

SECURITY

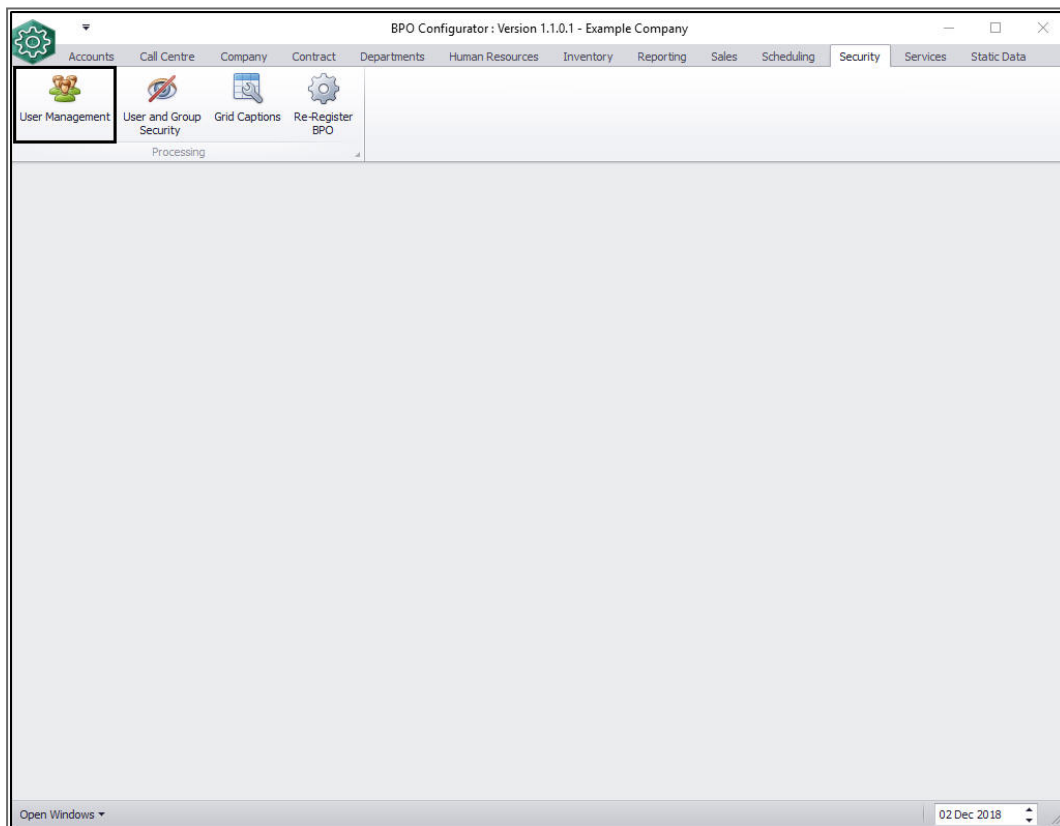
USER AND GROUP SECURITY – EDIT A USER

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.

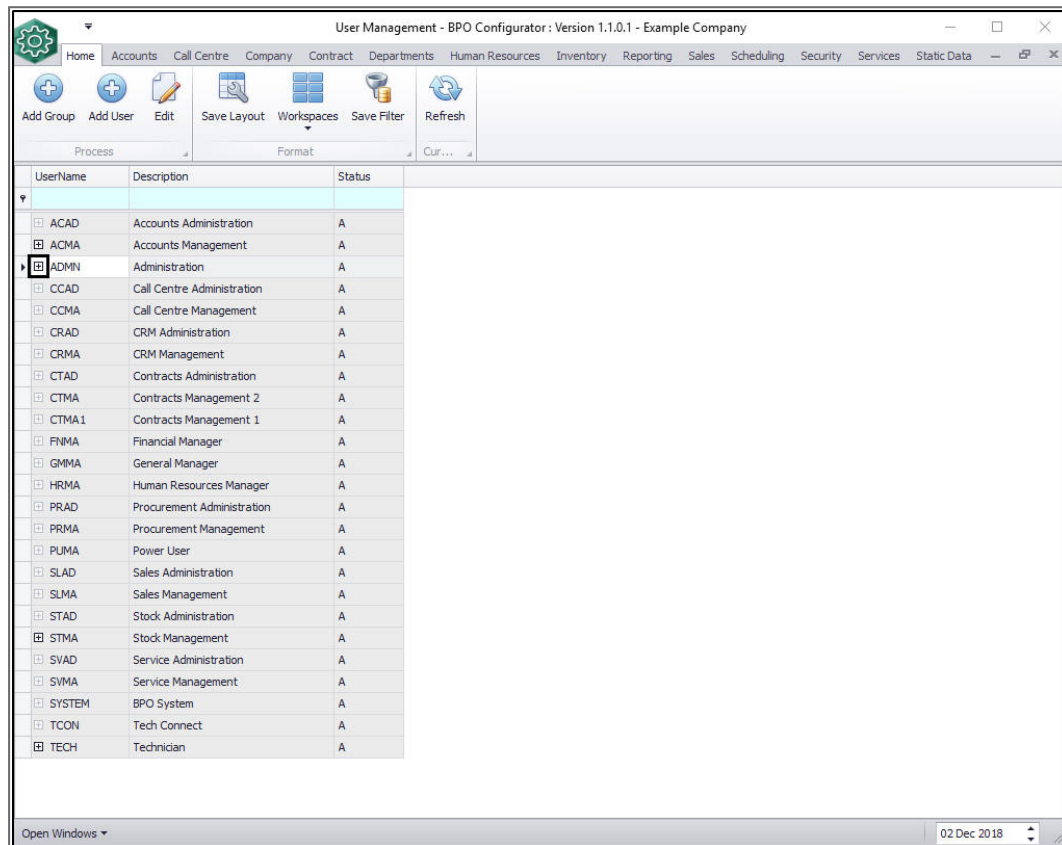
The user must log out of BPO2 and back in for the changes to take effect.

Ribbon Access: *Configurator > Security > User Management*

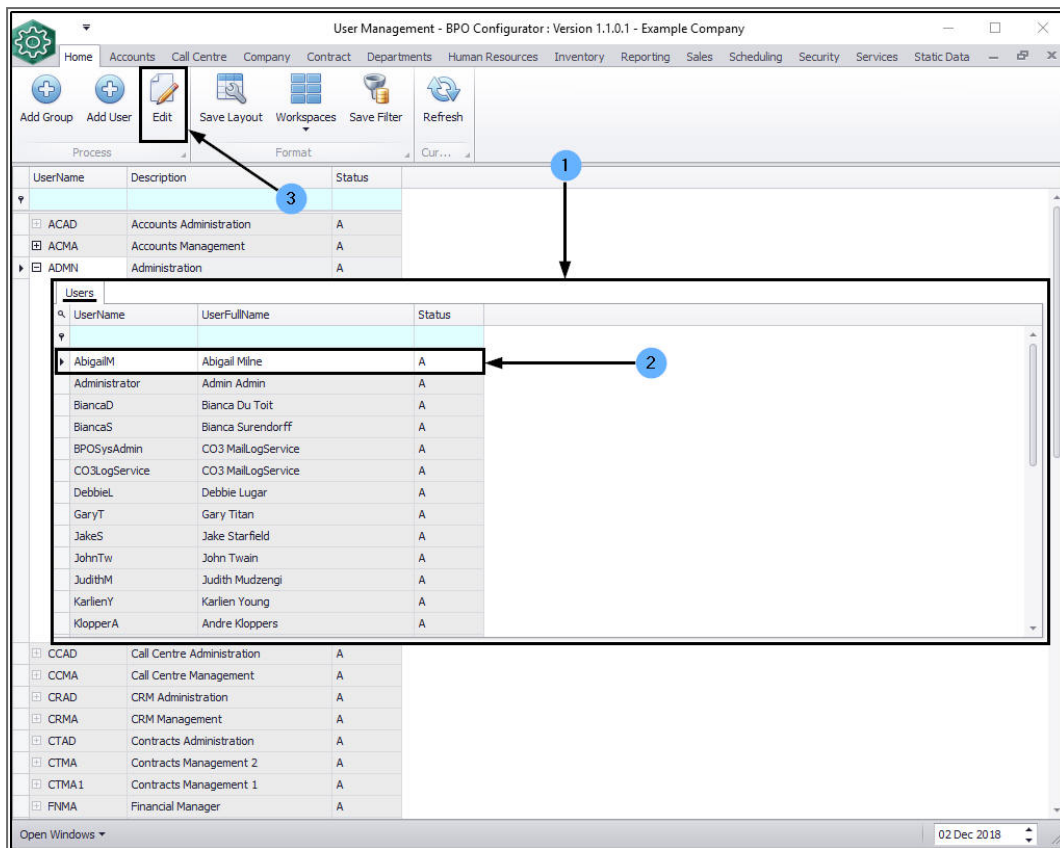


The **User Management** screen will be displayed.

- 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.

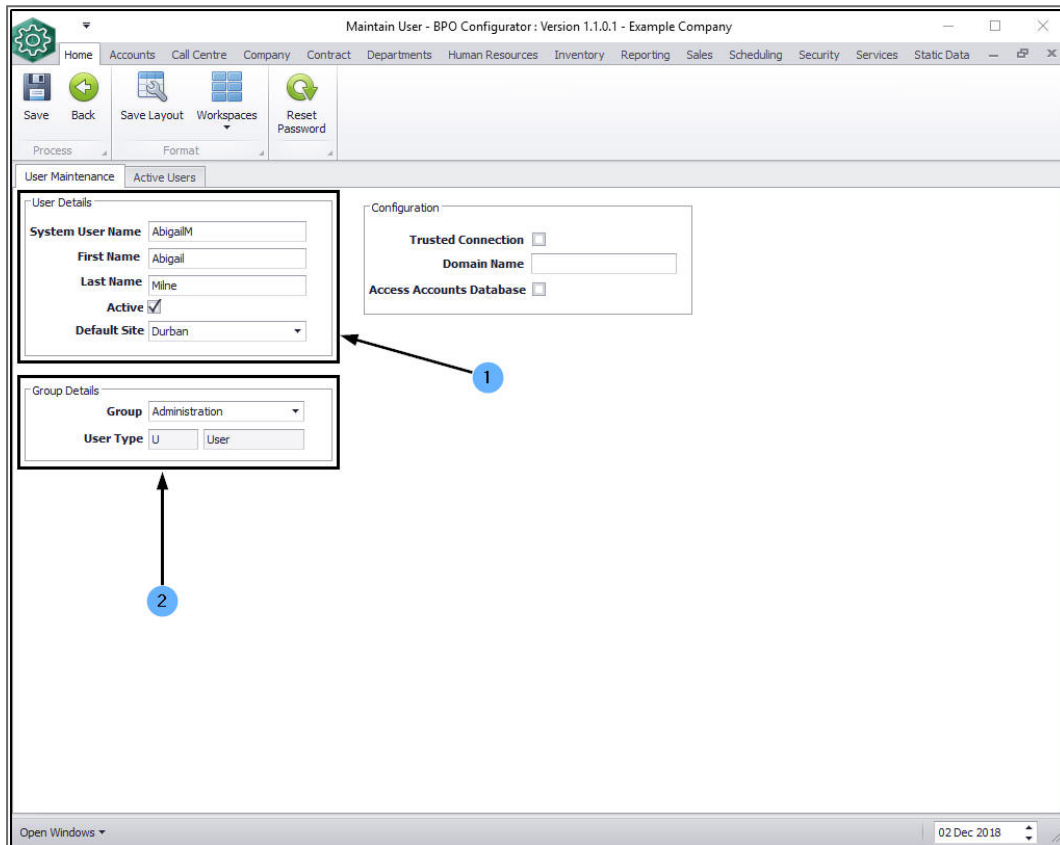
1. User Details

- **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.

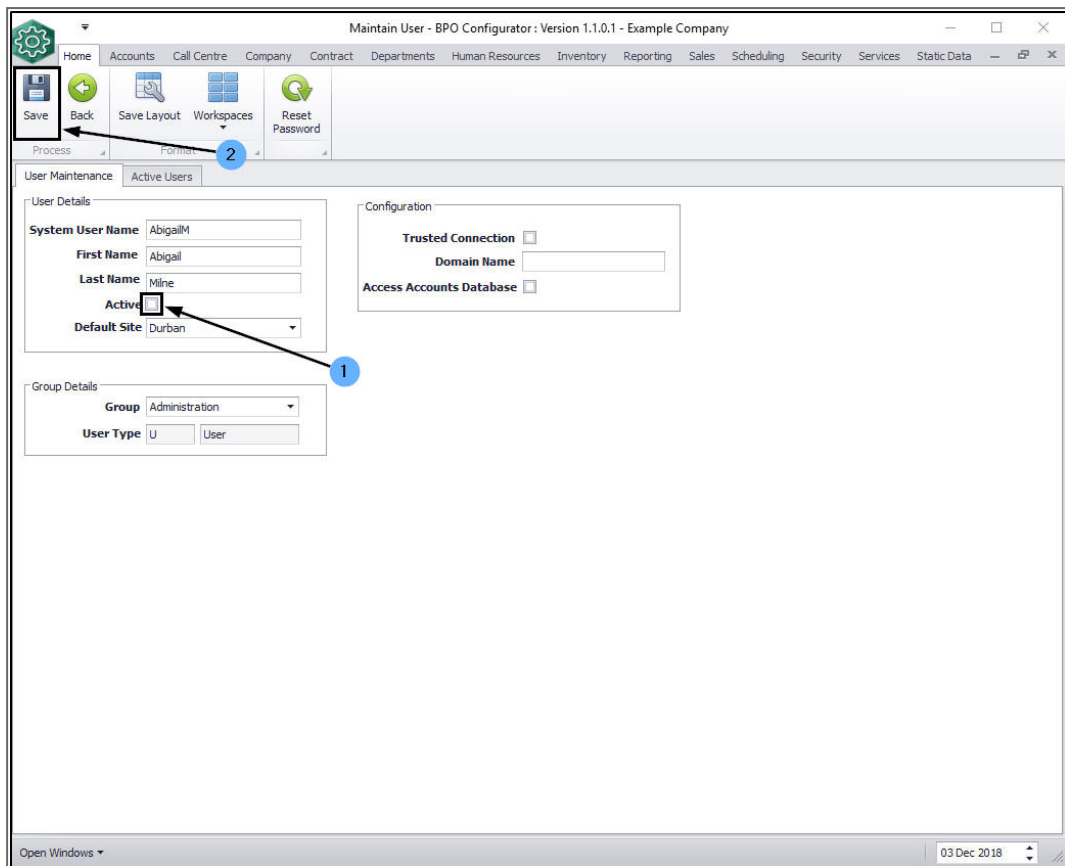
2. Group Details

- **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 window. The window has 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 bar is a toolbar with buttons for Save, Back, Save Layout, Workspaces, and Reset Password. The main area is divided into two sections: 'User Details' and 'Group Details'. The 'User Details' section contains fields for 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 red box highlights the 'User Details' section, and a red circle with the number '1' is next to it. Another red box highlights the 'Group Details' section, and a red circle with the number '2' is next to it. The 'Configuration' section on the right contains checkboxes for Trusted Connection, Domain Name, and Access Accounts Database. 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.

Maintain User - BPO Configurator: Version 1.1.0.1 - Example Company

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

Save Back Save Layout Workspaces Reset Password

Process Format

User Maintenance Active Users

User Details

System User Name AbigailM

First Name Abigail

Last Name Milne

Active ☐

Default Site Durban

Configuration

Trusted Connection ☐

Domain Name

Access Accounts Database ☐

Group Details

Group Administration

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.

OK

Open Windows 03 Dec 2018

MNU.085.006