

SECURITY

USER AND GROUP SECURITY - EDIT A USER

There could be several scenarios where a user's details will need to be edited. These may include:

- If a user's details have been **incorrectly entered** into the system.
- If a user needs to be **moved** to a **different** User Group.
- You may also need to **enable** or **disable** a **User Login** if, for example, an employee leaves.

The user <u>must</u> log out of BPO2 and back in for the changes to take effect.

Ribbon Access: Configurator > Security > User Management

				BPO Co	nfigurator : Version 1	1.0.1 - Exampl	e Company					Π	×
Accounts	Call Centre	Company	Contract	Departments	Human Resources	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data	1
292	S	er	(0)										
User Management	User and Group	Grid Captions	Re-Register										
	Processing		BPO										
Open Windows 🔻											02 0	ec 2018	- //



The User Management screen will be displayed.

- Click on the *expand* button in the *row* of the *group* which contains the *user* whose details you wish to edit.
 - In this image the *ADMN* Administration group has been selected.

counts Coll Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data e Edit Security Workpaces Swe Layout Workpaces Swe Layout Workpaces Swe Layout Workpaces Format Curr Accounts Administration A Call Centre Administration A Contracts Administration A Power User Sales Administration A Stock Administration A Stock Administration A Stock Administration A Sto			User Manager	ment - BPO	Configurator	: Version 1.	.0.1 - Examp	ole Com	pany			100		
Image: Field Image: Field Image: Field Image: Field Status Description Status Image: Field Status Description Status Accounts Administration A Accounts Administration A Call Centre Administration A Contracts Management A Contracts Management A Contracts Management A Procurement Manager A Procurement Manager A Stot Administration A St	Home Ac	ccounts Call Centre Company (Contract Departm	ients Huma	an Resources	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data	-	8
Ferrial Sive Layout Workspace Sive Filter Format Cur. Description Status Accounts Administration A Accounts Management A Administration A Call Centre Management A Cantracts Management A Contracts Management A Contracts Management A Contracts Management A Contracts Management A Procurement Management A Procurement Administration A Procurement Administration A Stock Administration A Stock Administration A Stock Management A	~ ~	5		452										
etail Save Layout Wonspaces Save Harpout Pormat Curr														
Percuption Status Accounts Administration A Accounts Management A Accounts Management A Call Centre Administration A Call Centre Administration A Call Centre Management A Contracts Administration A Contracts Management 1 A General Manager A General Manager A Procurement Management A Procurement Management A Sales Administration A Sales Administration A Sales Administration A Sales Administration A Stock Administration A Sales Administration A Stock Administration	Group Add Us	ser Edit Save Layout Works	baces Save Hilter	Refresh										
DescriptionStatusAccounts AdministrationAAccounts ManagementAAdministrationACall Centre AdministrationACall Centre ManagementACall Centre ManagementACRM ManagementAContracts AdministrationAContracts Management 2AContracts Management 1AContracts Management 2AContracts Management 3AGeneral ManagerAProcurement ManagementASales AdministrationASales AdministrationAStock AdministrationAStock AdministrationAStock AdministrationAStock AdministrationAStock AdministrationAStock AdministrationAStock ManagementAStock ManagementAStock ManagementABibles ManagementAStock ManagementAStock ManagementABibles Management	Process			Cur										
Accounts AdministrationAAccounts ManagementAAdministrationACall Centre AdministrationACall Centre AdministrationACall Centre AdministrationACRM AdministrationAContracts ManagementAContracts AdministrationAContracts Management 1AContracts Management 1AFinancial ManagerAContracts Management 1AProcurement AdministrationASales ManagementASales ManagementASales ManagementAStock AdministrationASales ManagementAStock AdministrationAStock ManagementABPO SystemATech ConnectAActional AdministrationAConnectAConnectAConnectAConnectAConnectAConnectAConnectAConnectAConnectA<	JserName	Description	Status											
Accounts AdministrationAAccounts ManagementAAdministrationACall Centre AdministrationACall Centre ManagementACRM AdministrationACRM AdministrationAContracts AdministrationAContracts Management 2AContracts Management 3AContracts Management 4AContracts Management 5AContracts Management 6AGeneral ManagerAHuman Resources ManagerAProcurement AdministrationASales AdministrationASales AdministrationAStock AdministrationAStock AdministrationAStock AdministrationAStock AdministrationAStock ManagementAABPO SystemAATech ConnectATechnicianA														
Accounts ManagementAAdministrationACall Centre AdministrationACall Centre ManagementACRM ManagementAContracts AdministrationAContracts Management 1AContracts Management 1AFinandal ManagerAGeneral ManagerAGeneral ManagerAProcurement ManagementAProcurement ManagementASales AdministrationASales AdministrationAStock AdministrationAStock AdministrationAStock AdministrationAStock ManagementAStock AdministrationAStock ManagementAStock Management	ACAD	Accounts Administration	A											
AdministrationACall Centre AdministrationACall Centre ManagementACRM ManagementAContracts AdministrationAContracts Management 1AContracts Management 1AContracts Management 1AGeneral ManagerAGeneral ManagerAHuman Resources ManagerAProcurement ManagementAProcurement ManagementASales AdministrationAStock AdministrationAStock AdministrationAStock AdministrationAService AdministrationAStock ManagementAStock ManagementAStock AdministrationAStock ManagementAStock ManagementAStock ConnectATech ConnectAATechnicianA	ACMA	Accounts Management	A											
Call Centre ManagementACall Centre ManagementACRM ManagementAContracts ManagementAContracts Management 1AContracts Management 1AContracts Management 1AGeneral ManagerAGeneral ManagerAProcurement AdministrationAProcurement AdministrationAProcurement ManagementASales AdministrationAStock ConnectATechnicianA	ADMN	Administration	A											
Call Centre ManagementACRM AdministrationACRM AdministrationAContracts AdministrationAContracts Management 2AContracts Management 1AFinancial ManagerAGeneral ManagerAHuman Resources ManagementAProcurement AdministrationAProcurement AdministrationASales AdministrationASales AdministrationAStock AdministrationA <t< td=""><td>CCAD</td><td>Call Centre Administration</td><td>A</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>	CCAD	Call Centre Administration	A											
CRM AdministrationACRM ManagementAContracts AdministrationAContracts Management 1ACintracts Management 1AFinandal ManagerAGeneral ManagerAHuman Resources ManagerAProcurrement ManagementAProcurrement ManagementAPower UserASales AdministrationASales AdministrationAStock AdministrationAStock AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationAService ManagementATech ConnectAAATechnicianA	CCMA	Call Centre Management	A											
CRM ManagementAContracts AdministrationAContracts Management 2AContracts Management 1AFinancial ManagerAGeneral ManagerAHuman Resources ManagerAProcurement AdministrationAProcurement AdministrationASales AdministrationASales AdministrationAStock AdministrationAStock AdministrationAStock AdministrationAStock AdministrationAStock AdministrationAStock AdministrationAStock RanagementABPO SystemATech ConnectAAATechnicianA	CRAD	CRM Administration	A											
Contracts AdministrationAContracts Management 2AContracts Management 1AFinandial ManagerAHuman Resources ManagerAHuman Resources ManagerAProcurement AdministrationAProcurement ManagementASales AdministrationASales AdministrationASales AdministrationAStock AdministrationAStock AdministrationAService AdministrationABPO SystemATechnicianA	CRMA	CRM Management	A											
Contracts Management 2AContracts Management 1AFinandal ManagerAGeneral ManagerAHuman Resources ManagerAProcurement AdministrationAProcurement ManagementASales AdministrationASales AdministrationAStock AdministrationAStock AdministrationAService ManagementAService AdministrationAStock ConnectATech ConnectA	CTAD	Contracts Administration	A											
Contracts Management 1AFinancial ManagerAGeneral ManagerAHuman Resources ManagerAProcurement AdministrationAProcurement ManagementASales AdministrationASales ManagementAStock AdministrationAStock AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationATech ConnectAAATechnicianA	CTMA	Contracts Management 2	A											
Finandial ManagerAGeneral ManagerAHuman Resources ManagerAProcurrement AdministrationAProcurrement ManagementASales AdministrationASales ManagementAStock AdministrationAStock ManagementAService AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationAService AdministrationATech ConnectAA	CTMA1	Contracts Management 1	A											
General ManagerAHuman Resources ManagerAProcurement AdministrationAProcurement ManagementASales AdministrationASales ManagementAStock AdministrationAStock ManagementAService AdministrationAService ManagementABPO SystemATechnicianA	FNMA	Financial Manager	A											
Human Resources ManagerAProcurement AdministrationAProcurement ManagementASales AdministrationASales AdministrationAStock AdministrationAStock AdministrationAService AdministrationAService ManagementABPO SystemATechnicianA	GMMA	General Manager	A											
Procurement AdministrationAProcurement ManagementAPower UserASales AdministrationASales AdministrationAStock AdministrationAStock AdministrationAService AdministrationAService AdministrationABPO SystemATech ConnectAA	HRMA	Human Resources Manager	A											
Procurement ManagementAPower UserASales AdministrationASales ManagementAStock AdministrationAStock AdministrationAService AdministrationAService ManagementABPO SystemATech ConnectAAA	PRAD	Procurement Administration	A											
Power UserASales ManagementAStock AdministrationAStock AdministrationAStock AdministrationAService AdministrationABPO SystemATech ConnectAA	PRMA	Procurement Management	A											
Sales AdministrationASales ManagementAStock AdministrationAStock ManagementAService AdministrationAService ManagementABPO SystemATech ConnectATechnicianA	PUMA	Power User	A											
Sales ManagementAStock AdministrationAStock ManagementAService AdministrationAService ManagementABPO SystemATech ConnectATechnidanA	SLAD	Sales Administration	A											
Stock AdministrationAStock ManagementAService AdministrationABPO SystemATech ConnectATechnicianA	SLMA	Sales Management	A											
Stock Management A Service Administration A BPO System A Tech Connect A Technician A	STAD	Stock Administration	A											
Service Administration A Service Management A BPO System A Tech Connect A Technician A	I STMA	Stock Management	A											
Service Management A BPO System A Tech Connect A Technikian A	SVAD	Service Administration	A											
brU System A Tech Connect A Technician A	SVMA	Service Management	A											
Technician A	SYSTEM	BPO System	A											
reunidan A	TCON	Tech Connect	A											
	TECH	recinician	A											
	SVMA SYSTEM TCON TECH	Service Man BPO System Tech Conne Technician	agement .	agement A A A A A A A A A A A A A A A A A A A	agement A A ct A A									

- 1. The *Users* frame will be expanded.
- 2. Click anywhere in the *row* of the user whose details need to be edited.
- 3. Click on *Edit*.



33	-			Use	r Managen	nent - BPO C	onfigurator	: Version 1.1	.0.1 - Examp	ole Com	pany					
2	Home A	ccounts Ca	all Centre Company	Contract	Departme	ents Human	Resources	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data	-	æ
d Grou	up Add U	ser Edit	Save Layout Wo	orkspaces S	ave Filter	Refresh										
liserN:	Process	Description		rmat.	4 his	CUP a		1								
			· ~ ~	3												
E AC	AD	Accounts /	Administration	A												
e aci	MA	Accounts I	Management	Α												
E ADI	MN	Administra	tion	Α				*								
	Users															
٩	UserNam	1e	UserFullName			Status										
٩	·						-									-
ŀ	 AbigailM 		Abigail Milne			A			_ 2							
	Administ	rator	Admin Admin			A										
	BiancaD		Bianca Du Toit			A										
-	BiancaS		Bianca Surendorff	f		A										
	BPOSysA	Admin	CO3 MailLogServi	ce		A										
	Debbiel	Service	Dobbio Lugar	ce		A										
	GarvT		Gary Titan			Δ										
	lakeS		Jake Starfield			A										
	JohnTw		John Twain			A										
	JudithM		Judith Mudzengi			A										
	KarlienY		Karlien Young			A										
	KlopperA	۱ <u>.</u>	Andre Kloppers			Α										
CC	AD	Call Centre	e Administration	A												
CC	MA	Call Centre	e Management	A												
CR/	AD	CRM Admir	nistration	A												
CRI	MA	CRM Mana	igement	A												
CTA	AD	Contracts	Administration	A												
		Contracts	Management 2	A												
	MA	Einancial N	management 1	A												
- FIN	niek.	rindruði M	lanager	A												_

The *Maintain User* screen will be displayed.

- 1. User Details
 - System User Name: Backspace or type over the text in this box to edit it.
 - First Name: Backspace or type over the text in this box to edit it.
 - Last Name: Backspace or type over the text in this box to edit it.
 - Active: Click on this check box to un-tick it (the User will become 'inactive' or 'disabled') or tick it (to make the user 'active' or 'enabled').



- **Default Site:** You can click on the drop-down arrow and select from the drop-down list, an alternative site if applicable.
- 2. Group Details
 - **Group:** You can click on the drop-down arrow and select from the drop-down list, an alternative group if applicable.
 - User Type: This field is un-editable.

	Maintain User - E	BPO Configurator : 1	/ersion 1.1.0.	1 - Example	Compa	ny			-		\times
Home Accounts Call Centre Company Contra	act Departments	Human Resources	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data	-	₽ x
Save Back Process Active Layout Workspaces Format Active Layout Control of the Maintenance Active Layout Control of the Con											
User Details		9									
System User Name AbicalM	Configuration										
First Name Abigain	Trus	ted Connection	1		62						
Last Name Milne	2012/01/01/01/01 01/01/01	Domain Name			2						
Active 🗹	Access Acco	ounts Database									
Default Site Durban +											
Group Details Group Administration User Type U User 2											
Open Windows 🔻									02 Dec	2018	÷ //

- 1. When you have finished editing the user details,
 - (in this image the *Active* check box has been *un-ticked*)
- 2. click on *Save*.



Edit a User

522	Ŧ							Mai	ntain User	BPO	O Configura	tor : V	ersion 1.1.0.	1 - Example	Compar	ıy			-)	K
223	Home	Account	s Cal	Centre	Compa	ny	Contrac	t	Department	s	Human Reso	irces	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data	×-	Ð	×
			2			G	-															
Save	Back	Save I	.ayout	Workspac	tes p	Reset	t															
Proces	55 A		Forma	- 2	4	033410																
User Ma	aintenanc	e Acti	ive Users	s			÷															
User D	Oetails							L_C	onfiguration	-					1							
Syste	m User	Name	AbigailM						Trus	ted (Connection											
	First	Name	Abigail							Do	main Name											
	Last	Name	Milne					A	ccess Acco	ount	s Database											
	Defau	It Site	Durban			•																
2	1.02520521		0.50.551.1		-	~																
Group	Details -																					
		Group	Administ	ration		•																
	Use	r Type	U	User																		
-							-															
																			-		14	
Open Wi	ndows •																		03 Dec	2018	÷	

- A .Net SqlClient Data Provider message box will pop up informing you that;
 - The server principal '[]' already exists. User, group, or role '[]' already exists in the current database.

This is because the SQL login exists. However, the changes you made will be *saved* in the BPO2 database.

• Click on *Ok* and have the User log out and back in again.



Edit a User

<pre>image in the image in the image. The image is the image in the im</pre>	Ione Accounts Call Centre Company Contact Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data - Fer e Bok Save Layout Workspaces Reset Password Format Forma	I non Accounts Cal Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data – Provider Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Reset Password Image: Back Sove Layout Workspaces Trusted Connection Image: Back Sove Layout Workspace Image: Back Sove Layout Workspace Image: Back Sove Layout Workspace Image: Back Sove Layout Workspace Image: Back Sove Layou	· ·	Maintain User - BPO Configurator : Version 1.1.0.1 - Example Company	- 0
Badt Badt Save Layout Workgaces Pormat er Details grstem User Name AbgaIM Hinst Name AbgaIM Inst Name Active Image: AbgaIM First Name AbgaIM AbgaIM Inst Name AbgaIM Inst Name Active Image: AbgaIM Format Trusted Connection Default Site Default Site Durban Configuration Trusted Connection Default Site Durban Configuration Trusted Connection Image: Active Image: A	Image: Seve Layout Workspace Back Seve Layout Workspace Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Format Fo	Back Format Format <th>Home Accounts Call Centre Company C</th> <th>Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Ser</th> <th>rices Static Data — 🗗</th>	Home Accounts Call Centre Company C	Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Ser	rices Static Data — 🗗
construction ar Maintenance Active Users ser Detais First Name Abigail Itast Name Mine Active Default Site Default Site Duban roup Detais Group Group Administration User Type U User Net SqlClient Data Provider User, group, or role "AbigailM" already exists in the current database. OK	active Users ar Maintenance Active Users are Details risst Mame Abgall Iast Name Mine Active I Default site Duban roup Details Group Group Administration User Type U User Type User roup or nole "AbigailM" already exits. User, group, or nole "AbigailM" already exits. OK	<pre>could could c</pre>	Back Save Layout Workspaces Reset Passwor	d	
Instruction ser Details rist Name Abigail Last Name Mine Active Default Site Durban	<pre>ser Details ser Details ser Data Mane Abigal Last Name Abigal Last Name Mine Active Default site Durban roup Details Group Administration Group Administration User Type U User VUSer Type U User VUSer Group, or role 'AbigailM' already exists. User, group, or role 'AbigailM' already exists in the current database. Net SqlClient Data Provider CK </pre>	are Under Name Abigal pstem User Name Abigal ast Name Abigal ast Name Mine Active Default Site Durban roup Details Group Administration User Type U User Net SqlClient Data Provider The server principal 'AbigailM' already exists. User Group, or ole 'AbigailM' already exists. Default Site User Type D The server principal 'AbigailM' already exists. Default Site User, Torup, or ole 'AbigailM' already exists. Default Site D	er Maintenance Active Liner	4	
ystem User Name Abigal First Name Abigal Last Name Mine Active Default Site Durban	rystem User Name Abigail First Name Abigail Last Name Mine Active Default Site Duban Image: Second Site Site Site Site Site Site Site Site	upser Name Abigail First Name Abigail Last Name Imine Active Default Site Default Site Duban	Iser Details		
First Name Abigal Last Name Mine Active Default Site Default Site Durban roup Details Toup Details Toup Details Toup Details Toup Details Toup U User Tou U	First Name Abigal Last Name Mine Active Domain Name Active Active Default Site Durban roup Details Group Administration User Type U Image: State of the server principal 'AbigailM' already exists. User, group, or role 'AbigailM' already exists. User, group, or role 'AbigailM' already exists. OK	First Name Abigal Last Name Mine Active Default Site Default Site Durban roup Details Group Administration User Type U User Net SqlClient Data Provider Net SqlClient Data Provider Net SqlClient Data Provider Cot Cot Cot Cot Cot Cot Cot Cot Cot Co	ystem User Name AbigailM	Trusted Connection	
Last Name Mine Active Default Site Duban	Last Name Active Default Site Durban	Last Name Active Default Site Duban roup Detais Group Group Isser Type U User Net SqlClient Data Provider The server principal 'AbigailM' already exists. User, group, or role 'AbigailM' already exists. User, group, or role 'AbigailM' already exists. OK	First Name Abigail	Domain Name	
Active Default Site Durban roup Details Group Administration User Type U User User Type U User The server principal 'AbigailM' already exists. User, group, or role 'AbigailM' already exists in the current database. OK	Active Default Site Durban roup Details Group Administration User Type U User Type U User The server principal 'AbigailM' already exists. User, group or le' AbigailM' already exists in the current database. K	Active Default Site Durban roup Details Group Administration User Type U User Type U User The server principal 'AbigailM' already exists. User, group, or ole 'AbigailM' already exists in the current database. OK	Last Name Milne	Access Accounts Database	
Default Site Durban roup Details Group Administration User Type U User Net SqlClient Data Provider Net SqlClient Data Provider Net SqlClient Data Provider	Default Site Durban roup Details Image: Comparison of the second sec	Default Site Durban roup Details Image: Comparison of the server principal "AbigailM" already exists. User Type Image: Comparison of the server principal "AbigailM" already exists. User, group, or role "AbigailM" already exists in the current database. OK	Active		
Group Administration User Type U User Image: Constraint of the server principal Abigality already exists. The server principal Abigality already exists in the current database.	Group Administration User Type U User Type Image: Contract of the server principal 'AbigailM' already exists. User, group, or nole 'AbigailM' already exists in the current database. OK	roup Details Group Administration User Type U User User Type The server principal 'AbigailM' already exists. User, group, or nole 'AbigailM' already exists in the current database. OK	Default Site Durban 🔻		
ОК	ОК	ОК	User Type U User	.Net SqlClient Data Provider × The server principal 'AbigailM' already exists. User, group, or role 'AbigailM' already exists in the current database.	
				ОК	
			en Windows 🔻		03 Dec 2018

MNU.085.006