wait for the cancellation result before starting another export.

Prepare the updates

1. On **MassUserExport**, retain the `System`, `SID`, `Client` and `User_ID` values that identify each account.
2. Edit the fields to their intended values. Retain existing values in fields that should stay the same.
3. Remove an account's row if it is outside this update. Remove its corresponding rows from **Roles** and **Parameters** too.
4. If you are changing roles or parameters, prepare their complete desired lists as described below.
5. Save the workbook as `.xlsx`.

Keep the worksheet names and column headings. Use the cell drop-downs where supplied. The lists reflect the SAP values available at export time, and userXpress validates the relevant choices again during review.

An empty cell usually requests removal of the existing value. Blank account-validity dates, `Security_Policy` and `License` instead retain their existing values. The field reference identifies these exceptions.

Use **Mass User Export** to prepare this workbook. The separate Mass User Create workbook defines new accounts and has a different layout.

Example: different contract end dates

Export the two contractors' accounts with **Validity Dates** selected. On **MassUserExport**:

- Set `Valid_To` to `31/12/2027` for the first contractor.
- Set `Valid_To` to `30/6/2028` for the second contractor.
- Retain the other exported values.

Save the file. During import, select **Validy Dates** under **Properties to change** and clear the other categories.

Roles and parameters describe the complete result

When **Roles** is enabled during import, each account's rows on **Roles** become its desired direct role assignments. Keep every assignment that should remain, add the new ones and remove those to withdraw.

Parameters works the same way for the account's parameter IDs and values. Keep every parameter that should remain in the resulting list.

If an account remains on **MassUserExport** but has no rows on an enabled related worksheet, its desired list is empty. Applying that change clears its direct roles or parameters. To preserve that category for the whole import, clear **Roles** or **Parameters** under **Properties to change**.

See Roles and Parameters for the exact headings and examples.

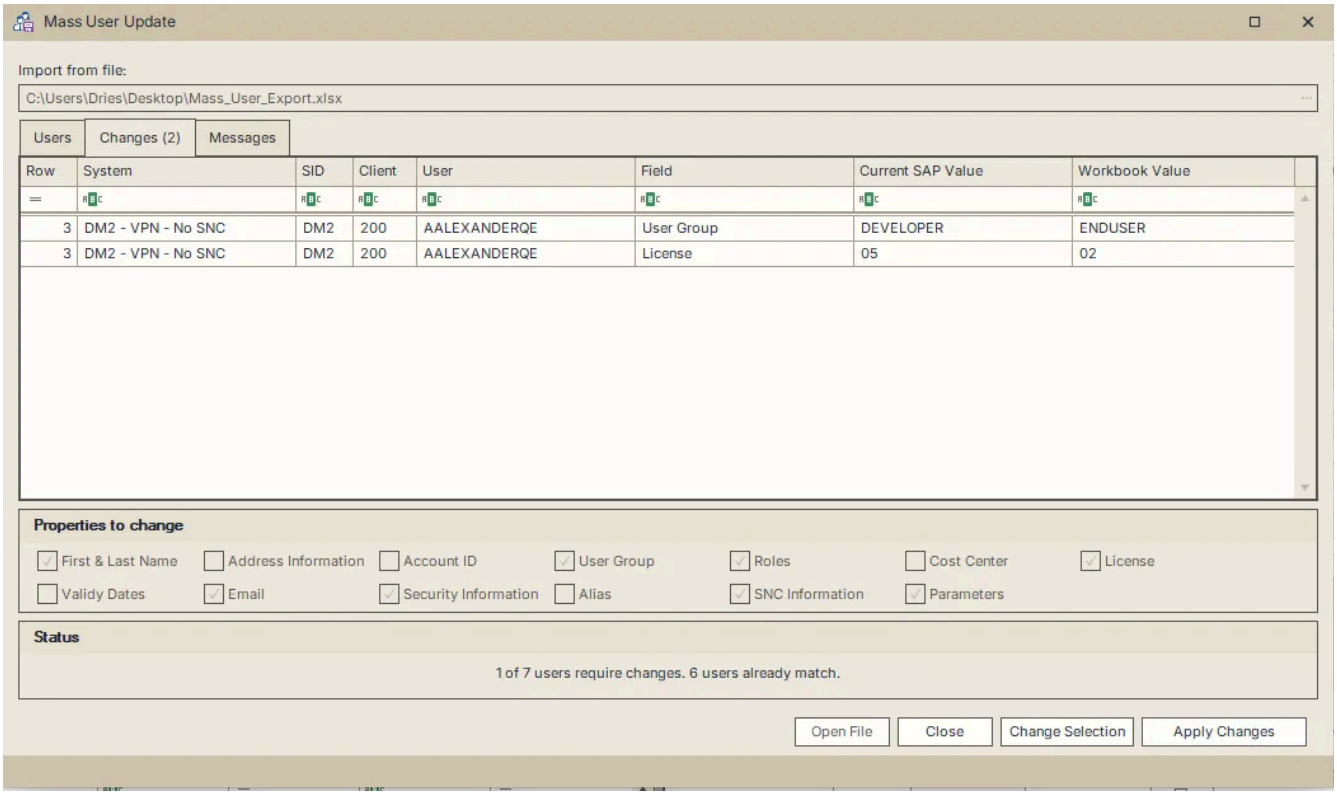
Import and review

Connect the SAP clients named in the workbook before reviewing it.

1. Open **Users** → **Change** → **Mass** → **Mass Changes** → **Import User Updates**. The **Mass User Update** window opens.
2. Choose **Open File**, or use the browse button beside **Import from file:**, and select the saved workbook. The **Users** tab shows its account rows.
3. Under **Properties to change**, clear every category that should remain unchanged. Categories with supported columns or related worksheets are selected automatically when the file loads.
4. Choose **Review Changes**. userXpress reads the SAP values, validates the selected fields and compares them with the workbook.
5. On **Changes**, read the **Field**, **Current SAP Value** and **Workbook Value** for each proposed change. **System**, **SID**, **Client** and **User** identify its target.

6. Open **Messages** for accounts that could not be validated or compared. Those accounts are excluded from the prepared update.

The status area reports how many accounts require changes, already match or could not be compared. Accounts that already match are omitted from the update. If no accounts need changes, **Review Changes** remains available instead of **Apply Changes**.



The preview proposes changes to two fields for one account: User Group and License. The other six accounts already match the workbook.

The preview is read-only. To revise the properties, choose **Change Selection**, select the categories again and choose **Review Changes**. **Change Selection** restores the automatic selections for the loaded workbook, so clear unwanted categories again.

To revise values, choose **Change Selection**, edit and save the workbook, then load it again with **Open File**. Review the newly loaded file before applying it.

Apply the prepared changes

Choose **Apply Changes** to apply the differences shown by the review. The prepared account list defines the update scope.

The status area reports **Processed n of total users**, followed by the refresh of the affected SAP clients. The **Users** tab displays **Result** and **Message** for each processed account. **Messages** contains the detailed responses.

For each account, userXpress applies account fields first, then roles, then parameters. If SAP rejects one stage, later stages for that account are skipped. Earlier successful stages remain in effect, and processing continues for the other accounts.

The review uses SAP values read when you choose **Review Changes**. To replace an older preview after other administration work, choose **Change Selection** and run **Review Changes** again.

Read and save the results

Use the **Messages** tab to interpret a result or identify the fields to correct:

- **Success** identifies a successful SAP response.
- **Warning** identifies a SAP warning or an additional problem, such as a failed table refresh.
- **Error** identifies validation, comparison or update failure. The message explains the affected account or workbook row.
- **Information** contains other responses. A message that SAP returned no messages is informational, rather than confirmation of a particular change.

The **Users** tab summarizes the most severe SAP update response for an account. Refresh warnings appear separately on **Messages**, alongside all of the SAP responses. The message columns include the account identity, **Row**, **Type**, **ID**, **Number** and **Message**. The SAP message identifiers help locate a reported error.

Choose **Copy Messages** to copy the displayed message rows, or **Export Messages** to save them to an `.xlsx` file.

A refresh warning is separate from the SAP update result. Use **Refresh** in the **Global User Table** to reload affected accounts after resolving that warning.

To correct and retry an update, close **Mass User Update**, edit the workbook and open **Import User Updates** again. Run **Review Changes** against SAP before applying the remaining differences. This leaves already matching values out of the next update.

Stop an update

Choose **Cancel** and confirm **Yes**. The status changes to **Stopping after active SAP changes finish…**. userXpress finishes account work already in progress and stops starting further accounts.

Wait for the operation to finish. Completed changes remain in SAP. The final summary reports how many accounts were not started, or that cancellation arrived after all account changes had started. Use the retry procedure above to review what remains.

Mass Changes workbook fields

Applies to userXpress 2.0.0.0

Account fields, empty-cell behavior, client-specific choices and complete role and parameter lists for workbook updates.

Start with the workbook created by **Users → Change → Mass → Mass Changes → Export Selected Users**. It includes the account identities and the properties you selected for export. Follow Update accounts from a workbook to import, review and apply it.

Account identity and worksheet layout

The **MassUserExport** worksheet requires these headings:

- `System`: the connection's system description.
- `SID`: the three-character SAP system ID.
- `Client`: the SAP client. Retain its three-digit form, such as `100` or `010`.
- `User_ID`: the existing SAP user ID to update.

Keep all four values on every account row. Retain the exported identities when changing account properties. A user ID in two different clients represents two separate accounts.

Remove unwanted account rows from the workbook, including their related **Roles** and **Parameters** rows. Hidden spreadsheet rows are imported too. A partially filled row with an empty `System` ends account processing at that point, so remove the entire row instead of clearing only its identity cells.

Column names determine which properties can be updated. Removing an optional column leaves that field out of the import. Preserve the required identity headings and the names **MassUserExport**, **Roles** and **Parameters**.

Empty cells

For a selected property category, a blank text cell normally clears that account field. To keep a value, leave its existing value in the workbook or exclude its category during import.

There are three exceptions on **MassUserExport**:

- Blank `Valid_From` or `Valid_To` retains the account's existing date.
- Blank `Security_Policy` retains the assigned policy.
- Blank `License` retains the license classification.

Roles and parameters use complete lists. An enabled related worksheet with no rows for an account requests an empty list for that account. See the worksheet sections below before deleting related rows.

Names, email and address information

First & Last Name includes `First_Name` and `Last_Name`. **Email** includes `Email`. **Alias** includes `Alias`.

Address Information includes:

- `Birth_Name`: name at birth.
- `Middle_Name`: middle name or initials.
- `Title`: the person's title, chosen from the supplied list or entered as its SAP key.
- `Department`: organizational department.
- `Function`: job or function.
- `Building`, `Floor` and `Room`: workplace location.
- `Telephone_Land`: the person's telephone number.

A title list entry can include its key in brackets after the description. Retain the complete chosen entry or use the key itself. The available titles depend on the target SAP client.

Groups, account ID and cost center

- **User Group** exports `User_Group`, the group used for authorization checks on the account's logon data. Use its client-specific list. For general group memberships, use Usergroup Management.
- **Account ID** exports `Account_ID`, the SAP accounting number.
- **Cost Center** exports `Cost_Center`, the account's cost-center default.

Validity dates

Validity Dates exports `Valid_From` and `Valid_To`. The corresponding import checkbox is **Validy Dates**.

Enter dates as day/month/year, for example `31/12/2027`. The export uses text cells for these dates. Preserve that format when editing so the written date remains unambiguous. Blank account-date cells retain the SAP values.

Security information

Security Information includes:

- `Reference_User`: a reference user available in the target client. An empty cell removes the reference-user assignment.
- `Security_Policy`: a policy available in the target client. An empty cell retains the existing policy.

Use the supplied lists for client-specific choices. The importer validates them again against SAP during **Review Changes**. See Reference users and security policies for their purpose.

SNC information

SNC Information includes:

- `SNC_Name`: the account's SNC identity.
- `SNC_Gui_Flag`: the user-specific **Unsecure communication permitted** indicator. Enter `X` to set it or leave it blank to clear it.

SAP's system-level SNC configuration determines whether the user-specific indicator permits a connection without SNC. See SAP's SNC field explanation. Follow Assign SNC names when you want to construct names from account details instead of editing them individually.

License

License exports `License`, the SAP license classification code. Keep this column as text to preserve leading zeros in codes such as `01`.

Choose a client-specific list entry or enter its code. List entries can include a description followed by a bracketed code. During review, userXpress resolves that code and validates it against the target client's active license types. A blank cell preserves the existing classification.

Roles worksheet

Select **Roles** during export to include the **Roles** worksheet. Its headings are:

`System`, `SID`, `Client`, `User_ID`, `Role`, `Valid_From`, `Valid_To`.

Each row describes one direct role assignment for an account on **MassUserExport**. The export includes direct assignments, including directly assigned composite roles. Assignments inherited through composite roles or organizational management are excluded from this editable list.

When **Roles** is selected during import, the rows for each account replace its direct assignment list:

- Keep a row to retain the assignment.
- Add a row with the same account identity to assign another role.
- Change its dates to change the assignment's validity.
- Remove a row to withdraw that assignment.
- Remove all of the account's role rows to request an empty direct-role list.

Use `Role` for the role name and day/month/year for the dates. Enter the start date for a new assignment. A blank role end date uses `31/12/9999`. Keep the start date on or before the end date. Duplicate rows for the same account, role and validity interval are rejected.

For example, if an account has roles `Z_DISPLAY` and `Z_CHANGE`, retain both rows and add `Z_REPORT` to request all three. Keeping only the new `Z_REPORT` row requests replacement of the previous direct-role list with `Z_REPORT`.

An account must also have a row on **MassUserExport**. A role row whose account is absent from that sheet is reported in **Messages**.

Parameters worksheet

Select **Parameters** during export to include the **Parameters** worksheet. Its headings are:

`System`, `SID`, `Client`, `User_ID`, `Parameter_ID`, `Parameter_Value`.

Each row defines a parameter for an account on **MassUserExport**. When **Parameters** is selected during import, these rows replace that account's parameter list.

Keep every parameter that should remain. Add a row to assign a parameter, edit `Parameter_Value` to change its value, or remove the row to remove the parameter. An account with no parameter rows receives an empty list.

For example, to change `BUK` while retaining `WRK`, edit the `BUK` value and keep the `WRK` row. A blank `Parameter_Value` supplies an empty value for that parameter. Remove its row when you intend to remove the parameter itself. Duplicate parameter IDs for one account are rejected.

See Manage parameter IDs for their purpose and the alternatives to full-list replacement.

Client-specific drop-down lists

The workbook stores available choices on **AllowedValues** and uses them in the corresponding cells on **MassUserExport**. Supported lists cover titles, user groups, reference users, security policies, SNC flags and license types.

Choose values for the account's target client. If a required value was added in SAP after export, export again to obtain the updated list. The importer uses SAP's values during review, so a stale workbook list does not make an obsolete choice valid.

Delete accounts

Applies to userXpress 2.0.0.0

Remove selected SAP accounts, choose the confirmed targets and interpret completed, failed or stopped deletions.

Use **Delete** to remove accounts that are no longer required, for example temporary accounts after a training session. If the account should remain but its access needs to be suspended, use Lock.

Delete removes the account from SAP. The confirmation list lets you exclude accounts before submitting the deletion.

Deletion in a CUA landscape

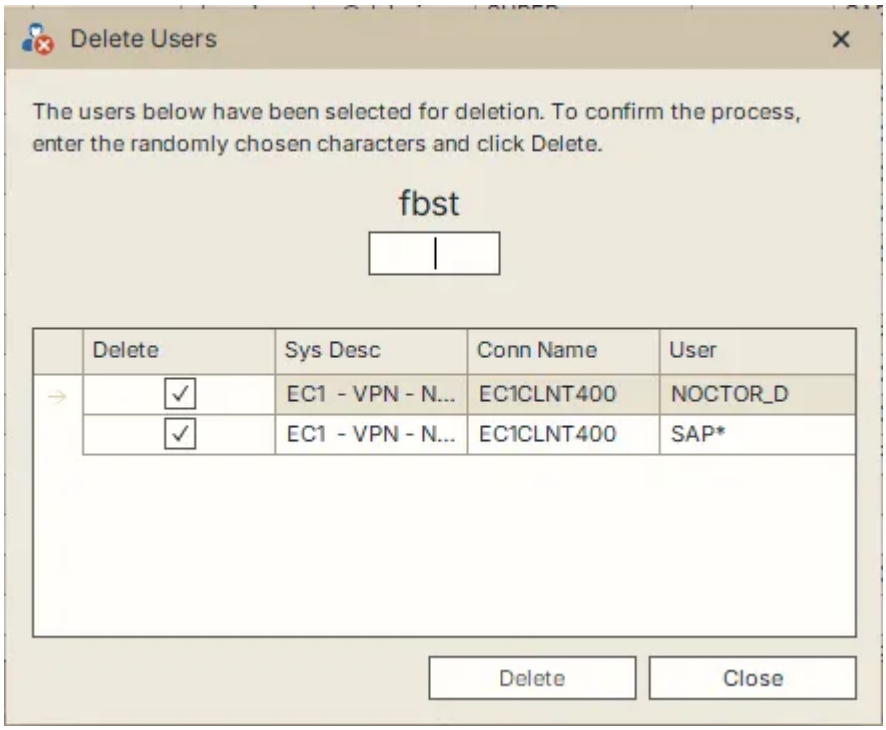
For accounts managed by Central User Administration (CUA), delete through the central client. Deletion there also applies to the user's accounts in the CUA child systems. This scope is described in SAP's Identity Management APIs guide, page 25.

The userXpress confirmation list shows the selected accounts. A central CUA deletion can therefore affect child-system accounts beyond the rows in that list.

Choose the accounts and confirm

1. In the **Global User Table**, select the accounts to delete.
2. Choose **Users** → **Change** → **Delete**. **Delete Users** opens with the selected accounts checked for deletion.
3. In the **Delete** column, clear the checkbox for any account that must remain.
4. Enter the four confirmation characters exactly as displayed. **Delete** becomes available when the characters match.
5. Choose **Delete**.
6. If **CUA Restriction** appears, choose **Yes** to continue with the permitted accounts, or **No** to cancel the operation.
7. If the productive-client confirmation appears, choose **Yes** to continue there or **No** to cancel.

Choose **Close** in **Delete Users** to return without deleting accounts.



The confirmation field is empty, so Delete is unavailable. Clear a row's Delete checkbox to exclude that account.

Read the outcome

When SAP confirms a deletion, userXpress removes that account's row from the **Global User Table**. The status bar reports the number deleted, for example **Deleted 3 of 4 confirmed users.**

An account whose deletion was rejected or could not be confirmed remains in the table with an error or warning. Point to an ordinary text cell in its row to read the explanation. To see returned SAP messages, select that account alone, right-click and choose **Full Message**.

Successful deletions remain in effect when another account fails. For an explicit SAP rejection, resolve the reported error and select the remaining accounts for another attempt.

If the message says deletion could not be confirmed, open the account in SAP to establish whether it still exists before retrying. That message identifies an unresolved outcome, rather than a confirmed rejection.

For central CUA deletions, userXpress also refreshes the corresponding accounts in connected child systems. If that display refresh fails, refresh the affected child-system rows. The refresh error does not reverse a completed deletion.

Stop a running deletion

Close the progress window using its **X** button to request a stop. userXpress waits for active SAP calls to finish, then displays their results. Calls that have already deleted accounts are not undone.

Rows marked **Deletion cancelled before the SAP call started.** were not processed. Other unprocessed accounts can retain their previous row message.

After a stop, use the accounts still listed in the table to choose any further deletion. The status-bar totals do not include every unprocessed account.

Copy users between clients

Applies to userXpress 2.0.0.0

Create selected user IDs in another SAP client, with their own roles or those of a target-client account.

Use **Copy To..** when existing users need accounts in another SAP client with the same user IDs. For example, copy a group of users into a training client without entering their names, contact details and defaults again.

Each selected account is copied to the one target client you choose. Existing target accounts are left unchanged and reported in **Results**. To create a different user ID from an existing account, use Create From or Fast Copy.

Copy to another system or client

Connect the source and target clients in the Control Panel. The **Copy To..** menu lists connected systems and their clients.

1. In the **Global User Table**, select the source accounts using their row checkboxes. Select one source account per user ID.
2. Right-click the selection and choose **Copy To..** → **target system** → **target client**. The **Copy To** dialog shows the destination at the top.
3. Choose where the new accounts' roles and profiles come from:
    - Leave **Use alternate source for Profiles & Roles** clear to copy each source account's assignments.
    - Select it to use one existing account in the target client for all copied accounts. Choose that account from the list beside the checkbox.
4. Under **Initial Password**, enter the same new password in both fields. This initial password applies to every account created by this copy.
5. Choose **OK**. Messages appear under **Results** as the accounts are processed.
6. When the status reads **Finished**, use the messages to identify any creation or assignment errors, then choose **Close**.

The dialog initially selects the first account in the alternate-source list. Choose the intended account before using that option.

If **CUA Restriction** appears, the selected client requires account creation through Central User Administration. Create and distribute the accounts from the central system.

Choose the authorization source

The default copies roles and profiles from each selected source account. Use it when those assignments are also appropriate for the destination. The named roles and profiles must exist in the target client.

Select **Use alternate source for Profiles & Roles** when the destination requires different access. For example, select an existing training account to give all copied users its training roles. The new accounts still receive their own source users' names and other account details.

Role assignments retain the validity dates from the chosen authorization source. An expired assignment therefore remains expired after copying.

What is copied

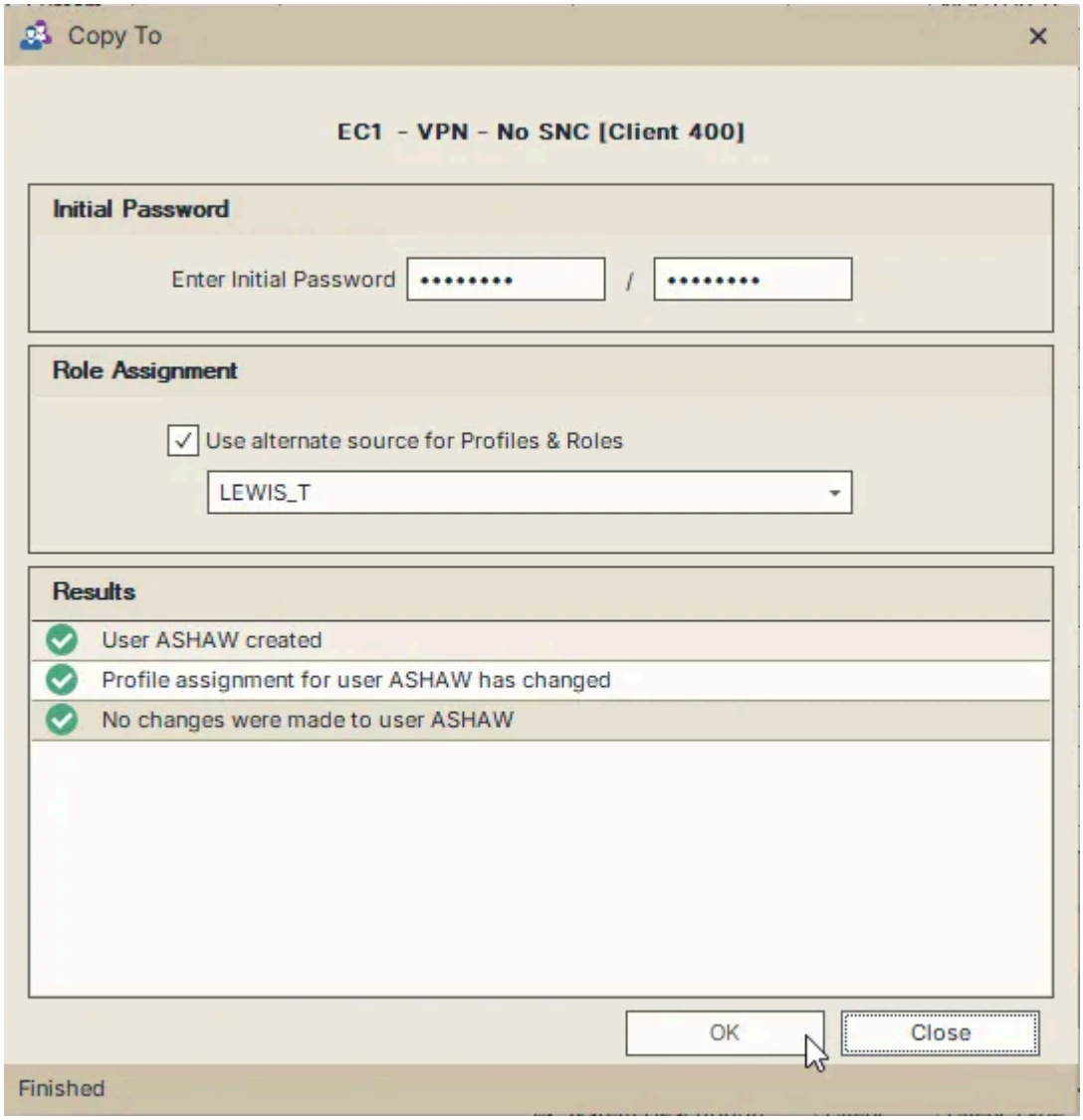
userXpress reads the source accounts from SAP when you start the copy. The account details include:

- **Logon data:** user type, validity dates, authorization-check group, account ID and time zone.
- **Personal and contact details:** names, address, work-center information, email and communication details.
- **Defaults:** logon language, date/time and number formats, print defaults, cost center and start settings.
- **Other account data:** alias, reference user, license classification, SNC data, general group memberships and parameter values.
- **Roles and profiles:** assignments from the source chosen in the dialog.

Only groups and parameter IDs defined in the target client are carried over. The authorization-check group is also copied only when it exists there. Differences between SAP releases can limit which fields can be transferred.

Understand the results

Results displays messages with success, warning or error icons. An account can produce several messages because creating it and assigning its profiles and roles are separate operations. **Finished** means that processing has ended, including accounts that returned errors.



- **User already exists:** the target account was skipped. Use the account or role maintenance commands to change that existing account.
- **Alternate authorization user does not exist:** choose an existing target-client account as the authorization source and start a new copy.
- **Account created, but an assignment failed:** the new account remains in the target client. Correct its assignments through Manage roles or SAP user maintenance.

Successfully created accounts are added to the Global User Table. To retry a failed creation, close the dialog and open **Copy To..** again for those source accounts.

If a **User Copy** error interrupts processing, load the target client's users to identify which accounts were created before the interruption. Retry only the missing accounts. Include the error text when contacting support.

Create a new user from an existing account

Use Create From to create one new account in the source's client. Use Fast Copy to create the same new user ID from source accounts in several clients. Both procedures let you choose which properties to copy.

Use Create users to enter the details directly, or account-list creation for a list of new IDs and source accounts.

Copy roles separately

Use the right-click **Copy Roles from user** and **Paste Roles** commands when existing accounts need another user's assignments. See Copy role assignments for the procedure.

Create users

Applies to userXpress 2.0.0.0

Create an account in several clients, assign its details and roles, or create a numbered series from a source account.

Choose **Create User** when you want to enter a new account's details and create it in one or more connected clients. For example, create a new colleague's account across their SAP systems with shared contact details and different roles in each client.

Choose **Create Ranged User..** for a numbered series, such as training accounts. Each account in the series inherits settings and assignments from a source account in one client.

To choose which properties to inherit from an existing account, use Create From for one client or Fast Copy for several clients. For a list of different new accounts, use account-list creation or Mass User Create.

Create an account in selected clients

1. Select a row in the **Global User Table** to make the creation command available.
2. Choose **Users** → **Change** → **Create** → **Create User**.
3. On **Select Systems**, select the clients in which to create the account.
4. Choose **Get Common Data**. userXpress loads the available groups, roles, reference users and other choices for those clients.
5. Enter **User ID**, the password in both **Password** fields, and the first and last name under **Name**. The user ID can contain up to 12 characters.
6. Choose **User Type**. The default is **Dialog**. Fill in the additional details and role assignments needed for the account.
7. Choose **Create User**.

The selected clients in **Select Systems** determine where the account is created. The row selected in the Global User Table only opens the command.

The **Comment** column reports progress for each client. **Results** contains the individual creation and assignment messages. New accounts are added to the Global User Table.

Account details

The same account details apply in each selected client. Role rows can have their own client scope.

- **Name**, **Email** and **Alias** identify the person and their contact or alternative logon details. If you leave the last name empty, userXpress uses the new user ID.
- **Validty Dates** sets the period in which the account is valid. Enter the start and end dates for a temporary account. The start date must be on or before the end date.

- **User Group** sets the account's logon-data user group. **Accounting** and **Enter Cost Center** supply the account and cost-center values used for allocation.
- **SNC Name** supplies the account's SNC identity. Under **Defaults → SNC**, **Permit Password-Logon with SAP Gui** controls password logon alongside SNC.
- **Address** contains work location, telephone, mobile, fax and company details. Choose the **Company** to associate with the account. Enter telephone, mobile and fax numbers as digits, with their country and extension values in the separate controls.
- **Defaults** sets date, time and number formatting, time zone and printing preferences. **Print Immediately** sends output to the selected **Output Device** immediately. **Delete After Output** removes the spool request after output.
- **Defaults → CATT → Test Status** enables test-status assignment for SAP CATT procedures. Use it for accounts that record those results. SAP's CATT authorization guidance explains the required authorization.
- **Defaults → Security Policy** assigns a policy offered for the selected clients. The field displays **Not supported for your selected system(s)** when a selected system does not support this assignment.
- **Parameters** sets default values used by SAP transactions. Add a row for each **Parameter ID** and **Value**. The **Description** identifies the parameter.
- **Groups** adds user-group memberships. Select each group in a separate **User Group** row. These memberships are separate from the single **User Group** in the account's logon data.
- **Licenses → Contractual User Type** assigns the SAP license classification for the account.

Get Common Data limits shared choices to values available across the selected clients. If the value you need belongs to only some clients, create those accounts as a separate selection.

When you change the system selection after loading common data, choose **Yes** in **Selection Change**. Select the new clients and choose **Get Common Data** again before creating the account.

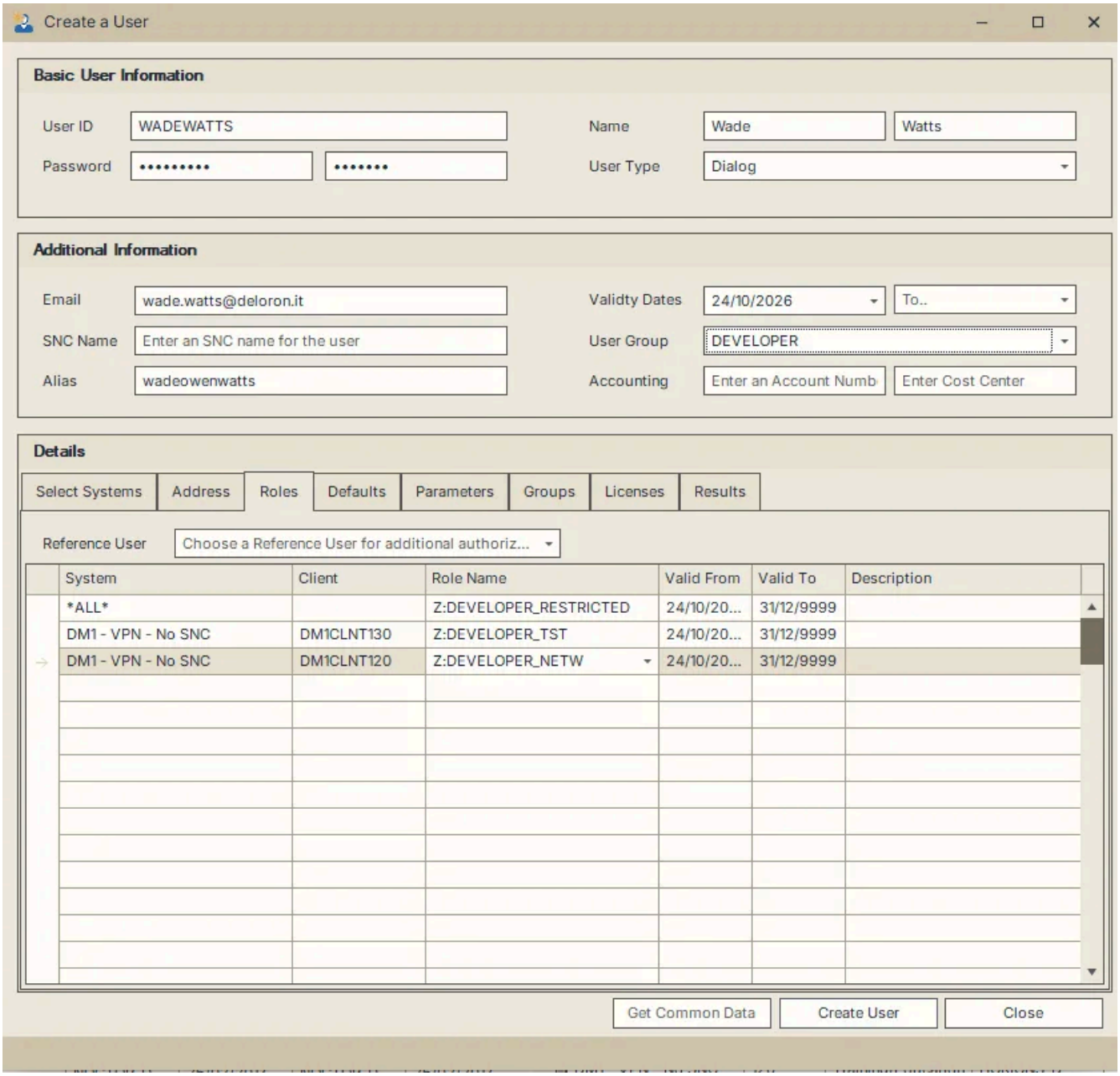
Assign roles during creation

Use **Roles** to give the account common assignments and additional assignments in particular clients.

1. Open **Roles** and start an empty row.
2. In **System**, choose the assignment's scope:
    - Choose ***ALL*** for a role that is available in every selected client.
    - Choose a specific system, then choose its **Client**, for a client-specific assignment.
3. Select **Role Name**. Its **Description** appears in the row.
4. Set **Valid From** and **Valid To**. Selecting a role fills these with today and 31 December 9999.
5. Add another row for each additional role.

For example, assign `Z_TRAINING_BASE` to ***ALL*** and add `Z_TRAINING_REPORTS` for client **200**. The account receives both roles in client 200 and only the base role in the other selected clients.

Use **Reference User** on the same tab when the account should inherit authorizations from a reference user available in the selected clients.



The first role applies to all selected clients. The other two rows add assignments for individual clients.

Creation results

A client can succeed while another fails. Each client has its own **Comment**, and **Results** identifies the associated messages.

- **The user ... already exists** means that client was skipped. Use the change-user procedures to update an existing account.
- An alias conflict creates a result message and removes the alias from the creation request. The alias is also omitted from subsequent clients in that run. Assign the intended alias afterwards to the affected accounts.

- An account can be created while a role assignment fails. Assign the missing roles to that existing account after resolving the reported error.

To stop a running creation, choose **Close**, then **Yes** in the confirmation. The active client finishes before the remaining clients are cancelled. Accounts already created remain available.

Create a numbered range

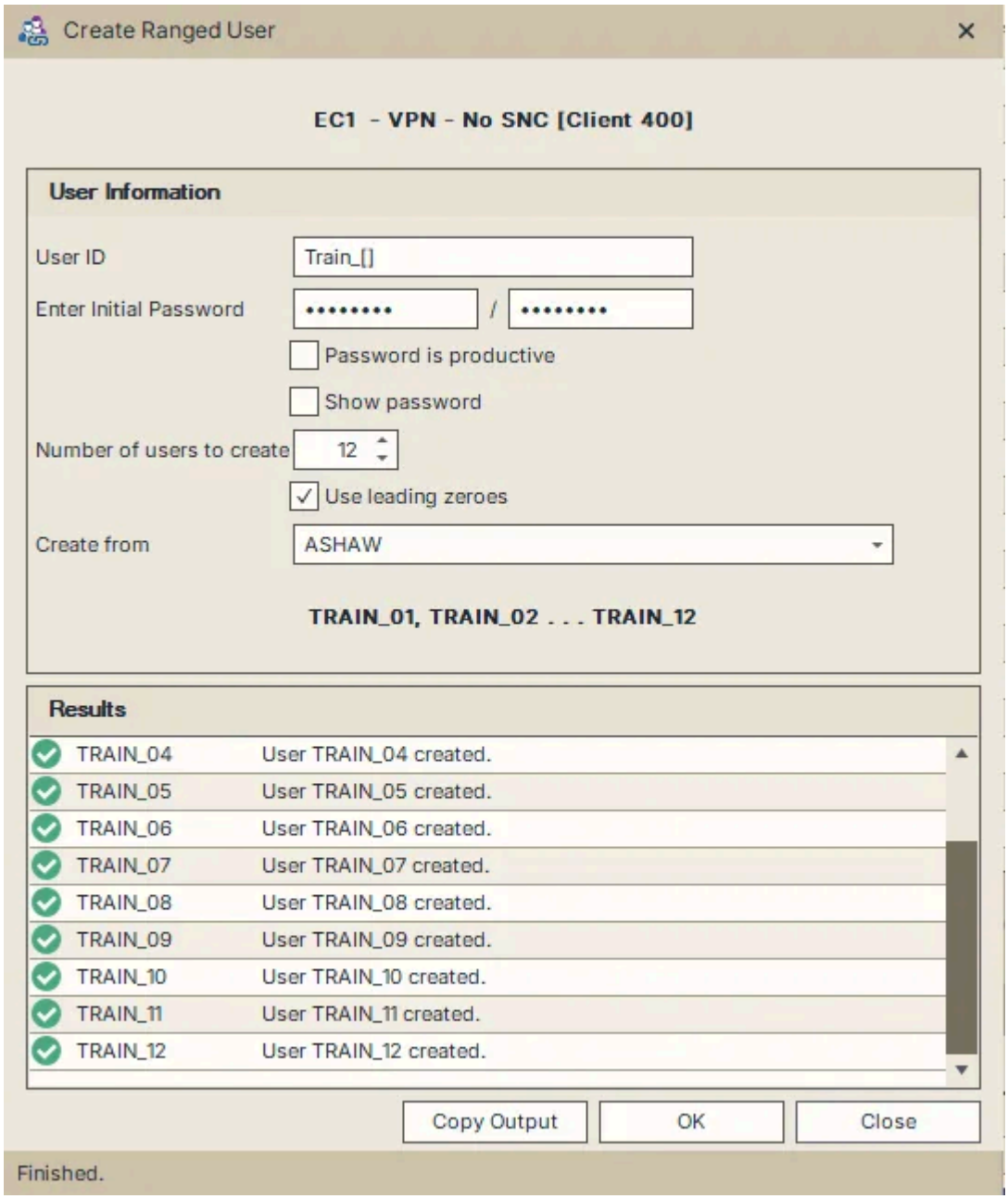
Use this command to create accounts such as `TRAIN_01` through `TRAIN_12` in one client.

1. Select one account in the target client in the **Global User Table**.
2. Choose **Users → Change → Create → Create Ranged User...**. The dialog shows the target system and client.
3. In **User ID**, enter a pattern containing `[]`, such as `TRAIN_[]`.
4. Set **Number of users to create** to **12**. The sequence starts at 1 and ends at this number.
5. Select **Use leading zeroes** to obtain `TRAIN_01` through `TRAIN_12`. Leave it cleared for `TRAIN_1` through `TRAIN_12`. Keep each complete ID within 12 characters.
6. Under **Create from**, choose the source account in that client.
7. Enter the password twice under **Enter Initial Password**. Select **Password is productive** when the new accounts should use it without an initial-password change at first logon.
8. Choose **OK**.

The example beneath **User ID** shows the naming pattern before creation. With leading zeroes, the width follows the number of accounts: 100 accounts produces numbers `001` through `100`.

The series copies the source's logon settings, company, defaults, parameters, reference user, role/profile assignments, groups and license data. All new accounts use the entered password. Their last name is the source user ID. Use Fast Copy when new accounts need individual names or a different selection of copied properties.

Results lists each **User** and **Message**. Existing IDs are skipped. A creation message can be followed by an assignment or password error for the same account. Resolve that reported step for the existing account instead of creating it again.



The completed run shows the TRAIN_01 through TRAIN_12 naming example and the account-creation messages.

Choose **Copy Output** to copy the results to the clipboard. To stop the run, choose **Close**. The active account finishes before creation stops, and accounts already created remain available.

Create From

Applies to userXpress 2.0.0.0

Create one new account in the source account's client and choose which details to copy.

Use **Create From** to create a new account based on an existing account in the same SAP client. For example, use a role-template account as the source for a new team member.

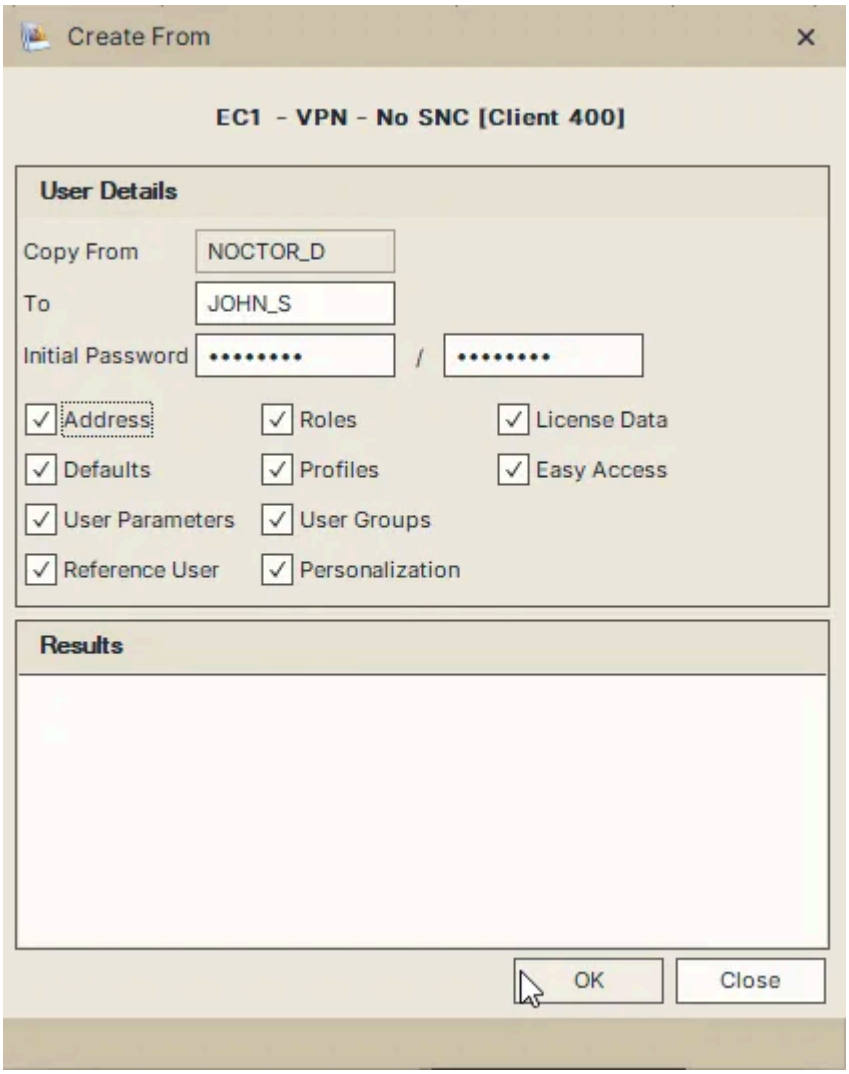
For creation in several clients, use Fast Copy.

Create the account

1. Select one source account in the **Global User Table**.
2. Choose **Users** → **Change** → **Create** → **Create From**.
3. The dialog shows the source under **Copy From**, with its system and client above. Enter the new user ID in **To**.
4. Enter the new password twice under **Initial Password**.
5. Choose the properties to copy.
6. Choose **OK**.

Results displays the returned SAP messages. The new account is added to the Global User Table. The last name is set to the new user ID. Use Name Information to enter the person's name afterwards.

If account creation succeeds but copying roles fails, resolve the error in **Results**, then assign the missing roles to the new account.



Address is selected in this example. Choose the properties needed for the new account.

Choose what to copy

The source's logon settings and company are carried over. These include its user type, account validity, logon-data user group, accounting number and time zone.

Address starts cleared. The other copy options start selected.

- **Address** copies the source's address and communication details. Select it when those details belong on the new account.
- **Defaults** copies SAP user defaults, such as display formatting and spool preferences.
- **User Parameters** copies parameter IDs and their values.
- **Reference User** copies the source's reference-user assignment.
- **Roles** copies the role assignments. In this dialog, it also controls copying authorization profiles. Use Fast Copy when you need independent **Roles** and **Profiles** choices.
- **User Groups** copies the source's additional group memberships.
- **License Data** copies the SAP license classification.

Personalization and **Easy Access** data must be maintained separately for the new account. Their checkboxes do not affect the copy in this version.

Fast Copy

Applies to userXpress 2.0.0.0

Create a new user ID from source accounts in one or more clients, with selected properties and new personal details.

Use **Fast Copy** when a new person needs accounts based on existing users in several SAP clients. Select the source account in each client, then enter the new person's details once.

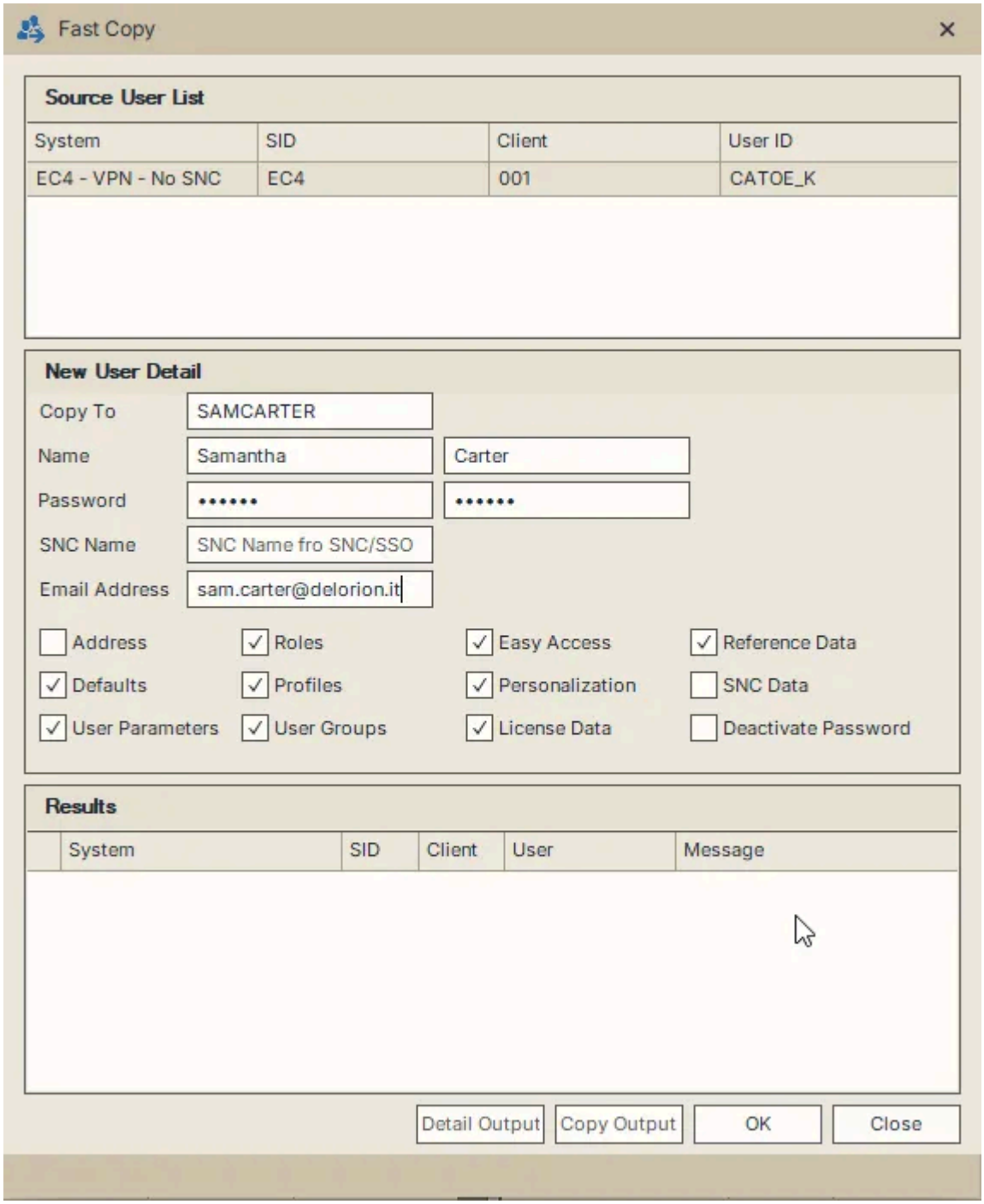
Each source row creates the new user ID in that source's client. For example, select a training template in clients 100 and 200 and enter `JSMITH` under **Copy To**. userXpress creates `JSMITH` in both clients, using each client's own template.

Create the new account

1. In the **Global User Table**, select one source account in each intended client.
2. Choose **Users** → **Change** → **Fast Copy**. **Source User List** shows the accounts and clients you selected.
3. Under **New User Detail**, enter the new ID in **Copy To**. Enter the first and last name under **Name**.
4. Enter the initial password twice under **Password**.
5. Choose the properties to copy, then enter the new **Email Address** and **SNC Name** where required.
6. Choose **OK**.

The new user ID can contain up to 12 characters. If the last name is empty, userXpress uses the new ID.

The operation uses the same new ID, name and password in every selected client. Choose one source per client to make the source of its settings and assignments unambiguous.



This example uses one source account. Address is cleared so the new person's email address can be entered.

Choose the copied properties

The source's logon settings and company are carried over, including user type, account validity, logon-data user group, accounting number and time zone.

Address and **SNC Data** start cleared. The other property checkboxes start selected.

- **Address** copies address and communication details. When selected, **Email Address** becomes unavailable because the source's email details are copied. Leave **Address** cleared to enter the new person's email address.

- **Defaults** copies SAP user defaults, including formatting and spool preferences.
- **User Parameters** copies parameter IDs and their values.
- **Reference Data** copies the reference-user assignment.
- **Roles** copies role assignments. **Profiles** independently copies authorization-profile assignments.
- **User Groups** copies additional group memberships.
- **License Data** copies the SAP license classification.
- **SNC Data** copies the source's SNC settings and makes **SNC Name** unavailable. Leave it cleared to enter the new person's SNC identity.

The **Name** values you enter take precedence over the source's name. **Personalization** and **Easy Access** data must be maintained separately for the new account. Their checkboxes do not affect the copy in this version.

Create an account with password logon disabled

Use **Deactivate Password** for an account that will use SNC single sign-on.

Enter the password fields before selecting **Deactivate Password**. The fields then become unavailable. userXpress creates the account with password logon deactivated and applies the SNC choice described above.

Read the results

Results lists the outcome by system, client and user. Choose **Detail Output** for the detailed SAP messages, or **Copy Output** to copy the result list to the clipboard.

- An existing target ID is skipped. To change that account, use the account-change procedures.
- A successful creation remains in place when another client fails.
- A role or profile error can occur after the account has been created. Complete the missing assignment for that account after resolving the reported error.

The Global User Table refreshes the newly created accounts. If the status bar reports that some new users could not be refreshed, their creation results still apply. In **Control Panel → Connected Systems**, select the affected client and choose **Remove**, then connect it again to reload its accounts.

To create another new user from the same sources, enter the next **Copy To** ID and name, then choose **OK**. The dialog retains the password and property choices for reuse.

Stop a running copy

Choose **Close** while copying is in progress. userXpress stops starting new copies and lets active SAP calls finish. Completed copies remain available and are included in the table refresh.

The dialog stays open with the results. Choose **Close** again to leave it.

Message and log off users

Applies to userXpress 2.0.0.0

Send a message to online SAP users or close their sessions from the Global User Table.

Use **Users** → **Interact** in the **Global User Table** to contact users in SAP or end their sessions.

Send Message is useful before planned maintenance or when a user needs to release work in SAP. **Log User Off** closes sessions that must be ended, for example when a user has left a session open.

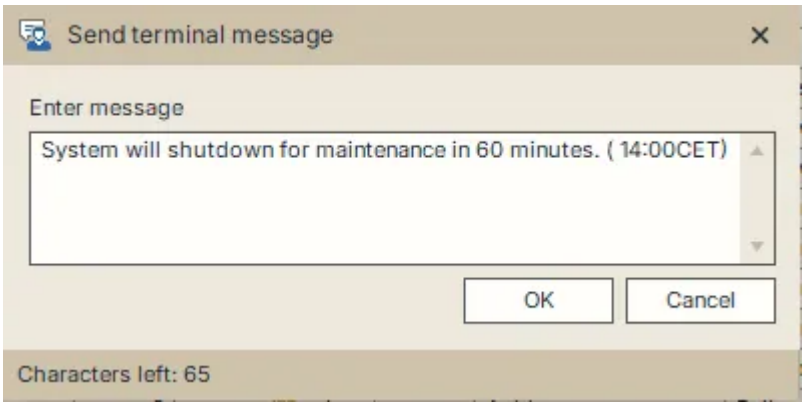
Find online users

The **Online** column identifies users with SAP sessions when their information was last retrieved. To update it, select the relevant accounts and choose **Users** → **Refresh**.

Filter **Online** to show online accounts, then select the recipients or users you want to log off. Each row identifies an account in a system and client. See Find and select users for column filters and selection.

Send a message

1. Select the online accounts in the **Global User Table**.
2. Choose **Users** → **Interact** → **Send Message**.
3. In **Send terminal message**, enter the text under **Enter message**. Keep it within 128 characters. **Characters left** shows the remaining space.
4. Choose **OK** to send the message to their SAP sessions.



For example: “Maintenance starts at 18:00. Please save your work and log off before then.”

userXpress sends to selected accounts marked online in the table. When a user has just logged on, refresh their row before sending.

A delivery error marks the affected row. Point to a text cell in the row to read the error tooltip. Refresh that account’s online status before sending again.

Log users off

Logging off ends the selected users' SAP sessions, including sessions on other application servers in the system. Unsaved work in those sessions can be lost. Send a message first when users need time to save their work.

1. Select the accounts in the **Global User Table**.
2. Choose **Users** → **Interact** → **Log User Off**.
3. Choose **Yes** in **Log User Off** to end their sessions, or **No** to cancel.

The status bar reports completed logoffs, and userXpress refreshes the affected accounts. An error marks the relevant row. Point to a text cell in that row to read its message.

To prevent a user from logging on again, lock the account.

Manage roles

Applies to userXpress 2.0.0.0

Assign roles, inspect existing assignments and use the Global Role Table to find where a role is used.

Role assignments grant access. Check the selected accounts, role names, clients and validity dates before confirming a change.

Inspect current assignments

Use **Roles → Role Assignment** to compare selected users' roles, read assignment dates and export the account-and-role list. View users' role assignments explains the report columns, composite indicators and incomplete results.

Assign roles from the Global Role Table

Use **Assign** in the Global Role Table after selecting destination accounts and role rows. Assign roles from the Global Role Table explains client matching, validity dates, overwrite, results and stopping.

Add and remove assignments together

Use **Roles → Update Role Assignment** to add and remove roles for selected users across clients. Update role assignments explains common and client-specific changes, row actions, dates, clipboard input, results and stopping.

Remove expired assignments

Use **Roles → Expired Roles** to search clients for assignments ending before today or by a selected date. Find and remove expired role assignments explains the criteria, organizational assignments, whole-role removal, results and stopping.

Copy role assignments

Use the right-click **Copy Roles from user** and **Paste Roles** commands when existing accounts need another user's roles. Copy role assignments between users explains destination selection, role filtering, validity dates, overwrite, source definitions and results.

To copy definitions without assigning roles to users, follow Copy roles between clients.

Use the Global Role Table

See Global Role Table: menu and tasks for Where Used, Assign and Export, and Search role content to find roles by authorizations or transactions.

The Global Role Table lists roles from connected clients. Filter its columns to narrow the selection.

- **Where Used** identifies users assigned to the selected roles. Check the returned system/client rows, including clients with no matching users. Export the report when needed.
- **Assign** applies the selected roles to the intended users in the Global User Table.
- **PFCG** opens the selected roles in separate SAP GUI windows. Double-click a role to open that role alone. See Open roles in PFCG for prerequisites, confirmation and the window limit.
- **Export** saves the current role view in an offered format for further analysis.

Before **Assign**, check both tables: the selected roles in the role table and the selected target users in the user table. Review client-specific results after the operation.

Check a failed assignment

Confirm that the role exists in the target client, that its validity dates are appropriate and that your SAP account is authorized to maintain assignments. Read the returned message before retrying. Repeating the whole selection can obscure which assignments already succeeded.

Assign roles from the Global Role Table

Applies to userXpress 2.0.0.0

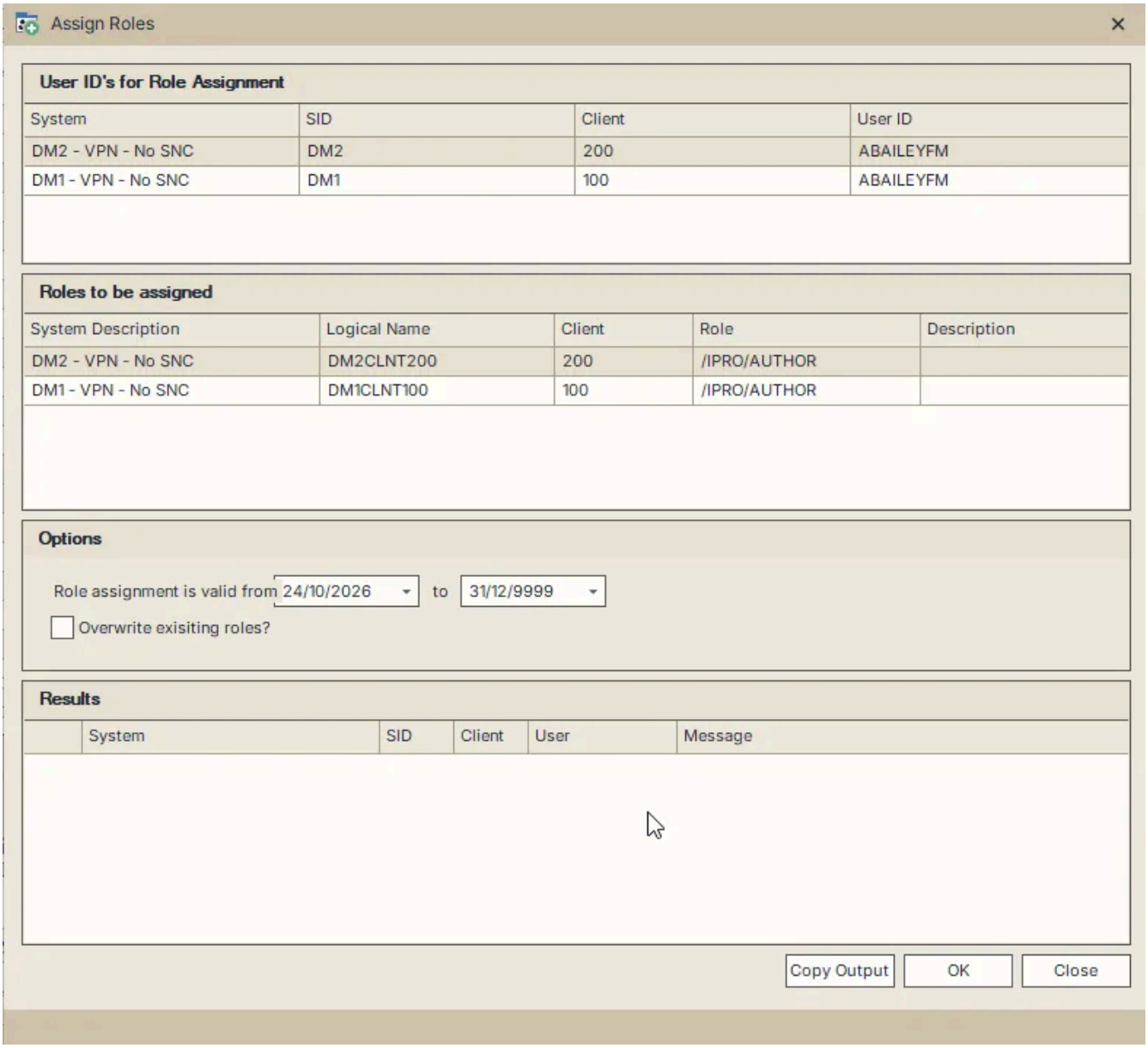
Assign selected roles to selected users in matching SAP clients, with a shared validity period and a choice to retain or replace existing roles.

Use **Assign** in the **Global Role Table** when you have found the roles that users need. For example, select a reporting role in several clients and assign it to the team members in those clients.

Each user receives the selected roles from the same system connection and client. The role and user selections can span several clients in one operation.

Select users and roles

1. In the **Global User Table**, filter the accounts you need, then select their row checkboxes.
2. In the **Global Role Table**, filter the roles, including their systems and clients. Click the first role row, then hold **Ctrl** while clicking additional rows to select them.
3. Choose **Assign** in the Global Role Table. You can also drag the selected roles onto the Global User Table to open the same dialog.
4. In **Assign Roles**, **User ID's for Role Assignment** shows the destination accounts. **Roles to be assigned** shows the selected role rows and their clients.



The same role is selected from both clients to match the two target accounts.

These lists come from the two tables' selections. To change the accounts or roles, choose **Close**, change the table selections and open **Assign** again.

For example, suppose you select users in clients 100 and 200, but select `Z_DEMO_REPORT` only from client 100. The client-100 users receive that role. To assign it to the client-200 users too, select the role's client-200 row before opening **Assign**.

Set the validity period

Under **Options**, set the two dates beside **Role assignment is valid from** and **to**. The initial period is today through 31 December 9999.

The dates apply to every new assignment in this operation. For temporary access, enter its end date. For a scheduled start, enter its start date.

Use Update role assignments when different roles need different new periods. To edit a period already assigned to a user, use the Mass Changes role worksheet.

Retain or replace existing roles

Overwrite exisiting roles? starts clear.

- Leave it clear to retain the user's existing direct role assignments and their dates, while adding the selected roles with the new period.
- Select it when the selected roles should replace the user's existing role list. Existing direct roles outside the selected list are removed. The selected roles receive the period entered in **Options**.

Your license determines whether the overwrite option is available. The operation applies the same choice to all listed users who have matching selected roles.

Apply the assignments

1. Set the dates and overwrite choice for the operation.
2. Choose **OK**. The status bar identifies the account and client being processed.
3. When **OK** becomes available again, read **Results** for the completed operation.
4. Choose **Copy Output** to copy the result list, or **Close** to return to the tables.

Results identifies each account with **System**, **SID**, **Client** and **User**. The **Message** column includes SAP responses prefixed with the operation:

- **Remove roles:** the response from replacing the previous assignment list.
- **Assign roles:** the response from applying the prepared list, including retained assignments when overwrite is clear.
- **No Role was selected for this user. No action taken.** means none of the selected role rows matched that user's system connection and client.

Results accumulate while the dialog remains open. A later operation adds its messages below the previous results.

Resolve incomplete assignments

Assignment replacement clears the previous list before applying the prepared list. If removal succeeds but assignment fails, the account can be left with missing roles. Open Role Assignment for the affected account, then use Update role assignments to restore its intended roles.

An SAP error during removal is followed by an assignment attempt. **Results** includes both responses and a message explaining that sequence. Use the account's resulting assignment list to determine what remains to be restored.

Other accounts can complete when one account fails. To retry affected accounts, close the dialog, select those accounts and the matching role rows, and choose **Assign** again. Include the copied result messages when contacting support about a persistent failure.

Stop processing

Choose **Close** while the operation is running. Active SAP work finishes, and accounts that have not started are skipped. The dialog stays open for **Results**.

Cancelled before role assignment started. identifies an unstarted account. Completed changes remain applied. Choose **Close** again after processing stops to leave the dialog.

View users' role assignments

Applies to userXpress 2.0.0.0

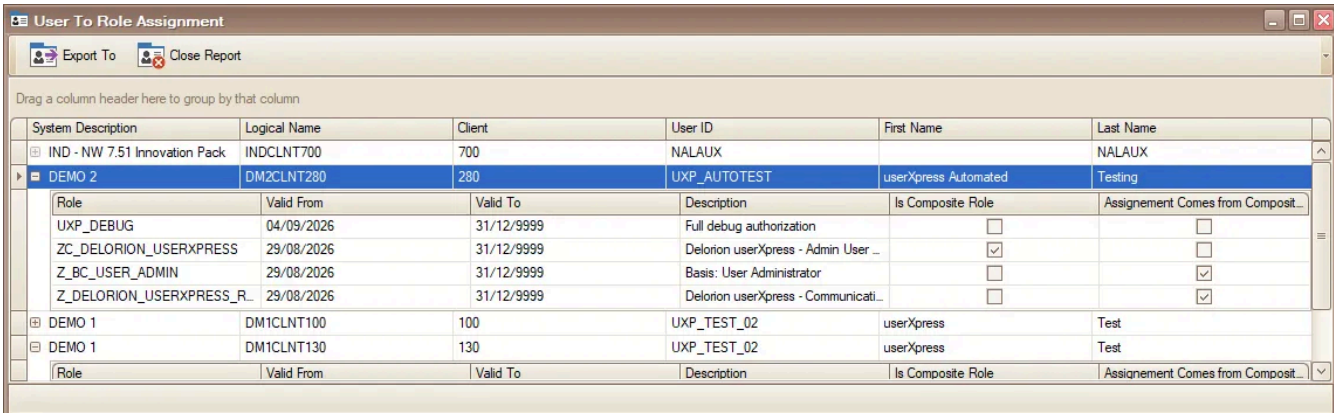
Read and export the roles assigned to selected users, including validity dates and composite-role indicators.

Use **Roles → Role Assignment** to see which roles selected users have in their SAP clients. This is useful when comparing users' access, investigating an unexpected assignment or preparing an assignment report.

Open the report

1. In the **Global User Table**, select the accounts using their row checkboxes. You can select accounts from several clients.
2. Choose **Roles → Role Assignment**. The progress window shows the clients being read.
3. In **User To Role Assignment**, expand an account with the plus button beside its row to display its roles.
4. Choose **Close Report** when you have finished.

The report reads role assignments from SAP when you open it. Open it again to retrieve changes made since that read.



Expand an account to see the roles assigned in that system and client.

Read an account's assignments

The account row identifies the **System Description**, **Logical Name**, **Client** and **User ID**. **Logical Name** identifies the connection, such as `DM1CLNT100`. **First Name** and **Last Name** come from the selected Global User Table row.

Each expanded role row shows:

- **Role:** the SAP role name.

- **Valid From** and **Valid To:** the assignment's start and end dates. These are the role-assignment dates, not the account's validity dates.
- **Description:** the available role description. A blank description means no text was returned for the report's language.
- **Is Composite Role:** selected when the role contains component roles. A clear checkbox identifies a role with no component roles in the retrieved data.
- **Assignement Comes from Composite Role:** selected when SAP marks this assignment as inherited from a composite role. A clear checkbox means that composite-origin indicator is absent.

A composite role groups single roles. Assigning it gives the user its component roles through SAP's user comparison. Maintain an inherited assignment through its composite role. See SAP's explanation of composite roles.

The report includes expired and future-dated assignments. Use **Valid From** and **Valid To** to distinguish them from assignments valid today. An account with no retrieved assignments has no role detail rows.

Export the report

Use **Export To** to save the account-and-role list for further analysis or sharing.

1. Choose **Export To**.
2. Under **Export Format**, choose an available format:
    - **Excel 2007 - 2013** produces an `.xlsx` workbook.
    - **Excel 97-2003** produces an `.xls` workbook.
    - **CSV** produces comma-separated text.
    - **XML** produces structured data. **XML incl. Schema** also includes the data structure.
3. Use the browse button beside **Save As** to choose the destination and filename.
4. Choose **OK**. A confirmation identifies the saved file, then the export dialog closes.

Export includes all assignments retrieved for the report, including collapsed accounts and rows hidden by report filters. Each exported row combines an account with one role assignment. Accounts with no assignments have no rows in the exported file.

Incomplete report

When some reads fail or are stopped, a **Roles** message states how many selected users are included. It also gives the failed and unstarted counts. The report contains the completed reads.

To retry the missing accounts, close the report, select those accounts in the Global User Table and open **Role Assignment** again. If their assignments still cannot be read, include the **Roles** message when contacting support.

To add or remove assignments, follow Update role assignments.

Update role assignments

Applies to userXpress 2.0.0.0

Add and remove roles for selected users across SAP clients, with common or client-specific changes.

Use **Roles → Update Role Assignment** when selected users need the same role changes. For example, add a new reporting role and remove the role it replaces across several clients in one operation.

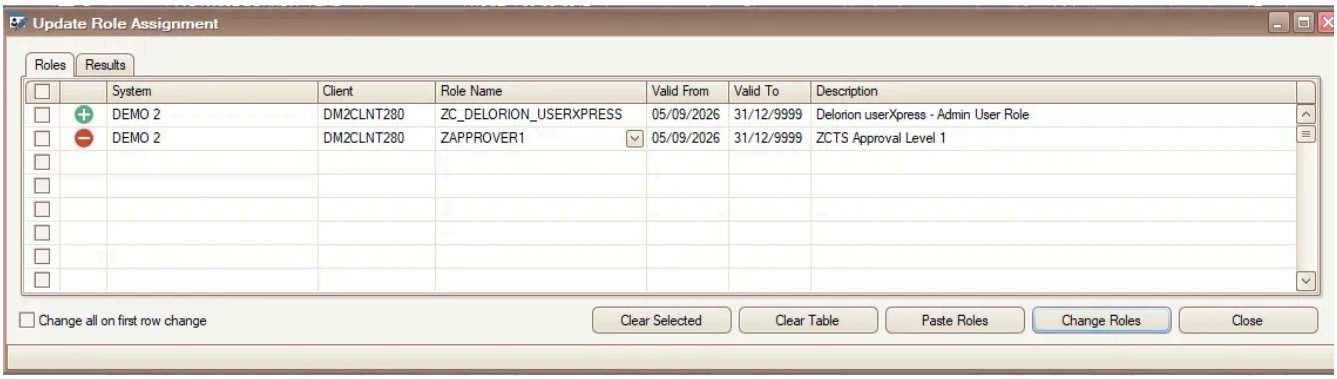
Each row in the **Roles** tab describes an addition or removal. Its system and client determine which selected users receive that change. You can combine changes for all selected clients with changes for one client.

Prepare the changes

The dialog uses the role lists already loaded in the **Global Role Table** for your connected clients.

1. In the **Global User Table**, select the target accounts using their row checkboxes.
2. Choose **Roles → Update Role Assignment**. Wait for **Getting common and unique Roles** to finish.
3. In an empty row on the **Roles** tab, choose **System**:
    - Choose a named system, then choose **Client**, to affect selected users in that client.
    - Choose ***ALL*** to affect selected users in every client represented by your selection. This choice is available when the selection spans several clients.
4. Choose **Role Name** from the list. For ***ALL***, the list contains names present in every selected client.
5. Choose the action in the icon column: the green plus adds the role, and the red minus removes it. New rows default to Add after you choose a system.
6. For an addition, set **Valid From** and **Valid To**. Choosing a role initially sets today and 31 December 9999. Change these dates for a scheduled start or temporary assignment.
7. Repeat for each change. Leave **Change all on first row change** clear when rows need different actions or destinations.
8. Choose **Change Roles** to apply the populated rows. The dialog switches to **Results**.

Change Roles uses all populated rows in the proposal. Row checkboxes select rows for **Clear Selected**. To exclude a proposed change, remove its row before applying.



The icon beside each row selects Add or Remove.

How each change applies

userXpress reads the selected users' assignments before applying your changes. It carries forward the existing role names and validity periods, adds the requested rows and removes the requested entries.

- **Add:** supplies the named role with the dates entered in that row.
- **Remove:** removes a matching role entry by name. The row's dates do not select a particular assignment period.
- ***ALL*:** applies the row to every selected user, using the role with that name in each user's own client.
- **Named system and client:** applies the row only to selected accounts in that destination.

For example, suppose you selected users in clients 100 and 200. You can add `Z_DEMO_REPORT` with ***ALL*** and add `Z_DEMO_APPROVE` only in client 200. The client-100 users receive the reporting-role change. The selected client-200 users receive both changes. These names are illustrative—choose your own roles from the lists.

If a role has several assignment periods, one Remove row removes one matching entry. To edit or remove a particular period, use the Mass Changes role worksheet, which describes the complete resulting assignment list.

Change several rows together

Select **Change all on first row change** when populated rows need the same action or destination. Changing these fields in the first row copies the corresponding value to the other populated rows:

- Add/Remove icon
- **System**
- **Client**

The role names and validity dates remain individual. Clear the checkbox before making a change that should affect only the first row.

Changing **System** clears that row's **Client**. Choose the destination client again before applying a client-specific change.

Paste role names

Use **Paste Roles** when you already have a list in a spreadsheet. Pasting starts at the first proposal row and fills subsequent rows.

1. Copy one column of role names without a heading.
2. In **Update Role Assignment**, choose **Clear Table** if you want to replace an earlier proposal.
3. Choose **Paste Roles**, or press **Ctrl+V** in the role table.
4. Set the required Add/Remove action, **System**, **Client** and dates for the pasted rows.

Pasted roles start as additions. With several selected clients, their initial system is ***ALL***. With one selected client, that client is used. Choose the specific destination for any role that is not common to all selected clients.

The **Description** column identifies role names that could not be found. Correct those rows by selecting the system, client and role from the lists. For text copied from an editor, include a line break after the last role name so that the final entry is read.

To remove rows from the proposal, select their checkboxes and choose **Clear Selected** or press **Delete**. **Clear Table** empties the entire proposal. These controls edit what you are preparing to apply.

Read the results

The **Results** tab identifies **System**, **SID**, **Client**, **User** and **Message** for each response. One user can have several messages. The icon distinguishes success, warning and error responses.

At completion, the status reads **Role assignment is complete**, **Not all role assignment changes completed successfully** or **Role assignment was cancelled**.

- **SKIPPED:** none of the proposal rows applied to that user's client.
- **SAP error:** read the message for the affected user and client. Successful changes for other users remain applied.
- **Cancelled before this user was processed:** the account had not started when you stopped the operation.

For a retry, close the dialog and select the affected accounts in the Global User Table. If the error leaves the outcome uncertain, open Role Assignment to see which assignments reached SAP before preparing the remaining changes. Each new **Change Roles** run replaces the previous **Results** list.

Stop an operation

Choose **Close** while changes are running to request cancellation. Active account operations finish, and accounts that have not started are skipped. The dialog remains open so you can read **Results**. Choose **Close** again when processing has stopped.

Find and remove expired role assignments

Applies to userXpress 2.0.0.0

Find assignments by their end dates across SAP clients and remove roles that users no longer need.

Use **Roles → Expired Roles** to find role assignments whose validity has ended or will end by a chosen date. Use the results to plan access renewals or remove assignments left after temporary access has ended.

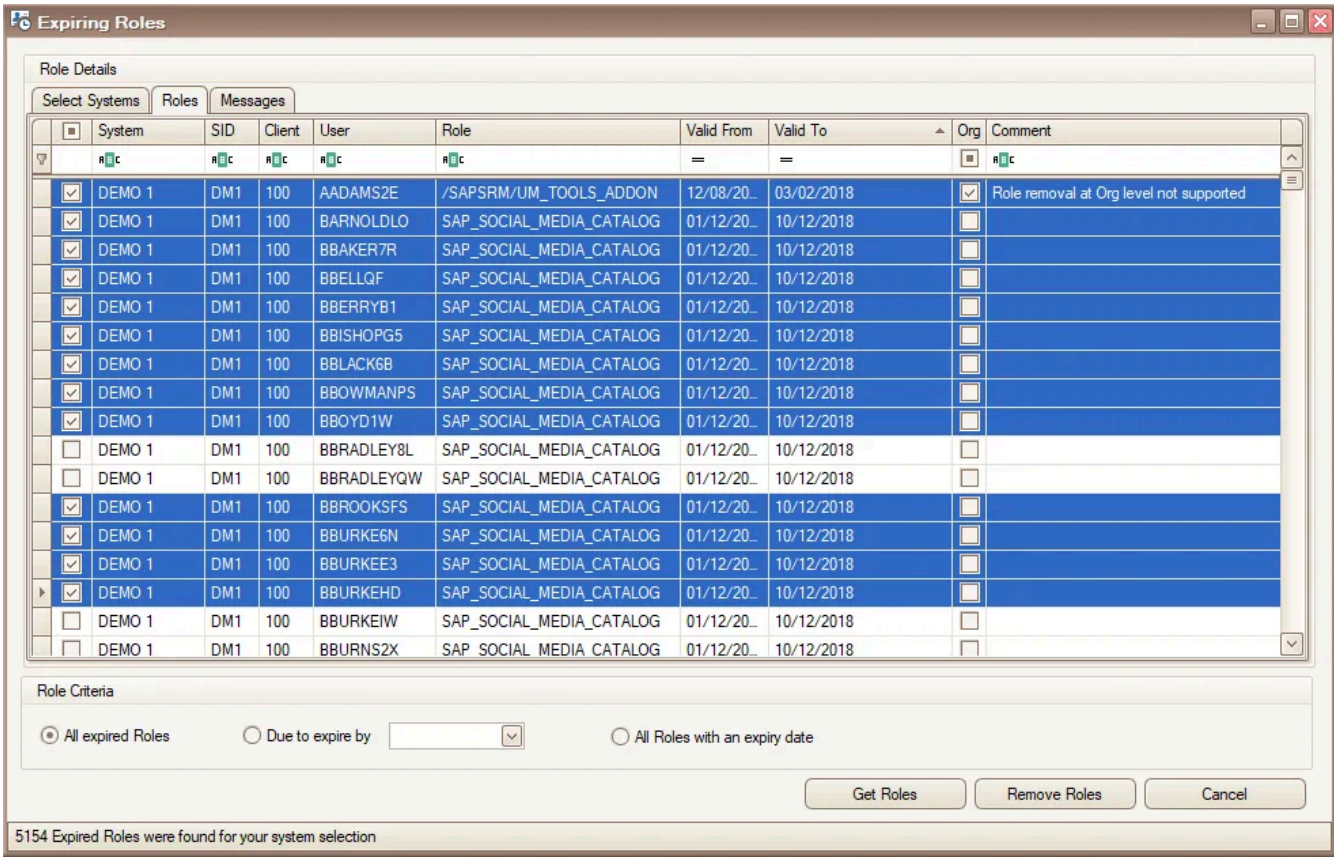
The **Expiring Roles** window searches all users in the clients you choose on **Select Systems**.

Find assignments

1. In the **Global User Table**, choose **Roles → Expired Roles**.
2. On **Select Systems**, select the checkboxes for the clients to search.
3. Under **Role Criteria**, choose an option:
    - **All expired Roles** finds assignments whose **Valid To** is before today. This is the initial selection.
    - **Due to expire by** finds assignments whose **Valid To** is on or before the date you enter. It includes already expired assignments as well as assignments ending by that date.
    - **All Roles with an expiry date** includes expired assignments and future expiries within the configured search horizon. The default horizon is ten years from today. Use **Due to expire by** when you need a specific cutoff.
4. Choose **Get Roles**. When the search finishes, the **Roles** tab shows the matching assignments.

For example, choose **Due to expire by** and 31 December 2027 to find assignments ending on that date or earlier. Assignments ending on 1 January 2028 are outside that search.

Changing the criteria or selected clients takes effect the next time you choose **Get Roles**. Each search replaces the displayed assignment list.



Filter the result columns, then select the assignments you want to remove.

Read and filter the results

Each row identifies an assignment using **System**, **SID**, **Client**, **User** and **Role**.

- **Valid From** and **Valid To** are the assignment's dates. These let you distinguish an expired assignment from one that is still valid but ends within your chosen cutoff.
- **Org** is selected for an assignment maintained through SAP organizational management. Its **Comment** says **Role removal at Org level not supported**. Maintain that assignment through organizational management in SAP.
- **Comment** also shows the outcome after a removal.

Use the filter row beneath the column headings to narrow the results, for example by user, role or client. Select the row checkboxes for the assignments you want to act on.

Composite roles appear as their own assignments. Their inherited component roles are omitted from this search. To see a user's full role list and composite indicators, use Role Assignment.

Remove selected roles

Remove Roles removes the selected role from the named user in that client. It removes all of that user's assignment periods for the role, including periods outside the search cutoff. To change one period while retaining another, use the Mass Changes role worksheet.

For a composite role, the removal includes its component roles and any direct assignments of those roles.

1. On **Roles**, select the rows for the user-and-role combinations to remove.
2. Choose **Remove Roles**. Removal starts immediately.
3. When processing finishes, read **Comment** beside each selected row. **Role successfully removed.** identifies a completed removal.
4. Open **Messages** for the system/client messages and the user and role named in each removal result.

Rows marked **Org** are skipped with a message explaining that their assignments are maintained at organizational level. Other selected rows can still be processed.

The result rows remain visible with their comments after removal. Choose **Get Roles** again to retrieve the remaining assignments for your criteria.

Read failures and partial results

Results cover the clients marked **Finished checking..** on **Select Systems**. **Check failed. See Messages.** identifies a client whose search failed. Open **Messages** for the corresponding details. To retry, select the failed clients and choose **Get Roles** again.

For removal results:

- **Role successfully removed.** means the role is no longer assigned to that user.
- **Role was not removed. See messages for more info.** means the role was still assigned after the attempt.
- **Role removal failed** identifies an error during removal or the subsequent read of the assignment.
- **Removal was not attempted because an earlier client operation failed.** means processing stopped before that row. Work in other clients can still complete.
- **Operation cancelled..** identifies a row that had not started when you stopped removal.

After an error that leaves the outcome uncertain, open Role Assignment for the affected account to see its assignments. Retry the remaining user-and-role combinations. Include the **Messages** details when contacting support about a persistent failure.

Stop a search or removal

Choose **Cancel** while an operation is running. The status changes to **Cancelling operation...** Active SAP work finishes, and work that has not started is skipped.

Completed removals remain applied. After removal stops, read the row comments and **Messages** before choosing the remaining work. Choose **Cancel** again when the operation has stopped to close the window.

Copy role assignments between users

Applies to userXpress 2.0.0.0

Use an existing user's roles as the starting point for other accounts, while choosing whether to retain their existing assignments.

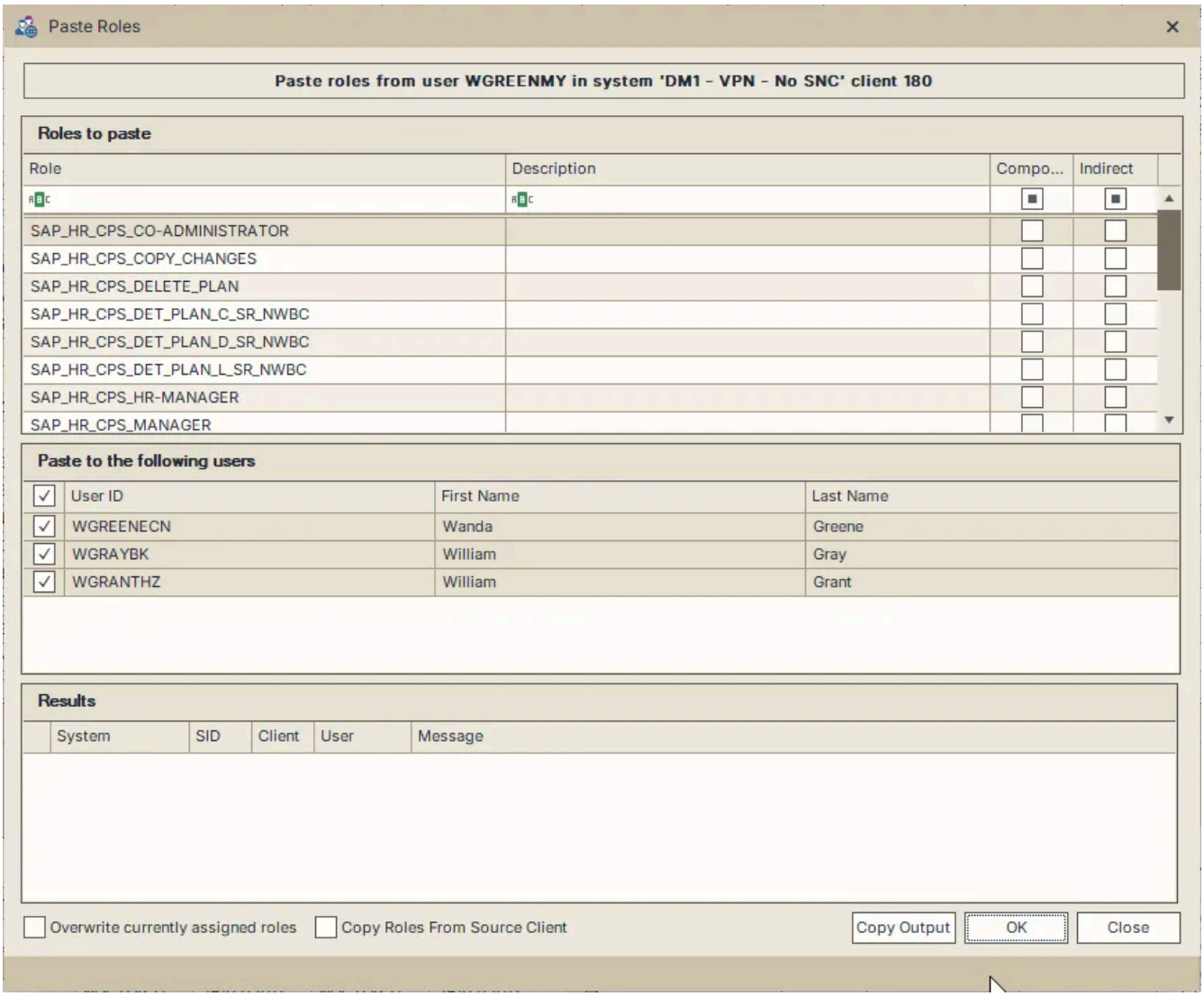
Use **Copy Roles from user** and **Paste Roles** when existing accounts need the same roles as another user. For example, add a colleague's purchasing roles to a new team member without changing that person's other assignments.

You can paste to accounts in several connected clients. With the default options, userXpress assigns the role names using the definitions already in each destination client.

Copy from one account

1. In the **Global User Table**, select one source account using its row checkbox.
2. Right-click that account and choose **Copy Roles from user 'ID'**, where `ID` is the source user ID.
3. Wait for **Copying Roles from user** to finish. userXpress keeps the retrieved assignment list for the next paste.
4. Clear the source selection and select the destination accounts.
5. Right-click and choose **Paste Roles to 'ID'** for one account or **Paste Roles to selected users..** for several.

The **Paste Roles** window identifies the source user, system and client above **Roles to paste**. **Paste to the following users** lists the destination accounts.



The destination list comes from your Global User Table selection. To change it, choose **Close**, change that selection and open **Paste Roles** again. Clearing a checkbox inside the dialog does not exclude that account from the operation.

To retrieve changes made to the source account since copying, repeat **Copy Roles from user** before opening the paste dialog.

Choose the roles and assignment behavior

Roles to paste shows the copied role names and descriptions:

- **Composite** identifies a role that contains component roles.
- **Indirect** identifies an assignment inherited from a composite role. With the default options, userXpress adds the composite role when it is included in the list and skips separately assigning its inherited components.

Use the filter row under the column headings to limit the roles to paste. All rows remaining visible are included when you choose **OK**. Highlighting one row does not limit the operation to that role.

New assignments start today and end on 31 December 9999. The source list includes expired and future-dated assignments, so pasting a role can make it valid immediately. For specific validity periods, use Update role assignments.

Both options below start clear.

Overwrite currently assigned roles

- Leave this option clear to retain each destination user's existing assignments and dates. userXpress adds copied roles whose names are not already assigned. Use this to supplement access.
- Select this option to replace each destination user's assignments with the roles being pasted, using the new validity period. Use it when the pasted list should become that user's complete role list. Existing roles outside that list are removed.

With the default options, an existing role name keeps its destination dates even when that assignment has expired. Use the Mass Changes role worksheet to edit an existing validity period.

Copy Roles From Source Client

This option imports role definitions from the source client before assigning roles. Use it when the destination must receive the source definitions as well as the assignments. Read Copy the source role definitions before selecting it.

Apply the assignments

1. Set the role filter and the options for the intended operation.
2. Choose **OK**. userXpress processes the destination accounts.
3. Read the status bar and **Results** when processing finishes. Each result identifies the system, client and user it concerns.
4. Choose **Copy Output** to copy the result list to the clipboard, or **Close** to return to the Global User Table.

Paste Roles is complete means processing finished without reported errors. The original source account is skipped if it is also in the destination list. When no additional roles need assignment, **Results** shows **The selected roles are already assigned to the user.**

Each new operation replaces the previous **Results** list. Copy any results you need before choosing **OK** again.

Copy the source role definitions

Select **Copy Roles From Source Client** when you want to import the source client's roles as part of the paste. A role definition contains the role's authorization settings. Changing a definition affects its use in that destination client, including other users assigned to the role.

This option has broader scope than the role filter:

- The import includes every role in the copied source list whose **Indirect** indicator is clear, including roles hidden by the dialog's filter.
- userXpress imports those definitions into each destination client, then generates the associated single-role profiles.
- The assignment stage adds every visible role, including roles marked **Indirect** and names already assigned to the destination user. These additions use today's date through 31 December 9999.
- **Overwrite currently assigned roles** still determines whether the destination's previous assignments are retained in the resulting list.

For a role-definition copy without assigning roles to users, use Copy roles between clients.

Resolve partial results

Paste Roles completed with errors means at least one import, generation or assignment operation reported a failure. Read **Results** for the affected client and account. Other accounts can still complete.

With **Copy Roles From Source Client** selected, a role-import or generation error appears as **Problem importing or generating the role** followed by its name. Assignment processing continues after these errors. A completed assignment therefore needs to be read alongside any definition or generation error for that client.

Assignment replacement clears the user's role list before applying the prepared list. If the second step fails, the account can be left with missing assignments. Open Role Assignment for that account and use Update role assignments to restore the intended roles.

To retry affected accounts, close the dialog and select those accounts in the Global User Table. Use **Copy Output** to include the result messages when contacting support about a persistent failure.

Stop processing

Choose **Close** while processing is running to request cancellation. Active work finishes, and unstarted accounts are skipped. The dialog remains open so you can read **Results**.

Cancelled before this user was processed. identifies an unstarted account. Completed assignments and imported role definitions remain applied. After processing stops, choose **Close** again to leave the dialog.

Copy roles between clients

Applies to userXpress 2.0.0.0

Copy role definitions and their related roles to selected SAP clients, then read the import and profile-generation results.

Use **Roles → Copy Roles..** to transfer a role definition from one SAP client to others. For example, copy a purchasing role to another client where administrators need the same authorization settings.

A role definition includes its authorization settings and menu. This operation imports the definitions and generates their profiles. To give existing users another user's roles, use Copy role assignments between users.

Prepare the source and destinations

Connect the source and destination clients in the **Control Panel**. With role management enabled, their roles load into the Global Role Table. The copy window uses that loaded list. To retrieve roles added since the connection loaded, reconnect the source client and reopen **Copy Roles**.

Your SAP logon needs access to read the source definitions and to import and generate roles in the destinations. See SAP access for the required authorizations.

The copy includes related roles:

- A composite role groups single roles. Copying it includes those component roles.
- A derived role brings its parent role. Derived roles share the parent's menu and can have different authorization or organizational values.
- A composite's derived components also bring their parent roles.

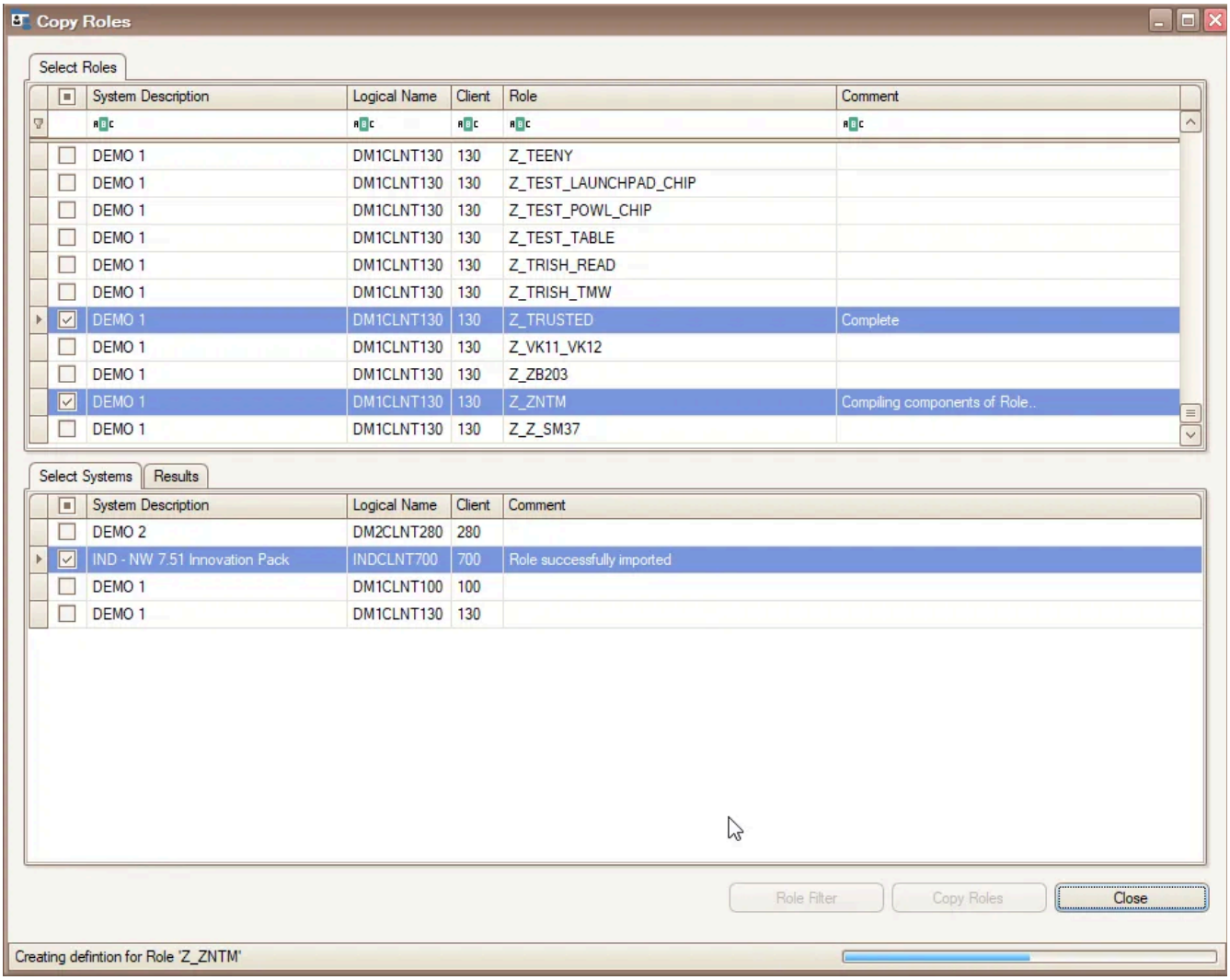
Importing these definitions can change roles already present in a destination, affecting users who have those roles. Select the source client whose definitions should be used for each role name.

Select and copy

1. In the **Global User Table**, choose **Roles → Copy Roles...**
2. Under **Select Roles**, narrow the list using the filter row beneath the column headings. **System Description**, **Logical Name** and **Client** identify each role's source.
3. Select the source-role checkboxes. Each selected role will be copied to each selected destination.
4. Wait for the automatic destination check to finish. Under **Select Systems**, select the destination-client checkboxes. A highlighted system name and a **Comment** identify a client where role-copy support is missing or could not be checked.
5. Choose **Copy Roles** to start.

6. When processing finishes, open **Results** to read the outcome for each role and destination.

A destination that is also the source client for a selected role is skipped for that role. Other source-role and destination combinations continue.



Choose source roles in the upper list and destination clients in the lower list.

Filter by a list of role names

Use **Role Filter** when you already have a list of roles to copy.

1. Choose **Role Filter**.
2. Enter or paste the full role names, one per line.
3. Choose **OK**. The list shows matching role names across the loaded clients.
4. Apply a source-system or client filter if needed, then select the role checkboxes.

Role Filter replaces the previous role-list filter. It matches complete names. Use the column filter row for a partial-name search.

Read the results

userXpress prepares each source definition, imports it into the destinations and generates the associated single-role profiles. The source-role **Comment** describes preparation. The destination **Comment** shows that client's latest copy outcome.

Results contains the detailed sequence, with **System**, **Logical Name**, **Client**, **Role** and **Message**. For example, `DM1CLNT100` identifies system DM1, client 100.

- **Role definition compiled successfully** means the source definition is ready for import.
- **Import of Role completed** means the destination accepted the import. Profile generation follows this step.
- **Role successfully imported** is recorded after the import and generation calls finish without a reported error.
- **The target client is the same as the source client. Skipping.** identifies a combination that was skipped.
- **Role copy finished** marks the end of processing. Read the preceding role-and-client entries for any failures.

Results accumulate while the window remains open. After another copy, its messages appear below the earlier results. The destination's single **Comment** can therefore be read alongside **Results** to see outcomes for all copied roles.

Check partial results

Destination cannot accept a copy

The automatic check highlights destinations where role-copy support is unavailable. Their **Comment** identifies a missing `/SDF/PRGN_EXECUTE_UPLOAD` function or a failed support check. Only clients with a successful check are included when you choose **Copy Roles**.

Include that comment when contacting support. After the cause is resolved, close and reopen **Copy Roles** to repeat the destination check.

Source preparation fails

Source role preparation failed means userXpress could not prepare that definition for import. Processing stops at that source role. Earlier copies remain applied.

Use the source system, client and role named in **Results** to identify the failed read. After resolving it, select the failed and remaining source roles for the next copy.

Import or generation fails

An import error stops that role's work in the affected destination. A generation error leaves the imported definition in place. Other destinations and subsequent source roles can still complete.

For a generation failure, open the affected role in **PFCG** in the destination client and use the generation messages to resolve its authorization data. Generate the single-role profiles describes the PFCG steps.

A role with no authorization data is identified in **Results** before generation is attempted. Include the role name, destination and relevant messages when contacting support about an unresolved failure.

To repeat a copy, select the affected source roles and destinations, then choose **Copy Roles** again.

Stop a copy

Choose **Close** during a copy and answer **Yes** to **Cancel Role Copy**. Active client work finishes, and work that has not started is skipped. Imported definitions remain in the destination clients.

The status changes to **Role copy was cancelled** when processing stops. Read **Results** for completed and cancelled copies, then choose **Close** again to leave the window.

Create users from an account list

Applies to userXpress 2.0.0.0

Import new user IDs and source accounts, assign initial passwords and create users in selected systems.

This workflow copies each new user from an existing source account. It is separate from Mass User Create, whose spreadsheet defines roles and account attributes directly.

Prepare the account list

Use an `.xlsx` workbook with these 16 headers in the first row, in exactly this order. Header names are case-sensitive. Keep the columns even when a value is optional.

Column	Header	Value
A	`UserID`	New user ID
B	`CopyFrom`	Existing source user
C	`InitialPassword`	Initial password. If blank on import, complete password generation before creation.
D	`Alias`	Optional alias value
E	`FirstName`	Optional first-name value
F	`LastName`	Last name. A blank value uses the new user ID.
G	`Address`	Copy address data
H	`Defaults`	Copy defaults
I	`Parameters`	Copy parameter assignments
J	`RefUser`	Copy reference-user assignment
K	`Roles`	Copy roles
L	`Profiles`	Copy profiles
M	`Groups`	Copy groups
N	`Personal`	Copy personal data
O	`License`	Copy license data
P	`EasyAccess`	Copy Easy Access menus

In columns G–P, enter `N` to exclude that data from the copy. A blank value copies the data. Use only `N` or a blank cell for these controls. Other values are not a reliable way to express “no”.

Review a small sample before applying the list broadly.

The source user must exist in each relevant target system/client. Verify its roles and profiles before using it as a template.

Import and assign passwords

1. Open the account-list batch-creation window and choose **File** → **Import**.
2. Import the workbook and review the rows.
3. If needed, choose **Set Password** → **Individual** to generate individual passwords, or **Set Password** → **Same** when your approved process requires a shared initial value.
4. Save the updated account list using **File** → **Save List**.

After the application generates passwords, **Accounts** → **Create Users** remains unavailable until the updated list has been saved.

The saved file contains credentials. Protect it appropriately.

Create and verify

Select the intended system/client combinations and choose **Accounts** → **Create Users**. Monitor the results. Use **Accounts** → **Cancel** if you need to stop. Inspect what already completed before restarting.

Select a user in the grid to view that user’s logs. Select a system/client in the system panel to narrow the logs to that target. Resolve failures individually rather than assuming that all accounts were created.

This workflow imports `.xlsx` workbooks, not CSV or XML files.

Mass User Create

Applies to userXpress 2.0.0.0

Create accounts from a workbook, choose shared or individual assignments, and save each account's results and initial password.

Use **Mass User Create** to create a group of accounts whose details, roles and parameters are defined in a workbook. For example, a new team can share a set of roles while each person has their own name, email address and user ID.

Open **Mass User Create** from the main userXpress toolbar. The **Spreadsheet** tab contains the editable workbook. **Messages** contains workbook-check results and account-creation messages.

Obtain the example workbook

1. Choose **Help** → **Save Example Mass User Create Spreadsheet** and save the file.
2. Choose **File** → **Open** to open it in Mass User Create.
3. Use **Full Description - Vertical** and **Full Description - Horizontal** to see the layouts, then prepare your accounts on **Your sheet**.

The first row provides choices for field headings. Keep the headings for the information you want to supply, using Workbook fields and formats as a reference.

Format and user-type cells have readable drop-down choices. The workbook also offers titles, time zones, security policies, logon languages and user groups from connected clients. You can type a value directly. A value offered by one client can still be unavailable in another target client.

Help → **View Help** opens this guide. **Help** → **Save Example MS Word Mail Merge** saves a Word template for notifying users from the results worksheet.

Choose a layout

- **Vertical**: Use this when everyone in a batch receives the same roles, profiles and parameters. List those assignments down their columns. Names, contact details and other personal values remain on each user’s row.
- **Horizontal**: Use this when users need different assignments. Put each user’s roles, profiles and parameter pairs across that user’s row.

Set cell A1 to `Vertical` or `Horizontal`. Separate batches with two completely blank rows. For example, give Accounts Payable and Accounts Receivable separate Vertical batches when each team needs a different set of roles.

See Repeatable assignments for role dates, parameter pairs and the Horizontal profile restriction.

Set targets for the batch

In both layouts, `System`, `SID` and `Client` define the targets for **every user in the same batch**. They do not belong to the user on the same row. Enter each intended target once, using matching system, SID and client values.

For example, a batch with two users and targets `ABC / 001` and `ABC / 100` creates both users in both clients: four accounts in total. Repeating a target beside each user can repeat processing. Use separate batches, divided by two blank rows, when different groups of users need different targets.

Connect the target clients through the Control Panel before running the workbook check.

Start from exported user objects

Select users in the Global User Table and choose **Export User Objects** to prepare a Horizontal workbook containing their details, roles and parameters. Use this as a starting point when new accounts need similar settings to existing accounts.

Users may come from several source systems. The exported file is one batch until you divide it into separate batches.

The exported `System`, `SID` and `Client` cells are blank so that you can choose the batch's destinations. Their drop-down lists contain choices from the clients connected when the file was exported. The lists are stored in the workbook and work in Excel and the Mass User Create spreadsheet editor.

1. Set `User_ID` and the personal details for the accounts you want to create.
2. Choose matching target values and enter each destination once. A choice in one list does not automatically select matching values in the other two lists.
3. Preserve three-digit clients such as `001`.
4. Run **Check** → **Format & Systems** after editing.

Existing accounts in a target are reported during checking. To change existing accounts from a workbook, use Mass Changes.

The export shows waiting, active and completed clients. Cancellation waits for active reads to finish. A failed or cancelled export does not provide a completed workbook. Read the reported error before trying again.

Open and check

1. Choose **File** → **Open** and select the workbook.
2. Select the worksheet containing the accounts to create.
3. Save any edits with **File** → **Save**, or use **Save As..** to save a separate workbook.
4. Run **Check** → **Format & Systems**. userXpress checks the worksheet first, then checks its target clients.

5. For a reported problem, use the highlighted cell or **Messages** entry to locate the value and correct it. Save your changes and run **Check → Format & Systems** again.

When the checks succeed, **Accounts → Start** and **Create Users** become available.

The check uses the active worksheet. Switching worksheets clears its check results. Run the check again when returning to that worksheet.

What the check covers

The worksheet check covers the layout marker, required headings, duplicate headings, target identifiers, account dates and coded preferences. The field reference explains the accepted values and blank-cell defaults.

The SAP check covers:

- Connections to the listed systems and clients.
- Existing user IDs and aliases in each target.
- The requested roles, profiles, parameters, output devices, reference users, user groups and security policies.

If **Client Connections** lists disconnected targets, connect those clients in the Control Panel and run **Check → Format & Systems** again. Other problems appear against their target client in **Messages**.

Find a reported cell

Point to a column heading for entry guidance, or to a highlighted cell for its message.

1. Choose **Messages → Show** to open the message list.
2. Double-click an entry with a cell reference. userXpress switches to the **Spreadsheet** tab and selects that cell.
3. Correct the value and run **Check → Format & Systems** again.

Next Cell and **Previous** step through cells reported by the worksheet check. **Messages → Export** saves the displayed message list to an Excel workbook.

Create accounts

Choose **Accounts → Start** or the **Create Users** toolbar button. userXpress processes every account in the active worksheet's batches against that batch's listed targets.

The status bar shows progress as clients and users are processed. Several clients can be active at once. Completed account information is added to the Global User Table, and the results worksheet opens when processing finishes.

Pause or stop

- Choose **Accounts → Pause** to pause after the active account operations finish. Choose **Accounts → Start** to continue.

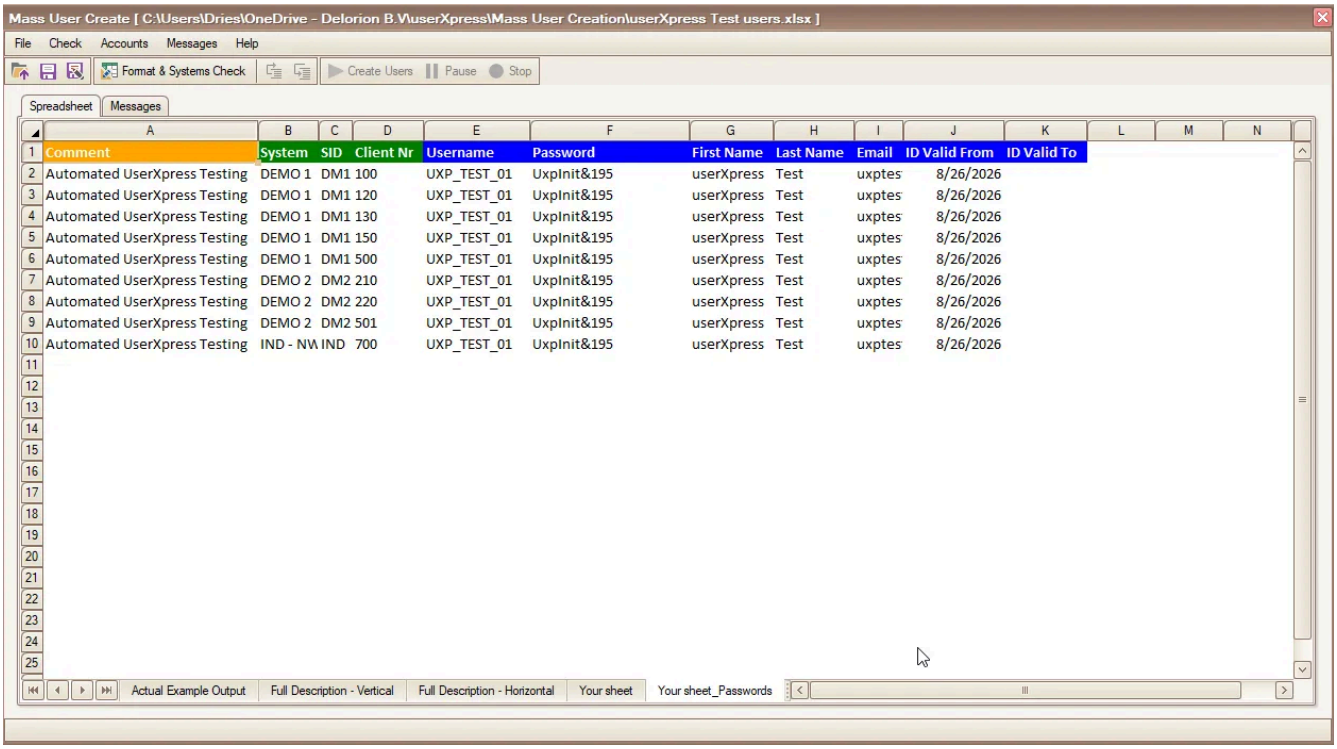
- While processing is active, choose **Accounts** → **Stop**, then **Yes**, to stop the run. Active account operations finish before the results are displayed. Accounts already created remain in SAP.

A stopped or incomplete run retains its progress for **Accounts** → **Start** to resume. See Recover a mass-creation run for the resume choices and recorded failures.

Save and review results

Use the **Save** toolbar button to save the workbook with its new results worksheet. The worksheet name normally ends in `_Passwords`, with a suffix when that name already exists.

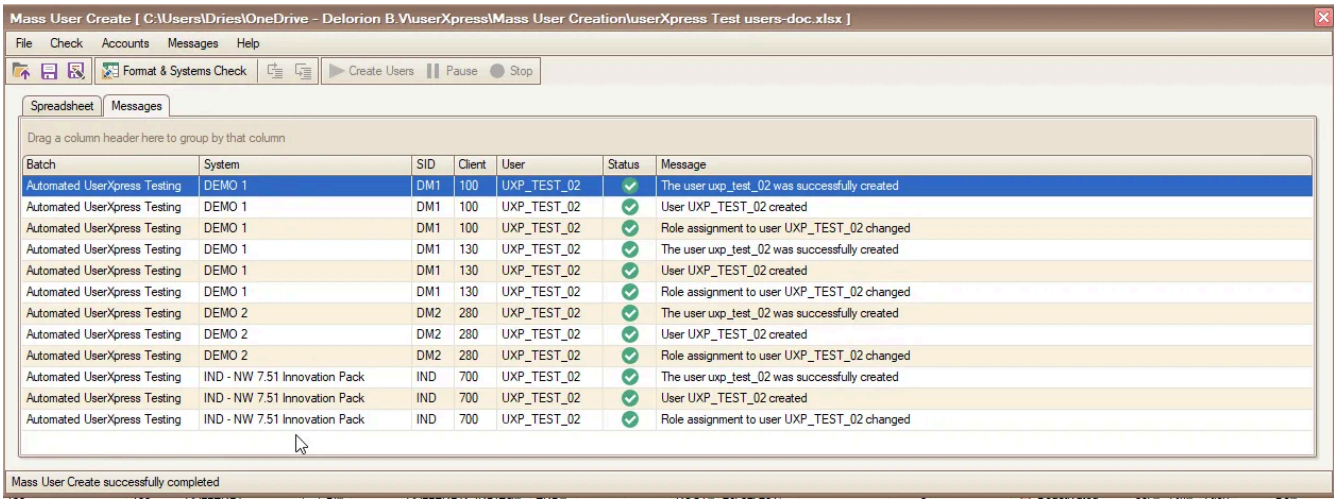
Each row identifies an account and its target through **System**, **SID**, **Client Nr** and **Username**. It also contains the recorded **Password**, name, email address and account-validity dates. **Comment** identifies the batch.



The results worksheet records account details and initial passwords by target client.

Open **Messages** for the account-creation and role-assignment outcomes. **Batch**, **System**, **SID**, **Client** and **User** identify the target of each **Message**.

- **The user … was successfully created** reports account creation. Role-assignment messages follow separately.
- **The user … was not created** is followed by SAP's explanation. Its password cell is empty.
- A role-assignment error can occur after an account was created. Resolve that assignment for the existing account using Update role assignments.



The Messages tab lists account-creation and role-assignment outcomes for each client.

After a stopped run, the **Save** toolbar button remains available. Use the recovery guide for a highlighted password beginning with `Error:` or a message that the Global User Table could not be updated.

For account notifications, see Work with a mail-merge template.

Choose **File** → **Close** to close the workbook or **File** → **Exit** to leave Mass User Create. If an unsaved-workbook warning appears, choose **No** to return and save it. Choosing **Yes** closes it without saving.

Recover a mass-creation run

Applies to userXpress 2.0.0.0

Resume unfinished account creation, retain recorded passwords and resolve a specific creation or display failure.

Use recovery after stopping Mass User Create or after an application, workstation or connection failure interrupts the run. userXpress retains the batch and its recorded account results so it can continue unfinished work.

Resume or stop recovery

Continue from the open window

After **Mass User Create was stopped** or **Mass User Create was incomplete**:

1. Save the displayed results with the **Save** toolbar button.
2. Connect any missing target clients through the Control Panel.
3. Choose **Accounts** → **Start** to continue.

Resume skips system/client/user combinations that already have a recorded result, including recorded failures. It processes combinations without a recorded result and includes the earlier results in the new output.

After recovery has finished, address any **The user … was not created** result. Correct the reported cause, then prepare a separate batch for that account and target. For an account that was created but whose role assignment failed, update its assignments.

Continue after reopening userXpress

1. Start userXpress and connect the target clients.
2. Open **Mass User Create**. userXpress detects the incomplete run and asks whether you want to resume.

Choose the action you need:

- **Yes** loads the original workbook and saved batch, then resumes. If **Systems Not Connected** lists missing clients, connect them and choose **Accounts** → **Start**.
- **No** opens a worksheet of the recorded results and clears the saved resume state. Use this when you want to finish handling the run manually. At **Save Users Processed**, choose **Yes** to save those results.

Choosing **No** ends automatic recovery even if you cancel the subsequent save dialog. Save the displayed results before closing the window. If no results were recorded, userXpress reports that none were found.

If **Missing Spreadsheet** appears, restore the original workbook to the path shown in the message. Reopen Mass User Create and choose **Yes** at the recovery prompt.

Resolve uncertain accounts

A failure can occur after SAP creates an account but before its details are recorded. During recovery, an account found in this state is marked in **Messages** and in the results worksheet.

The **Username** and **Password** cells are highlighted, and **Password** begins with `Error:`. The cell comment explains that the initial password is unknown and role assignment could be incomplete.

For that system/client/user combination:

1. Reinitialize the password to obtain a new initial password.
2. Display its role assignments and compare them with the requested roles and dates in the input workbook.
3. Use Update role assignments for any missing assignments.

If the recovery prompt does not appear after an interrupted run, contact support with the last displayed message and the time of the interruption. Keep the input workbook and any saved results available for that investigation.

SAP creation completed with a display warning

SAP creation completed with a Global User Table display warning means the account-creation run finished, but the table could not show every created account. Save the results, then disconnect and reconnect the affected client to load its account list again. Do not rerun account creation to repair the display.

If **Mass User Create results could not be displayed** appears, the completed-user recovery data is retained. Reopen Mass User Create to use the recovery prompt.

Work with a mail-merge template

Use the results worksheet as a Word mail-merge source when you want to send each user their account details. Each system/client/user row becomes a separate message, so a person with accounts in several clients receives several messages.

Save the result workbook first. The template is available through **Mass User Create → Help → Save Example MS Word Mail Merge**. Email merge requires desktop Word and a compatible email program. See Microsoft's mail-merge instructions for the supported setup.

1. Open the template in Word and choose **Mailings → Start Mail Merge → E-mail Messages**.
2. Choose **Select Recipients → Use an Existing List**, select the saved workbook and select its results worksheet.
3. Use **Insert Merge Field** to place **Username**, **System**, **Client Nr** and the other required account values in your message.

4. Choose **Preview Results** and move through the records. Match each account's details to its **Email** recipient, and exclude rows with failed creation or an unknown password.
5. Choose **Finish & Merge → Send E-mail Messages**. Select **Email** in **To**, enter the subject and choose the records to send. Choose **OK** to send the individual messages.

Reference

Workbook fields and formats

Applies to userXpress 2.0.0.0

Required headings, batch layouts, date formats and optional fields for a Mass User Create workbook.

Start from the example workbook saved through **Mass User Create → Help → Save Example Mass User Create Spreadsheet**. Preserve its headings and underscores. Use the exact spelling shown below even where a check accepts other letter casing.

Layout and required fields

Set cell A1 to `Vertical` or `Horizontal`. A Vertical batch shares role and parameter lists among its users. A Horizontal batch places those assignments along each user's row. Keep parameter IDs paired with their values.

Separate batches with two blank rows, following the example workbook. Do not insert blank columns between populated columns: a blank header can be interpreted as the end of the field list.

Field	Purpose	Example
`Comment`	Identifies the batch in the worksheet	`Demo team`
`System`	Connection entry used for the target system	`Example SAP system`
`SID`	Target system identifier	`ABC`
`Client`	Target client within that system	`100`
`User_ID`	Account to create	`DEMO_J`

The `System`, `SID` and `Client` columns form a target list for the batch. Every user in that batch is processed in every listed target, in both Horizontal and Vertical layouts. A target on a user's row is not limited to that user.

Enter each target once. Do not repeat the same target alongside all user rows.

Two users and two distinct targets produce four intended creations. To give users different destinations, put them in separate batches with two blank rows between batches.

Use `Comment` to name the batch, for example `Finance team`. That name appears with the account results.

Use a three-character alphanumeric `SID` and a three-digit `Client` such as `010`. Preserve leading zeroes. The `System` entry must match a configured connection, and each SID entry needs its corresponding client value.

Apart from the layout marker in A1, fields can appear in any order. Keep the related role-date and parameter columns together as described below.

Repeatable assignments

In a **Vertical** batch, put the shared roles, profiles and parameter pairs down their respective columns. Every user in that batch receives the shared assignments in each listed target client. Keep user-specific contact/default values on the user's row.

In a **Horizontal** batch, put assignments across each user's row. The columns `Roles`, `Role_Valid_From`, `Role_Valid_To`, `Profiles`, `Parameter_ID` and `Parameter_Value` can repeat. Other duplicate headings are rejected. Use `Profiles` (plural).

Keep each parameter's `Parameter_Value` immediately after its `Parameter_ID`. Repeat the pair to provide another parameter. A missing value is a blank value, not an instruction to skip the parameter. Preserve significant spaces when a SAP parameter requires them.

Place a role's validity columns immediately after that `Roles` column, before the next role.

If role validity is not supplied, userXpress defaults the start to the current date and the end to 31 December 9999. Supply explicit dates when that is not appropriate.

For example, a Vertical batch containing two users and two demo role rows gives both roles to both users. In a Horizontal batch, fill a role cell only on the row of the user who should receive it.

Horizontal profile restriction: include the `Parameter_ID` heading when using `Profiles` in a Horizontal sheet. Its cells can be empty when no parameters are needed. Without that heading, the profiles are omitted. Alternatively, use a Vertical batch.

Dates

Format account and role-validity date cells as `dd/mm/yyyy` and enter spreadsheet dates. For example, `23/09/2026` means 23 September 2026.

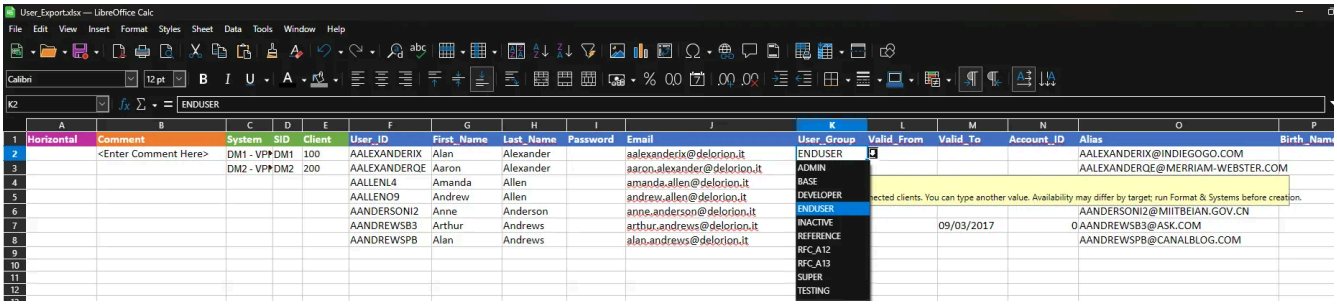
This applies to `Valid_From`, `Valid_To`, `Role_Valid_From` and `Role_Valid_To`. Keep this cell format when pasting dates from another workbook. The `Date_Format` field controls the SAP user's display preference and is separate from the workbook's date-cell format.

Choose formats and user types

Use the drop-down choices for `Date_Format`, `Decimal_Format`, `Time_Format` and `User_Type`. The description makes the choice readable, and the code in brackets identifies the SAP value. You can also enter the SAP code directly.

- **Date and time formats**: Choose the display style the new user needs. A blank cell leaves that preference unspecified.
- **Decimal format**: Choose the notation explicitly, including **1.234.567,89 [blank]** when that is required. In a Horizontal sheet, an empty cell leaves the preference unspecified. In a Vertical sheet, an empty cell in a `Decimal_Format` column selects `1.234.567,89`.
- **User type**: Choose **Dialog [A]** for an individual who signs in interactively. The other choices are **System [B]**, **Communications [C]**, **Reference [L]** and **Service [S]**. An empty cell creates a Dialog user.

The example workbook and files opened in Mass User Create also provide connected-client choices for `Title`, `Timezone`, `Security_Policy`, `Logon_Lang` and `User_Group`. These combine values from the connected clients. Run **Check → Format & Systems** to check their availability in every target.



The User_Group list is open in a Horizontal workbook, with ENDUSER selected.

If the **Creation dropdowns** message reports that choices could not be loaded, type the required values directly. Save the workbook to retain the available lists for use in Excel.

Identity and contact fields

Field	Purpose
`Account_ID`	Account number
`Alias`	Alternative account identifier
`Birth_Name`	Birth name
`First_Name`	First name
`Last_Name`	Last name. The user ID is used when no last name is supplied.
`Middle_Name`	Middle name
`Title`	Form of address
`Email`	Email address, for example `jane.demo@example.com`
`Telephone_Cell`	Mobile telephone number
`Telephone_Land`	Landline telephone number
`Building`	Building identifier
`Department`	Department
`Floor`	Floor
`Function`	Job function
`Room`	Room
`Cost_Center`	Cost center

Access and security fields

Field	Purpose
`Password`	Initial password. If omitted or blank, the workflow requests a generated password from SAP.
`User_Type`	Select a user type or enter `A`, `B`, `C`, `L` or `S`. Blank creates a Dialog user.
`User_Group`	Authorization-check user group
`Reference_User`	Reference user for additional authorization
`Roles`	Roles to assign, following the selected layout
`Role_Valid_From`	Role-assignment start date
`Role_Valid_To`	Role-assignment end date
`Profiles`	Profiles to assign, following the layout rules above.
`Security_Policy`	Security policy configured in the target client
`Valid_From`	Account validity start date
`Valid_To`	Account validity end date
`SNC_Name`	Full SNC identity name
`SNC_Gui_Flag`	Enter `X` to permit password logon for SAP GUI with SNC. Blank leaves the setting unspecified.

The SNC password-logon choice also depends on the SAP system's SNC settings. To change the choice after creation, use **Permit password logon for SAP GUI** in that guide.

SAP applies the target client's password policy when creating the account. A rejected password is reported in the account's creation messages.

Defaults and parameters

Field	Purpose
`Date_Format`	Choose a date-display style or enter its SAP code, `1`–`6`.
`Decimal_Format`	Choose `1.234.567,89 [blank]`, `1,234,567.89 [X]` or `1 234 567,89 [Y]`. See the blank-cell rules above.
`Time_Format`	`0` uses 24-hour time. `1`/`2` use 12-hour time with AM/PM or am/pm. `3`/`4` use hours 0–11 with AM/PM or am/pm.
`Logon_Lang`	Default logon language

Field	Purpose
`Output_Device`	Default output device
`Start_Menu`	Initial area menu
`Timezone`	SAP time-zone key valid in the target system
`Parameter_ID`	Parameter identifier
`Parameter_Value`	Value for its paired parameter identifier

Use SAP keys for `Timezone`, `Logon_Lang`, `Output_Device` and `Start_Menu`. The connected-client drop-downs supply available keys for time zone and language.

Reserved fields

`Add_Remove`, `Profile_Valid_From` and `Profile_Valid_To` are not supported by this creation workflow. Leave them out of new workbooks.

Validate before creating

Run **Check** → **Format & Systems** on the active worksheet. Correct any reported problems using **Messages** and the highlighted cells, then run the check again. Continue with Mass User Create when **Accounts** → **Start** becomes available.

Global Role Table: menu and tasks

Applies to userXpress 2.0.0.0

Find SAP roles, inspect their assigned users, open PFCG and search role authorizations across connected clients.

Use the Global Role Table when your starting point is a role: you want to find its users, inspect its content or assign it to accounts. The table brings together roles loaded from the connected SAP clients.

A role name belongs to a specific system and client. Filter those columns when you want to work in one part of the landscape, and select the role rows needed by the action.

Click a role row to select it. Hold **Ctrl** while clicking to add or remove individual rows. To select a range, click the first row, then hold **Shift** and click the last row.

See Role table columns for field meanings, blank values, column layout and the corresponding SAP fields.

Where Used

Use **Where Used** to find which users have the selected roles assigned, for example before reviewing or changing those assignments.

1. Select the role rows in the Global Role Table.
2. Choose **Where Used**.
3. Expand the roles in the assignment report to see their users and assignment details.

The report identifies the system/client for each role. When none of the selected roles is assigned, userXpress reports that result.

Continue with the assigned users

Choose **Apply Filter** in the report to bring its assigned users into view in the Global User Table. This uses all users under the report's visible role rows, including users under collapsed rows.

Filter the report's role rows first when only part of the report should contribute. Filtering the expanded user details does not narrow the account set used by **Apply Filter**.

The action replaces the Global User Table's criteria and clears its row selection. Select the resulting account rows for your next task. Any text in the user table's separate search box still applies.

You can save this account list's criteria under **My Queries**. It retains the captured system/client/user identities. Run **Where Used** again when you need a list reflecting later assignment changes.

Assign

Use **Assign** when you have already found the roles that the selected users should receive.

1. Select the target accounts in the Global User Table.
2. Select the role rows in the Global Role Table.
3. Choose **Assign** in the Global Role Table.
4. Set the validity dates and overwrite choice in **Assign Roles**, then choose **OK**.

See Assign roles from the Global Role Table for system/client matching, the assignment options and per-user outcomes.

PFCG

Use **PFCG** to open selected roles in SAP role maintenance. SAP GUI must be installed, and the connection must use a SAP **Dialog** user authorized for PFCG in the selected client.

1. Select the role rows in the Global Role Table.
2. Choose **PFCG**.
3. For several roles, the confirmation lists each role, system and client. Choose **Open N windows**, where N is the number of selected roles, to continue. Choose **Cancel** to return to the table.

Each selected role opens in a separate SAP GUI window. You can continue working in userXpress while those windows are open.

Double-click a role row to open only that role, even when other rows are selected.

The default SAP GUI window limit is five, shared with SU01. If the selection exceeds the available capacity, select fewer roles or close existing windows before choosing **PFCG** again.

For opening errors, use SU01 or PFCG does not open.

Content Filter

Choose **Content Filter** to find roles by their maintained authorizations or transaction content. For example, find roles with a particular object/field value without knowing their names.

- Search role content explains the editor and worked queries.
- Comparisons and values explains exact values, coverage, wildcards, ranges and organizational values.
- Role queries and search results explains **Run again**, **Clear role content**, query status and incomplete searches.

The content menu also offers **Download Filter Template**, **Import Filters** and **Export Filters**. Use the filter workbook guide to prepare or share saved definitions.

My Queries

Use **My Queries** for recurring role reviews. Save ordinary column criteria, role content conditions or both. Choose a saved name to apply the definition, then use **Save changes** or **Save query as...** after editing it.

Save and reuse role queries describes the complete procedure.

Export the role list

Use **Export** when you need a report of the roles shown in the table.

1. Apply the filters for the roles you want in the report.
2. Choose **Export**.
3. Select the **Export Format** and use **Save As** to choose the file.
4. Choose **OK** to write it.

The export includes the filtered role rows, including unselected rows. **Content Filter → Export Filters** serves a different purpose: it saves query definitions for reuse.

Role table columns

Applies to userXpress 2.0.0.0

Identify a role and its client, interpret creation and change details, and find the corresponding fields in SAP.

Use these columns to identify roles across clients or narrow a review by role name, creator or change date. For example, filter **Client** and **Created By** to find roles created by one SAP user in that client.

The Global Role Table displays information retrieved from SAP. Open PFCG to maintain a role.

Choose which columns to show

1. Right-click a column heading and choose **Column Chooser**.
2. Drag a field from the chooser to the heading row to show it.
3. To hide a column, drag its heading into the chooser.
4. Drag headings along the heading row to put them in the order you need.

All nine fields below are available. Your saved layout determines which ones are visible. To retain your arrangement for later sessions, enable **Settings → Workspace → Global Role Table → Save Layout** and choose **Apply** or **OK**.

Identify the role and client

System Description

The description of the SAP connection from which the role was loaded. Use it to distinguish systems when reviewing several clients together.

This comes from the connection's SAP Logon entry. It is connection information, with no corresponding role field in PFCG.

Logical Name

The connection identifier used by userXpress, formed from the system ID and client. For example, `DEMCLNT100` identifies system `DEM`, client `100`.

This value is generated by userXpress. It has no corresponding SAP role field to maintain.

Client

The SAP client containing the role. The same role name in two clients identifies two separate role definitions.

When opening SAP GUI manually, use this number in the logon screen's **Client** field. SAP's logon instructions describe that field.

Role

The technical name of the role. Use this value when selecting a role for assignment or entering a role name in SAP.

In **PFCG**, enter it in the **Role** field to display or change that role in the selected client.

Description

The role's short description. Use it alongside **Role** when the technical name alone does not explain the role's purpose.

A blank cell means no short description was loaded. To view or maintain the text in SAP, open the role in **PFCG** and use **Description** beneath the role name. The short description is language-dependent. The **Description** tab also provides a separate **Long Text** for a fuller explanation. SAP role description reference.

Creation and change details

Use these fields to find roles created or changed by a particular SAP user, or to narrow a review by date.

- **Created By**: The SAP user recorded as the role's creator.
- **Created On**: The recorded creation date. A blank cell means no creation date was loaded.
- **Changed By**: The SAP user recorded for the role's last change.
- **Changed On**: The recorded last-change date. A blank cell means no change date was loaded.

A blank **Created By** or **Changed By** cell means that the corresponding SAP user value is empty.

In **PFCG**, open the role and choose **Description**. Under **Administration Information**:

- **Created → User** corresponds to **Created By**.
- **Created → Date** corresponds to **Created On**. SAP shows its **Time** separately.
- **Changed → User** corresponds to **Changed By**.
- **Changed → Date** corresponds to **Changed On**. SAP shows its **Time** separately.

SAP records these administration values as roles are created and changed. See the PFCG screen reference. For a history of individual role changes, use SAP change documents.

Load updated role information

The role list loads when you connect a client. To retrieve role definitions changed since that load, disconnect and reconnect that client.

If the expected roles are missing, clear the role table's filters and inspect the client's result in Loading systems. A role-content query searches within the loaded role list. Use Run again after loading new role information.

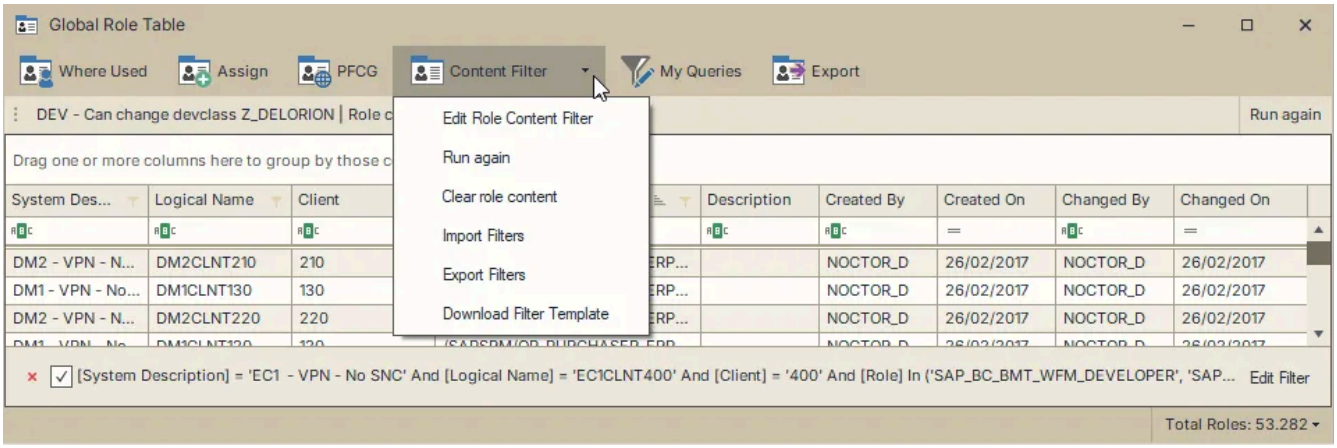
Search role content

Applies to userXpress 2.0.0.0

Find roles by authorization object, field value or transaction, and build a content filter in the Global Role Table.

Use a role content filter when you know the authorization or transaction you need to find but do not know which roles contain it. For example, find roles whose maintained authorizations cover activity `02` for a particular role name, or roles whose menus contain a transaction.

A column filter searches details already shown in the Global Role Table, such as role name or client. **Content Filter** reads the maintained content of the roles from the connected SAP clients.



Choose what to search

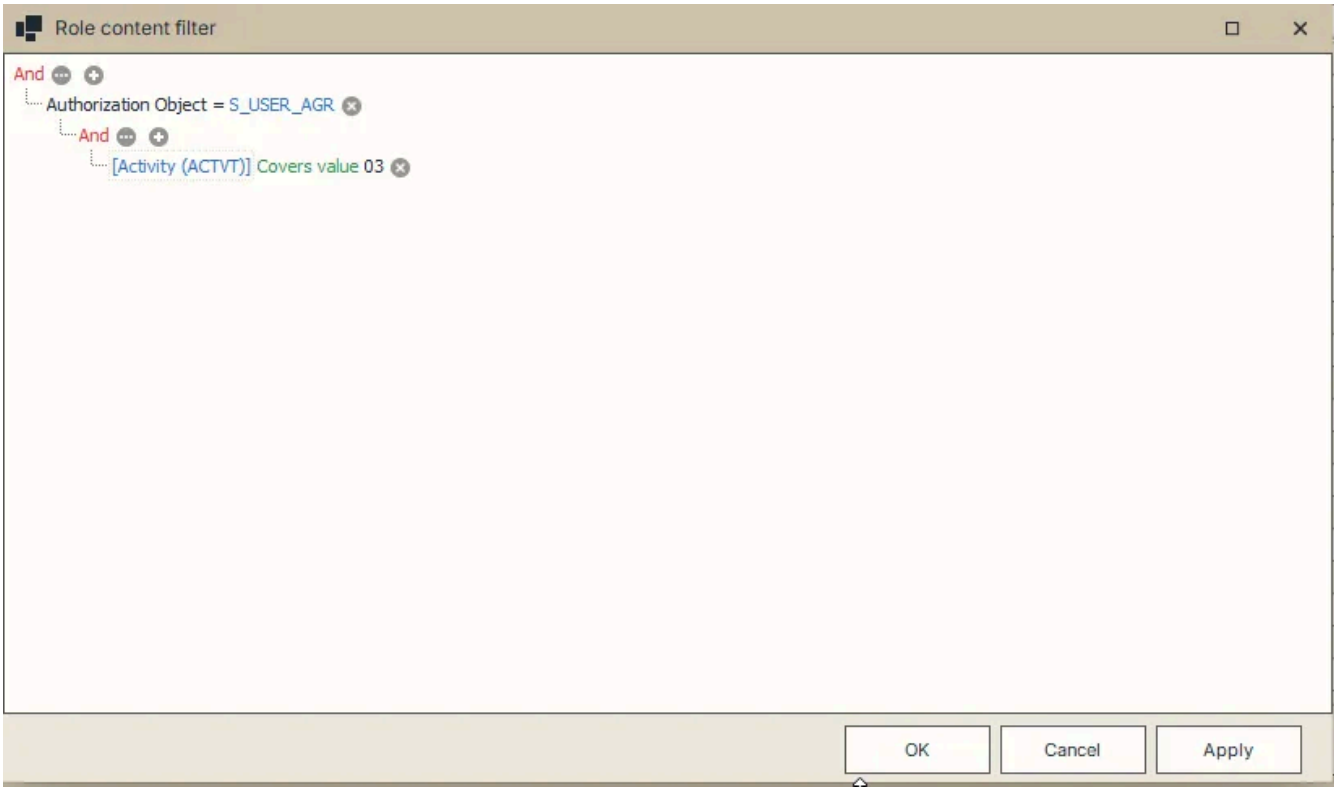
Condition	Use it to find
Authorization Object	A specific object and the values maintained in its fields. Keep related field requirements inside the same object condition.
Transaction authorization (S_TCODE)	Transaction codes covered by the role's maintained transaction authorizations.
Menu transaction	A transaction listed in the role menu, for example when locating roles that provide a particular menu entry.

For a composite role, search its member single roles to inspect their authorizations. The content search evaluates each role's own maintained data. To investigate a particular user's assignments, use Where Used or the user role assignment report.

Find roles containing an activity

This example finds roles with an `S_USER_AGR` authorization covering activity `03`.

1. Connect the SAP clients you want to search and load their roles in the Global Role Table.
2. Use ordinary column filters to narrow the scope when appropriate, for example to one client or a role-name prefix.
3. Click **Content Filter**, or open its menu and choose **Edit Role Content Filter**.
4. Add a condition using the group's plus button. Click its field selector and choose **Authorization Object**.
5. Click the object name. Search for `S_USER_AGR`, then double-click the matching row or press Enter. You can also enter the exact name with **Equals** selected and choose **Use**.
6. In that object's field conditions, choose **ACTVT**.
7. Click the comparison and choose **Covers value**. Enter `03` in the value cell.
8. Leave the other field values empty when they should not restrict this search.
9. Choose **Apply** to run the search, or **OK** to run it and close the editor.



The table shows the result for the eligible roles. An authorization containing `03`, a range covering `03`, or unrestricted activity coverage can satisfy this condition. The comparison guide explains how **Covers value** differs from **Equals**.

Choose fields and values

Click a field name to choose one of the fields belonging to the selected object. The selector shows technical codes and available descriptions. Search either column to locate a field.

For a value, type the SAP code directly or use the search button beside the value. Press **F4** to open the available-value lookup. Double-click a suggestion, or select it and press Enter, to insert its code. Escape closes the lookup and keeps the value you had entered.

Preserve leading zeros in codes, for example `03`. For role content comparisons, `03` and `3` are different values. Descriptions help you choose the code, while the query uses the code itself.

Unused field rows can stay empty. They are left out when you apply the filter. Enter at least one field value for each object condition. After changing an object or field, enter its dependent values again so the condition describes the newly selected field.

If SAP metadata is incomplete, the lookup explains which suggestions are unavailable. You can enter known codes directly. If the editor reports that a field does not belong to the chosen object, select the correct field or connect a client that provides its definition before applying the query.

Require related values in one authorization

Suppose you need `ACTVT` to cover `02` and `ACT_GROUP` to cover `Z_FINANCE` within the same `S_USER_AGR` authorization.

1. Open the filter from the preceding example.
2. Change **ACTVT** → **Covers value** to `02`.
3. In the same object condition, set **ACT_GROUP** → **Covers value** to `Z_FINANCE`.
4. Set the group containing those two fields to **And**.
5. Choose **Apply** or **OK**.

Each matching role must contain an authorization where both field requirements hold together.

Maintained content in an example role	Result
One authorization contains ACTVT `02` and ACT_GROUP `Z_FINANCE`.	Matches both requirements.
One authorization contains ACTVT `02` and ACT_GROUP `Z_SALES`.	Does not match the required role name.
One authorization contains `02` with `Z_SALES`, and a second contains `03` with `Z_FINANCE`.	Does not match. Neither authorization contains the required combination.

Keep the two fields inside one object condition. Two separate object conditions can be satisfied by different authorizations in the role.

Combine alternatives and groups

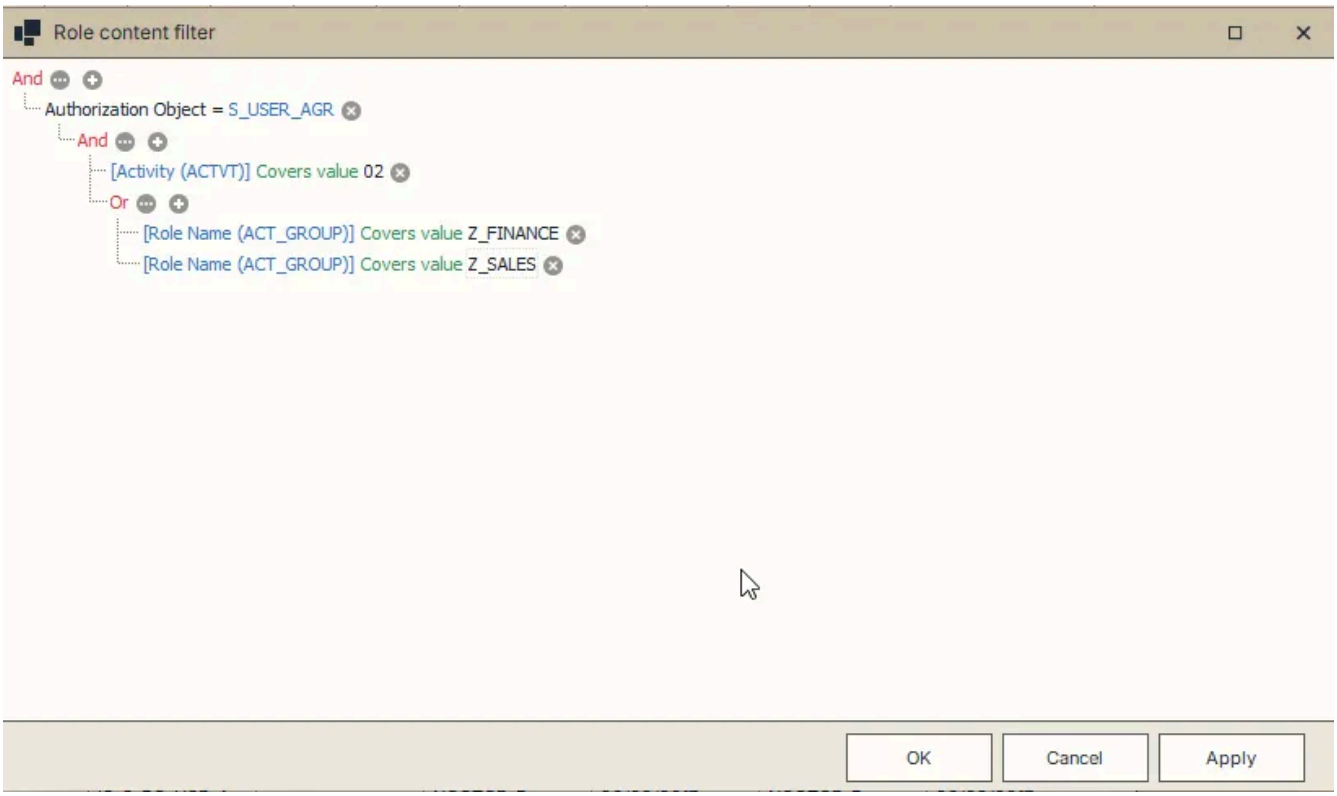
Use **And** for requirements that must all hold, and **Or** when any alternative is sufficient. Click a group's operator to change it. Use **Add Condition** to add another condition at that level, or **Add Group** to place a group inside it.

For example, to find change activity for either `Z_FINANCE` or `Z_SALES` within one authorization:

1. Keep the `S_USER_AGR` object condition.
2. Keep **ACTVT** → **Covers value** → **02** in its **And** group.
3. Add an **Or** group inside the same object.
4. Move the role-name choice into that group by removing the earlier ACT_GROUP condition and adding **ACT_GROUP** → **Covers value** → **Z_FINANCE** inside **Or**.
5. Add **ACT_GROUP** → **Covers value** → **Z_SALES** to that **Or** group.
6. Apply the query.

The definition reads:

```
Authorization Object = S_USER_AGR
  And
    ACTVT covers 02
    Or
      ACT_GROUP covers Z_FINANCE
      ACT_GROUP covers Z_SALES
```



A role qualifies when one authorization contains activity `02` together with at least one of the two role-name values.

Combine objects and transactions

Add conditions to the top-level group when they describe separate requirements for a role. For example, find roles with a VA01 or VA02 menu entry and transaction authorization covering VA01:

1. Set the top group to **And**.

2. Add **Transaction authorization (S_TCODE)** with **Covers value** `VA01`.
3. Add a group beneath the top **And** and set it to **Or**.
4. In the **Or** group, add **Menu transaction**, **Equals**, `VA01`.
5. Add another **Menu transaction**, **Equals**, `VA02` to the same group.
6. Apply the query.

A role with the VA02 menu entry and S_TCODE value `VA*` matches. A role with the menu entry but no matching transaction authorization does not match this query.

Use the menu condition to locate navigation entries and the transaction authorization condition to inspect maintained S_TCODE values. Whether a user can complete a transaction also depends on that user's other required authorizations.

Exclude a combination

Use a negative group when you need roles that do not contain a particular combination. For example, place an object condition for `S_DEVELOP` and activity `02` inside a **Not And** group containing just that object condition. This reverses the result for the whole object condition.

A negative field comparison has a narrower meaning: it applies to the field within an existing authorization. To exclude an entire object/field combination, negate the enclosing object condition as in the example.

An unreadable or unresolved role remains unverified even under negation. See Understand incomplete results.

Apply, OK and Cancel

- **Apply** runs the edited definition and keeps the editor open.
- **OK** runs the definition and closes the editor.
- **Cancel** closes the editor and discards edits made since the last application of the filter. Results already produced by **Apply** remain in the table.

After applying a content filter, select the result rows needed for your next task. The search clears the previous row selection.

To keep the definition, save it under My Queries. To share it with another administrator, export the saved filter.

Role content comparisons and values

Applies to userXpress 2.0.0.0

Choose between stored-text comparisons and authorization coverage, including ranges, wildcards and organizational values.

Choose the comparison according to the question you are asking. **Equals** finds a value maintained exactly as entered. **Covers value** finds maintained authorizations that cover the requested value, including a suitable wildcard or interval.

Equals or Covers value

For a query asking about activity `03`:

Maintained value	Equals `03`	Covers value `03`
`03`	Match	Match
`01` through `03`	No match	Match
`*`	No match	Match
`02`	No match	No match

Use **Equals** when reviewing how an authorization was maintained. Use **Covers value** when locating roles that cover a particular code.

Text comparisons treat a maintained interval as `LOW..HIGH`, for example `01..03`. They compare text, including leading zeros and letter case. Use the SAP internal value, such as `03`, rather than its description.

Coverage requests

Enter one of these forms with **Covers value**:

Request	Meaning
`03`	Cover this one value.
`Z_FIN*`	Cover the complete prefix beginning with Z_FIN.
`01..03`	Cover the full interval from 01 through 03.
`*`	Cover the unrestricted value range.

The entire request must be covered. A maintained value of `Z_FIN_REPORT` covers that single code but does not cover every value under `Z_FIN*`.

Use an asterisk only at the end of a coverage prefix. For **Covers value**, the prefix before the first asterisk determines the wildcard range. Use name patterns when matching object or field names.

Text comparisons

Use these comparisons to inspect maintained text or literal menu transaction codes.

Comparison	Meaning
Equals	At least one maintained value equals the text.
Does not equal	No maintained value equals the text.
Contains / **Does not contain**	A maintained value contains the text, or none contains it.
Begins with / **Ends with**	A maintained value starts or ends with the text.
Is like / **Is not like**	A maintained value matches the pattern, or none matches it. Use `%` for any number of characters and `_` for one character.
Is any of / **Is none of**	A maintained value equals one entry in the list, or none equals any listed entry.
Is greater than / **Is greater than or equal to**	A maintained value sorts after the supplied text, with equality included only in the second choice.
Is less than / **Is less than or equal to**	A maintained value sorts before the supplied text, with equality included only in the second choice.
Is between / **Is not between**	A maintained value is inside the inclusive text interval, or none is inside it. Enter both bounds.

For example, **Menu transaction** → **Begins with** → **VA** finds menu codes beginning with VA. **Menu transaction** → **Is like** → **VA__** finds four-character codes beginning with VA.

If a field contains both `01` and `03`, **Does not equal** → **03** is false: the field does contain `03`. The presence of another value does not make that negative condition true.

Organizational values

Add an organizational restriction as a field of its authorization object. For example, use object `F_BKPF_BUK` and set **BUKRS** → **Covers value** → **1000** to search for company-code coverage.

userXpress resolves organizational references using the values maintained for that role in its SAP client. For derived roles, it uses the derived role's own organizational values.

- A maintained company-code value `1000` or unrestricted coverage matches the example.
- A maintained company-code value `2000` does not match.
- If the organizational data cannot be read or resolved, the result remains unverified. The query status explains incomplete searches.

Object and field name patterns

Use a name pattern when the objects or fields share part of a technical name.

1. Click the object name or field name in the content editor.
2. Choose **Matches pattern** in its selector.
3. Enter the pattern and choose **Use**.

For names, `*` matches any number of characters and an underscore is literal. Object pattern `S_USER_*` searches matching object names. Field pattern `ACT_*` searches matching fields within that object. Choose **Any field** to consider any field in the object's authorization.

The pattern remains part of the saved query. Later runs apply it to the role content available at that time.

Keep the different wildcard forms distinct:

- Object/field names use `*`.
- **Is like** value comparisons use `%` and `_`.
- **Covers value** uses a complete value, a trailing `*` prefix or an interval.

Any maintained value, nonblank value or unrestricted coverage

These questions need different conditions:

Question	Condition
Does the field have any maintained value, including a stored blank?	**Is like** → **%**
Does it have a maintained value containing at least one character?	**Is like** → **_%**
Does it provide unrestricted coverage?	**Covers value** `*`

An unused empty field row in the editor is omitted from the query when applied. To ask one of the questions above, choose the explicit comparison and enter its value.

Values that remain unverified

Unsupported coverage values, malformed ranges and unavailable SAP data can prevent a definite answer. Such roles remain visible with an incomplete-results status. Open **Details…** for the affected clients and messages, then correct the reported cause and run the query again.

Role queries and search results

Applies to userXpress 2.0.0.0

Save, reopen and update role queries, understand incomplete results, and rerun or clear role content filters.

Save a role query when you repeat an access review or want to keep a useful combination of role-name, client and content conditions. A query can contain ordinary column criteria, a role content filter, or both.

Save and reuse a role query

1. Apply the column conditions and role content filter you want to keep.
2. Choose **My Queries** → **Save current query...**.
3. Enter a descriptive name, such as `Client 100 - finance role maintenance`, and choose **OK**.
4. If the name is already used, confirm replacement to update it or choose another name to keep both definitions.

Choose the saved name under **My Queries** to reuse it. A query containing role content runs a fresh search against the connected SAP clients. A column-only query applies its saved table criteria.

Saved queries retain the conditions and the column-filter enabled setting. The matching roles are determined when the query runs. The menu icon and tooltip identify entries that include role content.

Change a saved query

1. Choose its name under **My Queries**.
2. Change the column criteria or open **Content Filter** to edit the content conditions.
3. Apply the revised filter.
4. Choose **My Queries** → **Save changes** to update the saved definition, or **Save query as...** to keep it under another name.

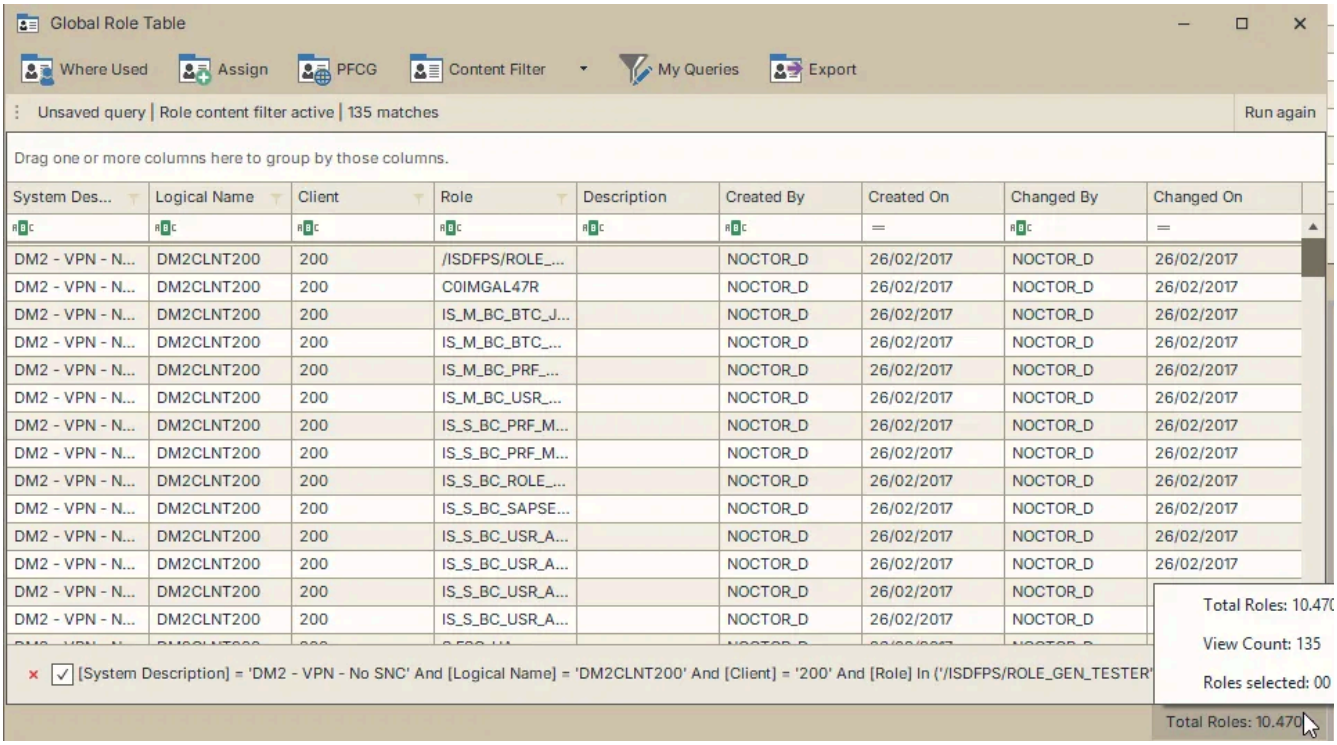
Modified in the query status means the working definition differs from the saved one. When you open another saved query, userXpress asks whether to save those changes. Choose **Yes** to save, **No** to continue without saving, or **Cancel** to keep working on the current query.

Rename or remove a saved query

Open **My Queries** → **Maintain Queries**, edit the description or select the query and choose **Delete**, then save the changes. Use this to keep a useful set of recurring reviews in the menu.

Understand the status

Status	Meaning and next action
Unsaved query	The working definition has no saved name. Save it when you want to reuse it.
Modified	The working conditions differ from the saved definition. Use **Save changes** or **Save query as…** to keep the revision.
Role content filter active	The content result is part of the table's enabled filter.
Role content filter paused	The table filter is disabled. Re-enable it to use its criteria again, then use **Run again** when the results need updating.
Results need updating	The table scope, connections or enabled column criteria have changed since the search. Choose **Run again**.
A match count	The completed search found that many matching roles.
Incomplete with confirmed and unverified counts	Some roles could not be decided. Open **Details…** before interpreting the list as matching roles.



This completed search has 135 matches. Unsaved query means its definition has not been saved under a name.

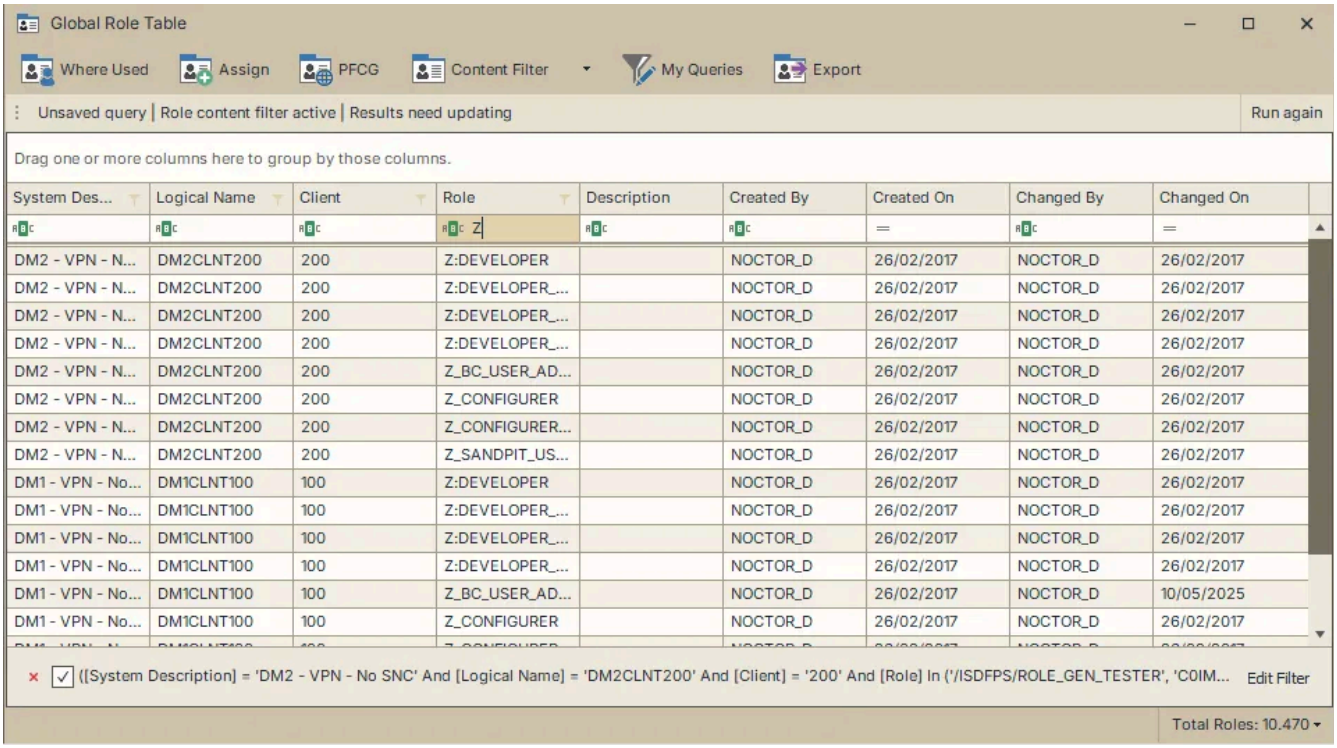
Run again

Use **Run again** after changing a column filter, changing the connected clients or updating relevant role content in SAP.

1. Set the ordinary column criteria for the roles you want searched.

2. Choose **Content Filter** → **Run again**, or **Run again** on the query status bar.
3. Read the new match count or incomplete-results message.

Enabled column criteria define the eligible roles before the content search. For example, a role-name filter limits the search to matching names in the loaded connected clients. To broaden the search, remove that column restriction and choose **Run again**.



After changing the Role column filter, choose Run again to update the content results for the new scope.

The separate grid search box controls which rows you see. Use column criteria for the scope you want the content search to evaluate.

Understand incomplete results

A content search can confirm some matches while another role or client remains unreadable or unresolved. Unverified roles stay visible so that missing information is not treated as proof that they fail the query.

Choose **Details...** for the confirmed and unverified counts by system/client and the available failure messages. Correct the reported connection, SAP access or condition problem and choose **Run again**.

A negative condition also leaves unresolved content unverified. For example, a failed read cannot establish that a role lacks an authorization.

If no eligible client can be read, userXpress reports the failure and retains the previous query and results. Use the failure message to resolve the cause before running again.

Pause or clear

To pause filtering, clear the checkbox in the table's filter panel. The query remains available, and the status shows **Role content filter paused**. Re-enable the filter to use it again.

Choose **Content Filter → Clear role content** to remove the content restriction while keeping the ordinary column criteria. This also clears the selected role rows. Use it when you want to return to the client or role-name list and start another content search.

The workbook guide explains how to exchange saved role content queries with other administrators.

Import and export role filters

Applies to userXpress 2.0.0.0

Prepare role content filters in Excel, import them into My Queries and export saved definitions for reuse or sharing.

Use a filter workbook to prepare several role content queries together or share a set of review criteria with another administrator. Import saves the definitions under **My Queries**. Choose a saved name there when you want to run it against connected SAP clients.

For a single query, the content editor is a convenient starting point. You can build it visually, save it and export it as an editable workbook.

Download the template

1. In the Global Role Table, open **Content Filter** → **Download Filter Template**.
2. Choose a destination for the `.xlsx` file and save it.
3. Open the workbook in Excel or the spreadsheet application you use for `.xlsx` files.

The workbook contains:

Worksheet	Use
Instructions	Explanation of the format and supported values.
Ruleset	An empty sheet for your filters.
Simple examples	Object/field conditions where rows are alternatives.
Advanced examples	Explicit groups, transactions, multiple fields and comparisons.

Copy a complete example when starting a similar query. Keep the column headings unchanged. Columns may be rearranged because the importer identifies them by name.

Format SAP code cells as text so values such as `03` retain their leading zeros. Enter literal values rather than formulas.

Prepare a simple filter

Use the simple format when any one object/field condition should be sufficient for a role to match.

Each **Step** identifies one saved filter. Use a nonnegative whole number, such as `10`, and repeat it on every row of that filter. **Rule Description** supplies its saved name.

For example, prepare a filter named `User group activities 01 or 02` with two rows:

Field	Value for the first row
Step	`10`
Rule Description	User group activities 01 or 02
Type	`AUTH`
Auth. Object	`S_USER_GRP`
Auth. Field	`ACTVT`
Auth. Value	`01`

Copy this row to make the second row. Change only **Auth. Value** to `02`. The shared Step and description keep both conditions in one filter.

Leave **Final** and **Transaction code** empty. Keep advanced columns absent or empty for a simple filter.

Rows with the same Step are joined with **OR**. This example matches a role when it has an S_USER_GRP authorization covering activity `01` or activity `02`. A role covering only `03` does not match.

A concrete **Auth. Value** uses **Covers value**, so maintained intervals or wildcards can satisfy it. In simple rows, a standalone `*` means any maintained value, including a stored blank. To search specifically for unrestricted coverage, use an advanced field row with **Comparison** → **Covers value** and **Auth. Value** `*`.

The supported simple types **AUTH** and **ENGI** use the same object/field matching rules.

Prepare an advanced filter

Use the advanced format for AND conditions, nested alternatives, transaction conditions, explicit comparisons or negation.

Three row kinds describe the definition:

- **Group** joins its children with AND or OR.
- **Condition** adds an authorization object or a transaction condition to a role-level group.
- **Field** adds a comparison inside one authorization object condition.

Group ID, **Parent Group ID** and **Object Condition ID** connect the rows. They are names you choose for the parts of this filter, such as `R`, `A` and `F`. Keep them unique where they identify different parts of the same Step.

Example: two fields in the same authorization

This query finds roles with an S_USER_AGR authorization covering activity `02` for role name `Z_FINANCE`:

```
And
  Authorization Object = S_USER_AGR
    And
      ACTVT covers 02
      ACT_GROUP covers Z_FINANCE
```

Copy the complete **Same authorization - AND fields** example from **Advanced examples**, or create these five rows in **Ruleset**. On every row, set **Step** to `20` and **Rule Description** to `Finance role maintenance`.

1. Create the role-level group: **Row Kind** `Group`, **Group ID** `R`, **Group Operator** `AND`.
2. Add its object: **Row Kind** `Condition`, **Condition Type** `Authorization Object`, **Group ID** `R`, **Object Condition ID** `A`, **Auth. Object** `S_USER_AGR`.
3. Create the object's field group: **Row Kind** `Group`, **Group ID** `F`, **Group Operator** `AND`, **Object Condition ID** `A`.
4. Add the activity: **Row Kind** `Field`, **Group ID** `F`, **Object Condition ID** `A`, **Auth. Field** `ACTVT`, **Comparison** `Covers value`, **Auth. Value** `02`.
5. Add the role name: **Row Kind** `Field`, **Group ID** `F`, **Object Condition ID** `A`, **Auth. Field** `ACT_GROUP`, **Comparison** `Covers value`, **Auth. Value** `Z_FINANCE`.

Leave unused cells empty. Both fields belong to object condition A, so they must match together within one maintained authorization.

Add alternatives within the object

To accept either `Z_FINANCE` or `Z_SALES` while still requiring activity `02`:

1. Add a **Group** row with **Group ID** `CHOICES`, **Parent Group ID** `F`, **Group Operator** `OR` and **Object Condition ID** `A`.
2. Change the ACT_GROUP field row's **Group ID** from `F` to `CHOICES`.
3. Copy that field row and change its **Auth. Value** to `Z_SALES`.
4. Keep the ACTVT row in group `F`.

The activity requirement and the alternatives now remain within the same object condition. A role with activity `02` and either role name in one authorization matches.

Step	Rule Description	Row Kind	Group ID	Parent Group ID	Group Operator	Negate	Condition Type	Object Condition ID	Auth. Object	Auth. Field	Comparison	Transaction code	Auth. Value	Value To
100	Nested fields in one authorization	Group	F		AND			A						
100	Nested fields in one authorization	Field	F					A		ACTVT	Covers value		02	
100	Nested fields in one authorization	Group	CHOICES	F	OR			A						
100	Nested fields in one authorization	Field	CHOICES					A		ACT_GROUP	Covers value		Z_FINANCE	
100	Nested fields in one authorization	Field	CHOICES					A		ACT_GROUP	Covers value		Z_SALES	

The five field-group rows link group CHOICES to parent F. All five belong to object condition A. The role-level group and authorization-object row are defined above.

Add transaction conditions

For a transaction condition, set **Row Kind** to `Condition`, choose **Transaction Authorization** or **Menu Transaction** under **Condition Type**, and place it in a role-level **Group ID**. Enter the comparison and the first value in **Transaction code**.

Use **Transaction Authorization** with **Covers value** when looking for S_TCODE coverage, for example `VA01`. Use **Menu Transaction** with **Equals** when looking for that code in a role's menu.

Workbook field reference

Filter identity and structure

Column	Meaning
Step	Whole-number identifier for one filter within the worksheet. Repeat it on the filter's rows.
Rule Description	Saved filter name. Repeat the same description within its Step.
Row Kind	`Group`, `Condition` or `Field` in an advanced filter.
Condition Type	`Authorization Object`, `Transaction Authorization` or `Menu Transaction` on a Condition row.
Group ID	The group's own ID on a Group row, or the containing group on a Condition/Field row.
Parent Group ID	The containing group for a nested Group row. Leave it empty for a root group.
Group Operator	`AND` requires every child. `OR` requires at least one child.
Object Condition ID	Identifies an object condition and connects its field groups and field rows. Leave it empty for role-level groups and transaction conditions.
Negate	`Yes` reverses the result of the row or group. An unresolved result remains unresolved.

Each filter needs one role-level root group. Each object condition also needs one field root group. Nested groups must stay within their role or object scope.

Conditions and values

Column	Meaning
Auth. Object	Authorization object name or supported name pattern.
Auth. Field	Field name or supported pattern inside that object.
Auth. Value	The first field comparison value. In advanced Field rows, an empty value is a literal blank.
Comparison	A supported comparison from the workbook's list, such as `Equals` or `Covers value`.

Column	Meaning
Transaction code	The first comparison value for a transaction condition.
Value To	The second bound for `Is between` or `Is not between`.
Type	`AUTH` or `ENGI` for simple rows.
Final	Leave empty.

For **Is any of** and **Is none of**, enter a list of quoted text values, such as `["01","02"]`, in the first value cell. Keep the quotes even for numeric-looking SAP codes.

For a coverage interval, choose **Covers value** and enter `01..03` in the first value cell. For a text comparison between two bounds, choose **Is between**, enter `01` in the first value cell and `03` in **Value To**. See Comparisons and values for their different meanings.

Saved column criteria

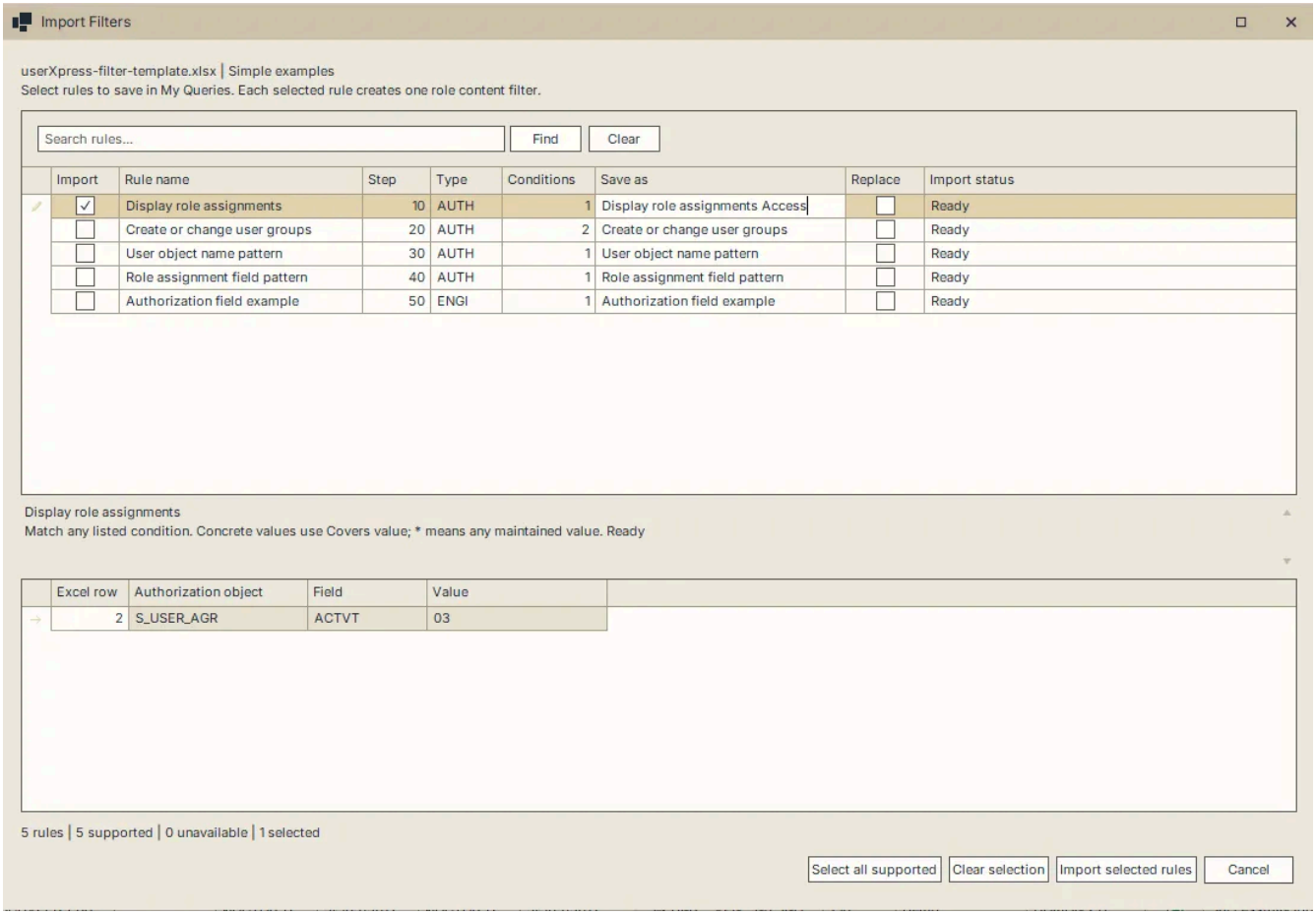
An exported workbook also contains **Column Filter** and **Column Filters Enabled**. These preserve the saved query's ordinary table criteria and their Yes/No enabled setting. Keep them unchanged when exchanging an existing query. New simple filters have no column restriction.

These settings can be supplied on the filter's first row. If repeated on other rows, the values must agree.

Import the workbook

You can import and save definitions before connecting to SAP.

1. Choose **Content Filter** → **Import Filters** and select the `.xlsx` workbook.
2. If it contains several filter worksheets, choose the one to import and click **Continue**.
3. Select the individual filters, or choose **Select all supported**.
4. Select a row to read its condition preview.
5. Edit **Save as** when you want a different saved name.
6. For an existing name, either rename the incoming filter or explicitly select **Replace** for that row.
7. Choose **Import selected rules**.



One rule is selected for import. Its Save as name is being changed, and the lower pane shows its activity 03 condition.

The completion message reports how many filters were saved. They appear under **My Queries**. Choose a name there to run the filter against the connected clients.

If an import replaces the saved definition of the currently open query, the working query remains as it was and can show **Modified**. Open the saved name again to use the imported definition.

Correct an unavailable filter

The import window identifies the affected row and the reason a filter is unavailable. Correct that row in the workbook, save it and import again.

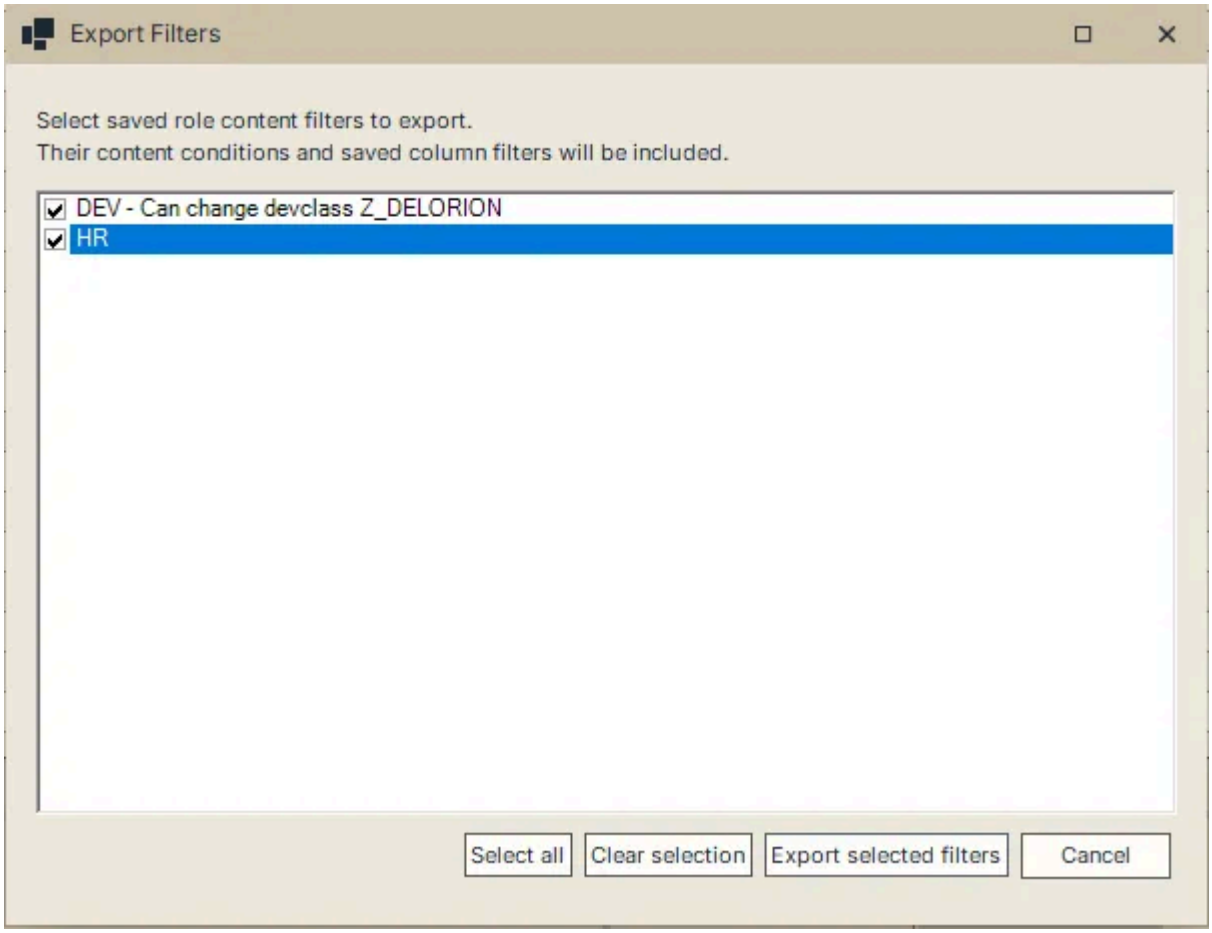
Common corrections include:

- Restore a missing or misspelled heading.
- Use a literal cell value instead of a formula.
- Give different groups or objects different IDs.
- Point a child row at an existing group in the same scope.
- Complete an empty group or remove it.
- Use either simple rows or advanced rows throughout one filter.
- Clear a value from a cell that does not apply to that row kind.

Every condition in a filter must be valid before that filter can be saved. Other supported filters can be selected independently.

Export saved filters

1. Save the queries you want to share under **My Queries**.
2. Choose **Content Filter → Export Filters**.
3. Select the saved role content filters, or choose **Select all**.
4. Choose **Export selected filters**, select a destination and save the workbook.



The workbook contains instructions and editable advanced rows. It preserves content conditions, their grouping and negation, and the saved ordinary column criteria. Use **Import Filters** to bring those definitions into another userXpress profile.

The export list contains queries with role content. To export a list of matching roles instead, use the Global Role Table's Export command.

Activity History

Applies to userXpress 2.0.0.0

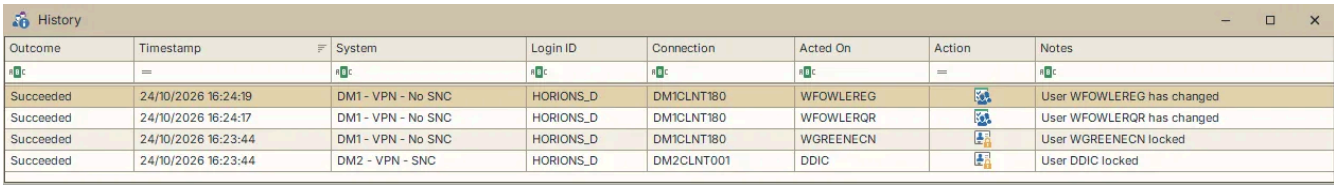
Find recorded account-operation results, distinguish successes from failures and use the messages to resolve an incomplete change.

Use **Activity History** to look back at recorded account operations in your open userXpress session. It is useful after changing several accounts, when you need to find an individual result or the SAP message for a failure.

Find an operation

1. Choose **Activity History** on the main toolbar. The newest records appear first.
2. Use the filter row beneath **System**, **Connection** or **Acted On** to find the affected account and client.
3. Read **Outcome** and **Notes** for the operation.

To return to the full history, clear the values you entered in the filter row. Closing the history window keeps its entries available for the rest of the session. Choose **Activity History** again to reopen it.



*This history shows successful account changes and locks. The **Notes** column identifies the result for each account.*

Read the columns

- **Timestamp**: When the operation's activity record was created. The initial order is newest first.
- **System**: The SAP system description for the connection used.
- **Login ID**: The SAP user logged on through that connection.
- **Connection**: The system/client identifier, such as `DEMCLNT100` for system `DEM`, client `100`.
- **Acted On**: The account on which the operation was performed.
- **Action**: The operation, such as locking an account or setting an initial password. Recognized operations are shown with their action icon.
- **Notes**: The operation's message or recorded details. Read this to understand a failure or skipped change.
- **Outcome**: The recorded result, as described below.

Use **System**, **Connection** and **Acted On** together. An account with the same user ID in another client has a separate result.

Interpret the outcome

- **Succeeded**: the recorded operation completed successfully.
- **Failed**: the operation reported a failure. Read **Notes** to identify the failed part. An operation with several steps can have completed some changes before the failure.
- **Skipped**: the account was omitted from that operation. Read the explanation in **Notes**.
- A blank **Outcome**: the record has no separate outcome value. Use **Action** and **Notes** to interpret it.

For example, a password reset and an unlock can have separate results. If the password was set but the unlock failed, resolve the unlock failure and use **Users** → **Unlock** for that account. See Password and lock results.

A Global User Table refresh error concerns retrieving the displayed information. It does not undo a completed SAP change. Select the affected account and choose **Users** → **Refresh** to retrieve its values again.

New entries and failure notifications

A number beside **Activity History** indicates entries added since you last viewed the history. Open the window to mark those entries as viewed.

After an operation reports failed updates, an **Updates failed** notification offers access to the history. Click the notification to open the recorded results. Use **Outcome** and **Notes** to find the affected accounts.

Turn activity recording on or off

1. Open **Settings** → **Diagnostics**.
2. Select **Record user activity** to record subsequent account operations. Clear it to turn recording off.
3. Choose **Apply** or **OK**.

The history belongs to the open application session. When support needs a message from it, include the affected account, connection, timestamp and **Notes** text in the support request.

Troubleshooting

Applies to userXpress 2.0.0.0

Resolve missing accounts, unavailable commands and partial operation results, then collect the relevant details for support.

Start with the message from the operation that failed. Use the affected system, client and user ID to distinguish its result from successful work in other clients.

No users appear after connecting

1. Open **Control Panel** → **Connected Systems** and find the intended client.
2. If AutoStart is still running, wait for its result in **Loading systems**. For a warning or failure, choose **Details** as described in Loading systems.
3. In the Global User Table, choose **Show Me** → **Clear All Filters** to remove both table criteria and search text.

If the client failed to connect, follow Connection problems. If SAP reports missing authorization, follow Diagnose a SAP authorization failure.

An action is unavailable

For an account command, select the accounts using the Global User Table's row checkboxes. Entering a filter narrows the list but leaves the selection unchanged.

If clicking the table selects individual cells, right-click and turn off **Cell Selection**. For a role command, select the roles in the Global Role Table.

Other windows enable actions after their required preparation:

- In **Mass User Create**, save the workbook and complete **Check** → **Format & Systems** before starting account creation. Follow Open and check.
- In the support wizard, select files and approve them before continuing. Follow Review and approve the files.
- During an operation, wait for its result before choosing another account action.

The Global User Table menu guide and Global Role Table guide identify the starting point and selection for each command.

SU01 or PFCG does not open

Use the message displayed by userXpress to choose the next action:

Message or state	What to do
The selection exceeds **Maximum SAP GUI windows**	Select no more than the available number shown in the message, or close existing SU01/PFCG windows. To change the limit, use Settings → Connections → SAP GUI. Choose the command again after changing the selection.
A selected record already has a window open or opening	Deselect that account or role and retry the remaining selection.
This SAP connection is interrupted.	Restore the connection, then select the affected records and try again.
SAP GUI requires a connection made with a Dialog user.	Reconnect with a SAP Dialog user authorized for the transaction in that client.

For individual opening errors, **SAP GUI launch failures** lists the transaction, record, system, client and message. Other windows opened by the same selection remain available. Resolve the listed errors, then select only those records for another attempt.

SU01 failures also appear on the affected Global User Table rows. Select one affected account, right-click and choose **Full Message** to read its error.

If SAP reports an authorization error, follow Diagnose a SAP authorization failure. For an installation or connection error, include the failure message, transaction, system/client and time in a support request.

SAP RFC library not found at startup

The **SAP RFC library not found** message identifies the missing file and required architecture. userXpress closes after this message.

Ask the workstation deployment administrator to install the matching SAP RFC runtime, then restart userXpress. Use the filename and architecture shown in the message when selecting the package. See System requirements.

Startup or a system load is slow

Use Measure performance to capture the affected session. For a slow account operation, perform that operation after the measured startup and open its entry in the report.

Include the system/client, operation, approximate time and selected account or role count in the support request. The report separates SAP work, local processing and display time.

Some accounts changed and others did not

1. Open Activity History to find the affected account and its recorded **Outcome** and **Notes**.

2. For an account message in the Global User Table, select that account alone, right-click and choose **Full Message**.
3. Resolve the reported problem, then select only the accounts that require another attempt.

A command can contain several steps. For example, a password reset can succeed while its unlock fails. Repeat the failed step using its own command where available. The password guide explains this case.

For interrupted spreadsheet creation, use Mass User Create recovery. The saved creation results determine which accounts a resumed run skips.

The change succeeded but refreshing the table failed

Select the affected accounts and choose **Users** → **Refresh**. This retrieves their SAP information again. A refresh failure does not undo the preceding change.

If newly created accounts are missing from the table, disconnect and reconnect the client to load its account list again. See Creation completed with a display warning.

Read the application log

Use **Display Errors Log** on the main toolbar when support needs the application message associated with a problem.

1. Open **Display Errors Log** after the problem occurs.
2. Choose **Refresh Display** to load the latest entries.
3. Use **Time** and **Message** to find the relevant entry. The filter row beneath a heading narrows the displayed entries.

Include the time and message in the support request. The support wizard offers the application log as an attachment for review.

Online Help does not open

Help on the main toolbar opens the manual in your browser. If Windows cannot open the browser, userXpress displays the documentation address. Open that address manually.

You can also open the userXpress manual directly.

For the relevant feature guide:

- **Mass User Create** → **Help** → **View Help** opens Mass User Create.
- The **?** button in SNC assignment opens the SNC variable reference.

Contact support

Choose **Information** → **Create support request**, or open the Delorion support portal.

Include what you tried, the expected result, the actual message and the affected system/client. The wizard fills in the application version and offers relevant logs. Follow Create a support request to select attachments and submit the ticket.

Measure performance

Applies to userXpress 2.0.0.0

Measure startup and account operations, read timing and memory results, and export a diagnostic report for support.

Use **Information → Diagnostics** when loading a SAP client or performing an operation is slow. **Measure next session** restarts userXpress and records startup and subsequent operations until you close the application.

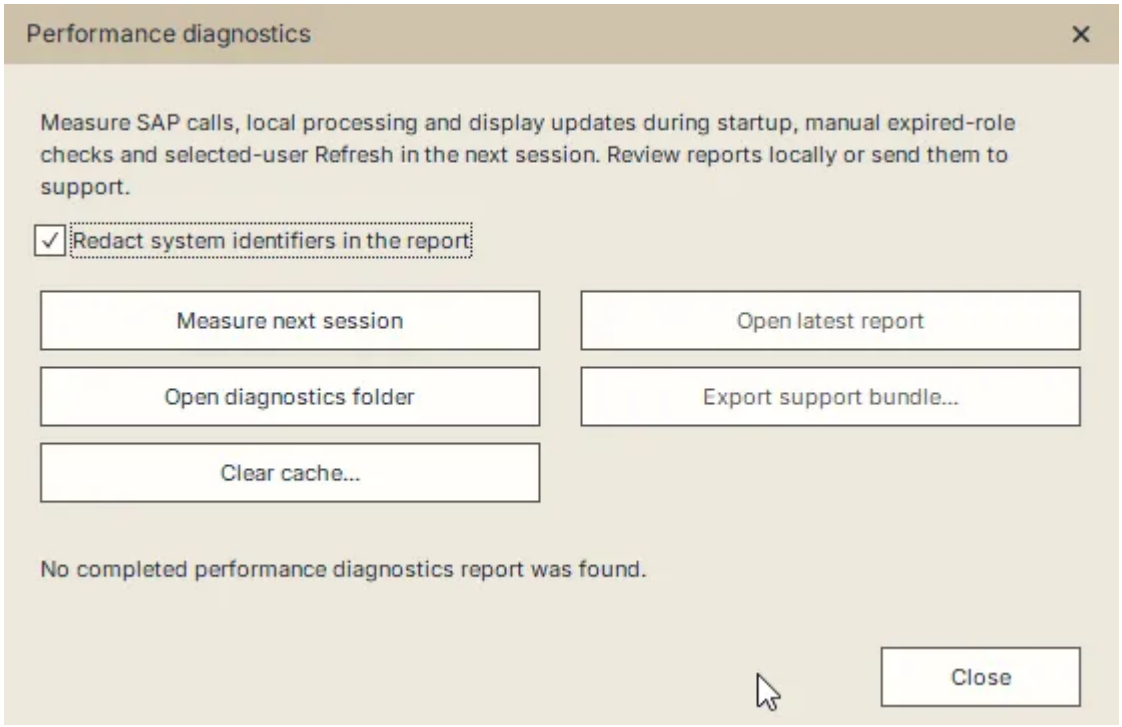
The report separates time spent reading SAP data, processing it and displaying the results. It also records memory use during startup. Use it to identify which part of the work took time and give support the measurements for that session.

Measure the next startup

Save any open workbook edits before starting this procedure. The measurement restarts userXpress.

1. Open **Information → Diagnostics** on the main toolbar.
2. Choose whether to keep **Redact system identifiers in the report** selected. It replaces system descriptions with aliases and omits SID/client values. Clear it when support needs to identify the systems by name in the report.
3. Choose **Measure next session**, then **OK** to close and restart userXpress.
4. Enter your passphrase after restart and let AutoStart finish loading the configured clients.
5. Open **Information → Diagnostics → Open latest report** to view the results in your browser.

The main-window title includes **Performance diagnostics active** during the measured session. The request applies to one session. After you close userXpress, your next ordinary launch uses normal operation without diagnostics.



Measure an operation after startup

Keep the measured session open to capture the operation that is slow. For example:

- To measure a selected-account refresh, select the accounts in the Global User Table and choose **Users** → **Refresh**.
- To measure an expired-role search, open **Roles** → **Expired Roles**, set its search criteria and run the search.
- To measure a role-content search, set the criteria in Content Filter → Edit Role Content Filter and apply them.

Wait for the operation's result, then choose **Information** → **Diagnostics** → **Open latest report**. The report's **Contents** lists recorded operations with their start times and results. Choose the matching entry to inspect its measurements. Each invocation has its own entry.

Opening or closing the diagnostics window leaves measurement active. Close userXpress when you have finished capturing the session. The report remains available through **Open latest report** after you start the application again.

Find and read the report

Open latest report opens the newest available HTML report. It works offline. **Open diagnostics folder** opens the saved reports in File Explorer, where each session has its own folder.

Start with **Session summary**. **Session active / partial** means the application is still recording that session. The separate startup and operation results show whether those parts have finished.

Startup measurements

- **Startup phases** shows elapsed time from application start.
- **Time allocation by component** separates SAP work, userXpress processing and display work.
- **Measured time by operation** identifies operations that account for the most measured work across clients.
- **System loading timeline** shows when each client loaded and which loads overlapped.
- **Operation duration by system** helps identify a step that took longer in one client than in others.

Parallel work overlaps. The sum of several clients' measured work can exceed the time you waited for them to load.

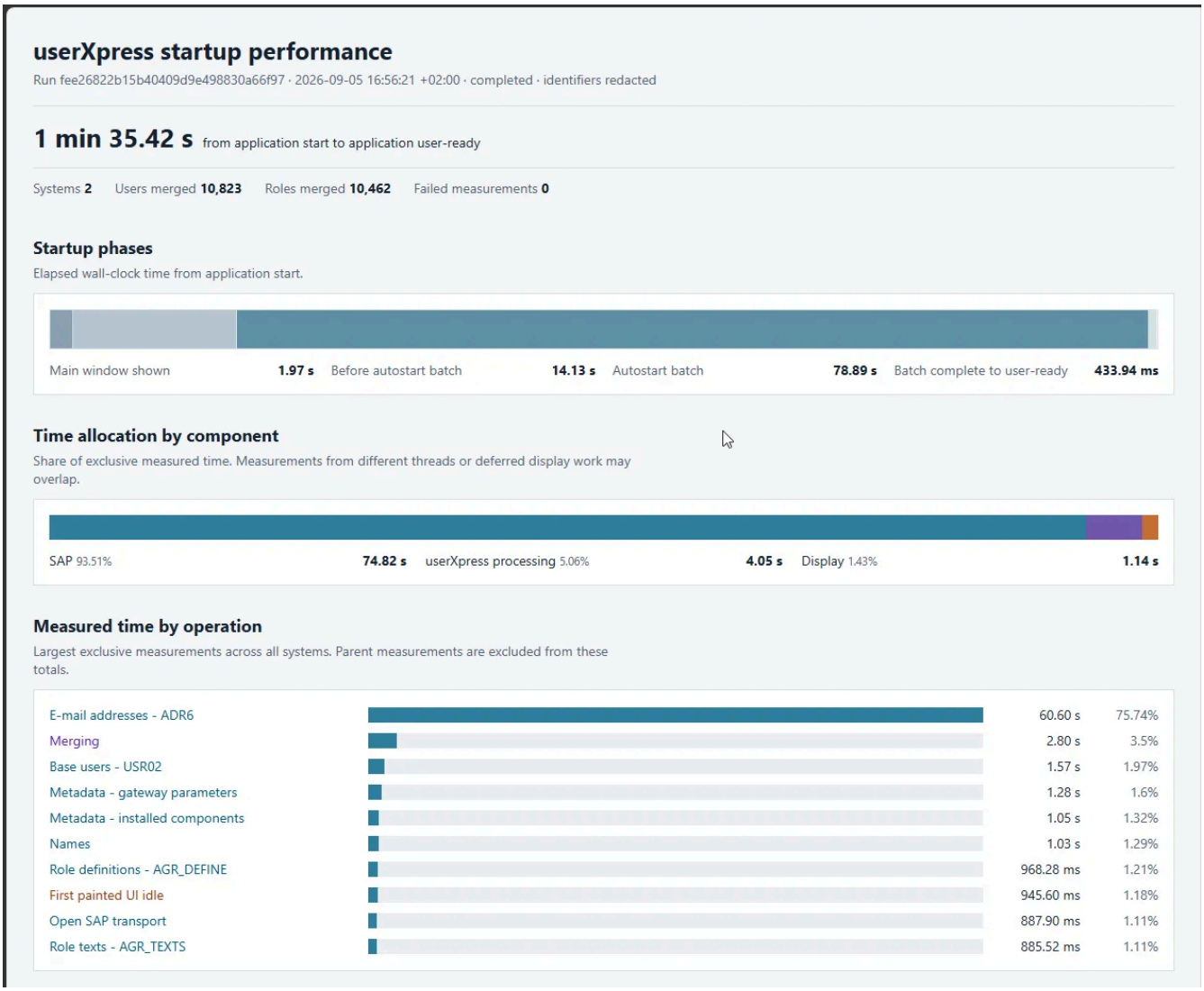
Detailed measurements

Expand a system under **Detailed measurements** to see its steps. Open an operation from **Contents** to see the phases of that operation.

- **Elapsed**: Time for the step, including its child steps.
- **Self**: Time for the step after excluding child-step time.
- **Input** and **Output**: Record counts measured for that step. A blank count means it was not recorded.
- **ms/input** and **ms/output**: Time per input or output record. Use these when comparing similar operations with different record counts.
- **Status**: Whether the measurement completed, failed, was cancelled or was skipped. A skipped step was disabled or did not apply to that run.

Use either a parent's elapsed time or its child measurements when comparing durations. Adding both counts the child time twice. Time between manually started operations is excluded from their durations.

A failed or cancelled operation has measurements for the work performed before it stopped. Read its result and criteria before comparing it with a completed operation.



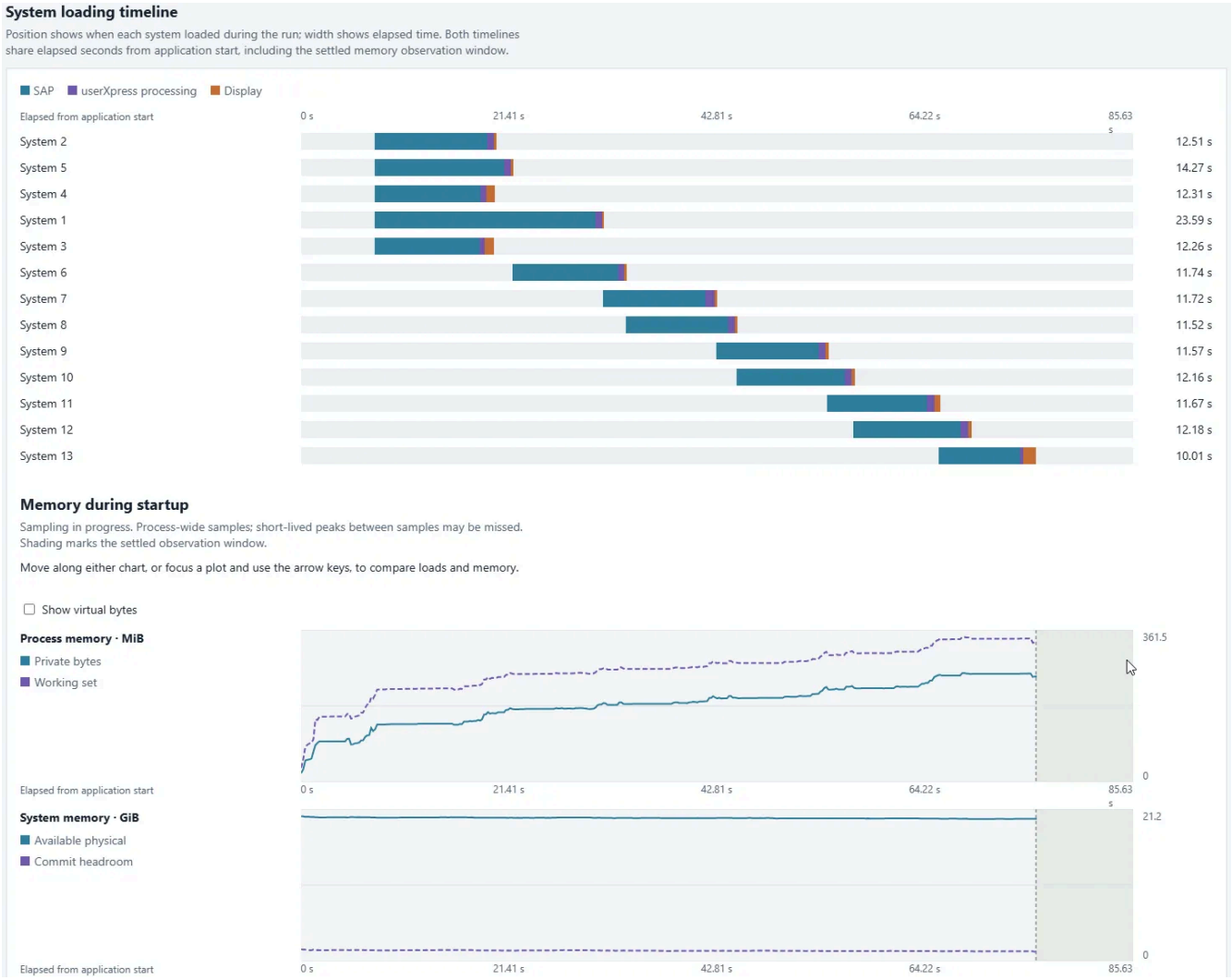
Memory during startup

Use **Memory during startup** alongside **System loading timeline** to see memory use while clients loaded.

Move the pointer along either chart. The readout shows the elapsed time, active loads and nearest memory sample. For keyboard navigation, focus the chart and use the left/right arrow keys. **Home** and **End** move to the beginning and end.

- **Private bytes** measures memory committed exclusively to the userXpress process.
- **Working set** measures process memory resident in physical RAM.
- **Available physical memory** shows RAM available on the workstation.
- **System commit headroom** shows how much more memory Windows can commit within its limit.
- Select **Show virtual bytes** to include the virtual address space used by the process.

The summary shows the baseline, sampled peak and settled values after loading. **Unavailable** means the report has insufficient samples for that value. The measurements are samples, so a short peak between samples can be missed.



The loading timeline and memory charts share an elapsed-time scale, so you can compare memory use with the clients loading at that point.

Make two runs comparable

When support asks for another report, keep the same accounts, clients and operation choices unless the request calls for a change. Describe differences in the workstation, network, record counts or settings with the report.

For a selected-user refresh, for example, use the same selected accounts in both runs. This makes the timing difference easier to interpret.

Review and share a report

1. Open the report and identify the session and operation you want to send.
2. Choose **Information → Diagnostics → Export support bundle...**.
3. Select a destination and save the ZIP. userXpress confirms that the bundle was created.
4. In a support request, use **Add file...** to attach that ZIP.

The ZIP contains the latest report folder, including the HTML report and accompanying data. Export creates a local file. The support wizard handles selecting and approving files for upload.

For a smaller attachment set, select **This is a startup or loading issue — include the performance report** in the support wizard. It includes the latest report's summary and measurement files. Use the ZIP when support needs the complete report, including its memory data.

System-identifier redaction applies to the generated diagnostics. Review other attachments separately because application logs and screenshots can contain their own system or user details.

Clear cached loading data

Use **Clear cache…** when support asks you to repeat loading without saved metadata, table counts or loading history. Clearing the cache makes subsequent operations retrieve that information again, so their next run can take longer.

1. Open **Information** → **Diagnostics**.
2. Choose **Clear cache…**.
3. Choose **OK** in the confirmation.

userXpress reports the number of cache files removed. If it reports that the cache could not be fully cleared, include that message in the support request before treating the next measurement as a run without cached data.

If a report is missing

- **Open latest report** and **Export support bundle…** are disabled: an HTML report is not yet available. Use **Open diagnostics folder** to locate a previous session, or start a capture with **Measure next session**.
- **Measure next session** is disabled: diagnostics are already active. Perform the operation you want to measure in that session.
- The application closed before the operation finished: retain that session's report folder and describe the failure time and message in the support request.
- Export failed: read the displayed error. If the destination is unavailable, choose a writable location and export again.

Create a support request

Applies to userXpress 2.0.0.0

Describe a problem, choose diagnostic files and create a ticket or add information to an existing support request.

Use **Information → Create support request** to send a problem description and selected diagnostic files to Delorion Support. Create a new ticket for a new problem, or add information to an existing ticket when continuing an investigation.

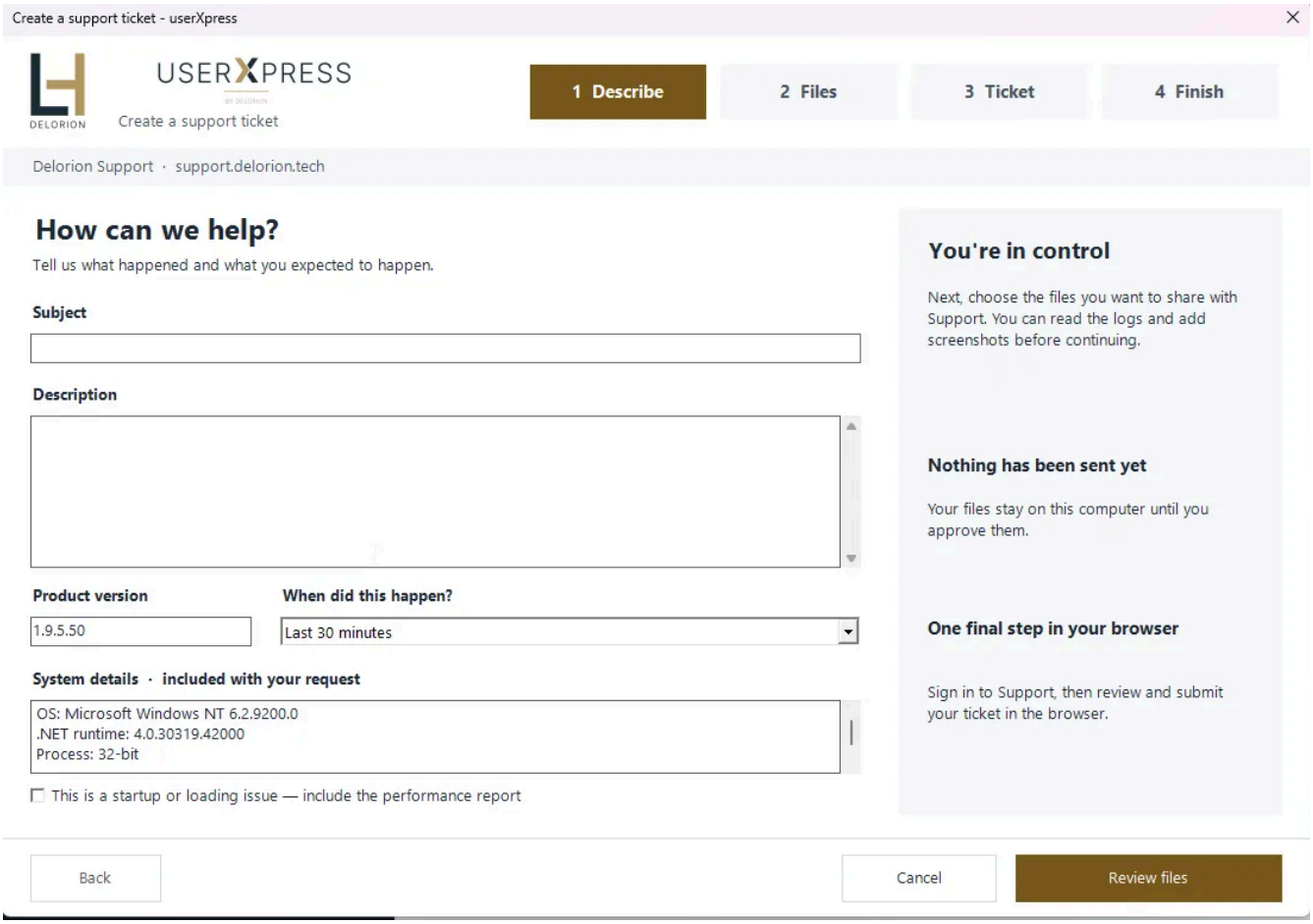
You need internet access and a Delorion Support account associated with your organisation. The wizard prepares the request and uploads the files you approve. You finish by choosing **Submit** in the support portal.

Describe the problem

1. Open **Information → Create support request** on the main toolbar.
2. Enter a **Subject** identifying the problem. In **Description**, explain the action you took, the expected result and what happened. Include the exact message and the affected system/client where relevant.
3. Choose **When did this happen?**: **Last 30 minutes**, **Last 2 hours**, **Today** or **Last 7 days**. This selects archived logs by their modification time. The current logs are included when available, and the selected files retain their full contents.
4. **Product version** is filled in automatically. Edit **System details** if you need to add context about the workstation or connection.
5. For a performance problem, select **This is a startup or loading issue — include the performance report** to attach files from the latest available diagnostic session. Capture a session first when you need measurements of the problem.
6. Choose **Review files**.

For example, use a subject such as “Selected-user refresh stops for client 100”. Describe how many accounts were selected, the client, the message and whether other clients finished.

The subject accepts 3–240 characters, the description 10–50,000 characters and system details up to 500 characters. Describe the problem without including passwords or license keys.



Review and approve the files

The wizard suggests application logs, an exception log and a generated version/environment summary. It also includes the performance files you requested.

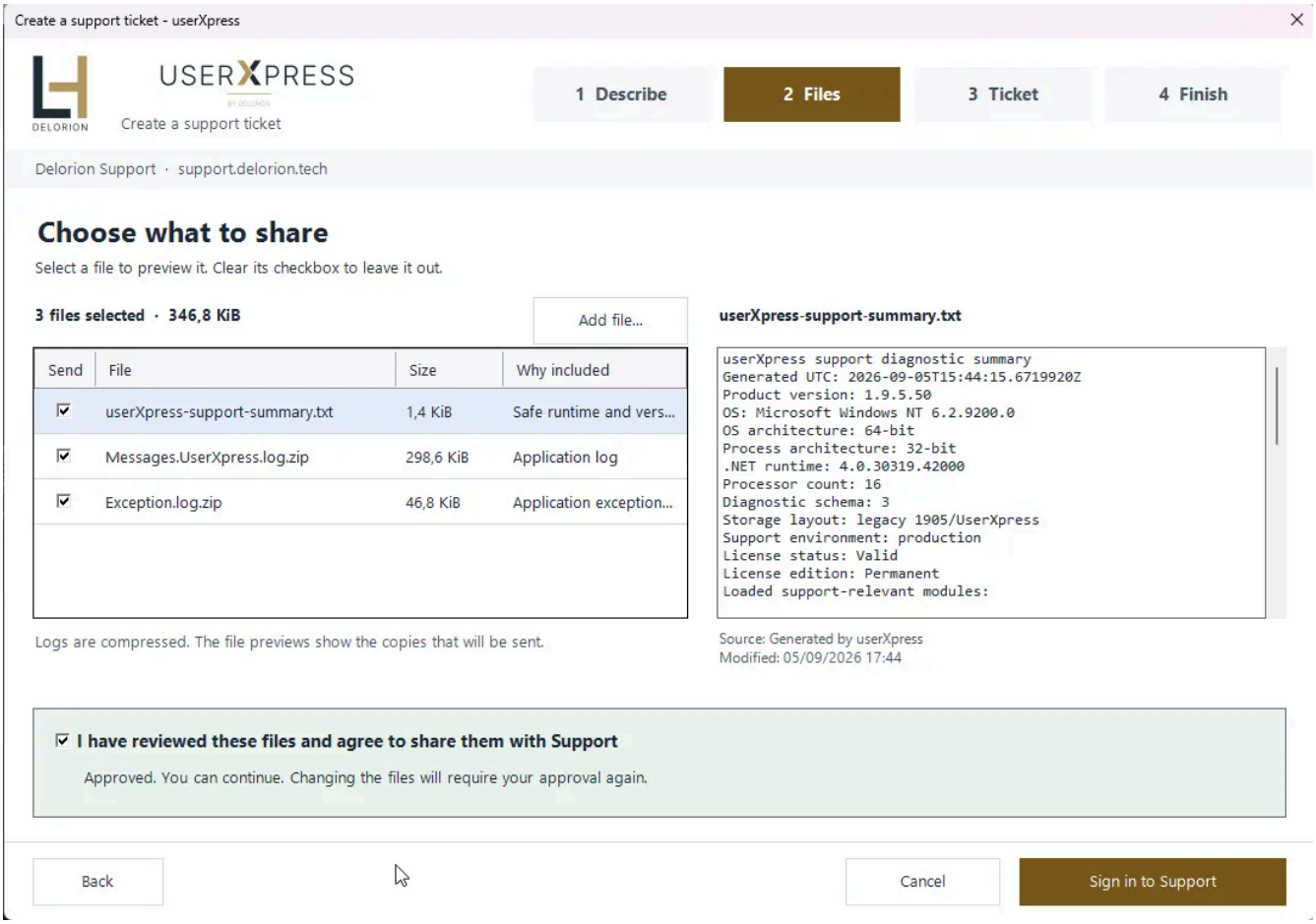
1. Select a row to read its preview. **Why included** explains the suggestion. The details below the preview identify the source and modification time.
2. Clear **Send** for any file you want to exclude.
3. To add a screenshot, PDF, text file or diagnostic archive, choose **Add file...**. Added files are selected for sending automatically.
4. Select **I have reviewed these files and agree to share them with Support**.
5. Choose **Sign in to Support**. If you have already signed in during this wizard, choose **Choose ticket**.

The file list shows the copies prepared for upload. Log files are compressed. A truncated preview displays only part of the file, while uploading sends the complete prepared file. Open the original separately when you need to review the rest or inspect a binary attachment such as a screenshot or PDF.

Logs and screenshots can contain account names, system names and paths. Use **Send** to exclude files you do not want to share. Review added files for passwords or other confidential content before selecting them.

At least one file is required. The generated summary is available when there are no logs to attach. A request can include up to 20 files, with a maximum of 25 MiB per file and 100 MiB in total. The displayed file sizes are the sizes prepared for upload.

Changing the file selection clears approval. Select the approval checkbox again after reviewing the new selection. Returning to **Describe** and choosing **Review files** rebuilds the list, so add any manually selected files again.



Sign in and choose a ticket

The browser opens for sign-in. Use your Delorion Support account, then return to the wizard after the browser confirms sign-in.

To register a new account, use the email address known to Delorion and complete email verification in the browser. Return to the wizard and choose **Resume sign-in** or **Sign in to Support** as displayed.

Choose the destination for your request:

- **Create a new ticket** uses the subject and description you entered.
- **Add to an existing ticket** lists recent userXpress tickets for your organisation. Select the ticket by its reference and subject. **Status** and **Updated** help identify it. Your description and files become a public update on that ticket. Choose **Refresh tickets** to reload the list.

Choose **Continue to create ticket** or **Continue to update ticket**. For an existing ticket, choose **OK** in the confirmation naming that ticket. The wizard then sends the approved files.

If the ticket you need is outside the recent list, open it in the support portal to continue the existing conversation there.

Finish in the browser

The final step shows each attachment as **Waiting**, **Sending...** and then **Ready**. After the files are uploaded, the portal opens to the prepared request.

1. Review the ticket destination, description and attachments in the portal.
2. Choose **Submit** to create the ticket or post the update.
3. Use the ticket reference shown by the portal for subsequent correspondence.

While the wizard remains open, **Review & create ticket** or **Review & update ticket** reopens the prepared request. Choose **Close** when you have finished.

If you cannot continue

Create support request is disabled

Point to the button to read its tooltip. Open the Delorion support portal directly and include that message with the problem description.

Sign-in was cancelled or did not return

Keep the wizard open and finish any registration or email-verification step in the browser. Use **Resume sign-in** or **Sign in to Support** to try again. **Cancel sign-in** stops the browser sign-in attempt while keeping the selected files available in the wizard.

If sign-in still fails, include the displayed error in a request through the support portal.

The file step will not advance

Select at least one file and approve the selection. If a size or count limit is reported, clear **Send** for files you want to exclude, then approve the revised selection.

No performance report is available

Measure a session, then start the support request again to include its results. You can also leave the performance option clear and send the available logs with a description of the delay.

Preparation failed before file upload

The wizard returns to the ticket step and displays the error. Correct the reported problem, then use **Continue to create ticket** or **Continue to update ticket** again.

An upload failed or was cancelled

The wizard reports that some files may have arrived and asks you to start a new request. Close the wizard and reopen **Information → Create support request**. Submission still takes place through **Submit** in the portal. If you already submitted a request, add the information to that ticket instead of creating another one.

Terms and status messages

Applies to userXpress 2.0.0.0

Look up account, connection, role and query terms, and find the explanation for a status shown in userXpress.

Systems, clients and accounts

- **SAP system**: The SAP environment identified by its system ID, such as `DEM`. Choose its SAP Logon entry when adding a connection.
- **Client**: The numbered client within that system, such as `100`. An account belongs to a specific system and client.
- **Account**: A SAP user record. The same user ID in two clients identifies two separate accounts. Use the system and client columns to select the intended account.
- **Connection**: The open connection from userXpress to one SAP client, authenticated as a SAP user. **Connected Systems** lists the connections available for your work.
- **AutoStart**: Saved connections that userXpress opens at startup when AutoStart is enabled. Manage them in **Control Panel** → **AutoStart Systems**.
- **Passphrase**: The local password you enter to unlock userXpress. SAP connections use their configured SAP authentication. Use **Session Password** on the main toolbar to change the passphrase.

See Connect to SAP for connection and AutoStart procedures.

Filters, selection and queries

- **Column filter**: A condition on a table field, such as **Client** equals `100`. Use it to narrow the displayed rows.
- **Selected rows**: Rows chosen for an action. In the Global User Table, use the row checkboxes. Each task guide identifies whether its command uses selected rows or the filtered list.
- **Query**: A set of filter conditions. Save it under **My Queries** to apply the same conditions again. Saved conditions are evaluated against the available data when you reuse them.
- **AND**: Every condition in the group must match. Use it for requirements that apply together.
- **OR**: At least one condition in the group must match. Use it for alternatives, such as either of two user groups.
- **Role content filter**: A query against the authorizations or menu transactions maintained in roles. Use it when the role's name alone does not identify what you need.

For a worked example with nested AND/OR groups, follow Create advanced user queries. For role content, follow Search role content.

Roles and authorization searches

- **Role assignment**: The link between a SAP account and a role, with its assignment validity dates. View it in the role assignment report.
- **Composite role**: A role that groups single roles for assignment together. Search its member single roles when investigating maintained authorizations.
- **Authorization object**: A set of authorization fields checked together. In the role content editor, keep requirements for the same authorization inside one object condition.
- **Authorization field**: One part of an authorization, such as an activity or an organizational value. Choose the field and comparison when building a content condition.
- **Covers value**: A comparison that accepts maintained values, intervals or wildcards covering the requested value. For example, a maintained interval from `01` to `03` covers `02`.
- **Menu transaction**: A transaction code listed in the role's menu. Choose this condition when finding roles that contain a particular menu entry.
- **CUA**: Central User Administration. SAP distributes user data between a central system and child systems according to field-distribution settings. Use the CUA view to identify where a field is maintained.

The comparison reference explains exact text, ranges, wildcard coverage and negative conditions.

Password terms

- **Initial password**: A password set for the user's next password logon. A dialog user changes it at that logon. Use it when resetting a forgotten password.
- **Productive password**: A password the account can continue using without the initial-password change at its next logon. Use it for accounts whose authentication requires that behavior, subject to SAP's password policy.
- **Deactivated password**: Password-based logon is disabled for the account. Configured single sign-on remains available.

See Lock accounts and manage passwords for the actions and their results.

Find a status explanation

Use the guide for the window showing the status:

- **Loading systems**: Waiting, Loading, completed results, warnings and failures. For a failed client, open its **Details** message.
- **Control Panel**: Connection and AutoStart status, including interrupted connections and CUA indicators.
- **Global User Table**: Locks, Online, CUA and row messages. Point to a text cell to read a row message, or select one account and open **Full Message**.

- **Role content query**: Active, paused, modified and outdated results. For **Incomplete** results, open **Details...** to distinguish confirmed matches from unverified roles.
- **Mass User Create**: Creation messages and saved results.
- **Mass Changes**: Update results for each account and requested change.
- **Activity History**: Operation records and messages for the session.

Templates and downloads

Applies to userXpress 2.0.0.0

Choose the workbook or document for account creation, account updates and role filters, and obtain the SAP role package.

Choose the file for your task. The workbook commands below save the format used by your installed userXpress application.

- Create new accounts: use the Mass User Create example workbook.
- Update existing accounts: export the accounts you want to change.
- Notify newly created users: save the Word mail-merge template and use the creation results workbook.
- Prepare or share role filters: save the filter template or export your saved filters.
- Assign SAP access for userXpress: download the SAP role package from the installation documentation.

Mass User Create workbook

Use this workbook when you need to create several accounts with personal details, roles, profiles and parameters.

To include choices from your SAP clients, connect those clients before saving the example workbook. Their values appear in lists such as user groups, languages and security policies.

1. Open **Mass User Create** from the main toolbar.
2. Choose **Help** → **Save Example Mass User Create Spreadsheet**.
3. Choose a folder and save the `.xlsx` file.
4. Choose **File** → **Open** in Mass User Create to open it.

The workbook includes **Full Description - Vertical** and **Full Description - Horizontal** examples and a **Your sheet** worksheet for your accounts.

Vertical batches share role, profile and parameter assignments. Horizontal batches hold those assignments on each user's row. Format and user-type cells have drop-down choices.

Follow Mass User Create to prepare and run the workbook. Use Workbook fields and formats for the headings, dates and blank-cell behavior.

Mass Changes workbook

Use this workbook to prepare different changes for existing accounts, such as a new validity date for each contractor.

1. Select the accounts in the Global User Table.
2. Choose **Users → Change → Mass → Mass Changes → Export Selected Users**.
3. In **Mass User Export**, choose the categories to include and the file path, then choose **Export**.
4. When **Messages** shows **Done**, choose **Open File**.

The export creates the **MassUserExport** worksheet from the selected accounts. It adds **Roles** and **Parameters** worksheets when those categories are included.

This workbook carries the account identities and values needed for an update. Follow Prepare the updates, then import it through **Import User Updates**. The field reference explains how empty cells and complete role or parameter lists affect the result.

Word mail-merge template

Use the template to prepare individual messages from the Mass User Create results, for example to send each person their new account details.

1. In **Mass User Create**, choose **Help → Save Example MS Word Mail Merge**.
2. Choose a folder and save the `.docx` file.
3. Open it in desktop Word and connect it to the saved creation-results workbook as the recipient list.

Follow Work with a mail-merge template for the Word controls, recipient fields and email-merge setup. Each system/client/user result row supplies one message.

Role content filter workbook

Use a filter workbook to prepare several queries together or share their definitions with another administrator.

1. In the Global Role Table, choose **Content Filter → Download Filter Template**.
2. Choose a folder and save the `.xlsx` file.
3. Open it and choose a starting point: **Ruleset**, **Simple examples** or **Advanced examples**. The **Instructions** worksheet explains the format.

Follow Import and export role filters to prepare the rows and import selected definitions into **My Queries**.

To share filters you have already saved, choose **Content Filter → Export Filters** and select their names. The export procedure explains what the workbook preserves.

SAP role package

Use the SAP roles download and assignment guide to obtain the ZIP package and import its roles into SAP.

The guide explains the communication role, user-administration role and composite role. After import in PFCG, generate the two single-role profiles and assign the composite role as described there.

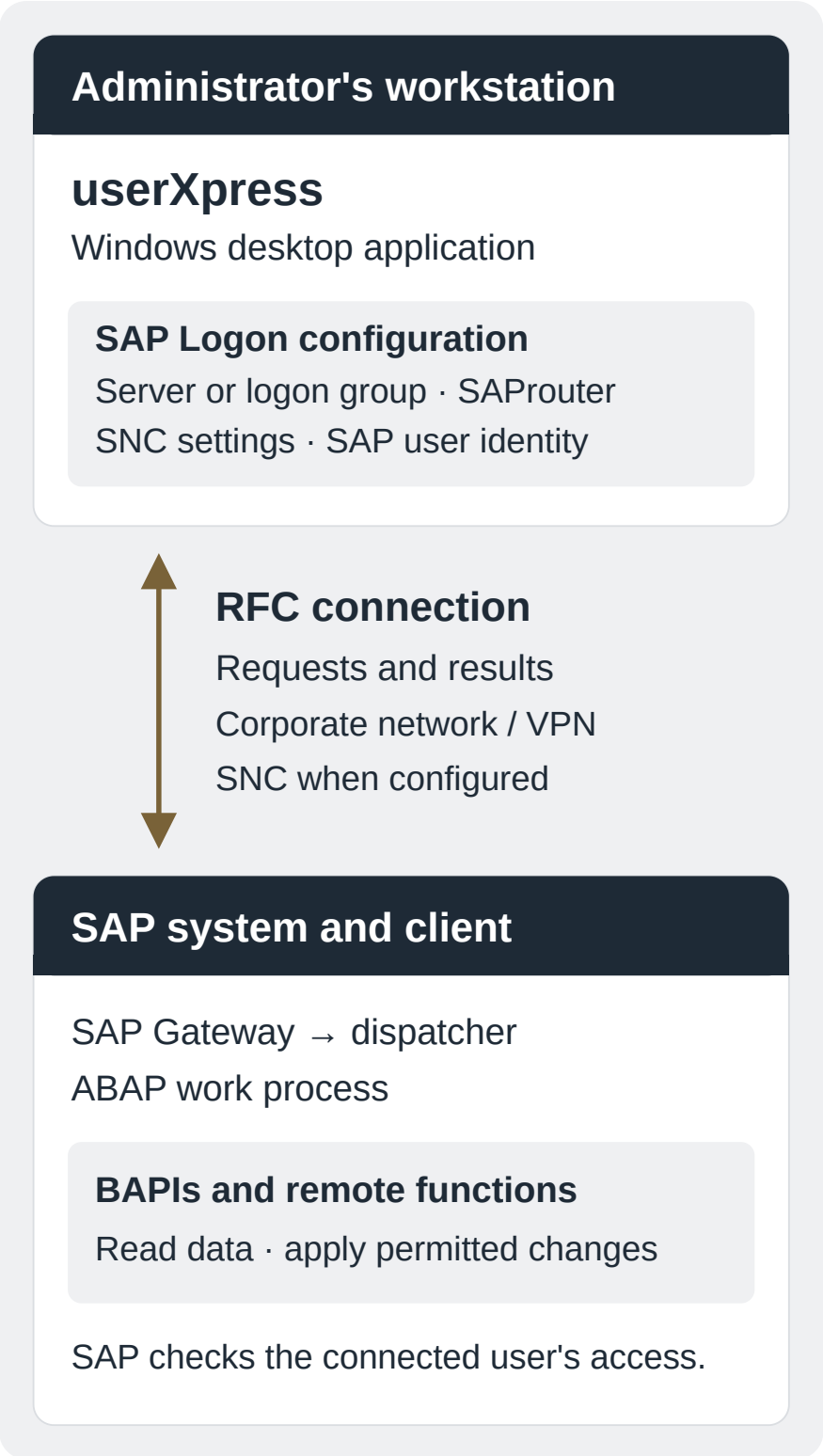
Architecture

Applies to userXpress 2.0.0.0

Understand how userXpress connects to SAP, authenticates administrators and reads or changes SAP data.

userXpress runs on the administrator's Windows workstation and communicates directly with the selected SAP systems.

It uses the connection definitions maintained for SAP Logon: application server or logon group, system number, SAProuter route and SNC settings. No intermediary userXpress server is required for these SAP connections.



How userXpress connects to SAP

A remote function call (RFC) lets userXpress request an operation on the SAP system. SAP checks the connected user’s authorizations, executes the function and returns data or a result.

Many account operations use SAP Business Application Programming Interfaces (BAPIs). For example:

- Reading account details uses `BAPI_USER_GET_DETAIL`.

- Changing account details uses `BAPI_USER_CHANGE`.

SAP identity and permissions

Each connection identifies a SAP system, client and logon user. The authentication method determines how that user signs in:

- **Password authentication:** the administrator supplies their SAP user ID and password for that client.
- **SNC single sign-on:** SAP maps the sign-on identity to a SAP user.

All requests run with that SAP user's normal administration permissions: access to read user and role information and make the user changes assigned to the administrator. The same scope of permitted users, roles and activities applies when working through userXpress.

Connections and global tables

- The **Control Panel** lists the connections.
- The **Global User Table** combines users from the connected clients.
- The **Global Role Table** combines roles from the connected clients.

An account is identified by its system, client and user ID. For example, `DEMO_USER` in client `100` and `DEMO_USER` in client `200` are separate accounts. Changing one does not change the other.

Refresh and operation results

The tables show information retrieved from SAP. They do not continuously reflect changes made by other administrators.

- Refresh the relevant records when you need current values.
- After an operation, check its results for each target. One client can succeed while another fails.
- If a change succeeds but the refresh fails, the displayed information may be old. Check SAP before repeating the change.

SAP GUI and SNC

userXpress reads the SAP Logon configuration selected in **Settings → Connections → SAP Logon configuration**.

SU01 and **PFCG** open selected accounts and roles in SAP GUI while you continue working in userXpress. Set their shared window limit in Settings → Connections → SAP GUI.

Secure Network Communications (SNC) protects communication according to the connection's quality-of-protection setting: authentication, integrity or encryption. SNC can also provide single sign-on when configured for that purpose.

Install your organization's SNC provider, configure its identity and trust, and select its 32-bit library in userXpress. See Configure SNC.

Installation sequence

1. Prepare the workstation using System requirements and compatibility. Install and configure SAP GUI and your SNC provider where required.
2. Install userXpress. Start it under your normal Windows account, set the local passphrase and enter the license.
3. Have your SAP security administrator assign SAP permissions for the work the administrator will perform.
4. Configure the SAP connection. userXpress detects the SAP Logon configuration file automatically. Configure SNC if used, and connect one system/client.

What to configure on each workstation

Program files are installed for the machine. Passphrase, saved logons, queries and preferences belong to the Windows user.

Complete first-start configuration in that person's Windows session, even when IT installs the program centrally.

The local passphrase unlocks userXpress and protects saved SAP logon credentials. SAP passwords or SNC/SSO authenticate the SAP connections. Resetting one does not reset the other. See Storage for storage locations and password-reset consequences.

Online Help opens in the browser. Support requests use the browser and the application to sign in and send the files the administrator approves.

Configure these HTTPS connections separately from SAP access. The network reference lists the destinations.

System requirements and compatibility

Applies to userXpress 2.0.0.0

Prepare the desktop and SAP authorizations required to install and use userXpress.

Desktop requirements

Requirement	What to provide
Operating system	Windows 11 Pro, Enterprise or Education, on a version supported by Microsoft and SAP. Run userXpress under your normal Windows user account.
Memory	At least **2 GB of available RAM for userXpress**, in addition to memory used by Windows, SAP GUI and other applications.
.NET runtime	Microsoft .NET Framework 4.8 or 4.8.1, included with Windows 11.
SAP GUI	A release of SAP GUI for Windows that SAP supports on your Windows version. See SAP GUI and SNC.
Application architecture	userXpress is a 32-bit application. Supply a 32-bit SNC library when using SNC, including on 64-bit Windows.
Installation rights	Windows administrator rights for the machine-wide installation.
SAP connection list	A readable SAP Logon configuration file containing the systems the administrator needs. See SAP Logon connection file.
Network	Workstation access to the SAP servers and SAProuter used by those connections. Online Help and support also need HTTPS access. See Network access.
Personal storage	Write access to the user's settings and cache folders, and to any folder used for workbooks, exports or reports.

SAP GUI and SNC

userXpress follows SAP's maintenance policy for SAP GUI for Windows. Use a release and Windows combination supported in SAP's Lifetime and Support Matrix.

The matrix lists SAP GUI 8.00 and 8.10 for Windows 11. Both the SAP GUI release and the operating system must remain within their supported lifetimes.

Before installing or upgrading SAP GUI, check SAP Note 1053737 for patch availability. You may need an SAP Support Portal account to read it.

- Patches are cumulative. Each patch includes the corrections from earlier patches for that release.
- Use a released patch that SAP has not withdrawn.

- Treat expected shipment dates as estimates, not confirmation that a patch is available.

Install and configure SAP GUI for users who will open **SU01** or **PFCG** from userXpress. Their SAP connections must use Dialog users authorized for those transactions in the target clients.

The SAP RFC runtime must match the userXpress application architecture. If a required library is missing at startup, the error message identifies its filename and architecture.

For SNC, install your organization's SNC provider and configure its identity and trust settings before selecting the library in userXpress.

The library is a Windows DLL. Its architecture must match userXpress, so a 64-bit DLL cannot be used by the 32-bit application. Follow Configure SNC to select the correct file.

Keep the SAP connection components included with userXpress together in the installation directory. Replacing individual DLLs can leave the application with incompatible components.

Storage and rollout preparation

Memory use increases with the number of users and roles loaded and the operations performed. Check memory availability with the intended SAP clients connected before rolling out to all administrators.

Allow disk space for local settings and caches, exported workbooks and diagnostic reports.

Exports and account-creation workbooks can contain personal information and passwords. Choose their storage locations before introducing the application into daily use.

Continue with Installation and enterprise deployment.

SAP requirements

userXpress uses the SAP authorizations an administrator normally needs for user administration:

- Read user and role information, including account details and assignments.
- Update users according to the administrator's responsibilities, such as changing account details, resetting passwords or assigning roles.

Using userXpress does not require broader administrative privileges. The administrator's existing scope of permitted users, roles and activities continues to apply.

Use a personal SAP account in each system/client the administrator manages. For SNC single sign-on, these permissions belong to the SAP user mapped to that identity.

The reference below gives the SAP security administrator a complete picture of the RFC calls, table reads and administration permissions used by these tasks. Use it to map the administrator's existing responsibilities to SAP authorization fields. Entries for specialized tasks, such as maintaining role definitions, apply to administrators who perform those tasks.

In the examples, `*` means all values for a field. Use the user groups, role names and other values from your organization's authorization model.

RFC and table access

In **S_RFC**, maintain `ACTVT = 16` for execution. Use `RFC_TYPE = FUNC` to name individual remote function modules, or `RFC_TYPE = FUGR` for function groups. `RFC_NAME` contains the corresponding function or group names.

A function-group grant covers the group's functions and can therefore be broader than an individual-function grant. See SAP's S_RFC reference.

Authorization object and field	Values and purpose
`S_RFC.ACTVT`	`16` — execute remote function calls.
`S_RFC.RFC_TYPE`	`FUNC` — individual functions.
`S_RFC.RFC_NAME`	Functions for the permitted operations, listed in RFC execution and administration permissions. Include supporting metadata and table-read calls described below.
`S_RFC.RFC_TYPE` / `RFC_NAME`	Where function-group grants are used: `FUGR` with `RFC1`, `STFC`, `SYST`. Keep these in a separate authorization instance from the `FUNC` entries.
`S_TABU_NAM.ACTVT`	`03` — display table contents.
`S_TABU_NAM.TABLE`	The table names needed for the selected features, grouped below. This permission does not grant table maintenance.

Common supporting RFCs include `RFC_READ_TABLE`, `DDIF_FIELDINFO_GET`, `RFC_GET_FUNCTION_INTERFACE`, `RFC_SYSTEM_INFO` and `RFCPING`. The required calls depend on the operation and the SAP system.

For a rejected supporting call, an authorization trace identifies the permission involved.

Maintain table-read access by purpose:

- **Users, addresses and assignments:** `ADCP`, `ADR6`, `ADRC`, `AGR_USERS`, `DEVACCESS`, `USCOMPANY`, `USER_ADDRP`, `USGRP`, `USGRPT`, `USR01`, `USR02`, `USR05`, `USR06`, `USR10`, `USR21`, `USR41`, `USRACL`, `USREFUS`.
- **Roles and their content:** `AGR_AGRS`, `AGR_DEFINE`, `AGR_TEXTS`, `AGR_MINI`, `AGR_MINIT`, `AGR_TCODES`, `AGR_TIME`, `AGR_CUSTOM`, `AGR_1250`, `AGR_1251`, `AGR_ATTS`, `AGR_BUFFI`, `AGR_1253`, `AGR_1252`, `AGR_HIERT`, `AGR_HIER`, `AGR_FLAGS`, `AGR_LSD`, `AGR_HPAGE`, `AGR_MAPP`.
- **System and user reference values:** `CVERS_TXT`, `DD02L`, `SA`, `SEC_POLICY_CUST`, `SVERS`, `T000`, `T005K`, `T005T`, `TBDLST`, `TPARA`, `TPARAT`, `TSACT`, `TSAD2`, `TSAD3`, `TSAD3T`, `TSP03`, `TUTYP`, `TUTYPA`, `TUTYPNOW`, `USRFLDDEF`, `USRFLDGRP`, `USRFLDSEL`, `USRFLDT`, `USZBVSYS`.
- **Role content filter metadata:** `TSTC`, `TSTCT`, `TOBJ`, `TOBJT`, `AUTHX`, `DD04T`, `TACT`, `TACTT`, `TACTZ`, `DD04L`, `DD01L`, `DD07L`, `DD07T`, `DD08L`, `DD05M`. Value suggestions can also read the check or text table associated with the selected authorization field.

SAP applies table authorization groups and other configured checks according to its release and configuration. Match table-read access to the user and role information needed for the administrator's tasks.

User administration

The values below describe standard SAP administration capabilities. Choose the activities that match the administrator's duties. Display-only users need the corresponding read access.

`ACTVT` identifies the permitted activity. Each code is shown with its meaning below. The scope fields define which users, roles, profiles or values those activities may affect.

Object	Scope fields	ACTVT — activity
S_USER_GRP	`CLASS` = `*`. Controls user administration within the permitted user groups.	`01` — Create `02` — Change `03` — Display `05` — Lock or unlock users and change passwords `06` — Delete `08` — Display change documents `22` — Enter, include or assign `24` — Archive
S_USER_AGR	`ACT_GROUP` = `*`. Controls role administration and assignment activities for the permitted roles.	`02` — Change `03` — Display `21` — Transport `22` — Enter, include or assign `36` — Extended maintenance `64` — Generate authorization profiles
S_USER_PRO	`PROFILE` = `*`. Controls administration and assignment of authorization profiles.	`01` — Create `02` — Change `03` — Display `06` — Delete `07` — Activate `08` — Display change documents `22` — Enter, include or assign
S_USER_AUT	`OBJECT` = `*` `AUTH` = `*`. Controls work with authorizations for the permitted authorization objects and authorization names.	`01` — Create `02` — Change `03` — Display `06` — Delete `07` — Activate `08` — Display change documents `22` — Enter, include or assign

S_USER_SAS	`ACT_GROUP` = `*`
	`CLASS` = `*`
	`PROFILE` = `*`
	`SUBSYSTEM` = `*`. Controls assignment scope where the corresponding SAP assignment checks are active.
		`22` — Enter, include or assign

Object	Scope fields	ACTVT — activity
S_USER_SYS	SUBSYSTEM = *. Applies to system assignments in Central User Administration (CUA).	78 — Assign
S_USER_TCD	TCD = *. Defines transaction codes the administrator may include in roles. It does not grant permission to start those transactions.	—
S_USER_VAL	OBJECT = * AUTH_FIELD = * AUTH_VALUE = *. Defines authorization field values the administrator may maintain.	—
S_SECPOL	POLICYNAME = *. Permits assignment of the specified security policies.	22 — Enter, include or assign
S_ADDRESS1	ADGRP = BC01. Permits the corresponding user-address operations.	01 — Create 02 — Change 03 — Display 06 — Delete

Use the administrator's established scope in place of the wildcard examples:

- Replace `S_USER_AGR.ACT_GROUP = *` with approved role names or a pattern such as `Z_FIN_*`.
- Replace `S_USER_GRP.CLASS = *` with the user groups the administrator manages, such as `FINANCE`.

Apply the same role names, user groups and activities in related assignment objects such as `S_USER_SAS`.

Read access and change access have their own SAP authorization checks. Configure each for the information the administrator may view and the users they may maintain.

Opening `SU01` or `PFCG` from userXpress uses the same **S_TCODE** and display or maintenance permissions as opening those transactions directly in SAP GUI.

Use existing SAP roles that provide this access, or the supplied userXpress role package. The role guide explains profile generation, assignment and user comparison when using the package.

Audit

Applies to userXpress 2.0.0.0

Find SAP user and role change documents and identify the SAP account that performed a change.

Which user performs an action?

Every request userXpress sends to SAP runs under the SAP user authenticated for that connection. With SNC single sign-on, this is the SAP user mapped to the sign-on identity. SAP records that account as the actor for changes that generate change documents.

Use each administrator's own SAP account so that changes can be attributed to that person. If several people use the same SAP account, the SAP user name alone cannot distinguish them.

The Windows account and local userXpress passphrase do not replace the SAP identity in these records.

Find changes to users

1. Open **SU01** in the SAP system and client where the change was made.
2. Choose **Information → Change Documents for Users**.
3. Enter the affected user and the relevant date/time range. To investigate one administrator's work, also restrict the selection to that administrator's SAP user where the selection screen offers it.
4. Execute the selection and open the relevant change documents. Compare the recorded actor, time and changed fields with the operation you are investigating.

User change documents can include account attributes, validity, user-group and assignment changes. Password-related changes can be recorded, but the password itself is not a readable audit value.

Available selections and document detail depend on the SAP release. See SAP's SU01 documentation.

Find changes to roles

1. Open **PFCG** in the SAP system and client where the role is maintained.
2. Enter the role name, then choose **Environment → Display Changes**.
3. Restrict the selection by role, date and changed-by user as needed. Select the change-document categories relevant to the investigation and execute the selection.
4. Open the matching documents to inspect the recorded changes. Role content changes and user-assignment changes answer different questions. Include both categories when investigating a change in a user's access.

The menu is described in SAP's role administration reference.

SAP also provides the role change-document report through **SUIM → Change Documents → For Roles**. See Displaying Change Documents for Roles.

What these records establish

For logons, failed authorization checks or other security events, use your organization's SAP security logging and tracing procedures.

If an expected change is absent, first confirm the SAP system, client, affected user or role, date range and connection account. Check the userXpress operation result to establish whether SAP accepted the change.

For an authorization failure, follow Diagnose a SAP authorization failure. Local application logs can help correlate an error, but do not replace SAP's change documents or your SAP audit-retention policy.

Storage

Applies to userXpress 2.0.0.0

Find user settings and working files, protect saved logons and understand passphrase reset and cache clearing.

Storage locations

- **Profile and logs:** `%APPDATA%\Delorion\UserXpress` contains settings, saved connections, queries and application logs. Startup diagnostic reports are stored under its `Diagnostics\Startup` subfolder.
- **Cached system metadata:** encrypted cache files are stored in `%LOCALAPPDATA%\Delorion\UserXpress\EncryptedCache`.
- **Workbooks, exports and reports:** these are in the folders selected when opening or saving files, which can be outside the application-data folders.

To open a default location, paste the path into File Explorer's address bar in the intended user's Windows session. `%APPDATA%` and `%LOCALAPPDATA%` resolve to that user's profile.

Protect credentials and working files

The local userXpress passphrase unlocks saved SAP logon credentials. The application decrypts them when it opens the saved connection.

A workbook can contain new-user passwords. A report can contain user IDs, names and role assignments. Use Excel export protection to require a password when opening an exported Excel file.

Store exports and logs in locations approved for their contents and restrict access accordingly.

SAP connection credentials

Saved logons and Auto Start entries use **AES-256-GCM**. A randomly generated 256-bit key encrypts the saved SAP user IDs and passwords. GCM provides encryption and tamper detection together.

The local passphrase protects this credential-encryption key through **Argon2id**:

Parameter	Value
Algorithm	Argon2id, version 1.3
Memory	256 MiB
Passes	3

Parameter	Value
Parallelism	4 lanes
Salt	32 random bytes
Derived key	256 bits

The derived key encrypts the credential-encryption key using AES-256-GCM. Each encryption uses a fresh random 12-byte nonce and a 128-bit authentication tag. A nonce is the per-encryption value used by GCM, and the tag detects changes to the protected data.

Authentication binds each saved credential to its profile, SAP system, client and field. The credential file's connection definitions and protected key are also authenticated. userXpress checks this protection before using the saved credentials.

userXpress session password

The session password is the local passphrase entered when starting or unlocking userXpress.

userXpress verifies the passphrase by deriving the Argon2id key and using it to authenticate and unlock the credential-encryption key. The same mechanism verifies the passphrase and protects saved logons. There is no separate password hash in this profile format.

Argon2id runs during unlock. userXpress then reuses the unlocked credential key when reading or saving logons, rather than repeating key derivation for each SAP user ID or password.

Changing the passphrase protects the same credential key with the new passphrase. Saved logons and connection definitions remain available. Resetting a forgotten passphrase creates a new key and clears the saved logons, as described in Reset a forgotten passphrase.

Excel export protection

Excel exports can be encrypted with a password that the recipient must enter to open the file. Protection is off by default. Enable **Protect Excel exports** in **Settings** and enter a **Default Excel password**. For automatic protection and per-export choices, see Excel export settings.

The default Excel password is stored in your userXpress profile, encrypted with **AES-256-GCM**.

Exported workbooks use Excel's password-to-open encryption. Recipients enter the password used for that file. You can use the saved default or choose a different password for one export. Choosing a password for one file leaves the saved default unchanged.

Changing the userXpress passphrase preserves the saved default Excel password. Resetting a forgotten passphrase clears that default. Previously exported files still require the password used when they were created, so retain that password for as long as the files are needed.

This option protects Excel workbooks. CSV, XML, logs and other output formats retain their own storage and access requirements.

Cached metadata

userXpress caches SAP function and table definitions, authorization objects, transaction codes and related lookup values. It also stores table counts and previous loading times to help prepare subsequent loads.

These files can reveal technical information about your SAP landscape, so keep the cache within the administrator's protected Windows profile.

Persistent cache files have three protections:

- **Encryption:** AES-256-CBC with PKCS#7 padding and a random initialization vector.
- **Tamper detection:** HMAC-SHA256 checks the authenticated file contents before decryption.
- **Key protection:** Windows Data Protection API (DPAPI) protects encryption and authentication keys for the current Windows user.

Copying the cache to another account does not provide that account with usable SAP metadata. If a cache entry cannot be authenticated or decrypted, userXpress ignores it and requests the information from SAP again.

Cache protection does not encrypt logs, exports or account-creation workbooks.

Reset a forgotten passphrase

A reset clears saved SAP user IDs, SAP passwords and the default Excel password. It also turns off AutoStart for the affected entries. Connection definitions, favorite selections and language settings remain available. It does not reset any SAP user's password. Make sure the administrator can obtain their SAP logon details again before proceeding.

1. At the userXpress unlock window, choose **Reset...**.
2. Read the warning and confirm only if you are prepared to re-enter the saved logons.
3. Enter and confirm a new passphrase in **New Passphrase**, then choose **OK**.
4. Re-enter the SAP credentials for the affected connections and verify them before enabling AutoStart again.
5. Set **Default Excel password** again before using automatic Excel export protection. Previously exported files retain the password used to create them.

If the current passphrase is still known, choose **Session Password** on the main toolbar to change it. Reset is the recovery path for a forgotten passphrase.

Back up user configuration

1. Finish active SAP operations and close userXpress.
2. Copy the user's settings directory to a protected backup location. Record the application version and the Windows account the backup belongs to.

3. Preserve any account-creation or recovery workbook still needed for unfinished work. Include exports only where your retention policy requires them.

Keep the passphrase available to the account owner. Do not use one person's configuration backup as a template for other administrators: it can contain saved SAP credentials and personal settings.

Clear cached data

Use **Information** → **Diagnostics** → **Clear cache...** to remove stored cache files when troubleshooting cached information or retiring a workstation. Read the confirmation and choose **OK**.

The result reports the number of files removed. An error can mean the cache was only partly cleared.

Cache clearing removes stored cache files. It does not remove saved queries, all settings, exports or workbooks. The next operation can take longer while information is read from SAP again.

Persistent encrypted cache files are checked for corruption before use, and their keys are protected for the current Windows user. Cached metadata and value suggestions help the application prepare SAP requests. They are not a saved list of matching roles.

Run the role content filter again when you need updated results.

Retention and removal

Retain bulk-operation recovery files until the operation has been reconciled. Then remove files containing credentials or personal data according to your retention policy. Apply that policy to backups and shared export folders as well as the local workstation.

When removing userXpress, review the settings folder, cache, diagnostic reports and user-selected output folders separately from uninstalling the program.

Before sharing any of those files with support, follow Review files before sending.

Installation and enterprise deployment

Applies to userXpress 2.0.0.0

Install userXpress with the EXE installer, complete the first start and request an MSI package for centralized deployment.

Before installation

Prepare the following before running setup:

- Obtain the userXpress EXE installer and license code from Delorion or your software administrator.
- Check the desktop requirements, including installation rights and any required SAP GUI or SNC components.
- Have the intended SAP system, client, connection file and logon method available.

Windows 11 includes the .NET Framework runtime required by userXpress.

Before installing, finish the current operation and close userXpress.

Install the program

1. Run the supplied EXE installer and approve the Windows elevation prompt with an account authorized to install software.
2. Read and accept the license agreement, then start installation. The setup executable uses the default installation folder.
3. Wait for installation to complete. On 64-bit Windows, the default folder is `%ProgramFiles(x86)%\Delorion\userXpress` (normally `C:\Program Files (x86)\Delorion\userXpress`).
4. Complete any restart requested by Windows before starting the application.

Setup creates a **userXpress** entry in the Windows Start menu. It installs the program for the machine.

Each user completes the following first-start steps in their own Windows account.

First start and license

1. Start **userXpress** from the Start menu under the normal Windows account of the person who will use it.
2. In **New Passphrase**, enter a **Passphrase**, repeat it in **Re-Enter**, and optionally enter a **Hint**. Choose **OK**. Keep the passphrase secure: it protects saved SAP logons. Choosing **Cancel** closes the application.

3. When the license window appears, choose **Enter new license**. Paste the supplied license code and choose **OK**. Check the license confirmation or registration details. If the code is rejected, obtain the correct code before continuing.
4. Replacing an expired or missing license closes userXpress. Start it again and enter your passphrase.
5. Open **Information** and record the displayed application version for your installation record.

On later starts, enter the same passphrase and choose **Unlock**. It is separate from your SAP password.

A forgotten passphrase requires a reset that clears saved logon credentials. See Reset a forgotten passphrase.

Deploy the MSI centrally

For centralized deployment, request the MSI package through the Delorion support portal. Run installation with machine administrator rights. Leave first-start configuration to the intended Windows user.

Run the following Windows Installer command in Command Prompt. It installs without displaying the wizard, suppresses an automatic restart and writes a verbose log.

Replace the example MSI path with the supplied package's actual path. The log directory must already exist and be writable by the deployment account.

```
msiexec.exe /i "C:\Packages\userXpress.msi" ^
  /qn /norestart ^
  /L*v "C:\Packages\userXpress-install.log"
```

Use these Windows Installer options with the `.msi` file. Configure SAP connections in the intended user's Windows account after installation.

Have the deployment tool wait for `msiexec` to finish and capture its exit code:

- `0`: installation succeeded.
- `3010`: installation succeeded and Windows needs a restart. Schedule that restart before handing over the workstation.
- For an error, retain the installation log and interpret the Windows Installer return code.

Upgrade or uninstall

To upgrade, finish the current operation, close userXpress and run the new EXE installer. The installer replaces the previous program version.

To uninstall, close userXpress and remove it through Windows' installed-applications controls. Uninstalling the program does not remove SAP accounts or role assignments.

Handle personal configuration, exports and recovery files separately under your retention policy.

If an upgrade must be reversed, contact Delorion support with the old and new version numbers and the failure details before restoring the old installation. Keep the previous installer available. Do not replace individual program files with older copies.

Network connectivity and authentication

Applies to userXpress 2.0.0.0

Use SAP Logon connection definitions, configure SNC and establish the first SAP connection.

Network access

Destination	Required access
SAP application or message server, including SAProuter where configured	Permit userXpress to reach the server addresses and ports in your SAP connection definitions. Obtain these from your SAP Basis team.
`docs.delorion.tech`	Browser HTTPS access for online Help.
`support.delorion.tech`	HTTPS access from userXpress and the browser for support sign-in, requests and approved attachments.

SAP ports depend on the system and route.

If a proxy is used, check support access from both the application and the browser.

SAP Logon connection file

userXpress automatically detects the SAP Logon configuration file in your Windows profile on first start and uses it to list the available systems.

Use a different connection file

To use a different SAP Logon configuration file, select it in Settings. SAP Logon XML and legacy INI files are supported.

1. Open **Settings** → **Connections**.
2. Under **SAP Logon configuration**, locate **Configuration file**.
3. Use the browse button to select your SAP Logon configuration file, then choose **OK** to save.
4. Open **Control Panel** → **Connected Systems** → **Add** and check that the expected system is in the list.

If the file is missing or the list does not contain the system you need, correct the file selection or ask the SAP Basis team to update the connection definition. Changing the SAP user’s authorizations will not add a missing connection entry.

Configure SNC

Complete this section when the SAP connection uses Secure Network Communications (SNC). Your SNC provider must already be installed and configured for the administrator's identity. userXpress needs the provider's **32-bit DLL**, even on 64-bit Windows.

1. Open **Settings** → **Connections** and find **SNC library**.
2. Choose **Find installed libraries**, then select the correct provider from **Select an installed library**. The list shows its product, version and architecture. Selecting an entry sets the library override automatically.
3. If the provider is not found, enable **Use a library override for userXpress**, choose **Browse...** beside **Library path**, and select its DLL.
4. Check the status below the selection. Resolve a missing, unreadable or wrong-architecture library before continuing.
5. Choose **OK**. If the library setting changed, userXpress offers to restart. Choose **Yes** when you are ready, or **No** to restart later. The new library selection takes effect after restart.
6. Connect to the SNC-enabled SAP system using the configured logon method.

If IT manages the library through the Windows environment, leave **Use a library override for userXpress** cleared. The status shows the inherited setting and path.

An enabled override takes precedence for userXpress and does not change the Windows environment settings used by other applications.

Setting an SNC name on a SAP user record is a different operation. It does not install the provider or configure workstation trust.

Make the first connection

1. Open **Control Panel** → **Connected Systems** → **Add**.
2. Select the system, then enter the intended **Client** and **Language**.
3. For password logon, enter **User** and **Password**. For SNC single sign-on, the **User** and **Password** fields are disabled. The configured SNC identity is used.
4. Leave **Auto start** cleared for this first connection. Choose **OK** and wait for loading to finish.
5. Check the system/client in Control Panel and its data in the Global User Table and Global Role Table.

After the connection works, use AutoStart if you want it opened at subsequent starts. Saved passwords must be updated when the SAP password changes.

Connection problems

Symptom	What to check
The system is absent from the logon list	Check **Settings → Connections → SAP Logon configuration**, the file's accessibility and its system entries.
SAP cannot be reached or the connection times out	Check the workstation's network/VPN, SAP server availability and the configured SAProuter route with the Basis team.
SAP rejects the logon	Check the client, account status and authentication method. For a changed password, update the saved credentials. Avoid repeated attempts with a rejected password.
The SNC library is missing or has the wrong architecture	Select the installed 32-bit provider DLL under **SNC library**, save and restart userXpress.
Logon succeeds but loading is denied	Give the SAP security administrator the reported function or table and follow Diagnose a SAP authorization failure.
Support sign-in succeeds in the browser but does not return to userXpress	Keep the support wizard open. Check that browser and endpoint policies allow the return to `127.0.0.1` on the same workstation.

For an unresolved problem, retain the exact message, timestamp and affected system/client. Use Diagnostics to prepare the information for support.

Required SAP access

Applies to userXpress 2.0.0.0

Understand the SAP permissions used by userXpress and trace an authorization failure to the affected account and operation.

Which account needs access?

userXpress works with the permissions of the SAP user used for each connection. For SNC single sign-on, this is the SAP account mapped to that identity.

The administrator needs the normal SAP access for their work: reading user and role information and updating users within their assigned responsibilities. Using userXpress keeps that administrative scope unchanged.

This page explains how those permissions apply to the SAP calls behind each task. It provides a reference for the SAP security administrator and a procedure for resolving an authorization error. For authorization objects, fields and values, see SAP requirements.

RFC execution and administration permissions

SAP uses **S_RFC** to control execution of remote function calls. The role must allow the required functions or function groups for your SAP release.

SAP checks RFC execution permission together with the user, role or table permissions for the requested task. See SAP RFC authorization.

The following reference maps administration tasks to their principal SAP calls. Use the entries relevant to the administrator's work.

Each task includes the supporting reads needed to display account details, offer field values and refresh the result after a change.

Task	Principal SAP calls
Read account details	`BAPI_USER_GET_DETAIL`, together with user, address and assignment table reads.
Create, change or delete accounts	`BAPI_USER_CREATE1`, `BAPI_USER_CHANGE`, `BAPI_USER_DELETE`.
Lock or unlock accounts	`BAPI_USER_LOCK`, `BAPI_USER_UNLOCK`.
Set initial or deactivate passwords	`BAPI_USER_CHANGE`.
Set productive passwords	`SUSR_USER_CHANGE_PASSWORD_RFC`. Password generation/checking also uses `SUSR_GENERATE_PASSWORD` and `PASSWORD_FORMAL_CHECK`.

Task	Principal SAP calls
Assign roles or profiles	`BAPI_USER_ACTGROUPS_ASSIGN`, `BAPI_USER_PROFILES_ASSIGN`, plus reads of existing assignments.
Copy role definitions and generate profiles	`/SDF/PRGN_EXECUTE_UPLOAD`, `PRGN_AUTO_GENERATE_PROFILE_NEW`.
Send a message or end a SAP session	`TH_POPUP` for messages. `TH_DELETE_USER` for session termination.

User administration involves **S_USER_GRP** for user-group scope. Role administration involves **S_USER_AGR**. Profile and assignment operations can additionally involve **S_USER_PRO** and **S_USER_SAS**, depending on your SAP authorization-check configuration.

Use the groups, roles, profiles and activities already defined for the administrator's responsibilities. SAP describes these checks in its user administration and role administration guidance.

SAP controls read access and change access through their respective authorization checks. Set the scope of each according to the administrator's responsibilities.

Access for role content filters

Role content searches read the authorization data maintained in roles, including authorization headers (`AGR_1250`), field values (`AGR_1251`), organizational values (`AGR_1252`) and role-menu data.

The editor also reads authorization and dictionary metadata to describe fields and suggest values. Some value lists require access to a field's own check table.

When access to one of these sources fails, the search can show confirmed matches alongside roles it could not evaluate. Those unverified roles are not confirmed non-matches.

Open **Details…** for the failed reads, correct the permission or connection problem and use **Run again**.

A match describes maintained role content. It does not establish that a particular user can execute a transaction: assignments, validity, generated profiles and other SAP checks also affect that user's access.

SAP GUI transactions

Commands such as **SU01** open SAP GUI using the account's normal transaction access and display or maintenance permissions, just as when the administrator opens the transaction directly.

Diagnose a SAP authorization failure

1. Record the exact error, action, time, SAP logon user, system and client. Include the function or table named in the error.

2. Have the SAP security administrator activate an authorization trace for that user, covering the application server handling the RFC request. **STAUTHTRACE** or **ST01** can be used according to the SAP release and your tracing procedure.
3. Reproduce the failing action once, then stop the trace. For an action that changes SAP data, first check whether the original attempt already made the change.
4. Inspect the failed authorization checks and their field values. Correct the intended role, regenerate the profile and complete user comparison where required.
5. Reconnect userXpress and repeat the affected action.

SAP's authorization trace guidance explains trace scope. A trace on a different application server can miss the RFC request.

If the action succeeded but updating the table failed, investigate the refresh read separately. Repeating a successful account change will not fix a missing read authorization.

SAP roles and assignment

Applies to userXpress 2.0.0.0

Import the userXpress SAP roles, generate the authorization profiles and assign the composite role to SAP users.

The supplied role package groups the SAP communication, read and user-administration permissions used by userXpress. You can provide this access through your existing SAP roles or use the package below, with authorization values matching the administrator's responsibilities.

The package contains two single roles and a composite role. To use it, import the roles in **PFCG**, generate both single-role profiles and assign the composite role to the SAP users who will connect from userXpress.

Download the userXpress SAP roles (.zip)

Roles in the package

Communication Authorization

Single role: `Z_DELORION_USERXPRESS_RFC`

Permits the RFC calls and table reads userXpress uses to communicate with SAP.

User Administrator

Single role: `Z_DELORION_USERXPRESS_USERADM`

Provides authorizations for SAP user accounts, role assignments and authorization profiles.

Admin User Role

Composite role: `ZC_DELORION_USERXPRESS`

Groups the communication and user-administration roles so you can assign them together.

Assign the composite role to the SAP account used by the userXpress connection. SAP assigns its two single roles during user comparison. See SAP: Creating Composite Roles.

Use the SAP access reference to identify the authorizations needed for the person's duties.

Prepare the role

Use the systems, clients, user groups, roles and activities already defined for the administrator's duties when preparing the supplied roles.

For example, an administrator who resets passwords may need to read account details and change passwords for one user group, without permission to delete accounts or change role definitions.

Include the reads used to load and refresh the relevant user and role information. SAP controls read access and account changes through separate authorization checks, so set the scope of both to match those duties.

Import a PFCG role file

1. Download the ZIP file above and extract `Delorion-userXpress-Roles.SAP`.
2. Log on to the intended SAP system and client with an account authorized to maintain roles, then open **PFCG**.
3. Choose **Role** → **Upload** and select the extracted `.SAP` file.
4. Import the three roles listed above. If a role already exists, check that you intend to replace it before confirming.

After import, generate the authorization profiles for both single roles. Profile generation makes their authorization data available for assignment to users. See SAP: Working with Transaction PFCG.

Generate and assign

Generate the single-role profiles

Complete these steps for each single role: `Z_DELORION_USERXPRESS_RFC` and `Z_DELORION_USERXPRESS_USERADM`.

1. Enter the role name in **PFCG** and choose **Change**.
2. Open **Authorizations** → **Change Authorization Data**.
3. Maintain the required authorization values and apply the user-group, role-name and activity restrictions agreed for the administrator.
4. Save the authorization data and choose **Generate** to generate the profile.

Assign the composite role

1. Open `ZC_DELORION_USERXPRESS` in **PFCG** and choose **Change**.
2. On the **User** tab, enter the SAP user IDs that should receive the roles and set their assignment validity dates.
3. Save the assignments and choose **User Comparison**, then **Complete Comparison**. This applies the included single-role assignments and their generated profiles to the users.
4. Reconnect the affected userXpress connection to use the assigned authorizations.

SAP explains profile generation and user comparison in Maintaining User Authorizations with Roles and Profiles.

Change or remove access

After changing a role’s authorization data, regenerate its profile and complete the necessary user comparison. Reconnect the affected userXpress connection to use the updated authorizations.

Before removing a role, identify the users who depend on it. Remove the intended assignments and complete user comparison through your SAP administration process. Uninstalling userXpress from a workstation does not revoke SAP role assignments.

Diagnostics for customer IT

Applies to userXpress 2.0.0.0

Capture a performance report, identify connection failures and send the relevant files to support.

Record the problem

Record the version from **Information**, the action, the time and the exact error message. For a SAP operation, include the affected system/client and whether all targets failed or only some of them.

A timeout can occur after SAP has accepted a change. Check the target account before repeating account creation, deletion or another change whose result is uncertain. If the operation succeeded but the table did not refresh, report both outcomes.

Capture a performance report

Use **Information** → **Diagnostics** for slow startup, system loading or the operations measured during a diagnostic session. Capture the workload that is slow on the affected workstation. A report from a different set of systems may not reproduce the problem.

1. Finish or save your current work. The next step restarts userXpress.
2. Open **Information** → **Diagnostics** and leave **Redact system identifiers in the report** selected unless you are authorized to include them.
3. Choose **Measure next session** and confirm the restart.
4. Let startup and system loading finish. If the problem concerns a later operation, perform that operation in the diagnostic session and note its time and result.
5. Return to **Information** → **Diagnostics** and choose **Open latest report**. Use **Open diagnostics folder** to locate the report files.

Measurement remains active in that session until userXpress closes. Normal subsequent starts do not automatically start another measurement. An active measurement disables **Measure next session**.

Read and retain the report

The HTML report opens in the browser and can be read offline. Start with the operation that was slow and check whether it completed, failed or was cancelled.

Compare time spent on SAP requests, local processing and display updates. Include the number of clients and records involved when reporting a performance problem.

- **Elapsed** includes work inside a step. Do not add a parent’s elapsed time to its child times.
- **Self** excludes child-step time.

Distinguish time spent waiting for a dialog choice from processing time.

The report directory contains HTML and accompanying CSV, JSONL and text files. Keep them together.

Choose **Export support bundle…** to save the latest report directory as a ZIP, and check that the ZIP belongs to the session you intend to send. Exporting the ZIP does not upload it.

If **Open latest report** is disabled, no HTML report is available for that action. Check the status and output location in the diagnostics window.

If userXpress failed before completing the operation, preserve the report folder and explain where execution stopped.

Connection and authorization failures

For an SNC failure, open **Settings** → **Connections** → **SNC library** and record the displayed library path, version, architecture and error. Follow Configure SNC if the wrong library was selected.

For a SAP authorization failure, give the SAP security team the error's function or table, SAP user and client. Follow Diagnose a SAP authorization failure.

For incomplete role content results, include the query's status and **Details…** information. Distinguish roles confirmed to match from those the application could not evaluate.

Review files before sending

Application logs, exports and screenshots can contain user identifiers, role names, file paths and other customer information. Performance-report redaction does not redact every other attachment.

Check the complete files you intend to send. A truncated preview is not the complete attachment.

Open **Information** → **Create support request**, describe the problem and review the proposed files. Exclude unrelated material and files containing passwords or tokens. Approve the selection before continuing to sign-in and upload.

After the approved files have been uploaded, complete the final review and submission in the browser. The desktop preparation step alone does not submit the ticket. Follow Create a support request for the wizard's individual steps.