

SECURITY

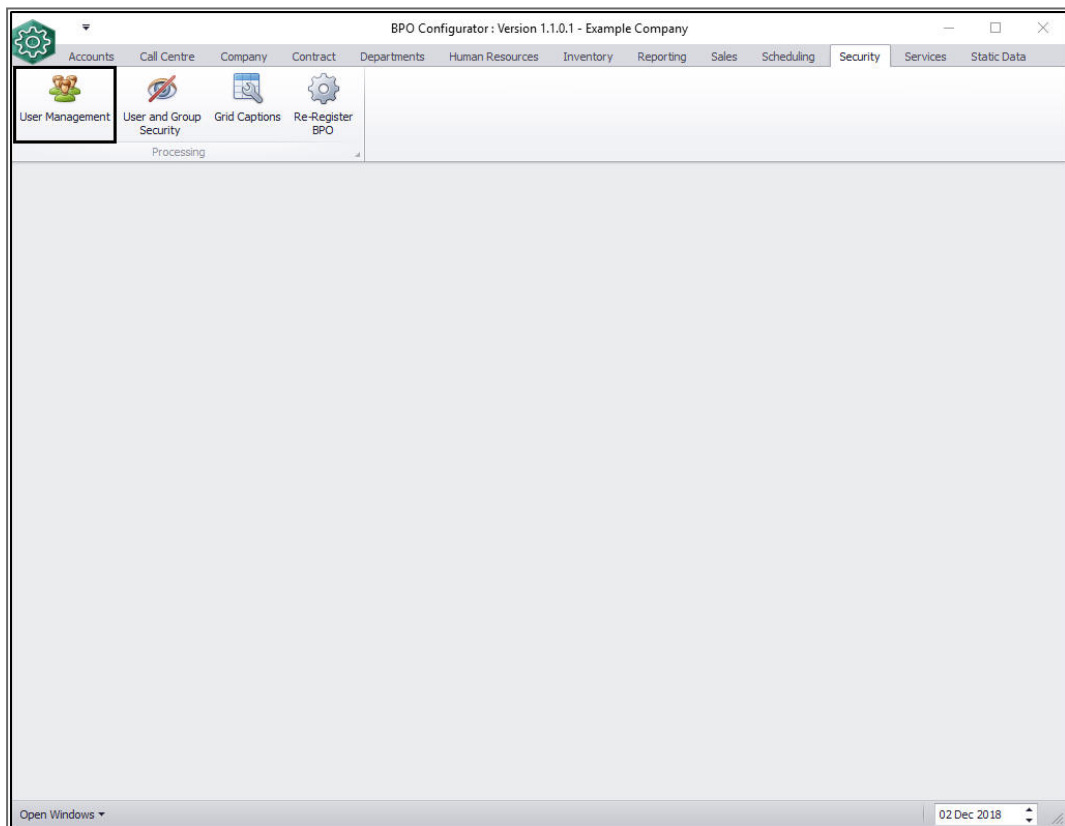
USER AND GROUP SECURITY – EDIT A USER

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.

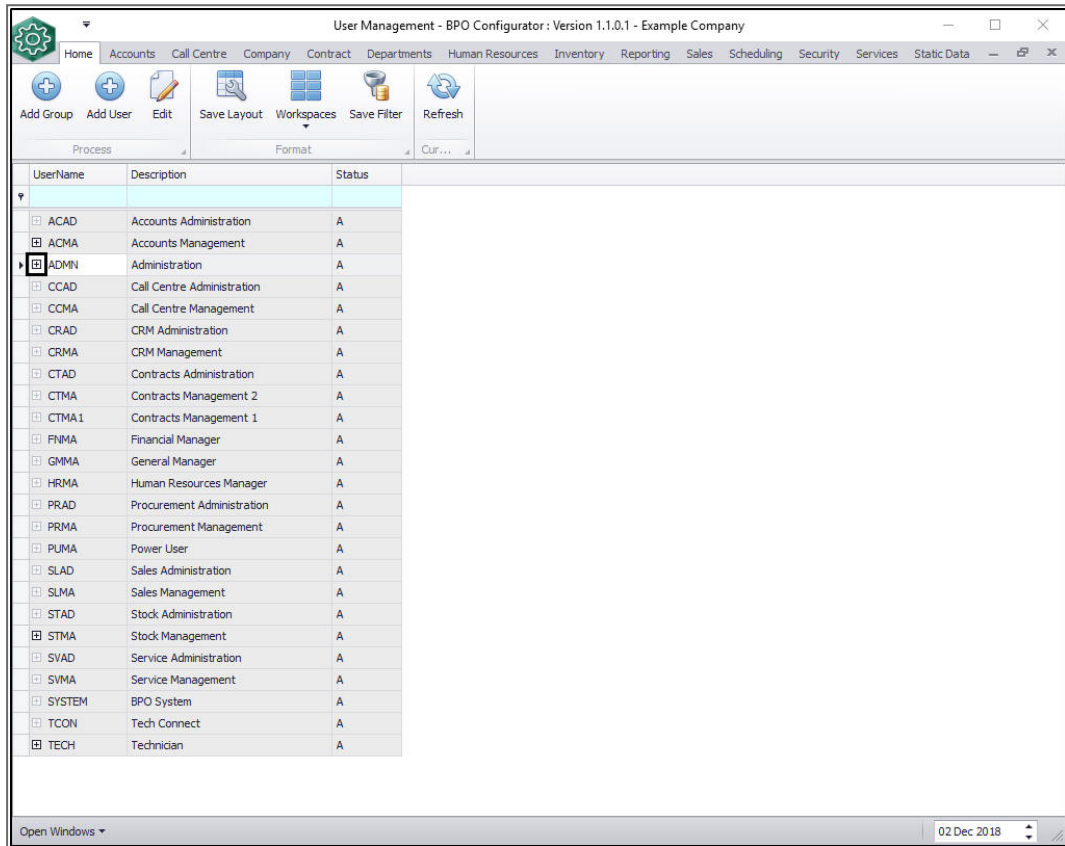
The user must log out of BPO2 and back in for the changes to take effect.

Ribbon Access: *Configurator > Security > User Management*

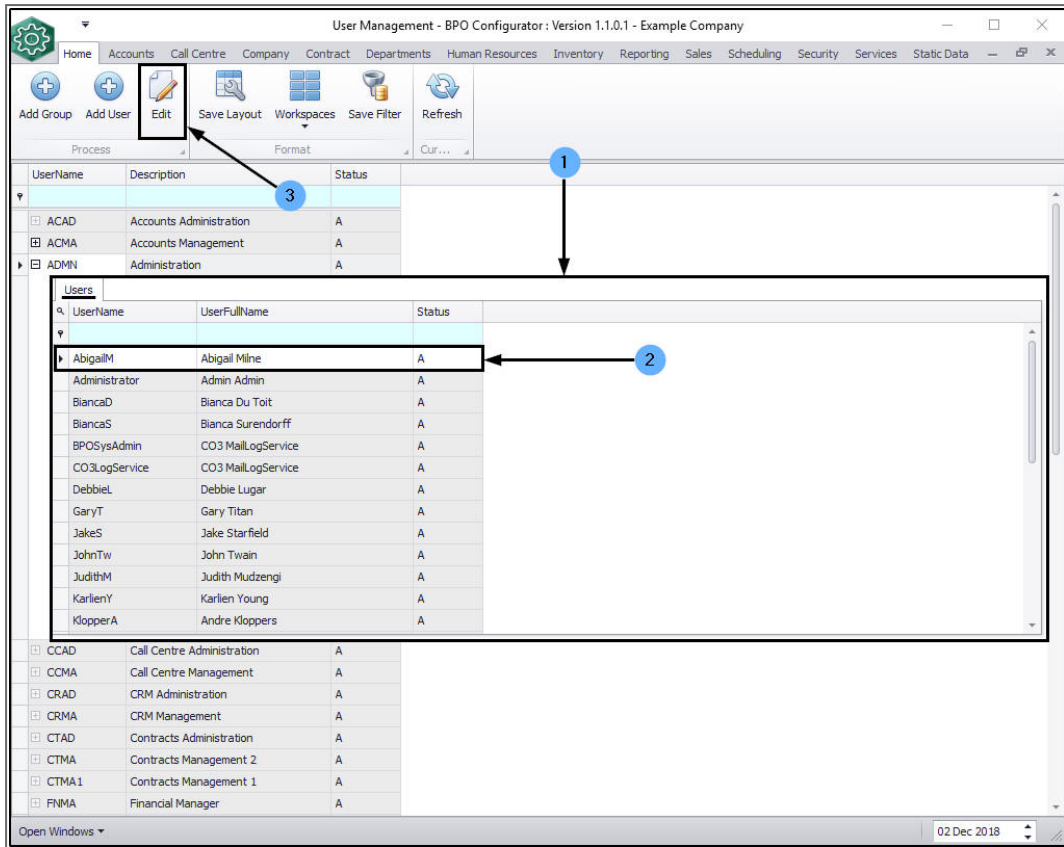


The **User Management** screen will be displayed.

- 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.



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**.



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

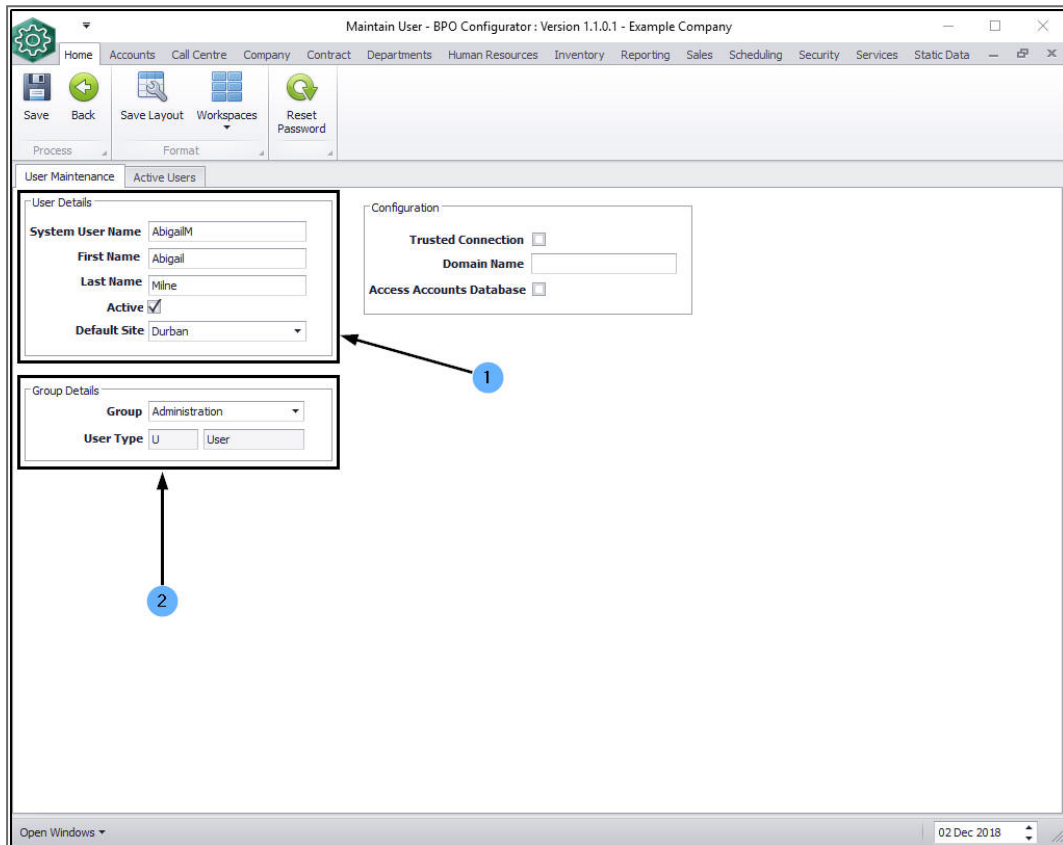
1. User Details

- **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.

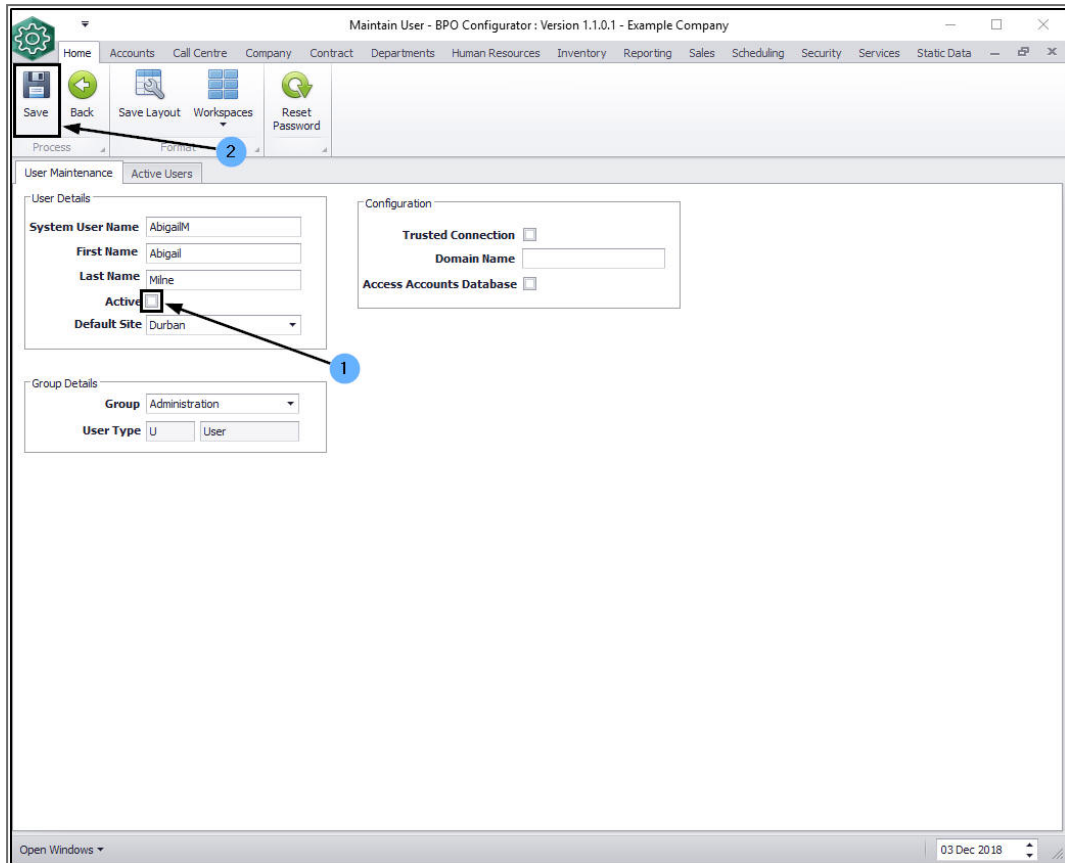
2. Group Details

- **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.



The screenshot shows the 'Maintain User - BPO Configurator' application interface. The title bar indicates 'Maintain User - BPO Configurator: Version 1.1.0.1 - Example Company'. The application has a menu bar with options: Home, Accounts, Call Centre, Company, Contract, Departments, Human Resources, Inventory, Reporting, Sales, Scheduling, Security, Services, and Static Data. Below the menu bar is a toolbar with icons for Save, Back, Save Layout, Workspaces, and Reset Password. The main content area is divided into two sections: 'User Details' and 'Group Details'. The 'User Details' section contains the following fields: System User Name (AbigailM), First Name (Abigail), Last Name (Milne), Active (checked), and Default Site (Durban). The 'Group Details' section contains a Group dropdown menu (Administration) and a User Type field (U). A blue circle with the number '1' points to the 'Active' checkbox, and a blue circle with the number '2' points to the 'Group' dropdown menu. The status bar at the bottom shows 'Open Windows' and the date '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**.



- 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.

The screenshot shows the 'Maintain User - BPO Configurator: Version 1.1.0.1 - Example Company' application. The interface includes a top 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 buttons for Save, Back, Save Layout, Workspaces, and Reset Password. The main area is titled 'User Maintenance' and contains two tabs: 'Active Users' and 'Inactive Users'. The 'Active Users' tab is selected, showing a form for editing a user. The form is divided into three sections: 'User Details', 'Configuration', and 'Group Details'. The 'User Details' section includes fields for System User Name (AbigailM), First Name (Abigail), Last Name (Mline), Active (checkbox), and Default Site (Durban). The 'Configuration' section includes checkboxes for Trusted Connection and Access Accounts Database, and a text field for Domain Name. The 'Group Details' section includes a dropdown for Group (Administration) and a text field for User Type (U). An error dialog box is displayed in the center of the screen, titled '.Net SqlClient Data Provider'. The dialog contains a yellow warning icon and the text: 'The server principal 'AbigailM' already exists. User, group, or role 'AbigailM' already exists in the current database.' An 'OK' button is located at the bottom right of the dialog. The bottom status bar shows 'Open Windows' and the date '03 Dec 2018'.

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