

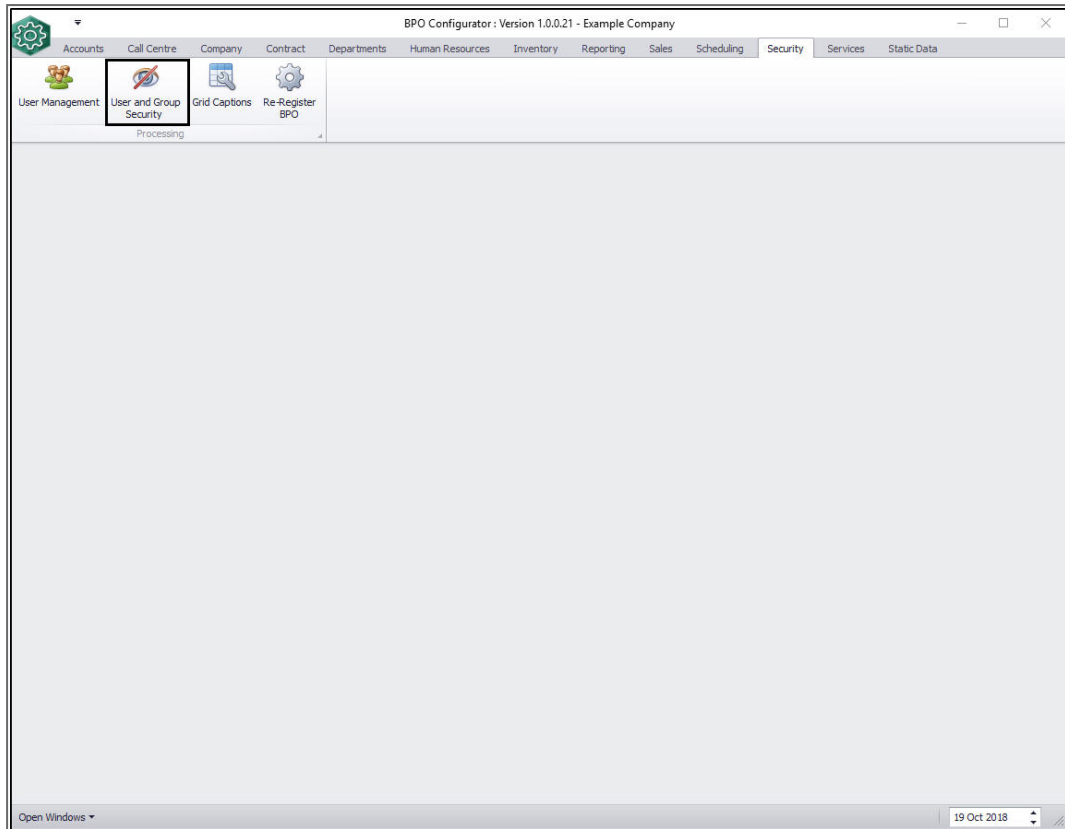
SECURITY

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.

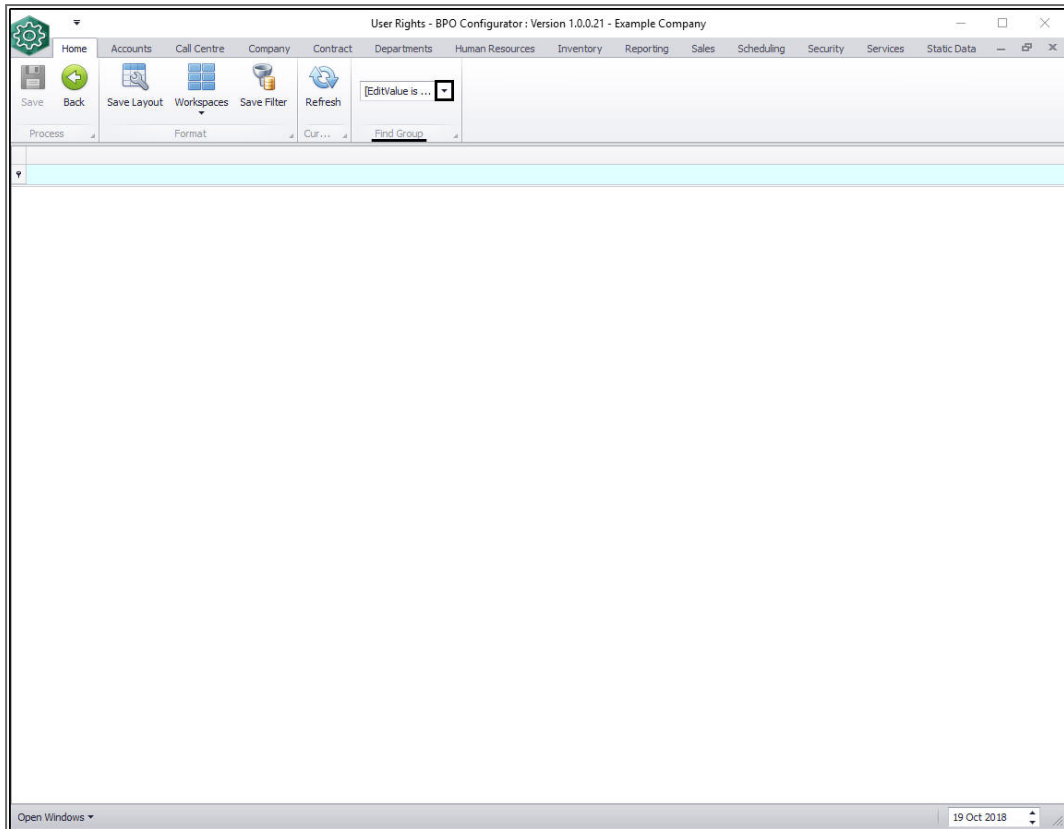
Ribbon Access: *Configurator > Security > User and Group Security*



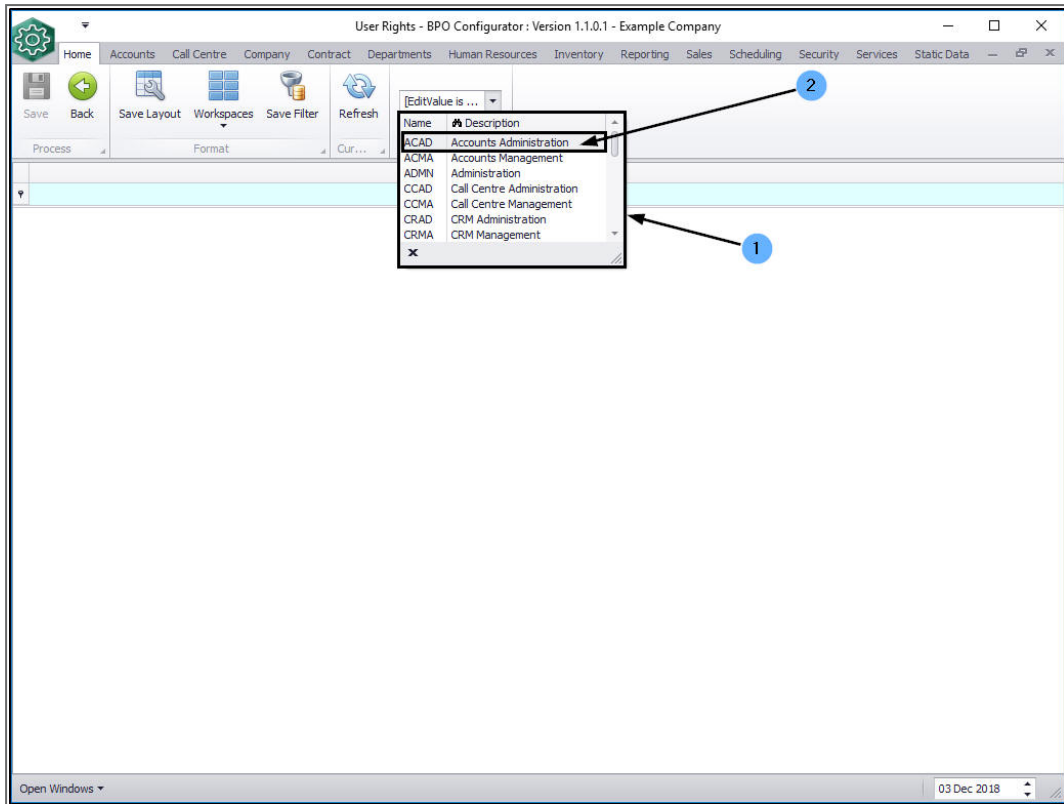
The **User Rights** screen will be displayed.

SELECT USER GROUP

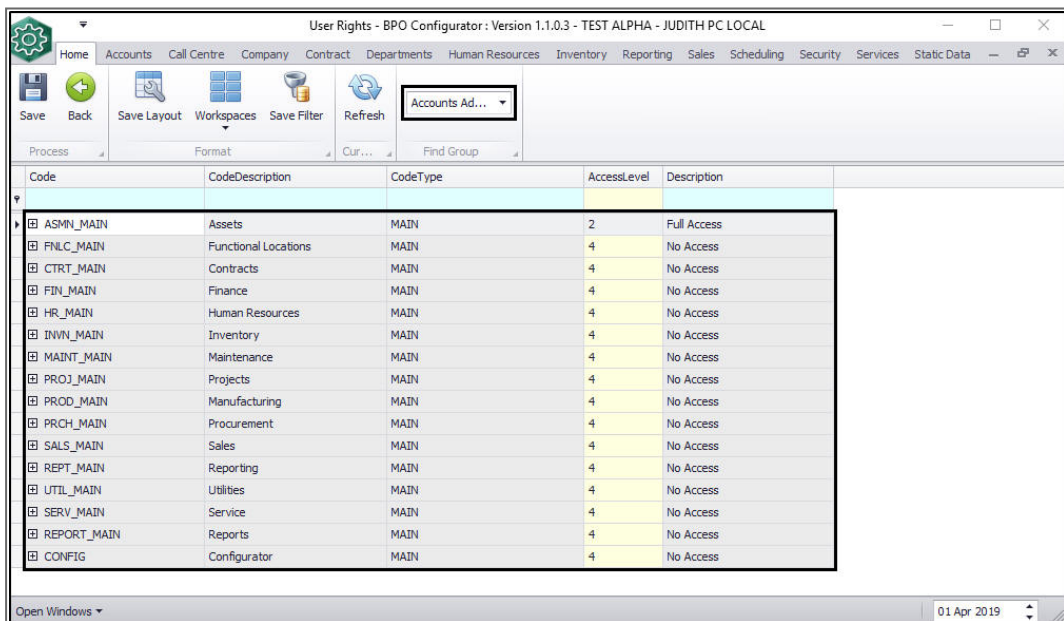
- Click on the **drop-down arrow** in the **Find Group** ribbon frame.



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



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



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.

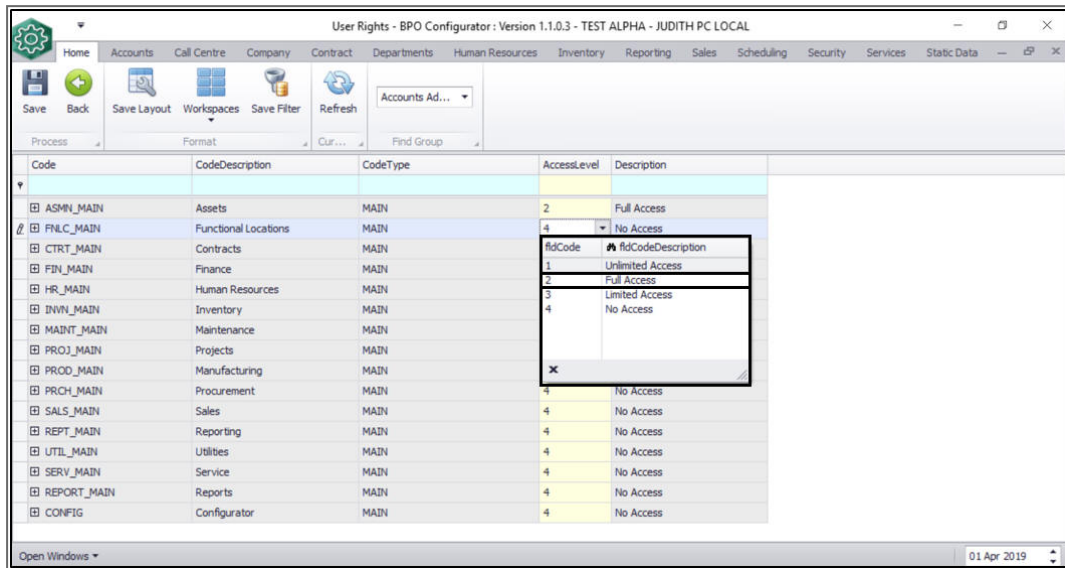
Code	CodeDescription	CodeType	AccessLevel	Description
ASMN_MAIN	Assets	MAIN	2	Full Access
FNLC_MAIN	Functional Locations	MAIN	4	No Access
CTRT_MAIN	Contracts	MAIN	4	No Access
FIN_MAIN	Finance	MAIN	4	No Access
HR_MAIN	Human Resources	MAIN	4	No Access
INVN_MAIN	Inventory	MAIN	4	No Access
MAINT_MAIN	Maintenance	MAIN	4	No Access
PROJ_MAIN	Projects	MAIN	4	No Access
PROD_MAIN	Manufacturing	MAIN	4	No Access
PRCH_MAIN	Procurement	MAIN	4	No Access
SALS_MAIN	Sales	MAIN	4	No Access
REPT_MAIN	Reporting	MAIN	4	No Access
UTIL_MAIN	Utilities	MAIN	4	No Access
SERV_MAIN	Service	MAIN	4	No Access
REPORT_MAIN	Reports	MAIN	4	No Access
CONFIG	Configurator	MAIN	4	No Access

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

Code	CodeDescription	CodeType	AccessLevel	Description
ASMN_MAIN	Assets	MAIN	2	Full Access
FNLC_MAIN	Functional Locations	MAIN	4	No Access
CTRT_MAIN	Contracts	MAIN	4	No Access
FIN_MAIN	Finance	MAIN	4	No Access
HR_MAIN	Human Resources	MAIN	4	No Access
INVN_MAIN	Inventory	MAIN	4	No Access
MAINT_MAIN	Maintenance	MAIN	4	No Access
PROJ_MAIN	Projects	MAIN	4	No Access
PROD_MAIN	Manufacturing	MAIN	4	No Access
PRCH_MAIN	Procurement	MAIN	4	No Access
SALS_MAIN	Sales	MAIN	4	No Access
REPT_MAIN	Reporting	MAIN	4	No Access
UTIL_MAIN	Utilities	MAIN	4	No Access
SERV_MAIN	Service	MAIN	4	No Access
REPORT_MAIN	Reports	MAIN	4	No Access
CONFIG	Configurator	MAIN	4	No Access

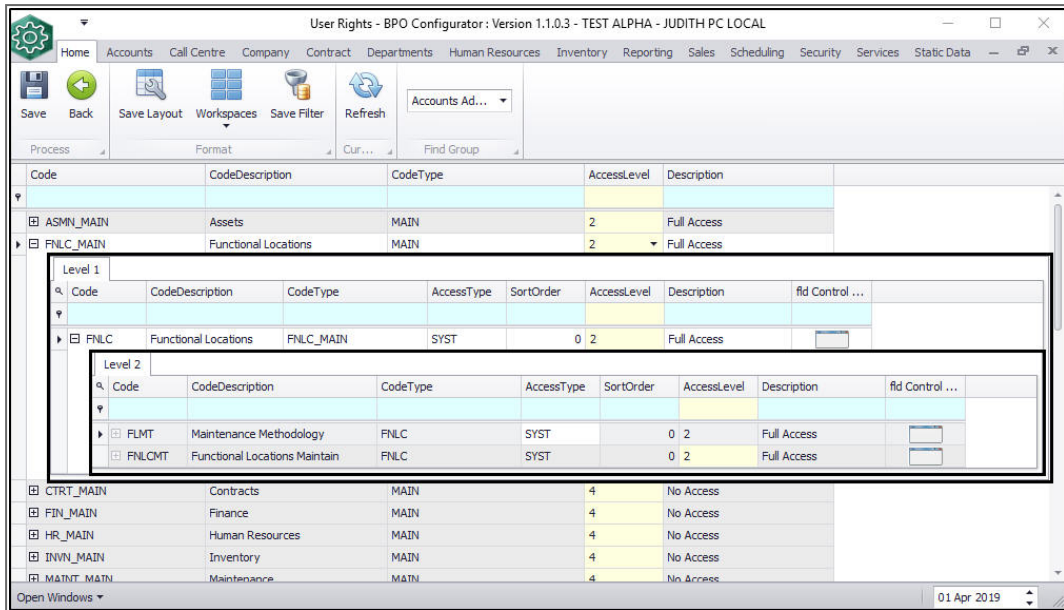
- Click on this arrow to display the **Access Level Code** drop-down menu.

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



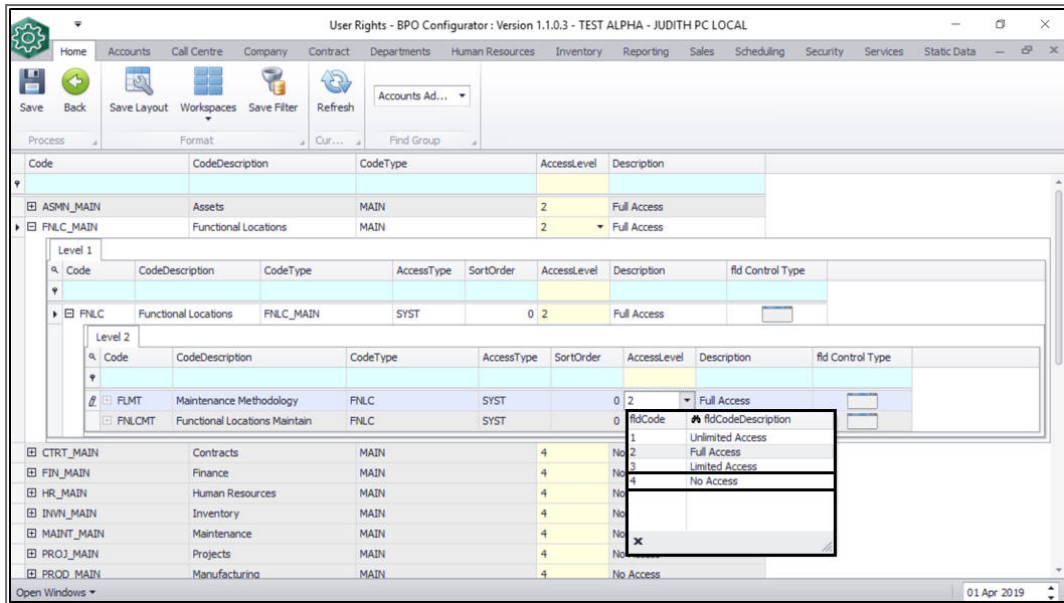
As you select the access level, **Level 1** and **Level 2** grids will expand.

- **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.

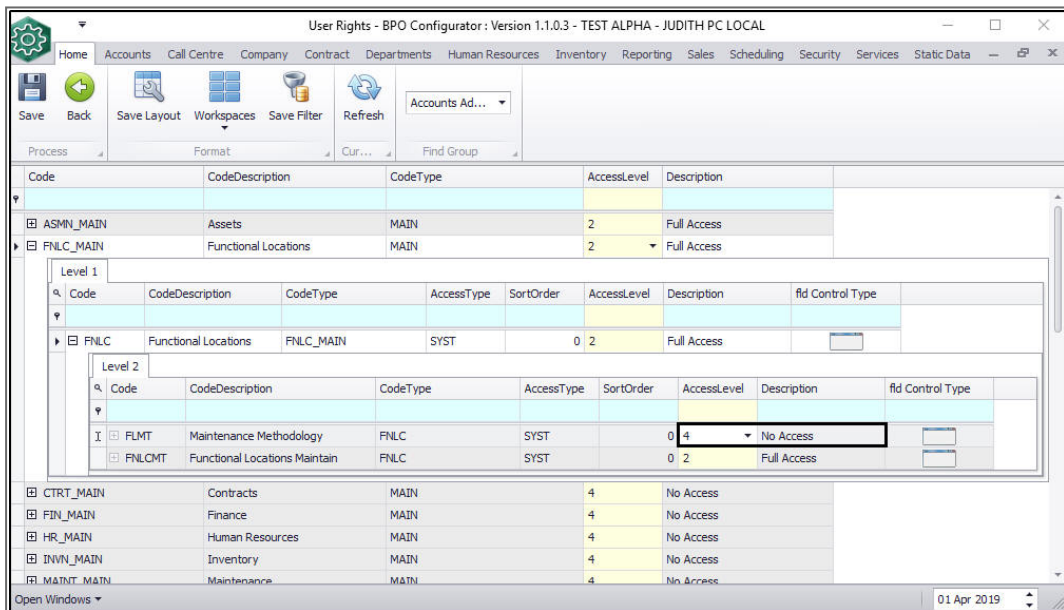


SET ACCESS LEVELS ON SUB CODES

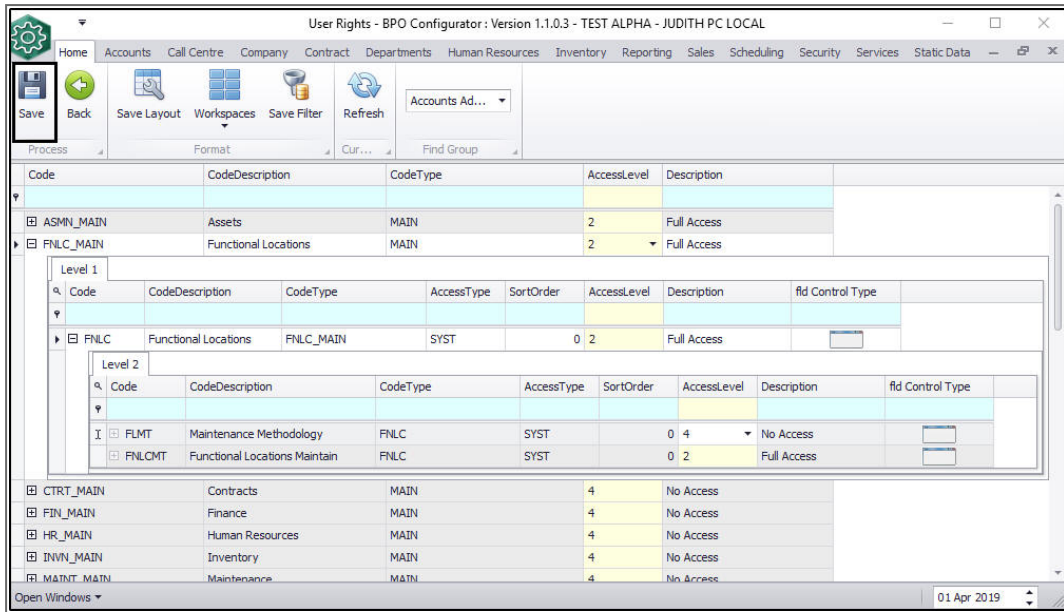
- In the **Level 2** sub grid, in the row of the code you wish to set an access level for, click in the **Access Level** column.
- The **Access Level Codes** menu will drop-down.
- Click on the **Access Level** you require.
 - In this image, access level **4 - No Access** is selected for **FLMT**.



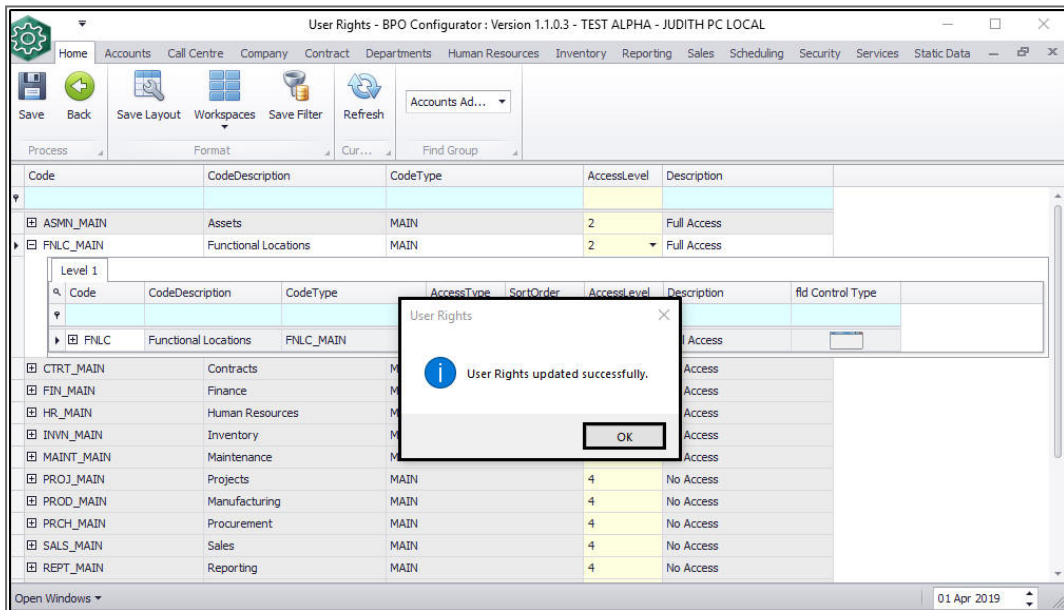
- The **Access Level** and **Description** will change to the one that was selected.
 - In this image, the **Access Level** and **Description** has changed to **4 - No Access**.



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



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



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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