

Principal users

September 10, 2026

Principal users

Principal users at a glance

A principal user is an administration record for the identity, access choices, approval limits,

authentication choice, and profile image used by a principal user in PAMS. The

Principal users

surface uses one screen for a new record and for an existing record.

If you need to...	Go to
Understand the fields and choices	Understand the principal-user screen
Enter identity, branch, role, approval, or authentication details	Maintain identity and access details
Open a new or existing record	Find or open a principal user
Check what changes for your access or record state	Handle access and record variations
Save, leave, or resolve a message	Save, leave, and handle problems
Review broader user administration	Users
Administer roles	Roles
Administer teams	Teams
Review two-factor configuration	2-factor Authentications

Before you start

Prerequisites

- Know whether you are creating a principal-user record or changing an existing one.
- Have the identity information and access choices ready before you select a save action.

- You need edit access for **Save** and **Save and Close** to be available after you make a change.
- The record and its credential information must be loaded before their fields can appear.
- The form must pass its validation before it can save.

Unsaved changes affect the close action. When you have edit access and the current values differ from the saved values, leaving the page opens a confirmation choice instead of leaving immediately.

Note: Use the required markers beside the fields as your check before selecting a save action.

Find or open a principal user

Use a principal-user record to maintain one person's identity and access settings.

Steps

1. Open the security users area.
2. Choose the route that matches your task:

If you need to...	Choose
Start a new record	Select the option to create a new principal user.
Change an existing record	Select the principal user in the users list.
Change a profile image	Select the principal user in the users list.

3. Confirm that the page heading identifies the principal-user record before entering values.

Result: The principal-user screen is open at the new-record route or at the existing record you selected.

Understand the principal-user screen

The screen groups identity information, access choices, approval settings, two-factor authentication, and profile-image controls. The new-record screen shows **Email**, **Title**, the person's given name, **Middle Name**, **Last Name**, **Display Name**, and **Mobile**.

The following fields are required on the new-record screen:

Field	Type	Required marker
Email	Text	Yes
Given name	Text	Yes
Last Name	Text	Yes
Display Name	Text	Yes

Field	Type	Required marker
Mobile	Text	Yes

These fields are also present but are not marked required on the new-record screen:

Field	Type	Details
Title	Text	Optional entry
Middle Name	Text	Optional entry

The access area contains the **Allowed Branches** and **User Roles** groups. Their checkbox entries come from the available branch and role data. The new-record screen showed five branch entries and nineteen role entries. **Accessible account** appears as a readout on this screen rather than as a visible selectable control.

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Users > Principal user

Save Save and Close X

Email
Enter Email

Accessible account
+ ☒ Active user

Title First Name Middle Name

Last Name Display Name

Mobile
Enter Mobile

Allowed Branches

☒ Shotec S.A.E ☐ Shotec Gulf ☐ Shotec GmbH

☐ Shotec IP GmbH ☐ Cronitec

User Roles

☐ SupperAdmin ☐ Sales Manager ☐ Team Leader

☐ Sales Engineer ☐ Shotec Secretary ☐ Purchasing Manager

☐ ShotecFinanceManager ☐ Section Head ☐ Admin

☐ Service Admin ☐ Principal Netzsch ☐ Principal Lewa

☐ Project Manager ☐ Owners ☐ Warehouse Keeper

☐ Accountant ☐ Assistant Sales Manager ☐ MirmBooking

☐ MirmSales ☐ Mazen_Almaddah ☐ Shorosh Test

☐ Junior Sales Engineer

Tickets

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Users > Principal user

Save Save and Close X

Email
Enter Email

Accessible account
+ ☒ Active user

Title	First Name	Middle Name
Last Name	Display Name	

Mobile
Enter Mobile

Allowed Branches

☒ Shotec S.A.E	☐ Shotec Gulf	☐ Shotec GmbH
☐ Shotec IP GmbH	☐ Cronitec	

User Roles

☐ SupperAdmin	☐ Sales Manager	☐ Team Leader
☐ Sales Engineer	☐ Shotec Secretary	☐ Purchasing Manager
☐ ShotecFinanceManager	☐ Section Head	☐ Admin
☐ Sevice Admin	☐ Principal Netzsch	☐ Principal Lewa
☐ Project Manager	☐ Owners	☐ Warehouse Keeper
☐ Accountant	☐ Assistant Sales Manager	☐ MrmBooking
☐ MrmSales	☐ Mazen_Almaddah	☐ Shorosh Test
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The approval area contains three approval-limit groups. Each group has an **Up to** amount and an **Unlimited** choice. The groups cover sales, purchasing, and invoicing. The amount uses the format `#,##0.00` and cannot be below `0`.

The **Mobile** field accepts a maximum of 20 characters.

The authentication area offers **Apply 2-factor Authentication With This User** with the choices **No** and **Yes**. Profile-image actions include an upload action and **Delete**. The screen has no record list.

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Users > Principal user

Save Save and Close X

Email
Enter Email

Accessible account
+ ☒ Active user

Title	First Name	Middle Name
Last Name	Display Name	

Mobile
Enter Mobile

Allowed Branches

☒ Shotec S.A.E	☐ Shotec Gulf	☐ Shotec GmbH
☐ Shotec IP GmbH	☐ Cronitec	

User Roles

☐ SupperAdmin	☐ Sales Manager	☐ Team Leader
☐ Sales Engineer	☐ Shotec Secretary	☐ Purchasing Manager
☐ ShotecFinanceManager	☐ Section Head	☐ Admin
☐ Service Admin	☐ Principal Netzsch	☐ Principal Lewa
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☐ Junior Sales Engineer		

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Maintain identity and access details

A principal-user record combines identity information with the branches, roles, approval limits, and authentication choice that apply to that person.

Prerequisites

- The principal-user screen is open.
- The identity information is ready.
- The branches and roles that apply to the record are known.

Steps

1. Enter the address in **Email**.
2. Enter the person's given name in **First Name**.

The screenshot shows the 'Principal user' form in the PAMS system. The form is divided into several sections: a top section for basic information (Email, Accessible account, Active user checkbox), a middle section for personal details (Title, First Name, Middle Name, Last Name, Display Name, Mobile), and a bottom section for permissions (Allowed Branches, User Roles). The 'Allowed Branches' section has checkboxes for 'Shotec S.A.E', 'Shotec Gulf', 'Shotec GmbH', 'Shotec IP GmbH', and 'Cronitec'. The 'User Roles' section has checkboxes for various roles including 'SupperAdmin', 'Sales Manager', 'Team Leader', 'Sales Engineer', 'Shotec Secretary', 'Purchasing Manager', 'ShotecFinanceManager', 'Section Head', 'Admin', 'Service Admin', 'Principal Netzsch', 'Principal Lewa', 'Project Manager', 'Owners', 'Warehouse Keeper', 'Accountant', 'Assistant Sales Manager', 'MrmBooking', 'MrmSales', 'Mazen_Almaddah', 'Shorosh Test', and 'Junior Sales Engineer'.

3. Enter the person's family name in **Last Name**.
4. Enter the name used to identify the record in **Display Name**.
5. Enter the person's mobile number in **Mobile**.
6. Enter the person's title in **Title** when that detail applies.
7. Enter the person's middle name in **Middle Name** when that detail applies.
8. Select the checkboxes for the branches the principal user may access.
9. Select the checkboxes for the roles the principal user needs.
10. Set each approval limit in its **Up to** amount when the corresponding approval must be capped.
11. Select **Unlimited** for an approval area that has no amount cap.
12. Choose the required authentication setting:

```
| If you need to... | Select |
|---|---|
| Leave two-factor authentication off | **No** |
| Apply two-factor authentication | **Yes** |
```

13. Choose an image in the image dialog.
14. Use the upload action in the image dialog.
15. Select **Delete** in the image menu to remove the current profile image.

The screenshot shows the 'Principal user' edit form in the PAMS system. The form is titled 'Users > Principal user'. It features a header with 'Save' and 'Save and Close' buttons. The main form area contains several sections: a profile picture placeholder, an 'Email' field with a hint 'Enter Email', an 'Accessible account' section with a '+' button and a checked 'Active user' checkbox, and a large grid for 'User Roles'. The grid is organized into three columns: Title, First Name, Middle Name, Last Name, Display Name, and Mobile. Below these are sections for 'Allowed Branches' (with checkboxes for Shotec S.A.E, Shotec Gulf, Shotec GmbH, Shotec IP GmbH, and Cronitec) and 'User Roles' (with checkboxes for various roles like SupperAdmin, Sales Manager, Team Leader, etc.). A 'Tickets' button is located at the bottom right of the form.

Result: The identity, access, approval, authentication, and profile-image values are set on the screen and are ready for a save action.

Handle access and record variations

The controls available to you change with your edit access, whether the record is new or existing, and whether an approval area is unlimited.

Situation	What you can use
You can edit and have changed a value	Save and Save and Close are available in the header.
You can edit and select the close control at the top-right of the screen with unsaved changes	A confirmation choice opens before you leave.
You cannot edit	The close control at the top-right of the screen leaves the page directly.
The record is new	The record fields appear after the new record loads.

Situation	What you can use
Unlimited is selected for an approval area	The amount control for that approval area is replaced by an unlimited value.
Unlimited is not selected	The approval amount is shown and must be at least 0 .

The **User Roles** and **Branches** panels do not contain separate fields; use the inline checkbox groups in the user-information area. The username field and re-send activation-mail button are not part of this screen.

Save, leave, and handle problems

Saving commits the values after the form passes validation. Leaving with unsaved changes uses the page's confirmation choices.

Prerequisites

- The fields you want to keep are completed.
- You have edit access for the save actions.
- The validation group passes before saving.

Steps

1. Select **Save** in the header to save while staying on the screen.
2. Select **Save and Close** in the header to save and leave the screen.
3. Select the close control at the top-right of the screen when you want to leave without starting a save.
4. When the unsaved-change prompt opens, choose the action that matches your desired outcome:

Desired outcome	Select
Leave without keeping the changes	Don't Save
Keep the changes and leave	Save
Stay on the screen	Cancel

5. When validation stops the save, correct the field identified by the message.

6. Select the save action again.

The screenshot shows the 'Principal user' profile page in the PAMS system. The page is titled 'Users > Principal user' and has a 'Save' button. The user's profile information is displayed, including a placeholder for a profile picture, an 'Email' field with the placeholder 'Enter Email', and an 'Accessible account' section with a '+' button and a checkbox for 'Active user' which is checked. Below this is a table of 'User Roles' with columns for 'Title', 'First Name', and 'Middle Name'. The roles listed are: SupperAdmin, Sales Manager, Team Leader, Sales Engineer, Shotec Secretary, Purchasing Manager, ShotecFinanceManager, Section Head, Admin, Service Admin, Principal Netzs, Principal Lewa, Project Manager, Owners, Warehouse Keeper, Accountant, Assistant Sales Manager, MrmBooking, MrmSales, Mazen_Almaddah, and Shorosh Test. The 'Allowed Branches' section shows a list of branches with checkboxes: Shotec S.A.E (checked), Shotec IP GmbH, Shotec Gulf, Cronitec, and Shotec GmbH. A 'Tickets' button is visible in the bottom right corner.

Title	First Name	Middle Name
Last Name	Display Name	
Mobile Enter Mobile		
Allowed Branches		
☒ Shotec S.A.E	☐ Shotec Gulf	☐ Shotec GmbH
☐ Shotec IP GmbH	☐ Cronitec	
User Roles		
☐ SupperAdmin	☐ Sales Manager	☐ Team Leader
☐ Sales Engineer	☐ Shotec Secretary	☐ Purchasing Manager
☐ ShotecFinanceManager	☐ Section Head	☐ Admin
☐ Service Admin	☐ Principal Netzs	☐ Principal Lewa
☐ Project Manager	☐ Owners	☐ Warehouse Keeper
☐ Accountant	☐ Assistant Sales Manager	☐ MrmBooking
☐ MrmSales	☐ Mazen_Almaddah	☐ Shorosh Test
☐ Junior Sales Engineer		

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Users > Principal user

Save Save and Close X

Email

Enter Email

Accessible account

+

☒ Active user

Title

First Name

Middle Name

Last Name

Display Name

Mobile

Enter Mobile

Allowed Branches

☒ Shotec S.A.E

☐ Shotec Gulf
☐ Shotec GmbH

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User Roles

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☐ Principal Netzsch
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☐ Project Manager
☐ Owners
☐ Warehouse Keeper

☐ Accountant
☐ Assistant Sales Manager
☐ MrmBooking

☐ MrmSales
☐ Mazen_Almaddah
☐ Shorosh Test

☐ Junior Sales Engineer

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What appears	What to do
This Field Is Required	Enter a value in the field identified by the message.
Just '_'-'-'.' And '&' Characters Accepted	Remove characters that the field does not accept.
Email is invalid	Correct the address in Email .
Are you sure you want to delete this item?	Confirm that the current profile image is the one you want to remove before selecting Delete .
Photo Deleted Successfully	The profile image was removed.
Server Error	Check the screen and retry the action when the service is available.
Error: This Email or User Name Already Exists	Use a different email or user name.
Error: Server Error	Check the screen and retry the save when the service is available.
Data saved Successfully .. An E-Mail was sent to this User	Continue from the activation dialog.

Generated from PAMS Fresh Generation docs · September 10, 2026

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What appears	What to do
New user created	Read the activation information in the dialog.
A activation mail with instruction sent to user [record email]	The activation message identifies the address receiving the message.
to activate his account Whenever user activate his account You'll be notified by mail	Follow the activation instructions for the new account.
Do you want to save your changes?	Choose Don't Save , Save , or Cancel in the unsaved-change prompt.
Do you want to save your changes?	Choose the required unsaved-change action in the prompt.
No	Choose No in the authentication control when that is the required setting.
Yes	Choose Yes in the authentication control when that is the required setting.
Ok	Close the activation alert.

The phrases Import instructions and file-size notices belong to import workflows in the shared popup. Subscription-upgrade content belongs to the subscription-upgrade workflow.

Result: The screen either remains open with the saved values, leaves after **Save and Close**, or presents the message that tells you which correction or confirmation is needed.

What comes next

After you finish the principal-user administration task, continue from the result that appears on screen. A successful new-user save can open the activation information; a leave action returns you to the surrounding security area.

Use these related pages for the next administration concern:

- [Users](#) for the user list and existing-record entry point.
- [Roles](#) for broader role administration.
- [Teams](#) for team administration.
- [2-factor Authentications](#) for related authentication configuration.

- [General error messages](#) for common application message handling.

Result: You know which related administration page to open after the current principal-user screen.