

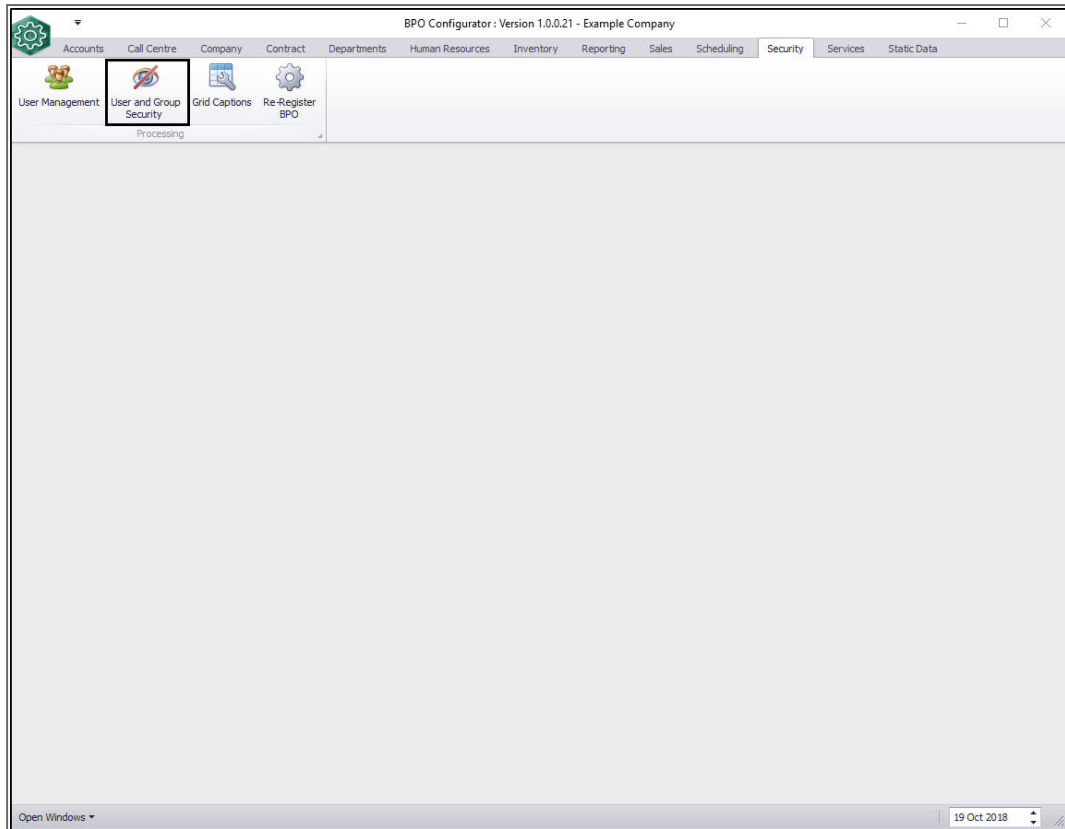
SECURITY

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.

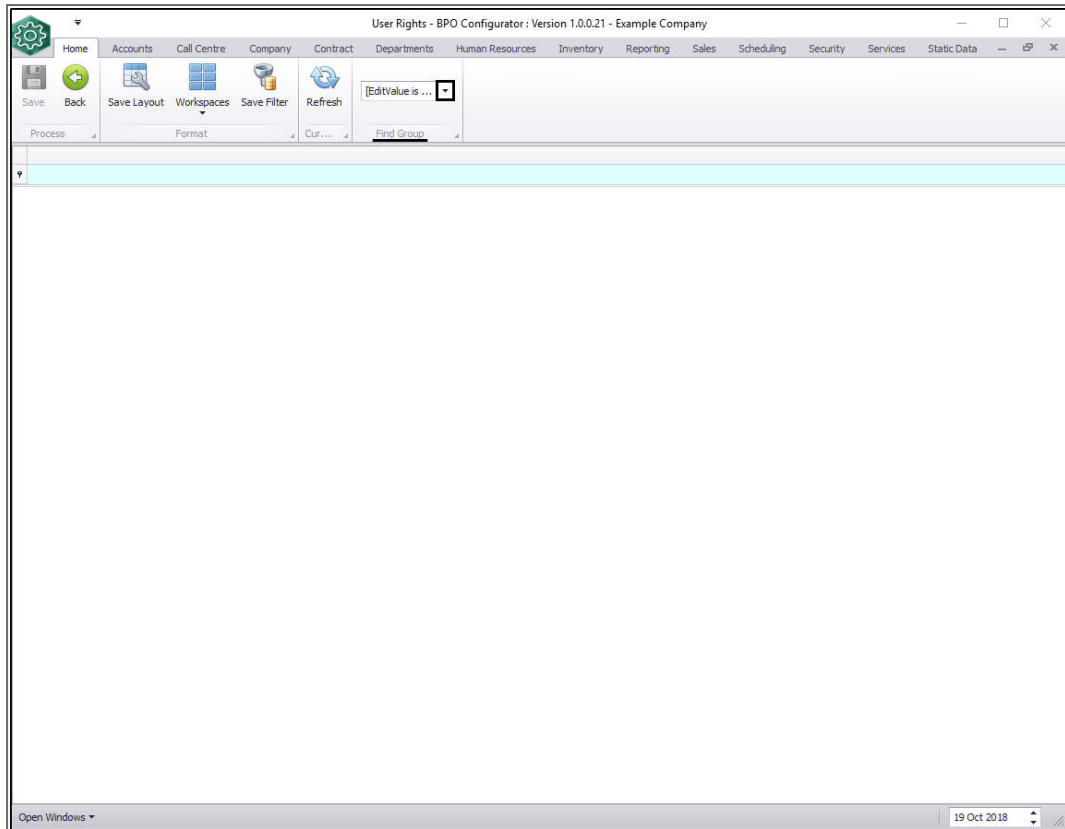
Ribbon Access: *Configurator > Security > User and Group Security*



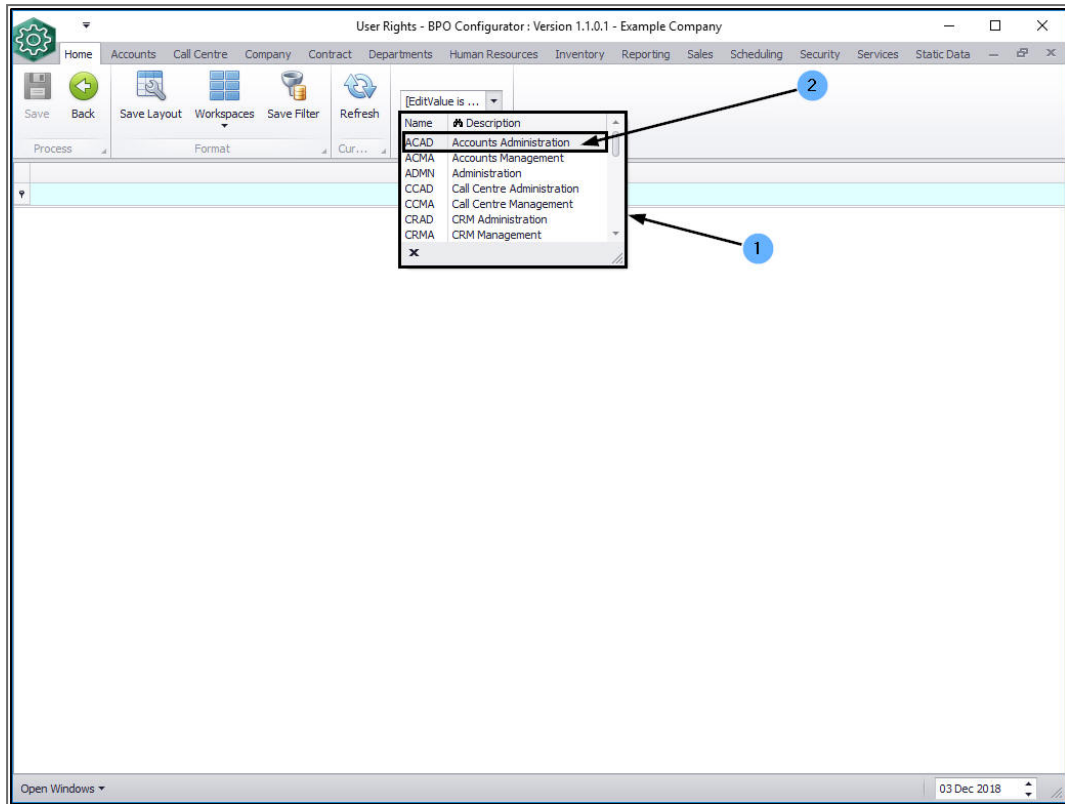
The **User Rights** screen will be displayed.

SELECT USER GROUP

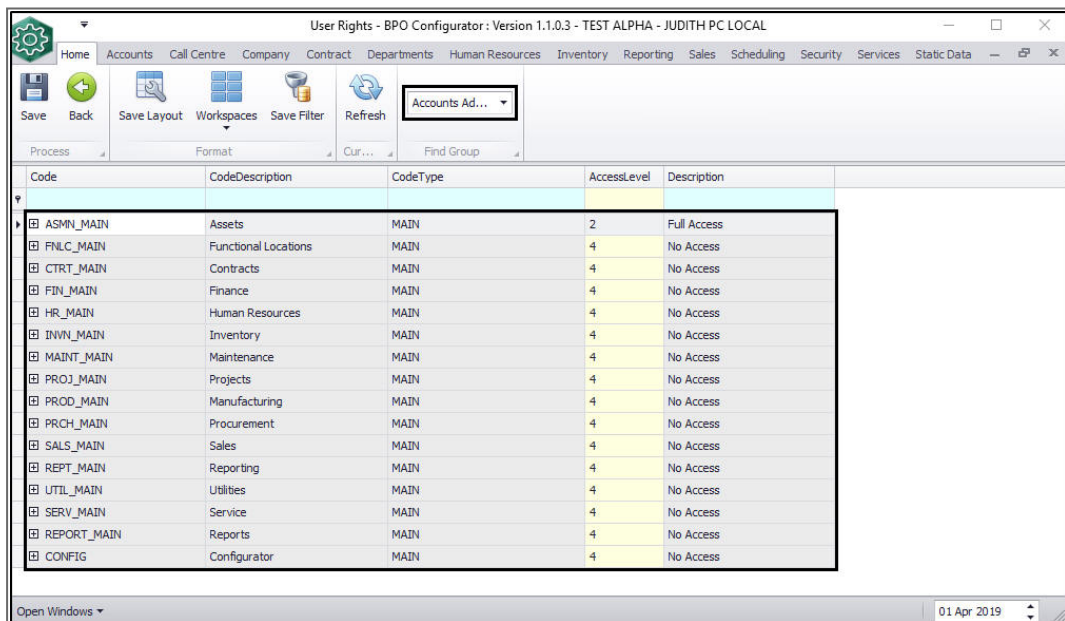
- Click on the **drop-down arrow** in the **Find Group** ribbon frame.



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.

User Rights - BPO Configurator: Version 1.1.0.3 - TEST ALPHA - JUDITH PC LOCAL

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Back Save Layout Workspaces Save Filter Refresh Accounts Ad...

Process Format Cur... Find Group

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

Open Windows 01 Apr 2019

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

User Rights - BPO Configurator: Version 1.1.0.3 - TEST ALPHA - JUDITH PC LOCAL

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Back Save Layout Workspaces Save Filter Refresh Accounts Ad...

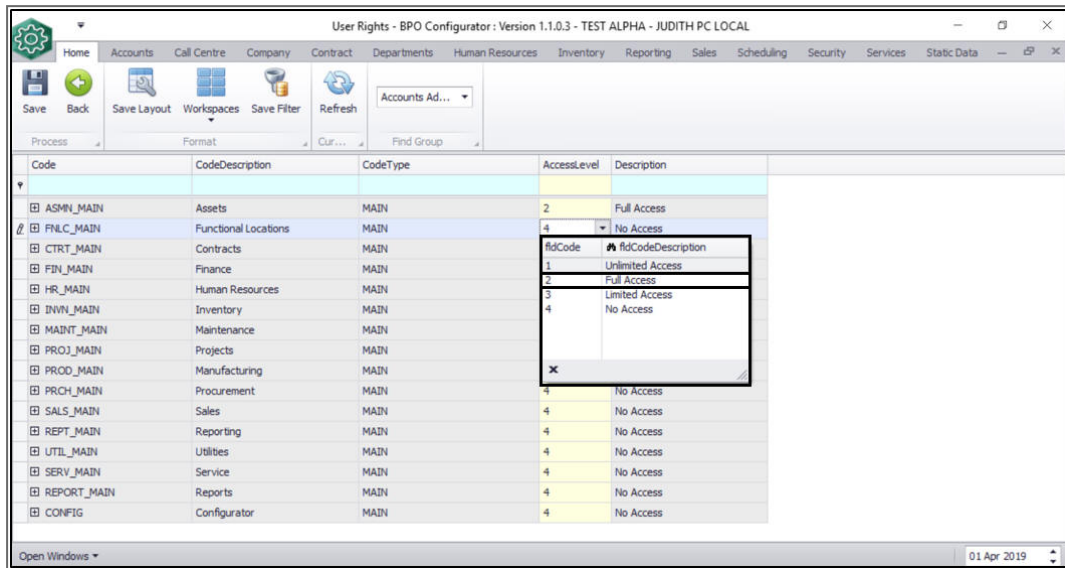
Process Format Cur... Find Group

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

Open Windows 01 Apr 2019

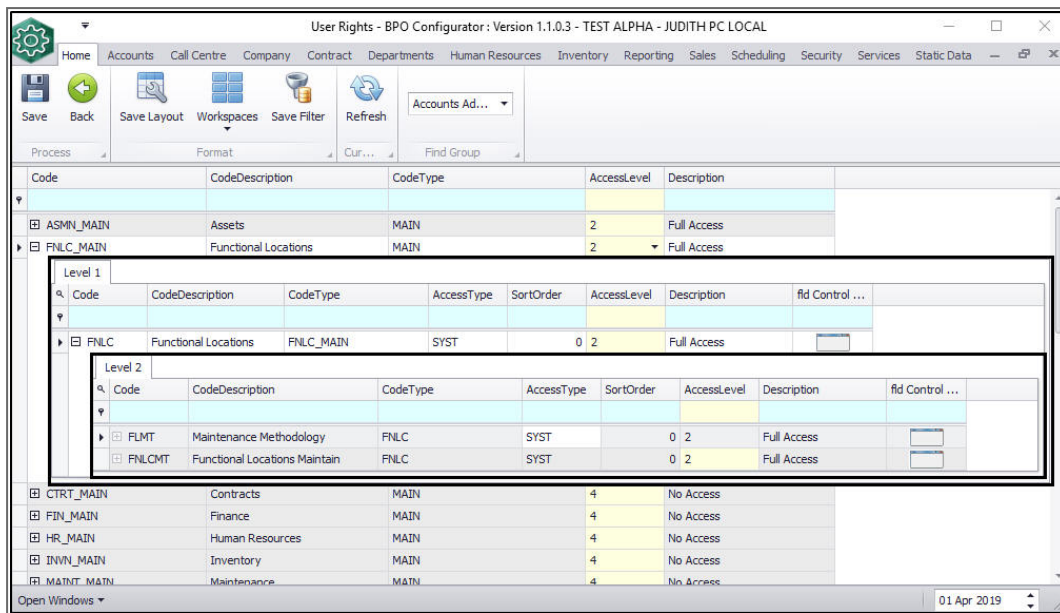
- Click on this arrow to display the **Access Level Code** drop-down menu.

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



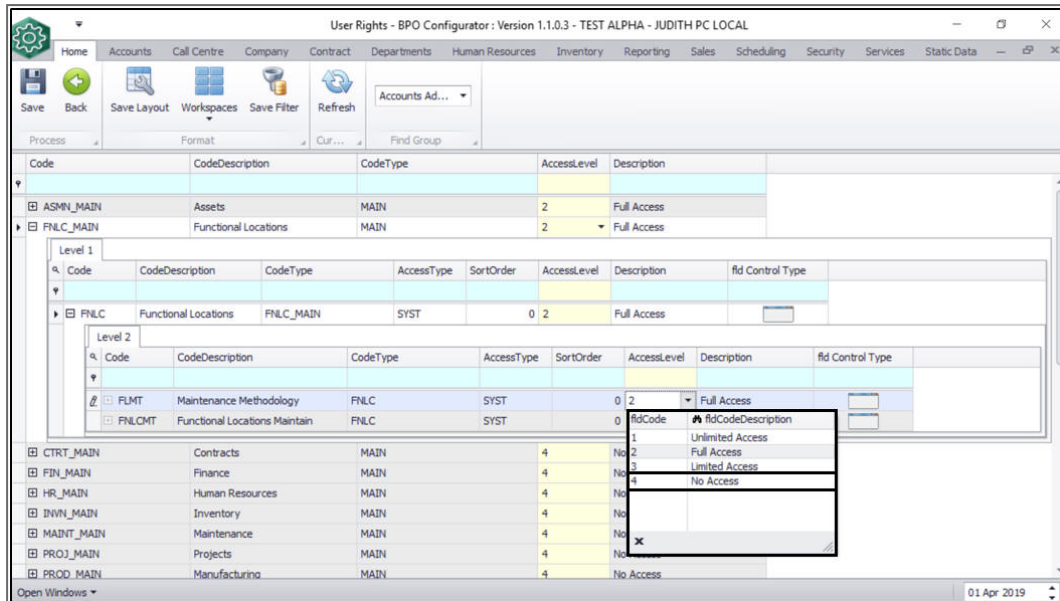
As you select the access level, **Level 1** and **Level 2** grids will expand.

- **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.

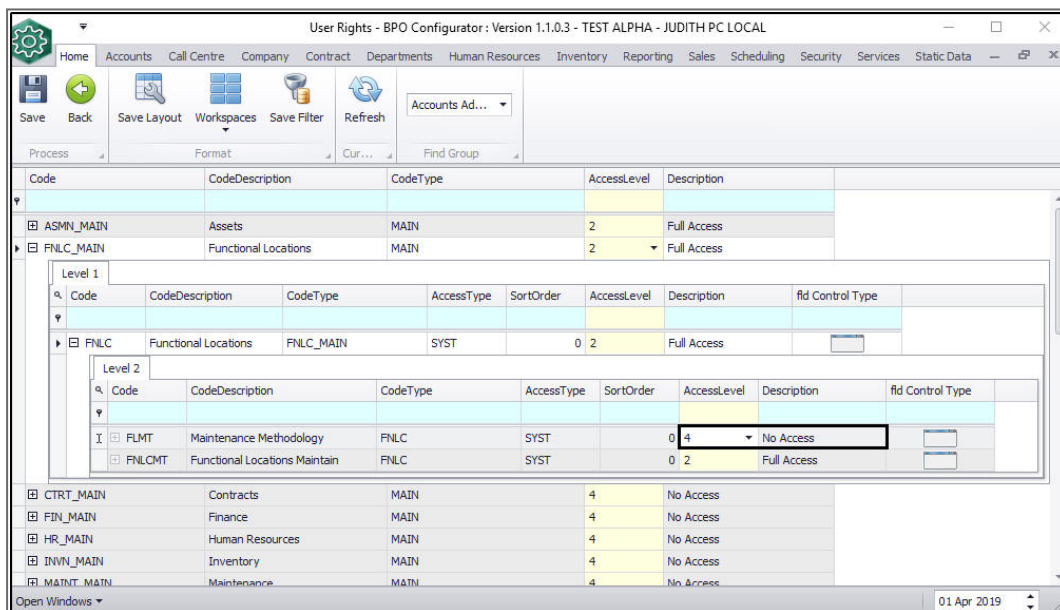


SET ACCESS LEVELS ON SUB CODES

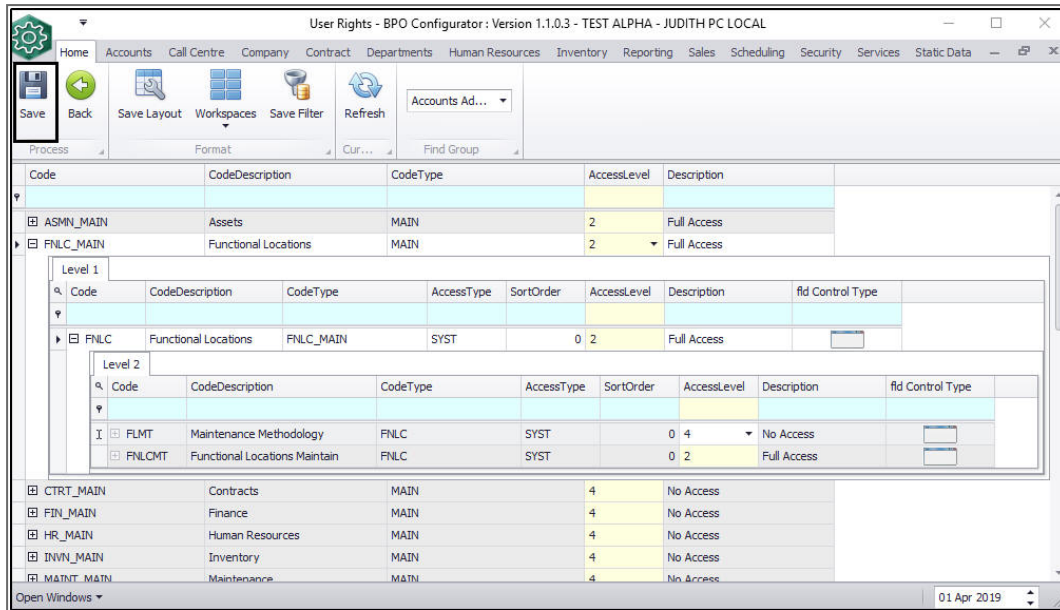
- In the **Level 2** sub grid, in the row of the code you wish to set an access level for, click in the **Access Level** column.
- The **Access Level Codes** menu will drop-down.
- Click on the **Access Level** you require.
 - In this image, access level **4 - No Access** is selected for **FLMT**.



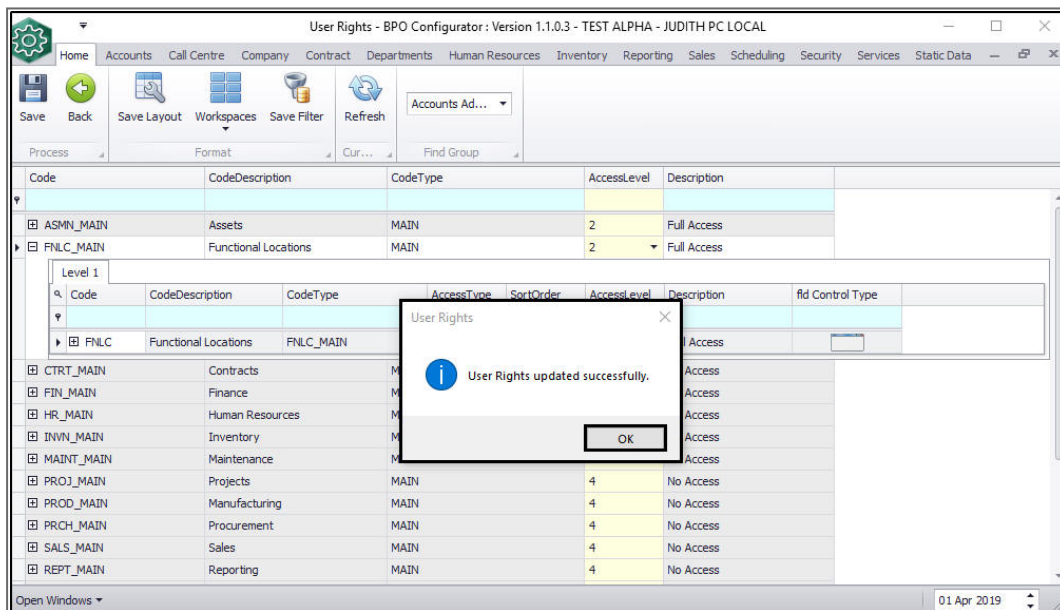
- The **Access Level** and **Description** will change to the one that was selected.
- In this image, the **Access Level** and **Description** has changed to **4 - No Access**.



- 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](#)

MNU.085.004

