

SECURITY

USER AND GROUP SECURITY - GROUP SECURITY SETTINGS

In User Group and Security, you can create new users, assign users to groups, and set user group security, i.e. what a user may or may not have access to in BPO.

A user must be created for **each** employee who is required to log on to BPO. Each user is placed in a security group and security rights are set for that group. Here we will outline how to set those group rights.

Ribbon Access: Configurator > Security > User and Group Security





The User Rights screen will be displayed.

SELECT USER GROUP

• Click on the *drop-down arrow* in the *Find Group* ribbon frame.





- 1. The *Group Name list* will be displayed.
- 2. Click on the particular *group name* that you wish to set the security settings for.



Group Security Settings



• The data grid will be populated with the relevant *codes* for the selected user group.

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E CTRT_MAIN	Contracts	MAIN	4	No Access			
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E HR_MAIN	Human Resources	MAIN	4	No Access			
⊞ INVN_MAIN	Inventory	MAIN	4	No Access			
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PRCH_MAIN	Procurement	MAIN	4	No Access			
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ACCESS TYPES:

- **System**: This sets the system functionality security (whether the user is able to perform the function)
- **Menu Access**: This access type sets the security for the ability to select the item in the BPO menu.
- All Other Access Types: This sets the security for each individual screen , and items within that screen.

ACCESS LEVELS:

- 1 Unlimited Access: Access to all parts of the system.
- 2 Full Access: Access to all parts of the system.
- 3 Limited Access: Read Only.
- 4 No Access: Not accessible in BPO.

SET ACCESS LEVEL

- Select the code you wish you set the Access Level for.
- In this image, *FNLC_MAIN* is selected.



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- Click in the *Access Level* field of the selected row.
- A drop-down *arrow* will appear.

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Click on this arrow to display the *Access Level Code* drop-down menu.



- Select the *level* that you wish to apply to the selected code.
 - In this image, *2 Full Access* is selected.

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As you select the access level, *Level 1* and *Level 2* grids will expand.

- Level 1: This is the main data grid with the access level you have set above.
- Level 2: This is a sub grid that contains sub codes of Level 1.
- You can also set access levels on each of these sub codes.



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SET ACCESS LEVELS ON SUB CODES

- In the *Level 2* sub grid, in the row of the code you wish to set an access level for, click in the *Access Level* column.
- The Access Level Codes menu will drop-down.
- Click on the *Access Level* you require.
 - In this image, access level 4 No Access is selected for FLMT.



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- The *Access Level* and *Description* will change to the one that was selected.
 - In this image, the *Access Level* and *Description* has changed to *4 No Access*.

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• Once all changes have been made, click on *Save*.



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- Level 2 sub grid will close.
- A *User Rights* pop up message will be displayed telling you;
 - User Rights updated successfully.
- Click on Ok.

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Note: Ask the users within that group to *log out* of and *back* into *BPO* to ensure that they are working within the updated group security right.

IMPORTANT NOTES:

- If you are setting up a *new group* from *scratch*, it is a good idea to set the 'Company Modules: Site' Access Type first, otherwise you cannot assign a user to this group you have created, and the user will not be able to log into BPO.
- Set the site (branch) security dependant on which sites the user may have access to.

Related Topics

- Security User Group and Security
- User Group and Security Edit a User
- User Group and Security Create New Group
- User Group and Security Procurement Authorisation
- User Group and Security Purchase Requisition Release for Approval Override

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