

# SECURITY

## USER AND GROUP SECURITY – CREATE A NEW GROUP

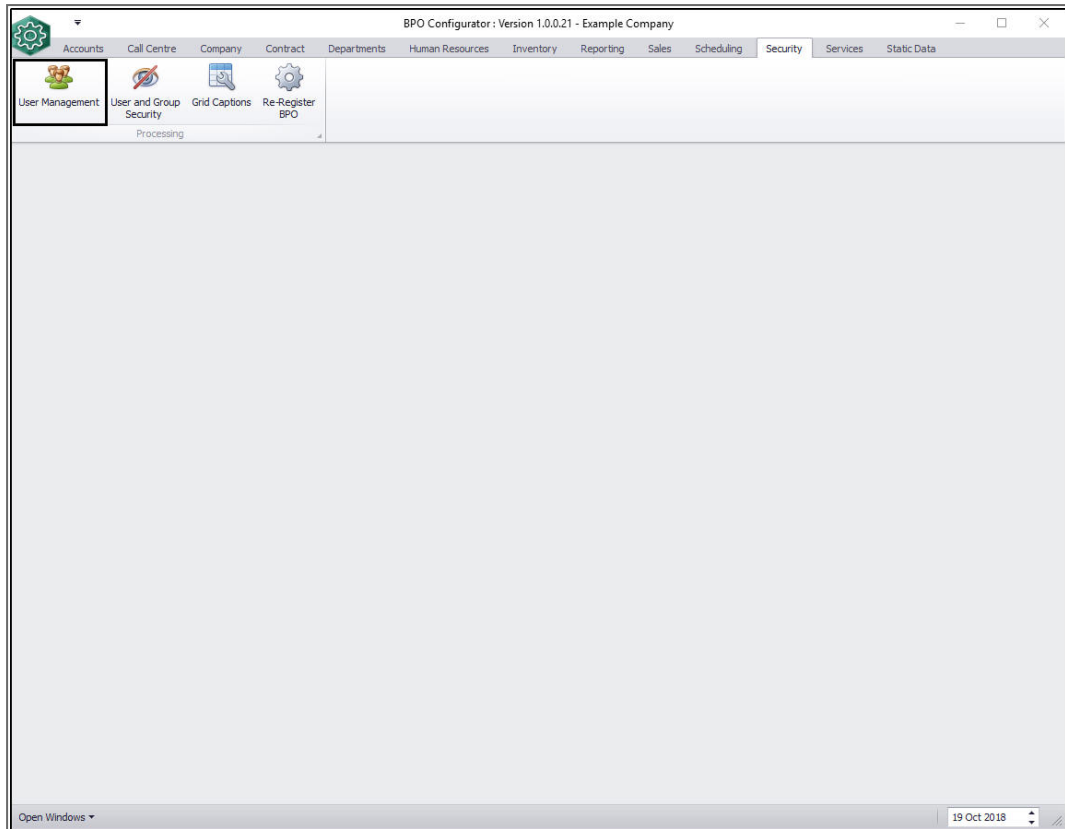
If you are setting up a **new** group from scratch, it is a good idea to set the **'Company Modules: Site' Access Type** first, otherwise you cannot assign a user to this group you have created, and the user will not be able to log into BPO.

Set the site (branch) security dependant on which sites the user may have access to.

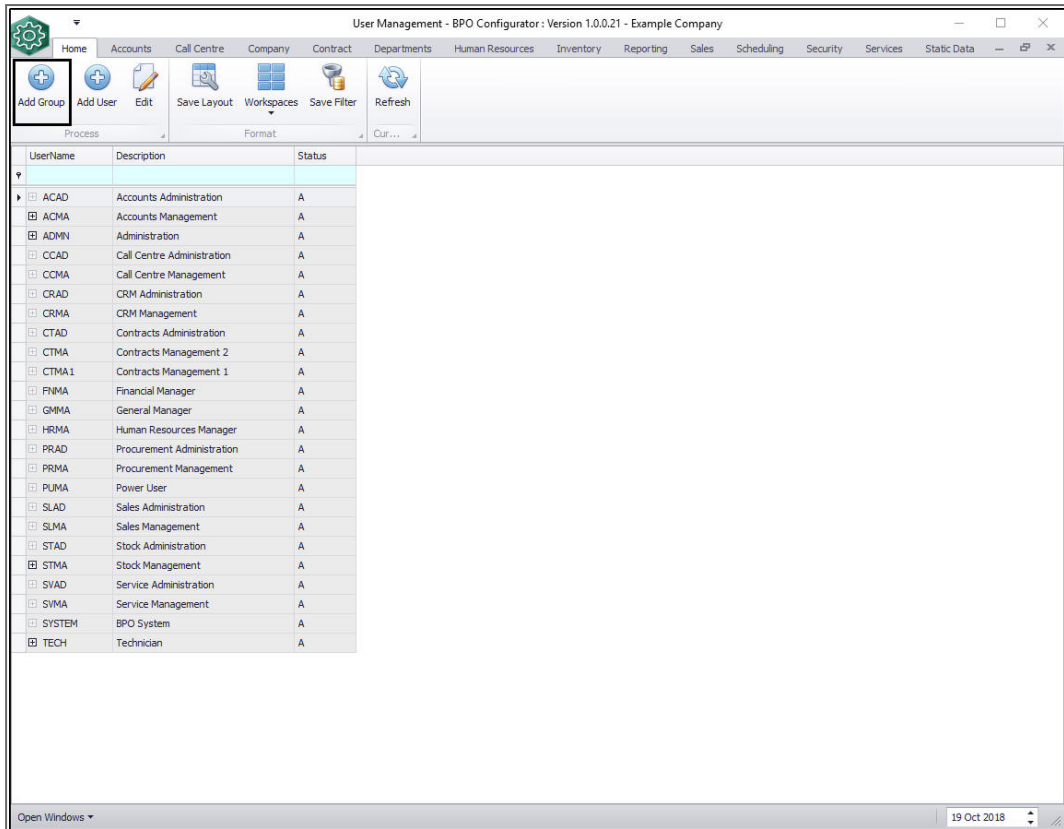
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**Ribbon Access:** *Configurator > Security > User Management*

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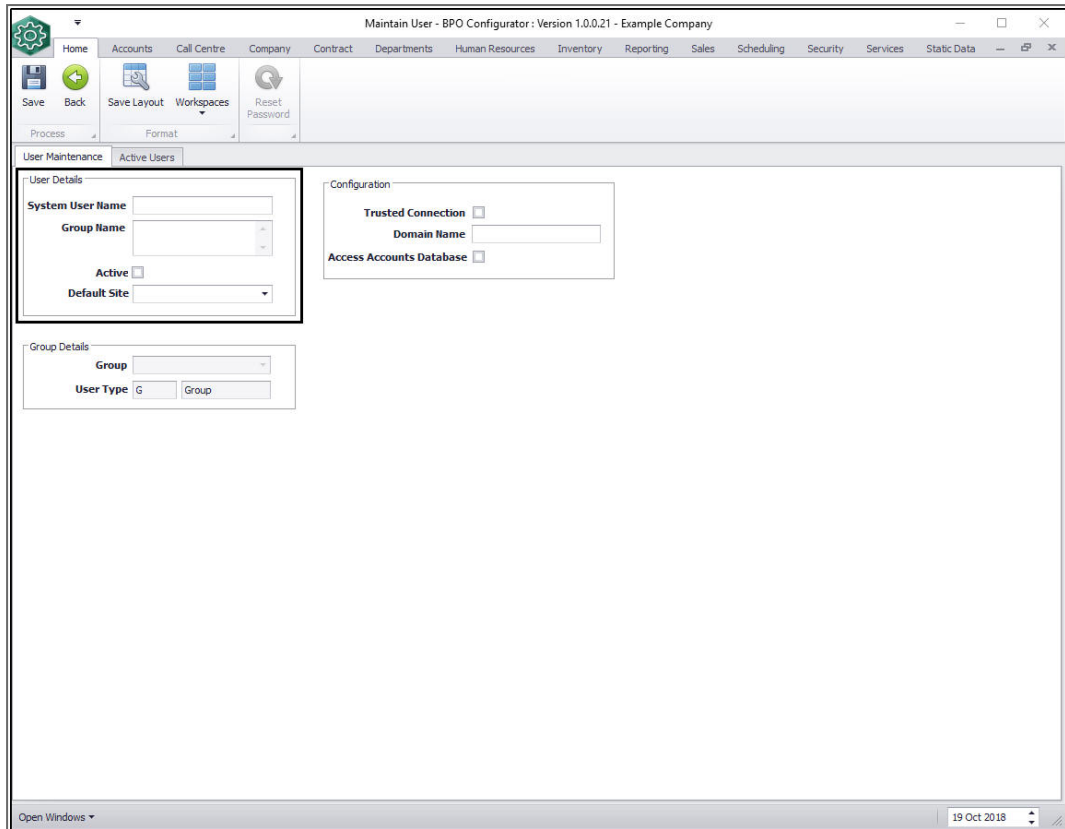
- The **User Management** screen will be displayed.
- Click on **Add Group**.



- The **Maintain User** screen will be displayed.

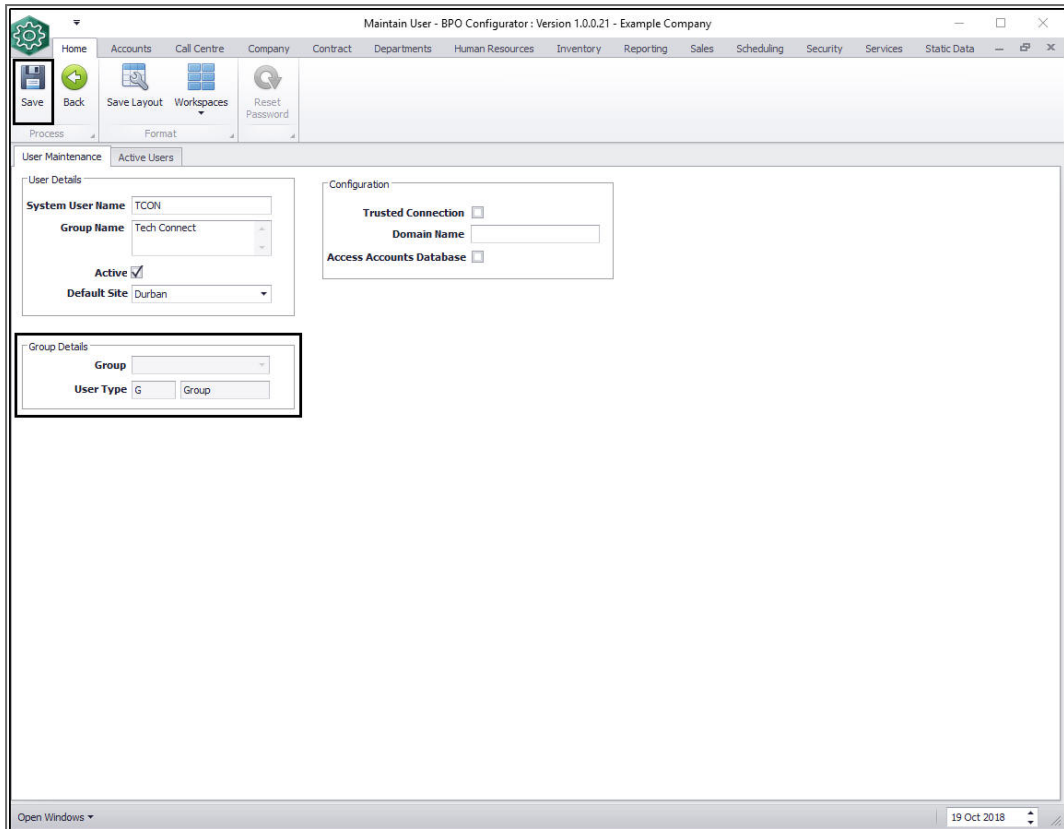
## USER DETAILS:

- **System User Name:** Type in the name of the the group, abbreviated if required.
- **Group Name:** Type in the full group name.
- **Active:** Set this group as '**Active**' by clicking on this check box.
- **Default Site:** Click on the drop-down arrow and select from the **Site** Name menu displayed, which site you wish to link this new group to.



- When you have finished adding the User Details, click on **Save**.

**Note:** The Group Details frame is *un-editable*.



- You will return to the **User Management** screen where you can now **view** the new group.

The screenshot shows the 'User Management - BPO Configurator' application window. The title bar indicates 'Version 1.0.0.21 - Example Company'. The interface includes a menu bar with options like Home, Accounts, Call Centre, Company, Contract, Departments, Human Resources, Inventory, Reporting, Sales, Scheduling, Security, Services, and Static Data. Below the menu is a toolbar with icons for 'Add Group', 'Add User', 'Edit', 'Save Layout', 'Workspaces', 'Save Filter', and 'Refresh'. A 'Process' dropdown is also visible. The main area contains a table with the following data:

UserName	Description	Status
ACAD	Accounts Administration	A
ACMA	Accounts Management	A
ADMIN	Administration	A
CCAD	Call Centre Administration	A
CCMA	Call Centre Management	A
CRAD	CRM Administration	A
CRMA	CRM Management	A
CTAD	Contracts Administration	A
CTMA	Contracts Management 2	A
CTMA1	Contracts Management 1	A
FNMA	Financial Manager	A
GMMA	General Manager	A
HRMA	Human Resources Manager	A
PRAD	Procurement Administration	A
PRMA	Procurement Management	A
PUMA	Power User	A
SLAD	Sales Administration	A
SLMA	Sales Management	A
STAD	Stock Administration	A
STMA	Stock Management	A
SVAD	Service Administration	A
SVMA	Service Management	A
SYSTEM	BPO System	A
TCOM	Tech Connect	A
TECH	Technician	A

The 'TCOM' row is highlighted with a black border. The bottom status bar shows 'Open Windows' and the date '19 Oct 2018'.

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