

Slide 1

In this session we look at how we Manage Business Profiles.



## Managing Business Profiles

- ◆ Not everybody needs Business Profiles or not necessarily all Business Profiles
- ◆ A Business Profile is established for a User, for an Application Module, if the User needs 1 or more privileges that can be granted on such a Profile

Managing Business Profiles

In the 1<sup>st</sup> instance it is necessary to understand that not every IES User needs Business Profiles.

Also does a User not necessarily need all the Business Profiles.


A Business Profile is established for a User, for an Application Module, if that User needs one or more Privileges that can be granted on such a Profile.

In other words, there is this difference between Business Profiles and Menu Profiles.

The Menu Profiles lead to Access to the Menu Options.

But some of these Menu Options include certain controls for which the User must have specific Privileges. Otherwise the User cannot perform some of that functions, even though the User may use that particular Menu Option.

So if the User needs some of those privileges, on that Business Profile, then of course we provide that Business Profile for the User.



## How to establish the Business Profile(s)

- ◆ Inheritance by Mirror Access
- ◆ Profiles can be easily copied from another User
- ◆ Profiles can also be created and edited from the User Master record

How to establish the Business Profile(s)

There are a number of ways in which a User can be provided with Business Profiles.

In the 1<sup>st</sup> instance, when we setup a User and we use Mirror Access, then the New User will also inherit the Business Profiles from the User that is being Mirrored.

The 2<sup>nd</sup> way to provide a User with Business Profiles is by copying from one User, to this User, or even repeating that process and copying some Profiles from one User, and other Profiles from another User, and so on.

We can also establish Profiles manually by creating, and / or editing them from the User Master Record.



**How to remove Business Profiles**

- ◆ By removing the User Code, or all access for the User in a Datamart
- ◆ By deleting a specific Business Profile

How to remove Business Profiles

If there is a need to Remove one or multiple Business Profiles, for a particular User, then we have 2 different ways of doing it.

In the 1<sup>st</sup> instance, we can Remove the User Code, or All Access for the User without Removing the User Code, in a specific Data Mart.

This will also get rid of the Business Profiles, in addition to the Menu Profiles.

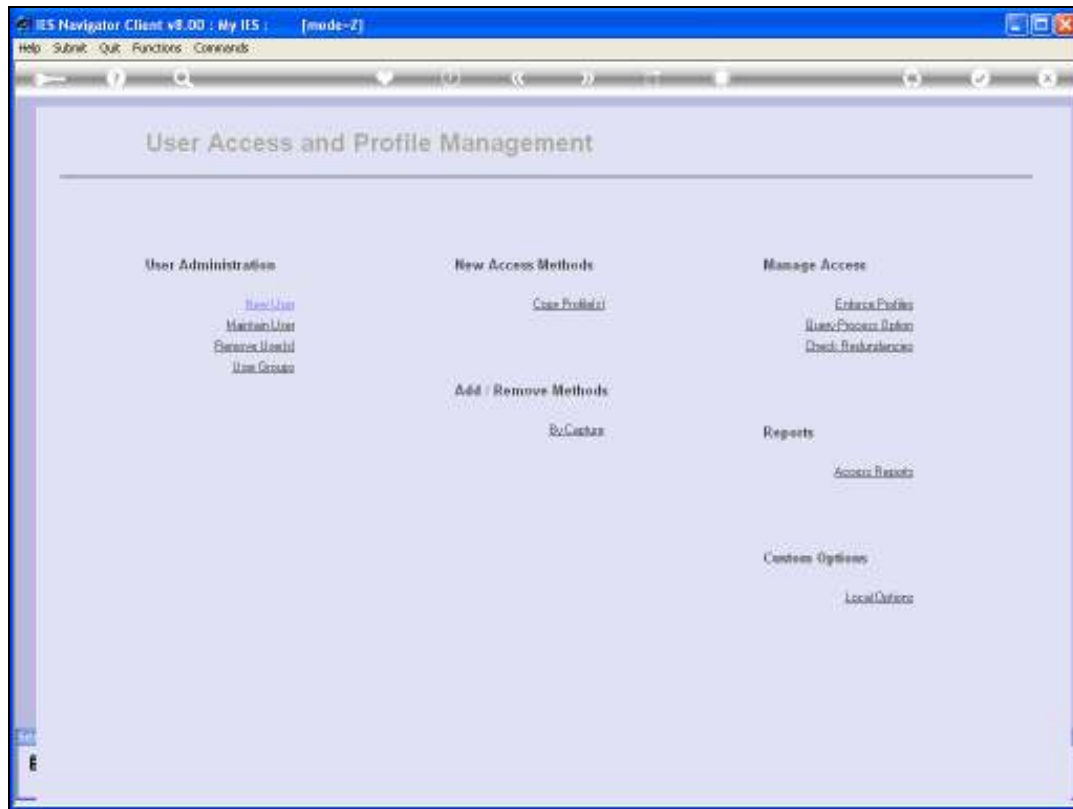
Then we can also selectively go to any Business Profile for a specific User and simply delete that Business Profile.



The slide features a vertical decorative bar on the left side, split into a yellow top half and a blue bottom half. A large, dark metal key is positioned vertically within the yellow section. The main content area has a blue gradient background. The title 'Reports on Business Profiles' is written in a yellow serif font. Below the title, a single bullet point in white text reads: '◆ Use the Access Reports to list the existing privileges'.

Reports on Business Profiles

When we need to know who has got Access to what, or who has got which Privileges, in terms of the Business Profiles, then of course we can use these specific Business Profiles Report Options that we find among the Access Reports.



Slide 6

This Tutorial is very much an overview of the various points on how we manage Business Profiles.

We are not going to look in detail at any of these Actions, because they are all dealt with separately and in detail in specific Tutorials.

But now we start looking at how we establish Business Profiles for a User.

IES Navigator Client vs. 0.00 : My IES : [mode-Z]

Help Submit Quit Functions Commands

### Create a new User Logon

Step 1: Choose a short but unique User Code - avoid using spaces.

New User Id

Step 2: What is the User's Name?

New User Name

Address As

Include Corporate Notebooks

Step 3: List the DataMarts that this User may enter - always include "InRoads!"

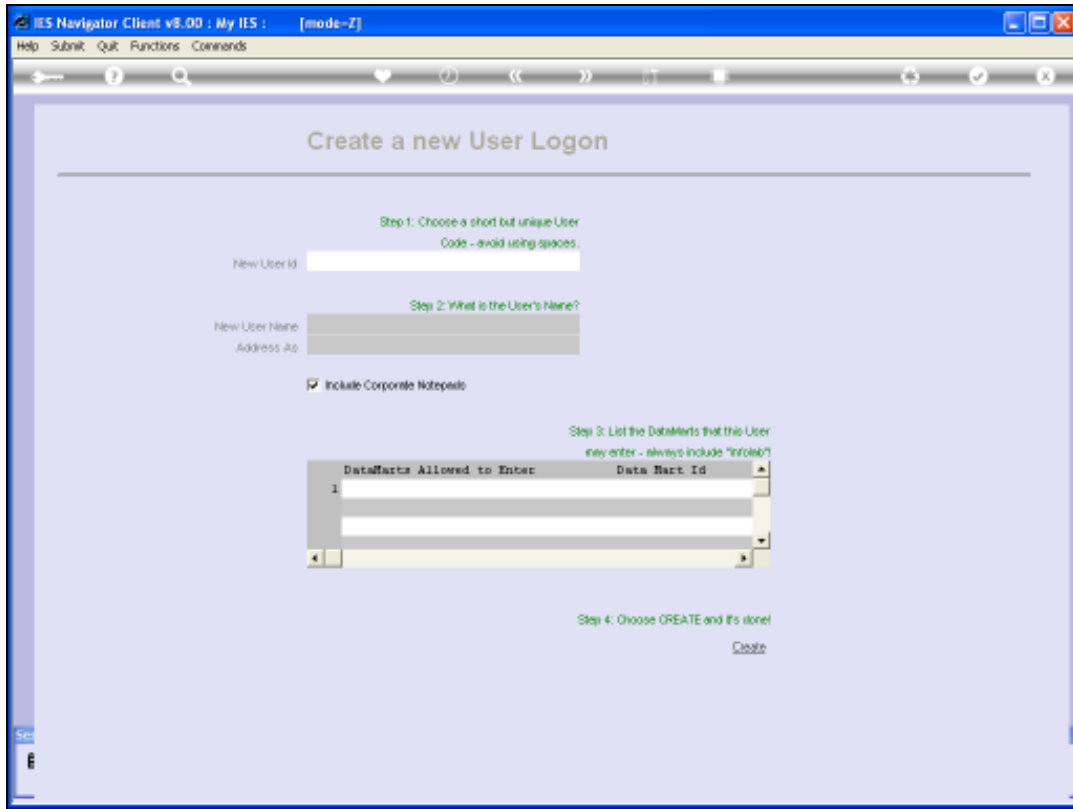
DataMarts Allowed to Enter	Data Mart Id
1	
<input type="text"/>	
<input type="text"/>	

Step 4: Choose CREATE and it's done!

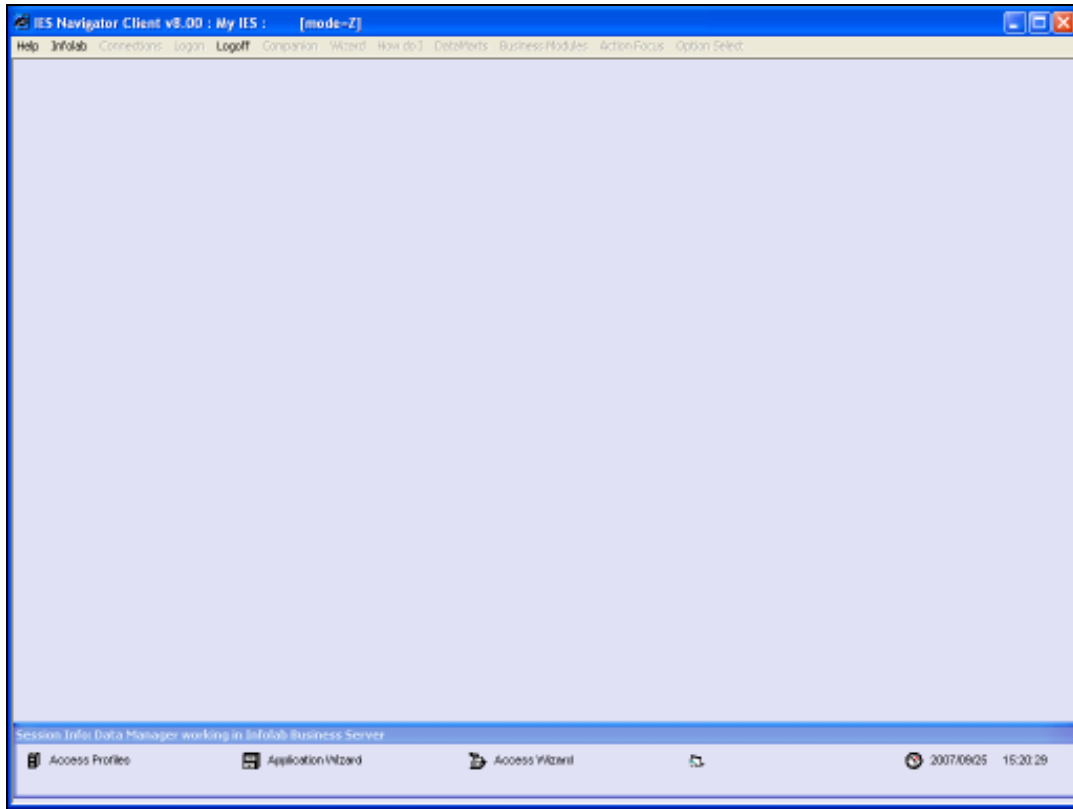
Slide 7

The 1<sup>st</sup> method that we mentioned was by Mirroring Access. So when we create a New User, or when we Save the Record, the System will prompt us whether we want to Mirror Access.

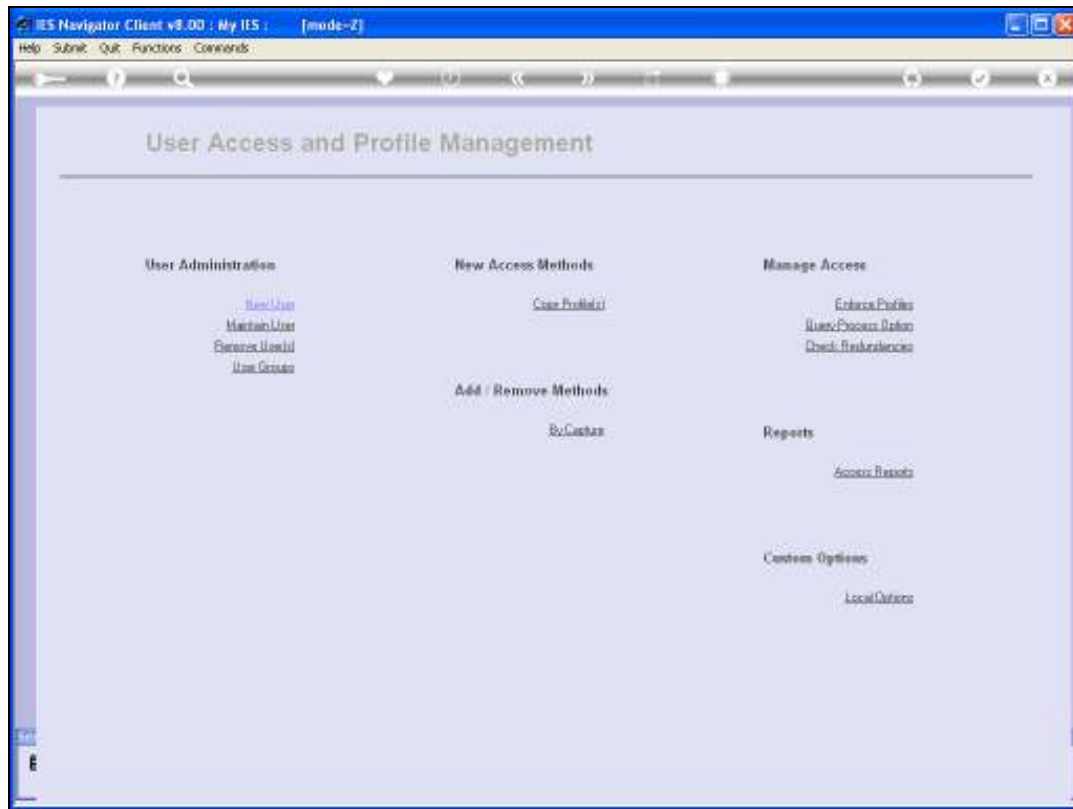
If we Mirror Access and choose a User to Mirror from, then the New User will inherit the Business Profiles that the Mirrored User currently has.



Slide 8



Slide 9



Slide 10

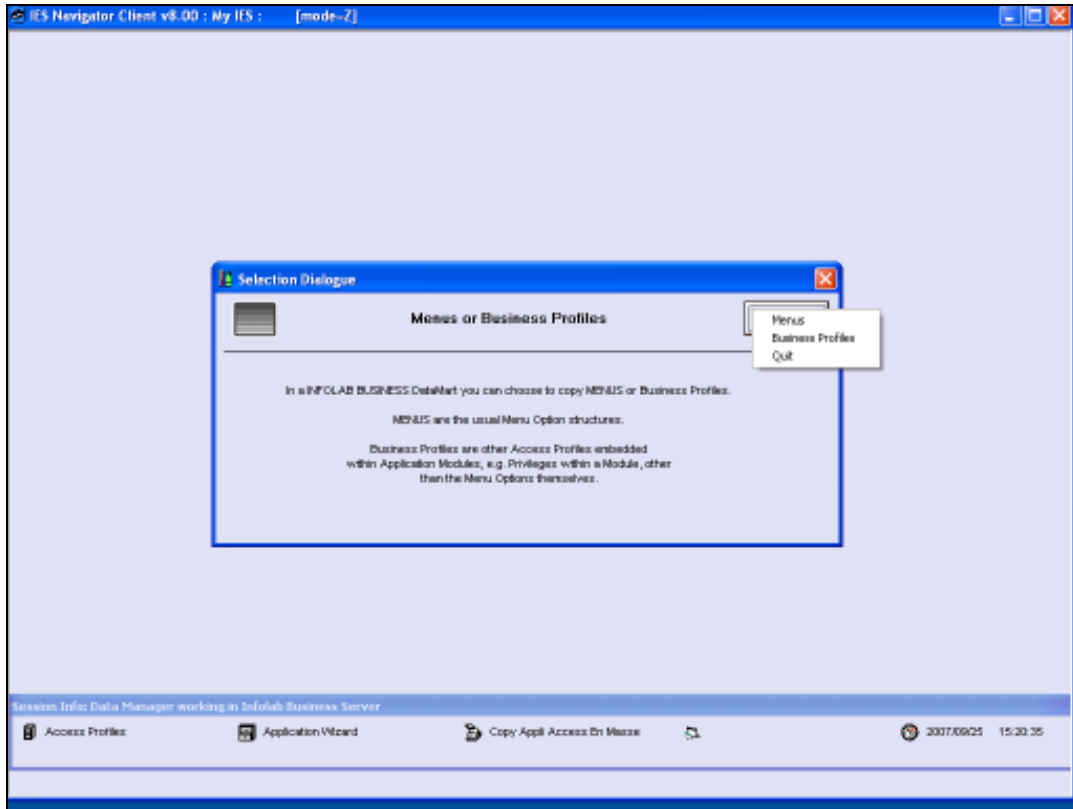
We can also establish Business Profiles for a User quite easily by Copying Business Profiles selectively from one User to this User and we can also do it from multiple Users, one after the other.



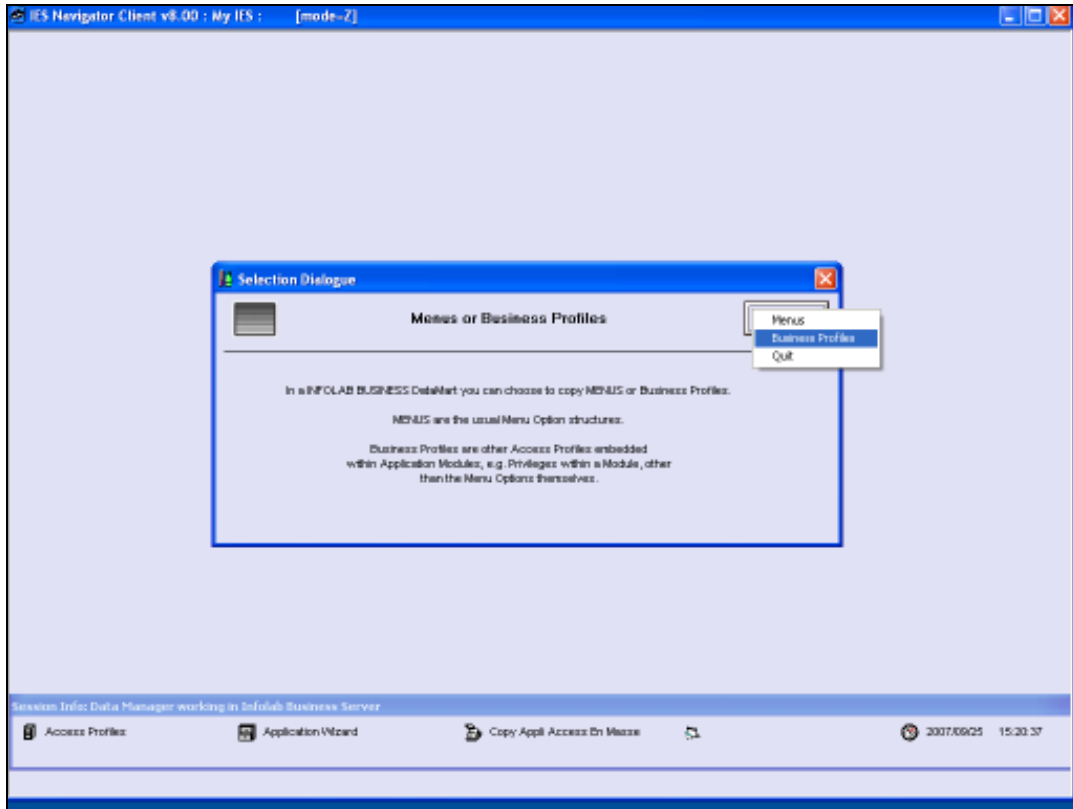
Slide 11



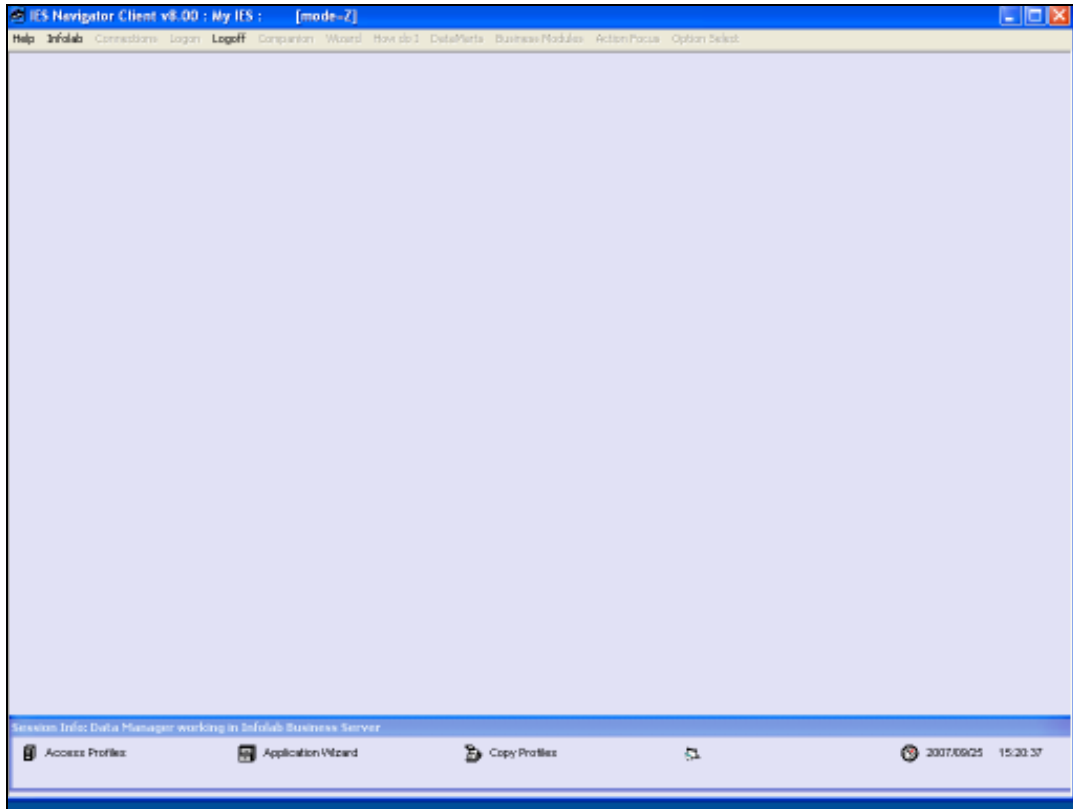
Slide 12



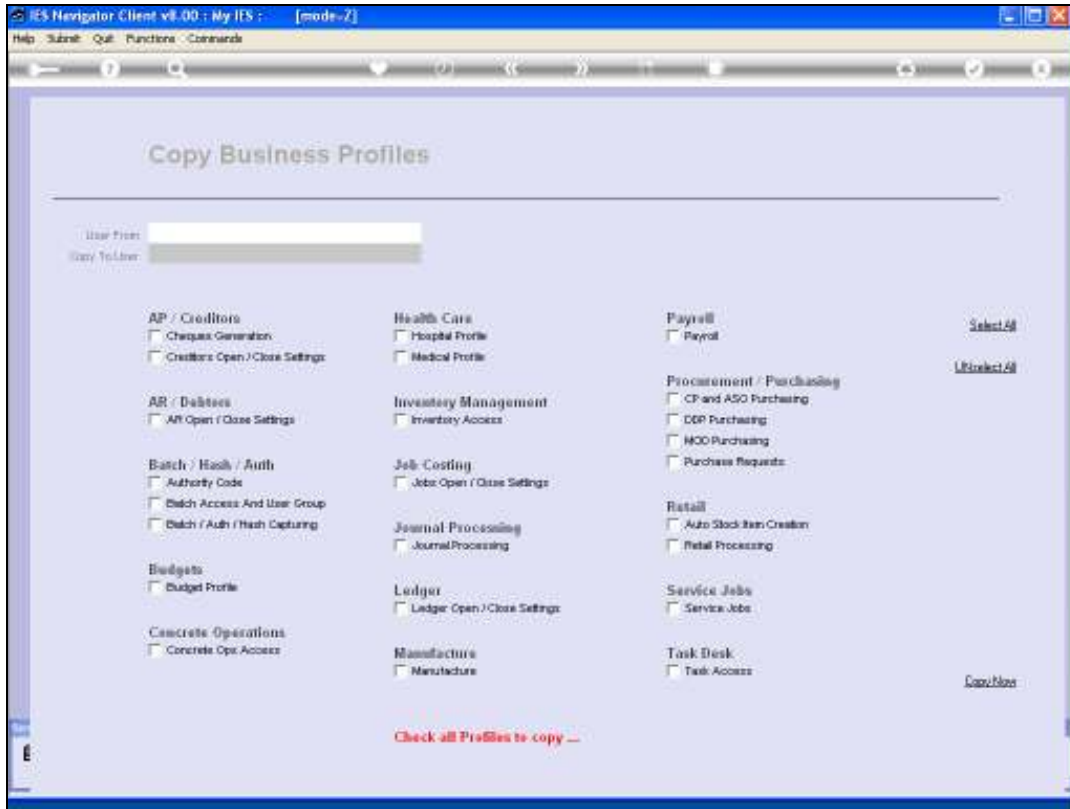
Slide 13



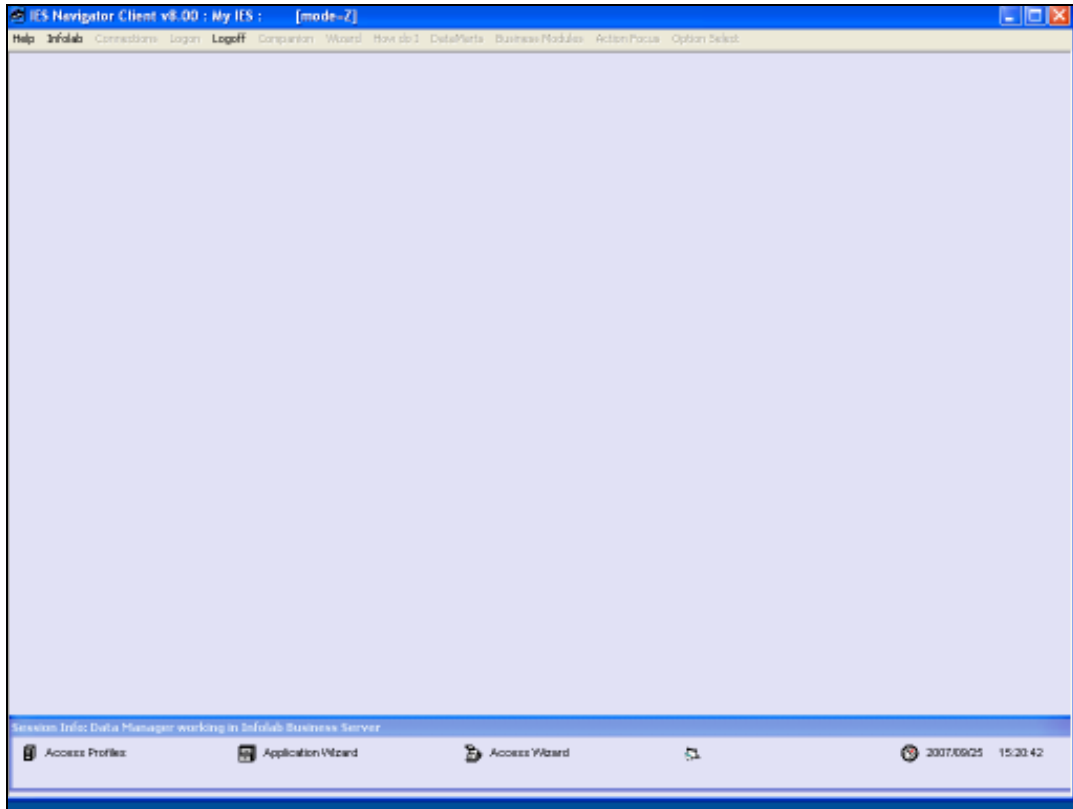
Slide 14



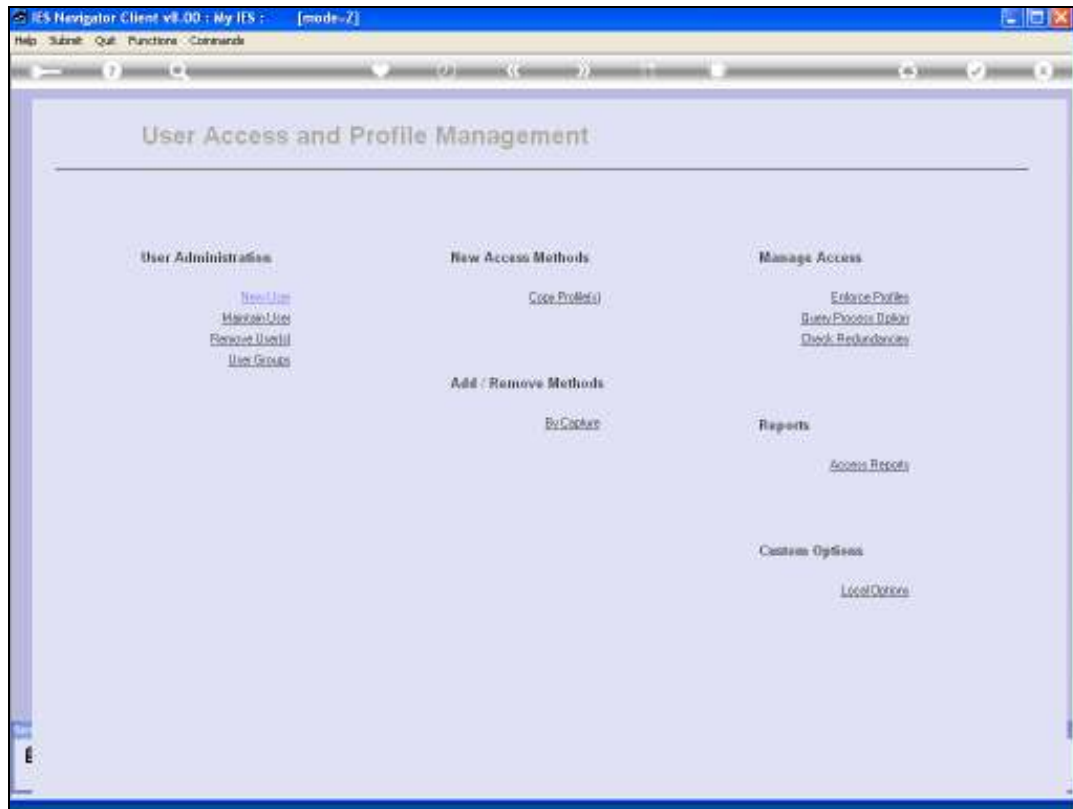
Slide 15



Slide 16



Slide 17

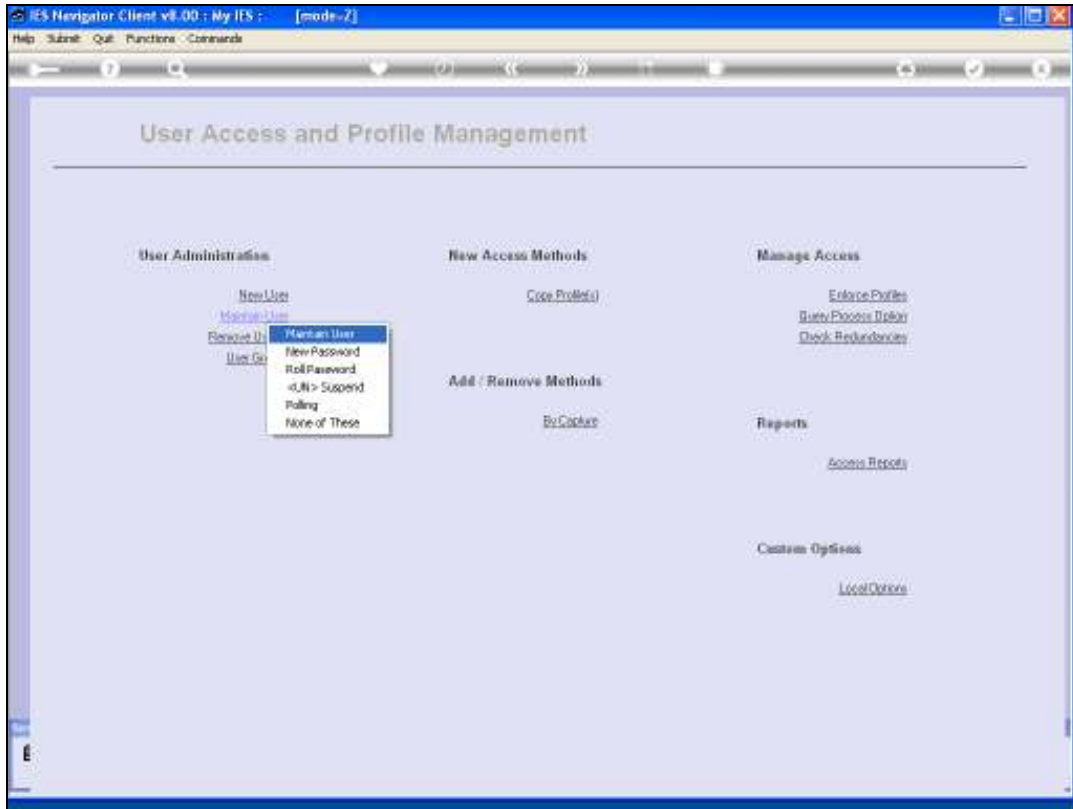


Slide 18

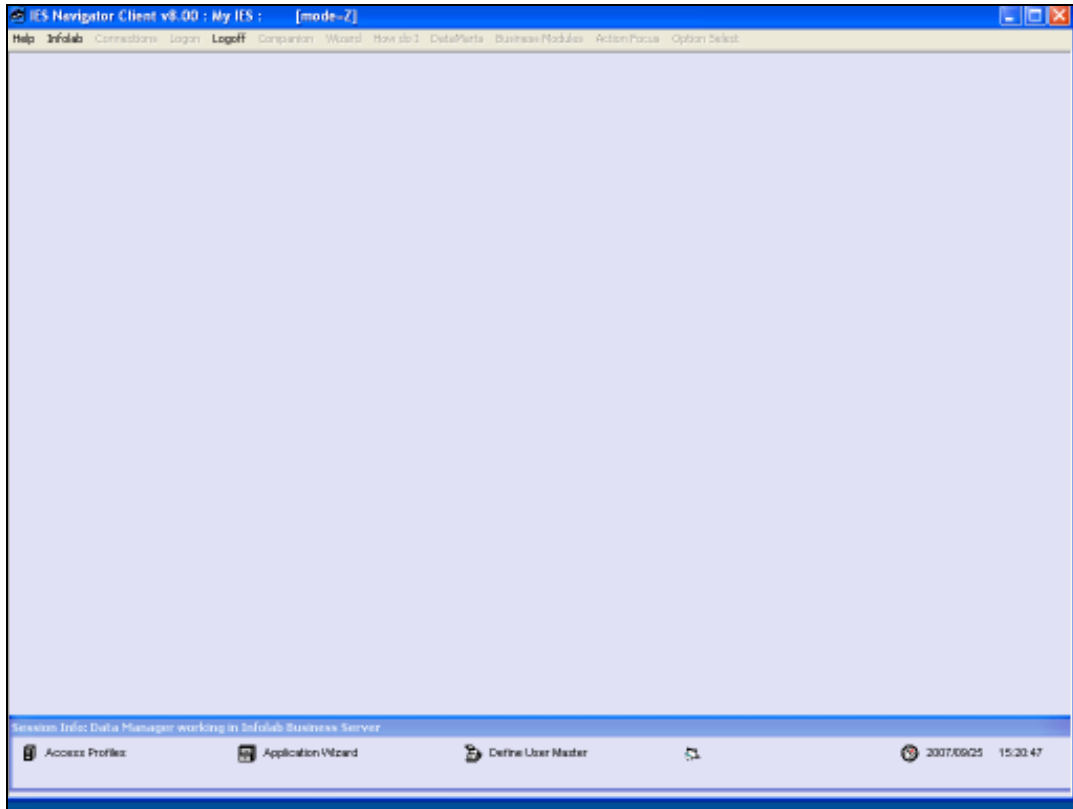
We can also Create, Edit, or Maintain specific Business Profiles for the User from the User's Master Record.



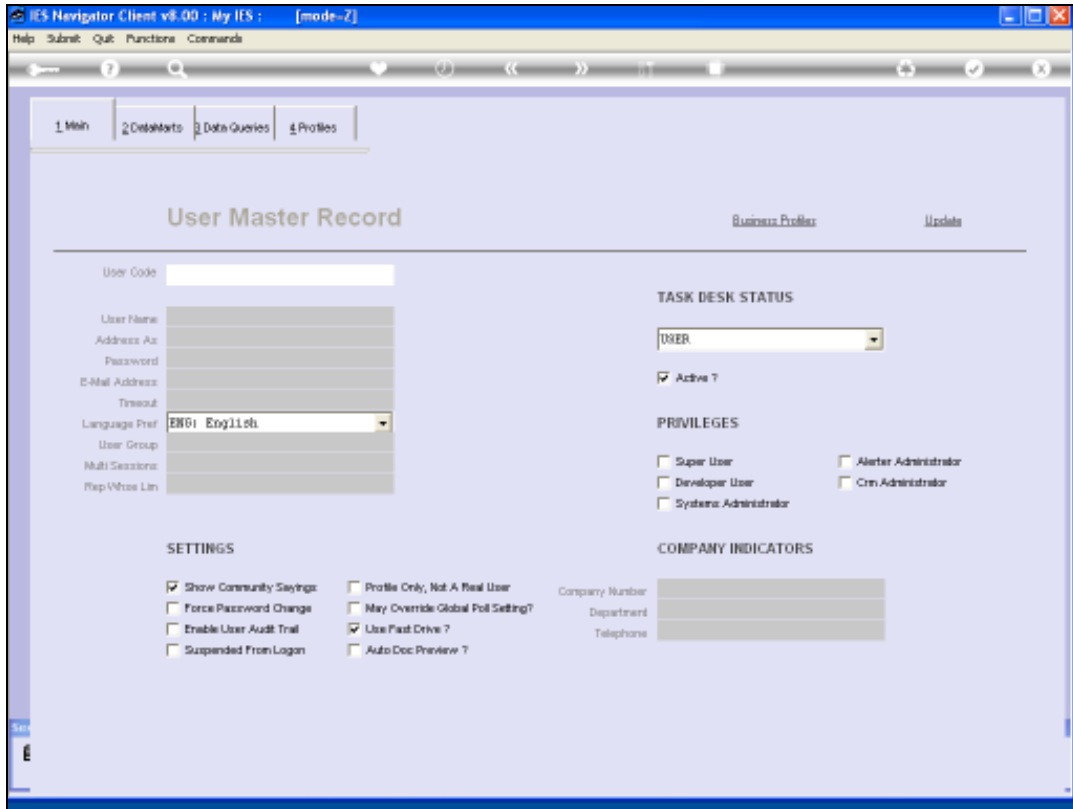
Slide 19



Slide 20



Slide 21



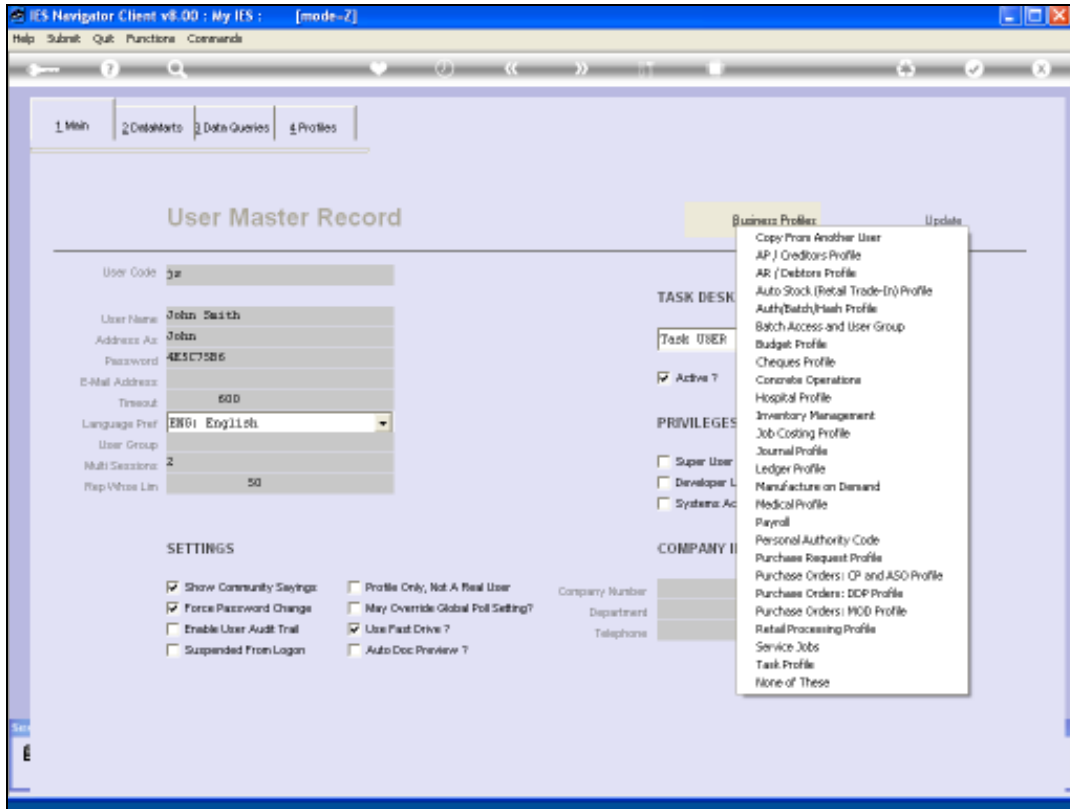
Slide 22

The screenshot shows a web browser window titled "IES Navigator Client v8.00 : My IES : [mode=Z]". The browser's address bar and navigation buttons are visible. Below the browser, there are four tabs: "1 Main", "2 DataMats", "3 Data Queries", and "4 Profiles". The main content area is titled "User Master Record" and includes a "Business Profile" and "Update" link. The form contains several sections: "User Code" (input field with "32"), "User Name" (input field), "Address Aa" (input field), "Password" (input field), "E-Mail Address" (input field), "Timeout" (input field), "Language Pref" (dropdown menu with "ENG: English"), "User Group" (input field), "Multi Sessions" (input field), and "Rep/VNew Lin" (input field). The "TASK DESK STATUS" section has a dropdown menu with "USER" selected and a checked "Active ?" checkbox. The "PRIVILEGES" section includes checkboxes for "Super User", "Developer User", "Systems Administrator", "Alerts Administrator", and "Crm Administrator". The "SETTINGS" section has checkboxes for "Show Community Sayings", "Force Password Change", "Enable User Audit Trail", "Suspended From Login", "Profile Only, Not A Real User", "May Override Global Poll Setting?", "Use Past Drive ?", and "Auto Doc Preview ?". The "COMPANY INDICATORS" section has input fields for "Company Number", "Department", and "Telephone".

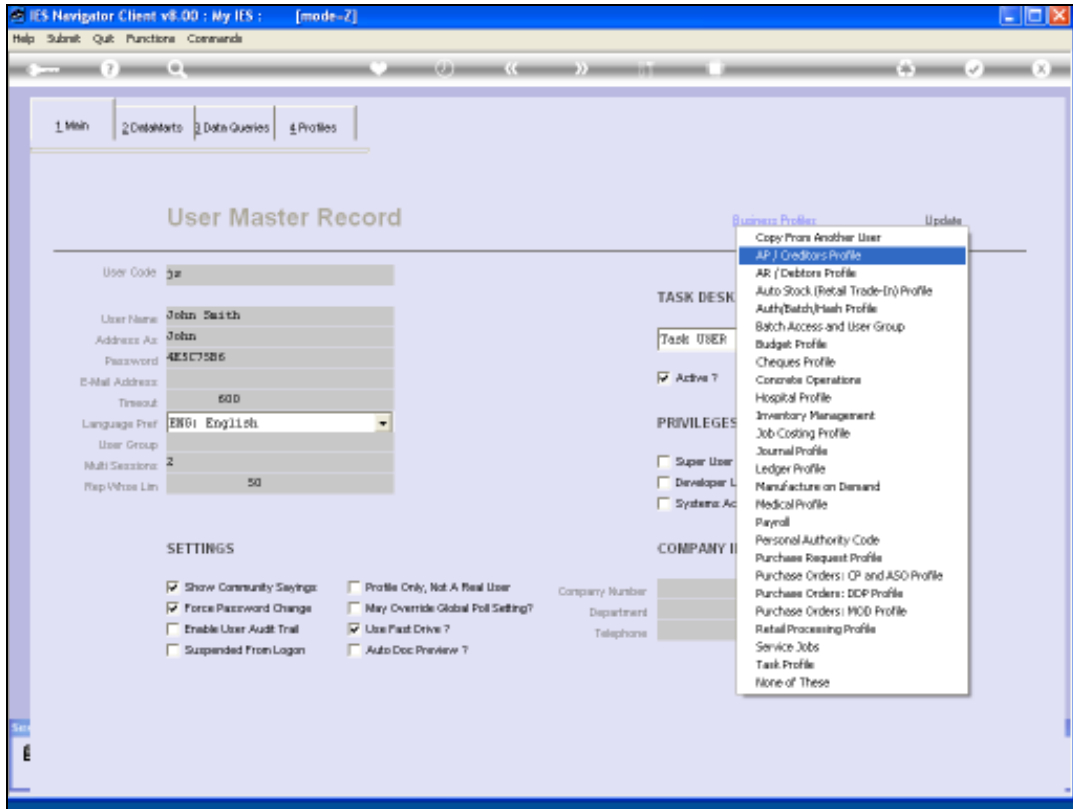
Slide 23

The screenshot shows a web browser window titled "IES Navigator Client v8.00 : My IES : [mode=Z]". The browser's address bar and navigation buttons are visible. Below the browser, there are tabs for "1 Main", "2 DataMats", "3 Data Queries", and "4 Profiles". The main content area is titled "User Master Record" and includes a "Business Profile" and "Update" link. The form contains several sections: "User Code" (input field with "32"), "User Name" (input field), "Address Aa" (input field), "Password" (input field), "E-Mail Address" (input field), "Timeout" (input field), "Language Pref" (dropdown menu with "ENG: English"), "User Group" (input field), "Multi Sessions" (input field), and "Rep/VNew Lin" (input field). The "TASK DESK STATUS" section has a dropdown menu with "USER" selected and a checked "Active ?" checkbox. The "PRIVILEGES" section includes checkboxes for "Super User", "Developer User", "Systems Administrator", "Alerts Administrator", and "Crm Administrator". The "SETTINGS" section has checkboxes for "Show Community Sayings", "Force Password Change", "Enable User Audit Trail", "Suspended From Login", "Profile Only, Not A Real User", "May Override Global Poll Setting?", "Use Fast Drive ?", and "Auto Doc Preview ?". The "COMPANY INDICATORS" section has input fields for "Company Number", "Department", and "Telephone".

Slide 24



Slide 25



Slide 26

IES Navigator Client v8.00 : My IES : [mode=Z]

Help Submit Quit Functions Commands

AP Payables / Creditors Profile Save

User Code: [text box]

Username: John Smith [text box]

May Open Accounts: [dropdown menu]

May Close Accounts: [dropdown menu]

May Perform Matching ?

May Perform Match Re-Build ?

Session Info: Data Manager working in Infobase Business Server

Access Profiles Application Wizard User Controls: Creditors CTUCONTROL 2007/09/25 15:20:58

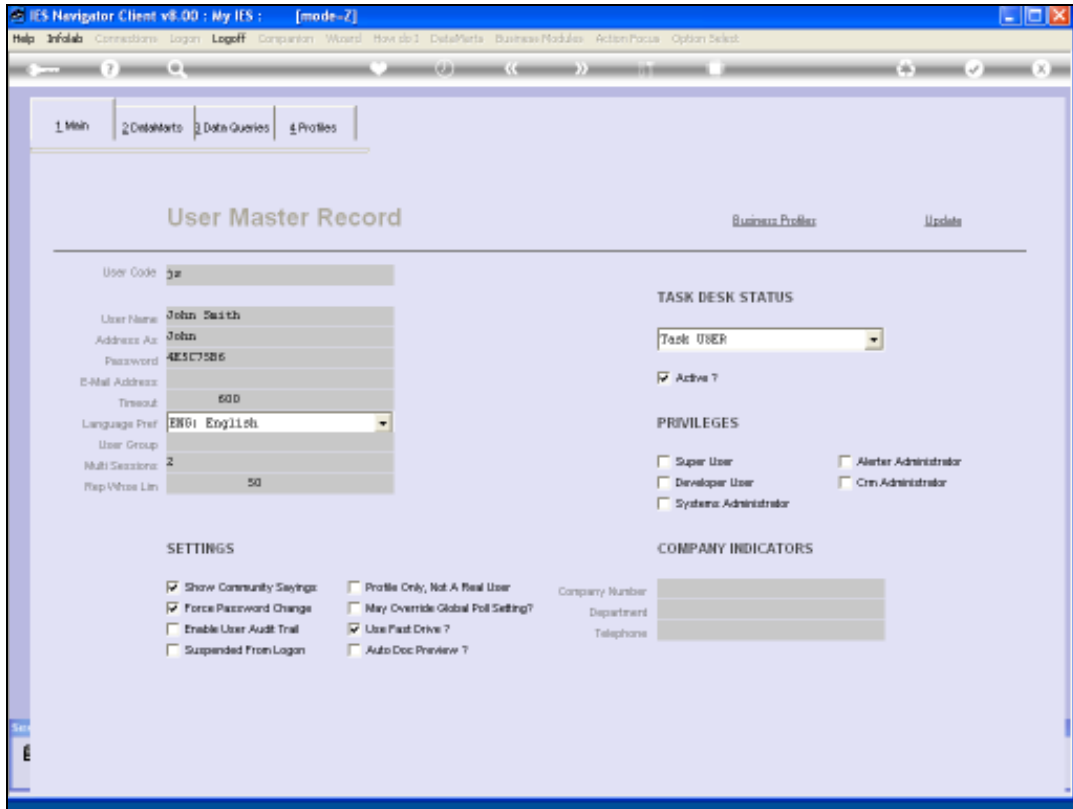
Slide 27

So, by choosing a specific Business Profile type, from the list, from the User's Master record, we can either Establish or Maintain, or Change, or even Delete that particular Business Profile for this User.

The screenshot shows the IES Navigator Client v8.00 interface. The title bar reads "IES Navigator Client v8.00 : My IES : [mode=Z]". The menu bar includes: Help, Initials, Commission, Login, Logout, Comparison, Wizard, New Job, Data Profile, Business Profiles, Admin Profile, Option Select. The breadcrumb trail is: 1 Main | 2 Database | 3 Data Queries | 4 Profiles. The main content area is titled "User Master Record" and includes "Business Profile" and "Update" links. The form contains the following fields and sections:

- User Code:** 32
- User Name:** John Smith
- Address Aa:** John
- Password:** 4E5C75B6
- E-Mail Address:**
- Timeout:** 600
- Language Pref:** ENG1 Eng11.01
- User Group:**
- Multi Sessions:** 2
- Rep/VNew Lin:** 50
- TASK DESK STATUS:** Task: USER (dropdown),  Active ?
- PRIVILEGES:**
  - Super User
  - Developer User
  - Systems Administrator
  - Alerts Administrator
  - Cron Administrator
- SETTINGS:**
  - Show Community Settings
  - Force Password Change
  - Enable User Audit Trail
  - Suspended From Login
  - Profile Only, Not A Real User
  - May Override Global Poll Setting?
  - Use Fast Drive ?
  - Auto Doc Preview ?
- COMPANY INDICATORS:**
  - Company Number: [text box]
  - Department: [text box]
  - Telephone: [text box]

Slide 28



Slide 29

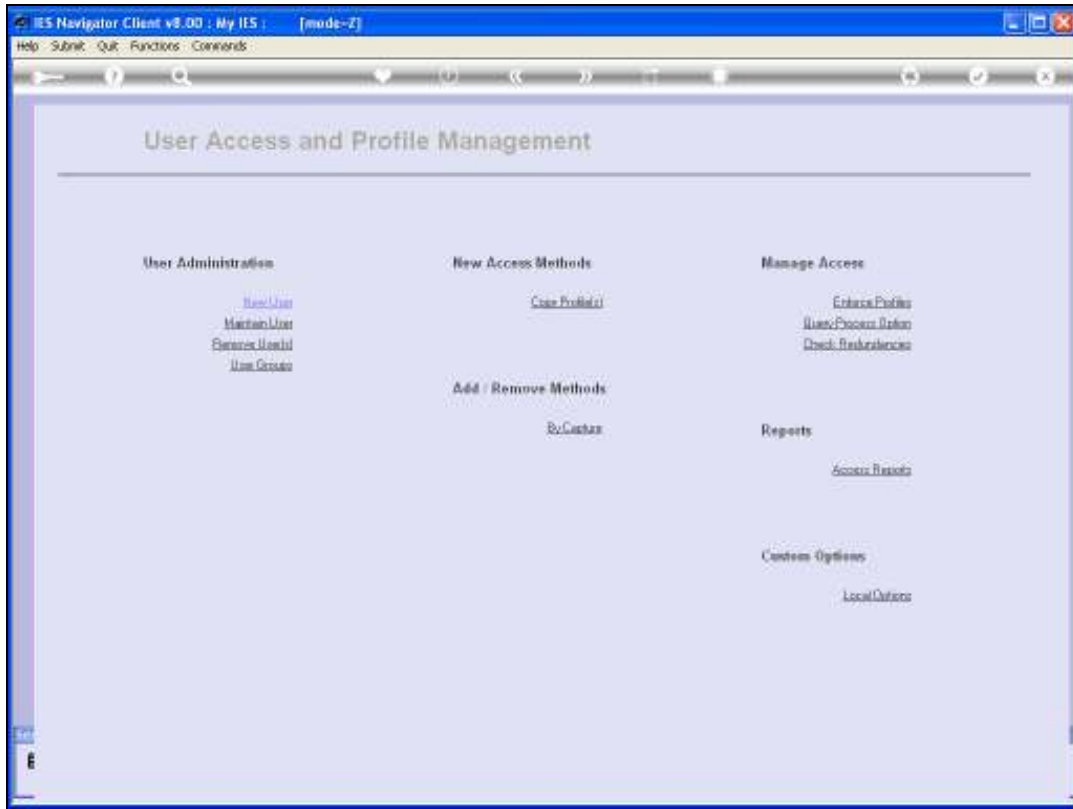


## How to remove Business Profiles

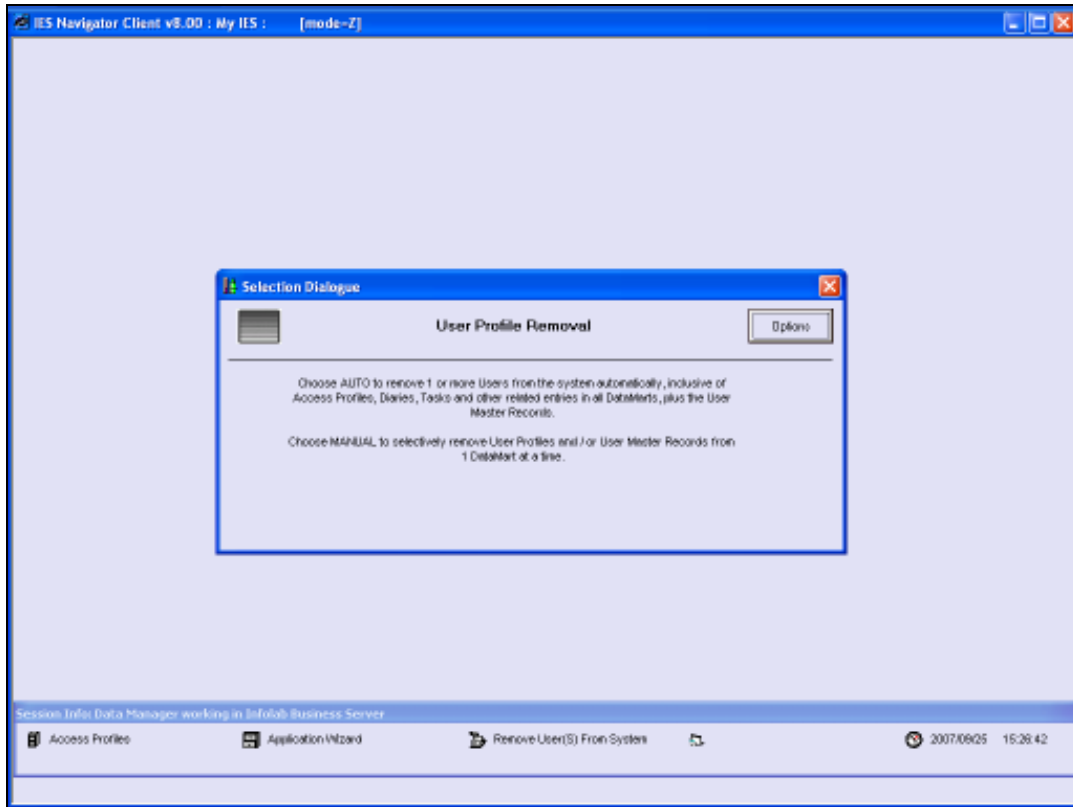
- ◆ By removing the User Code, or all access for the User in a Datamart
- ◆ By deleting a specific Business Profile

Copy of How to remove Business Profiles

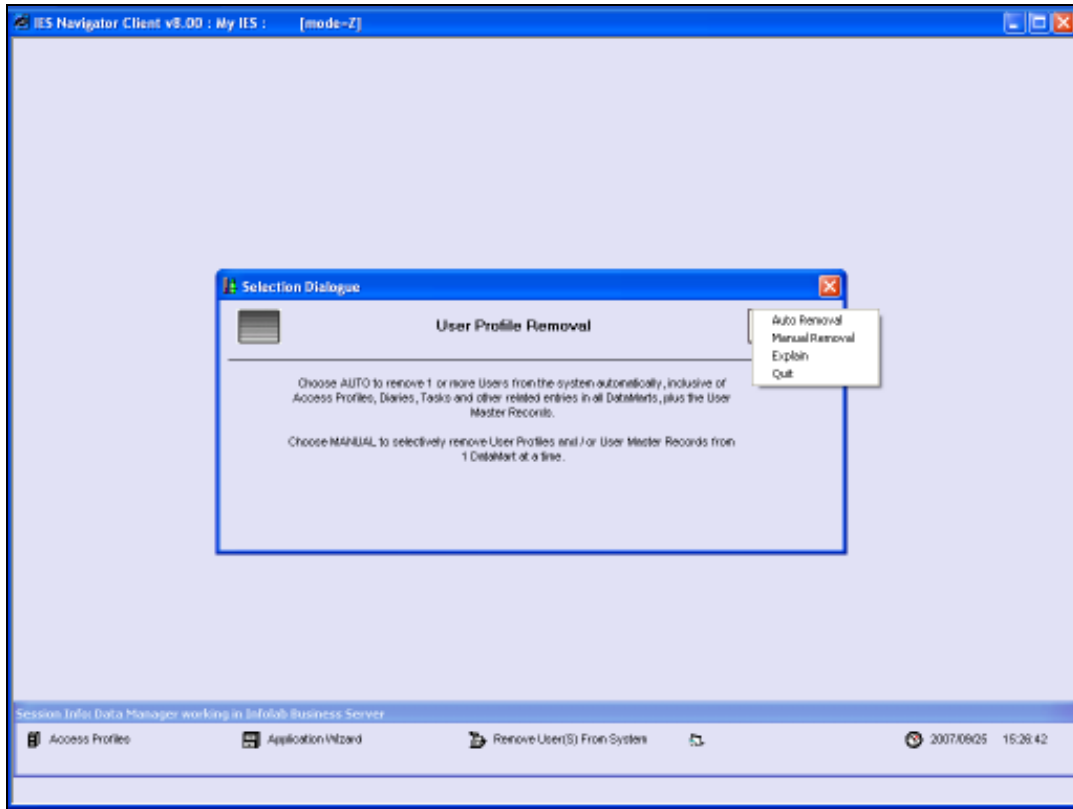
Next, we are going to look at how to Remove Business Profiles for a particular User.



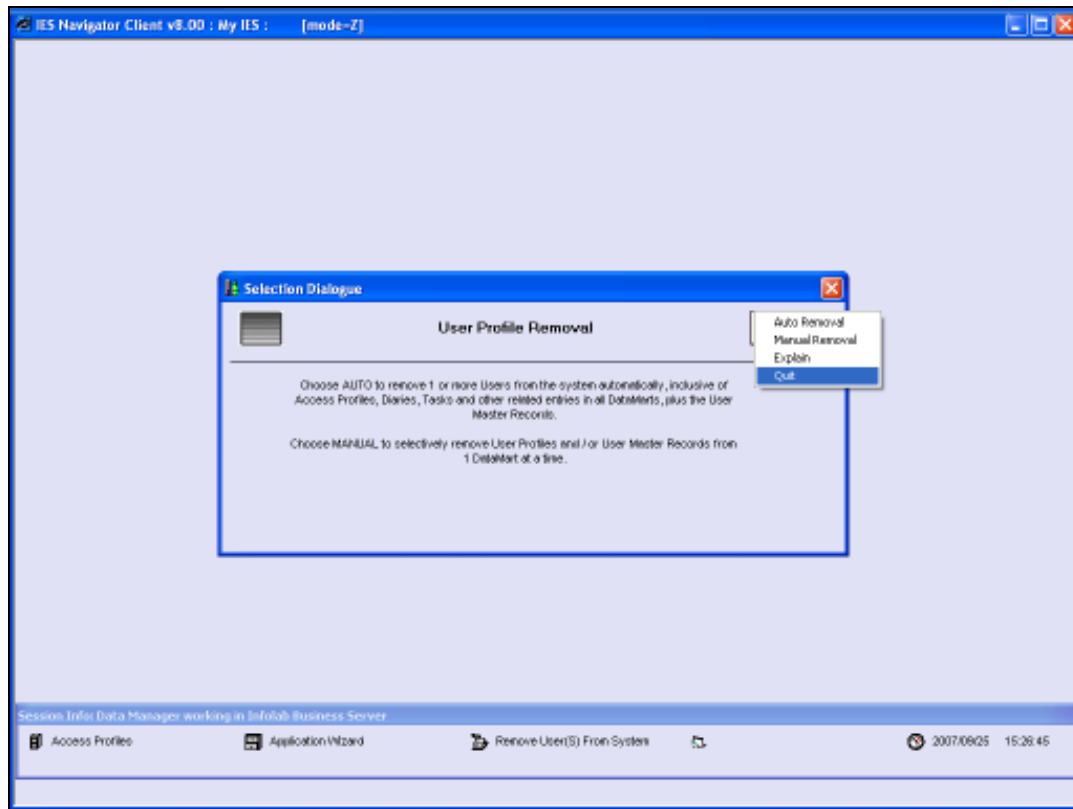
Slide 31



Slide 32



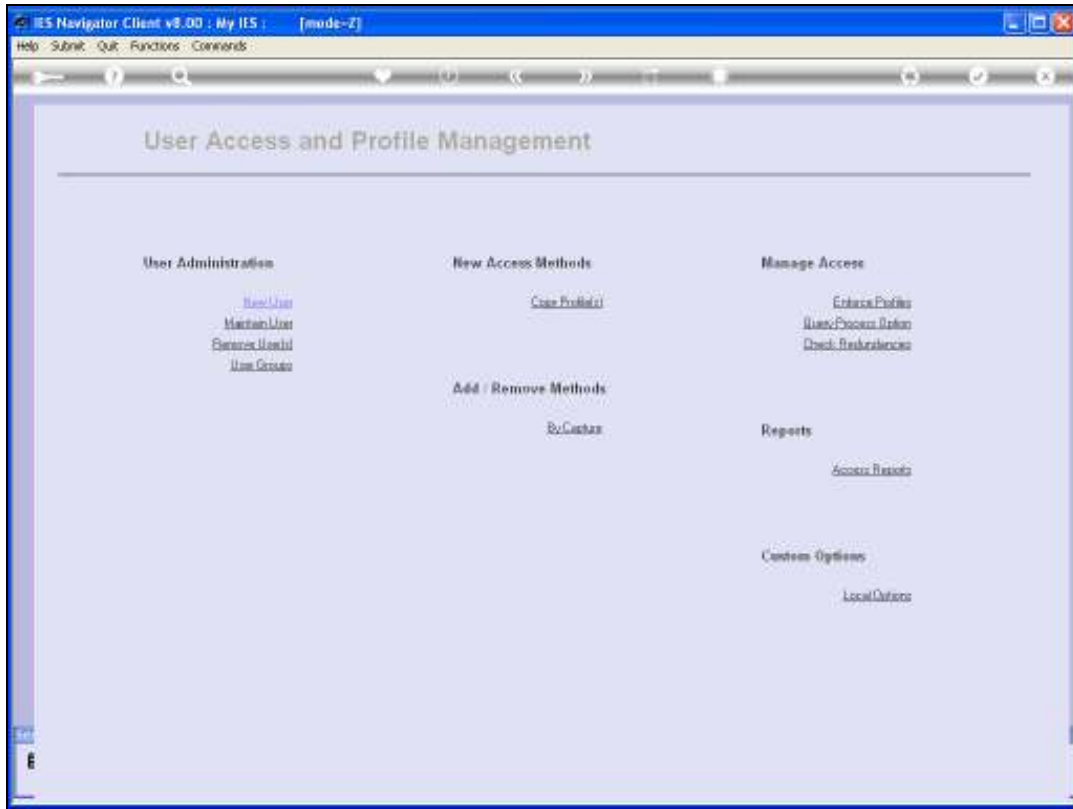
Slide 33



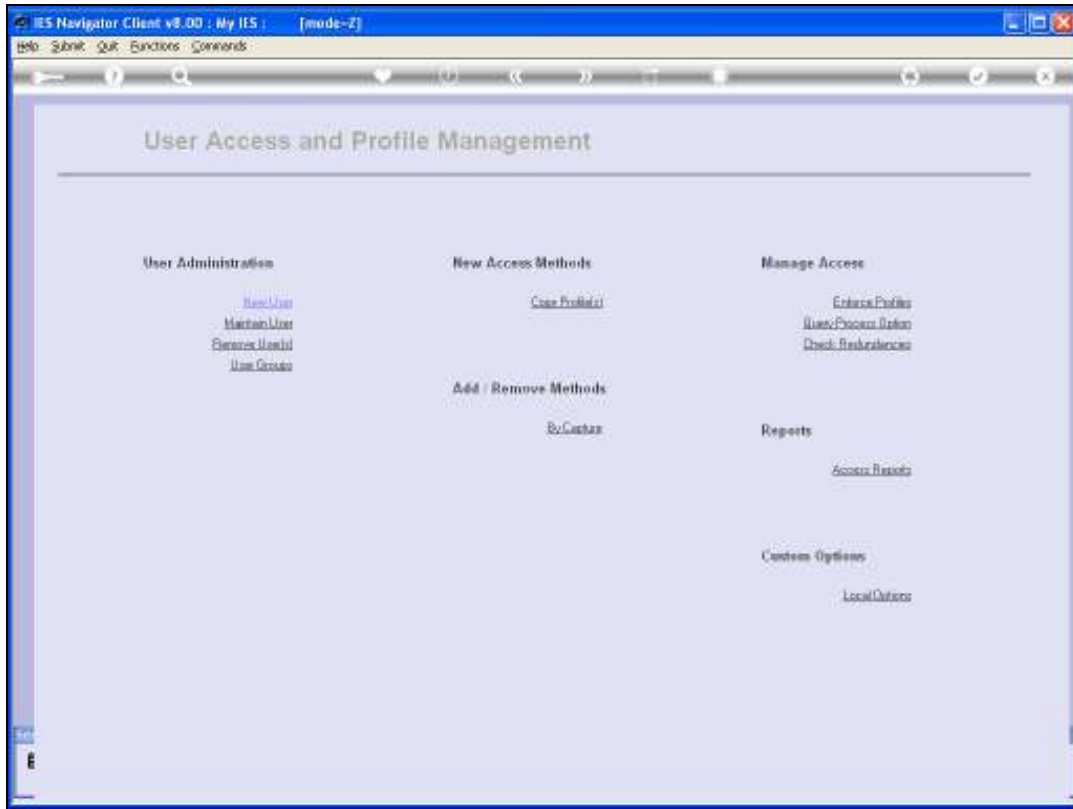
Slide 34

So if we want to Remove the User entirely from the System, we could choose the Auto Removal Method.

If we only want to Remove all the Access in this Data Mart, we can use the Manual Removal Method.



Slide 35



Slide 36

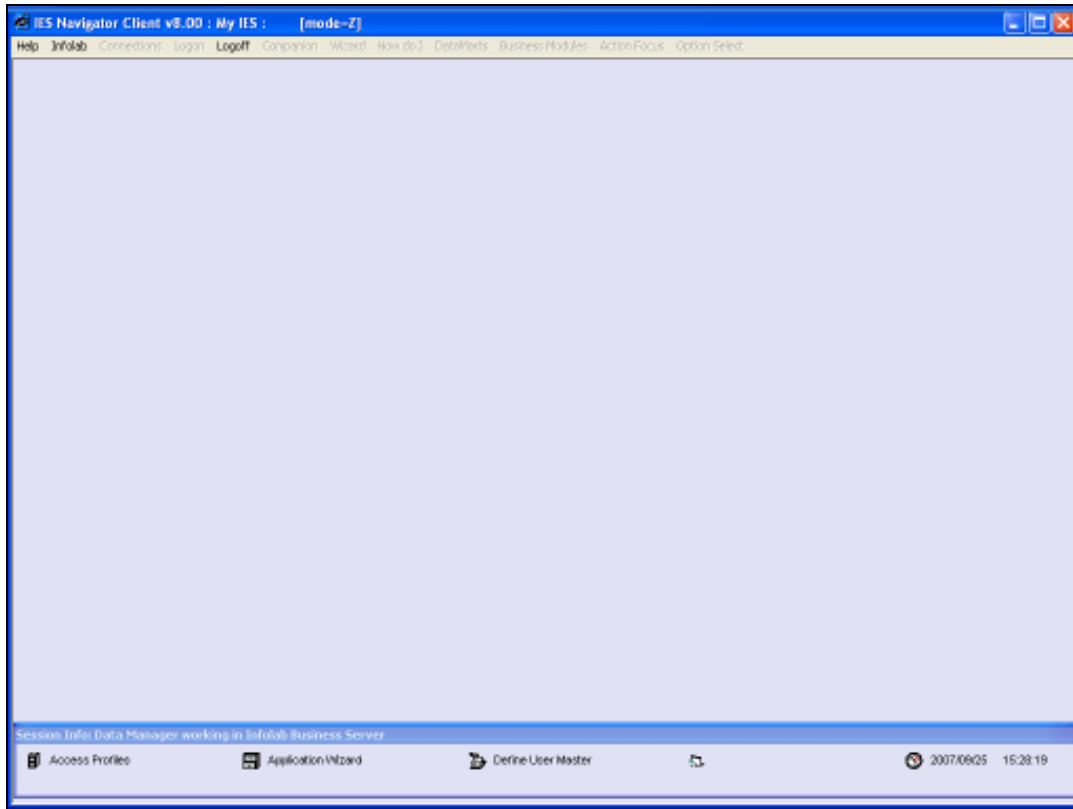


Slide 37

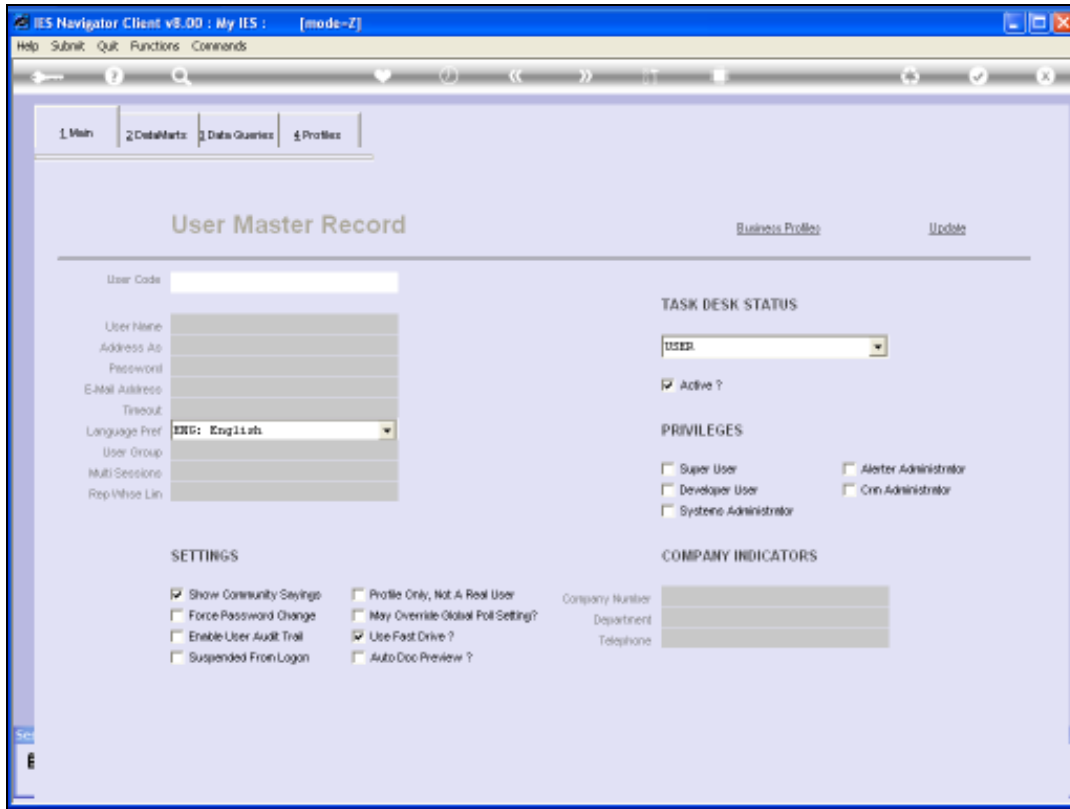


Slide 38

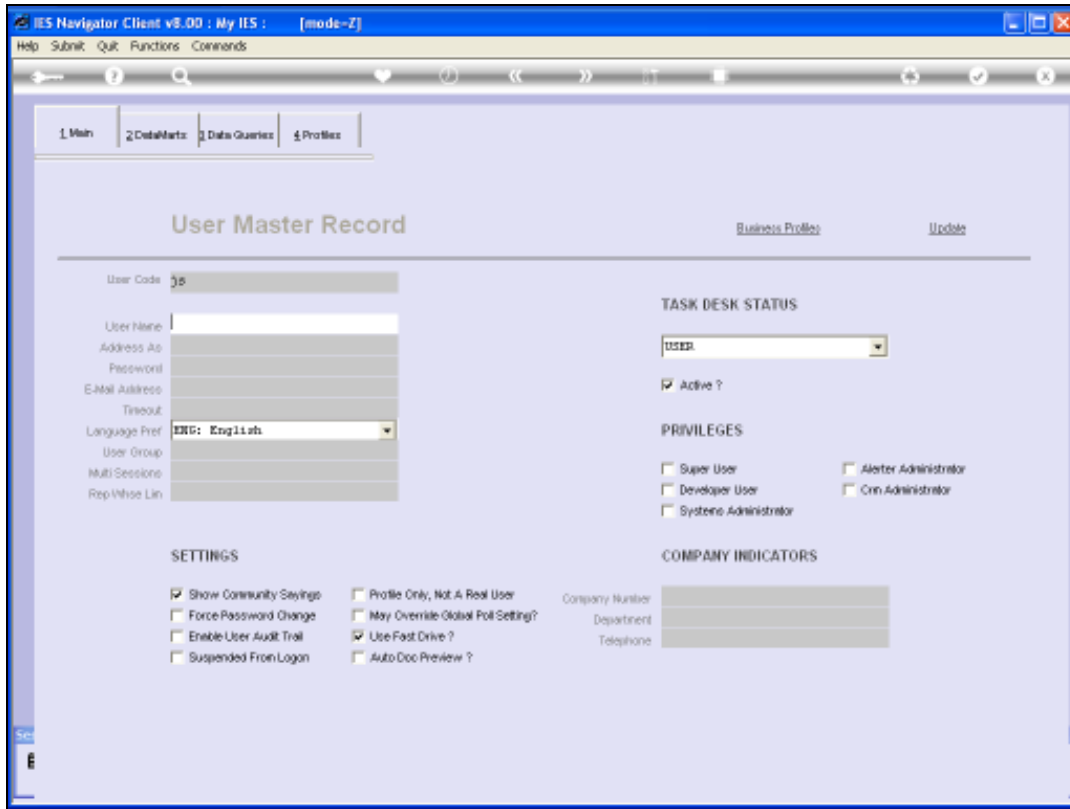
We can also Remove one or more Business Profiles for a particular User by Retrieving them from the User Master Record and executing the Delete Option.



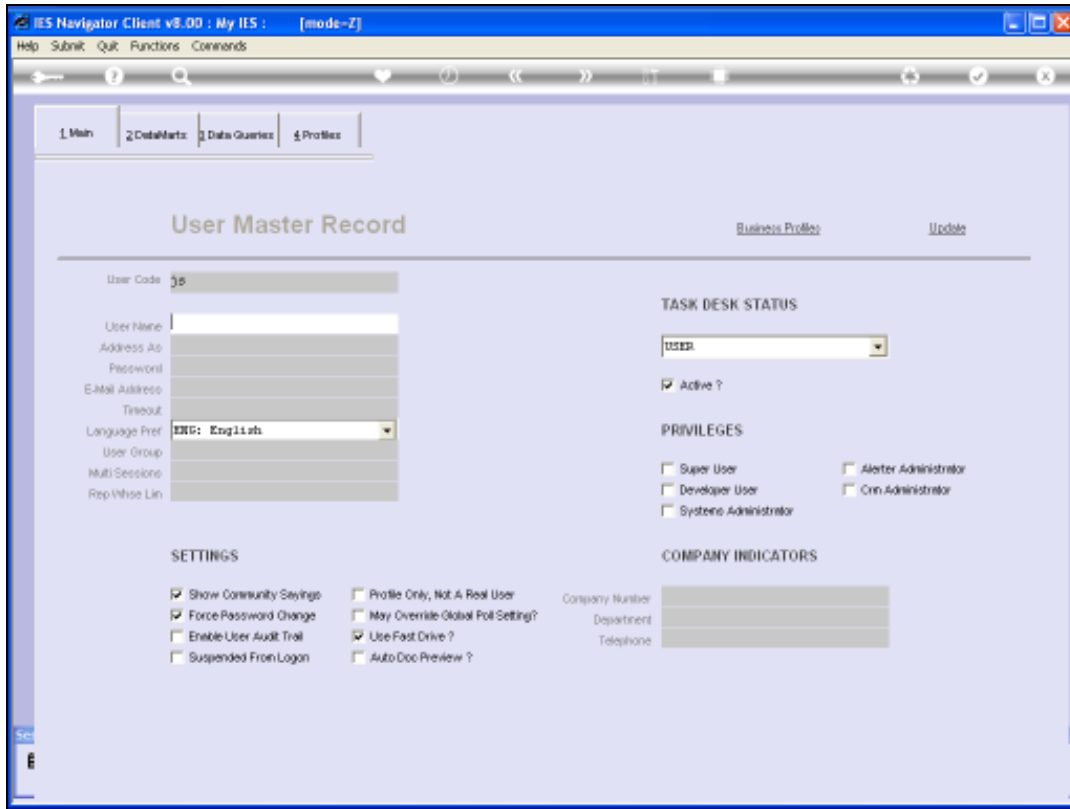
Slide 39



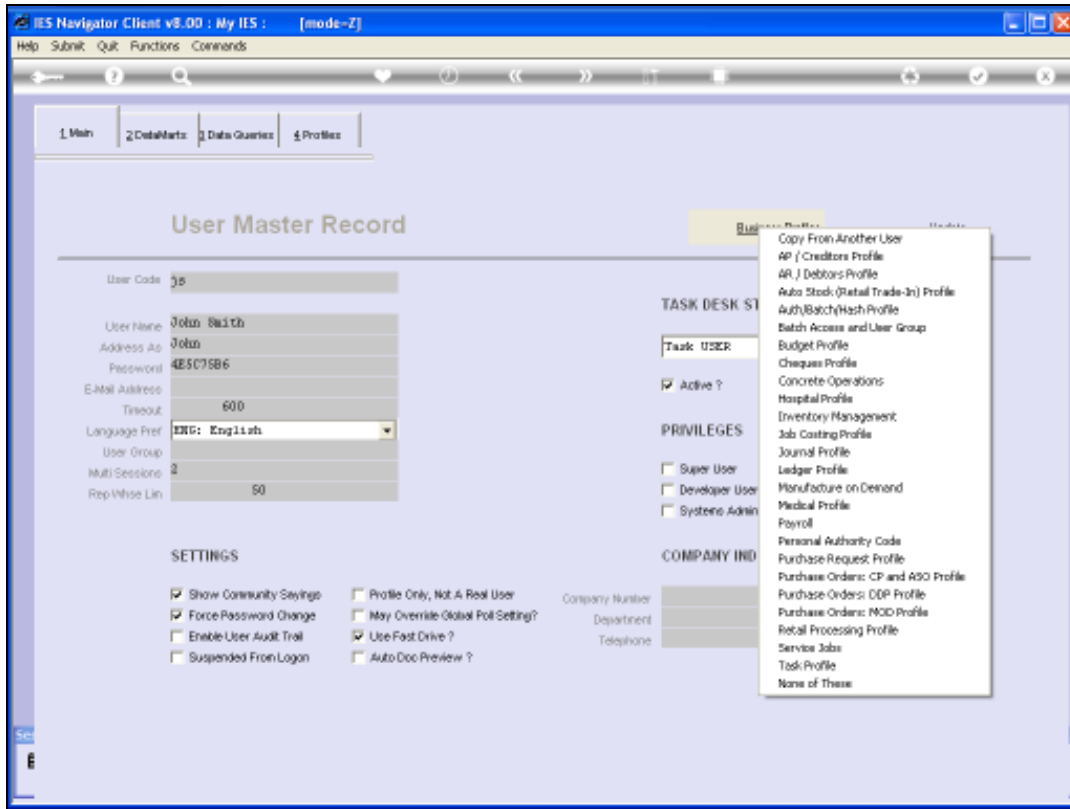
Slide 40



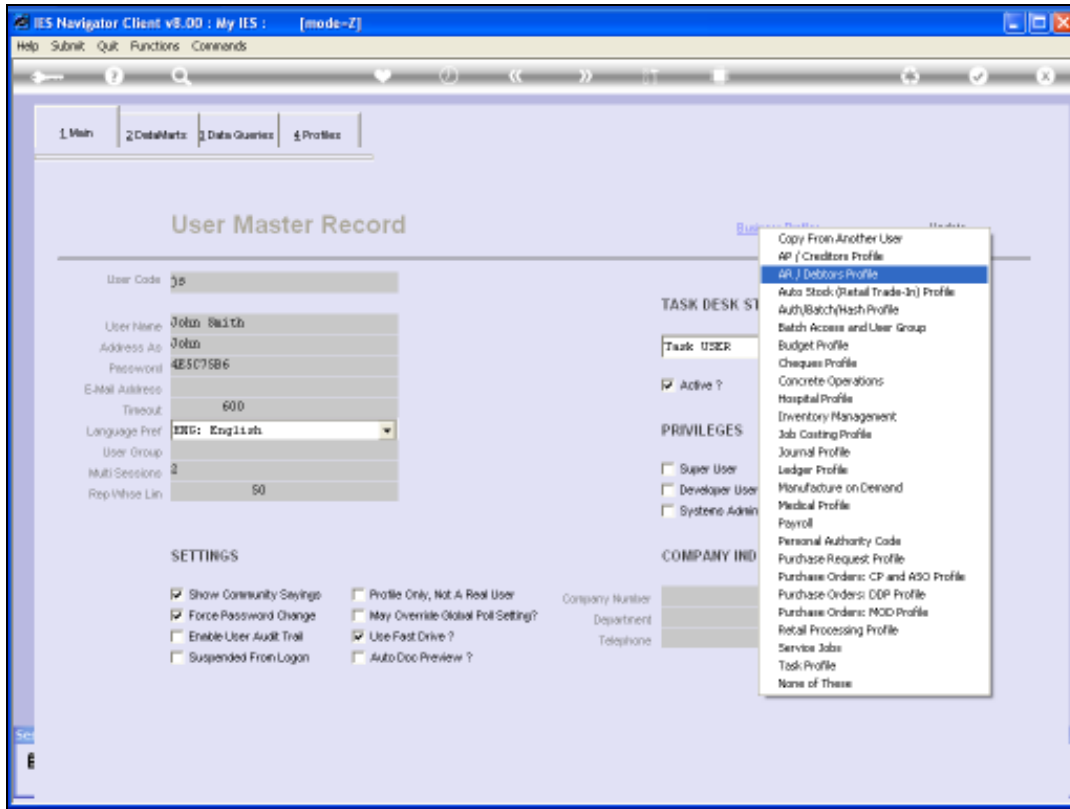
Slide 41



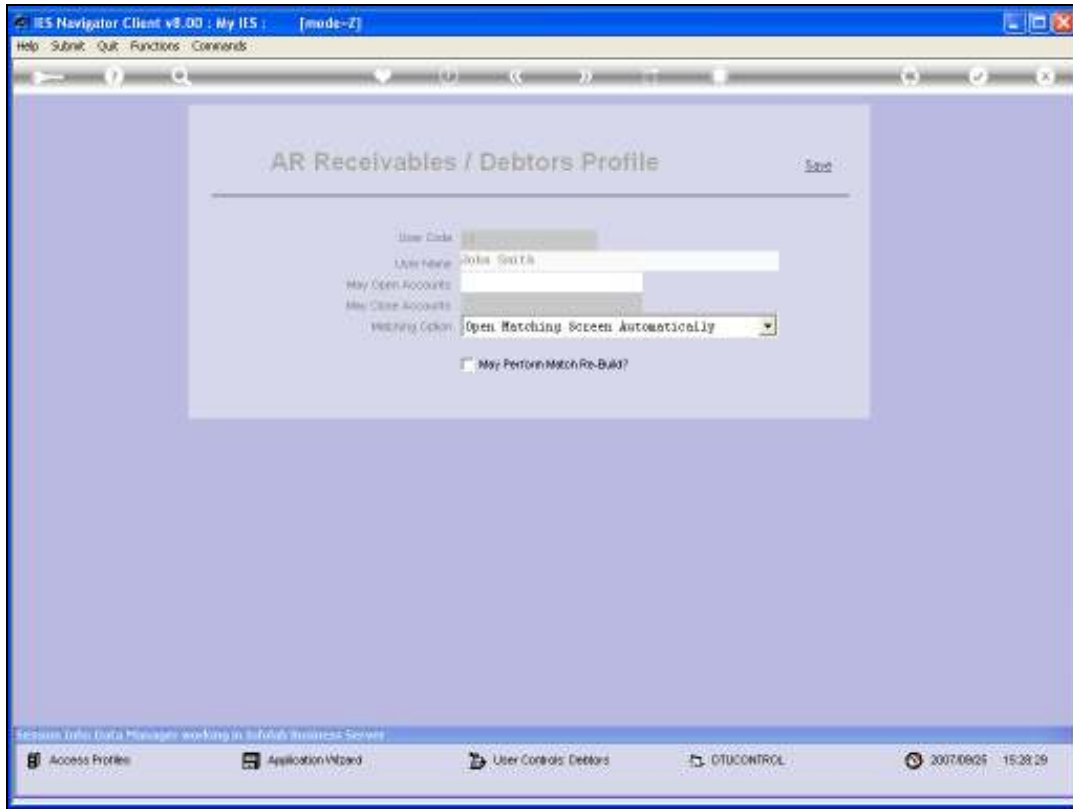
Slide 42



Slide 43

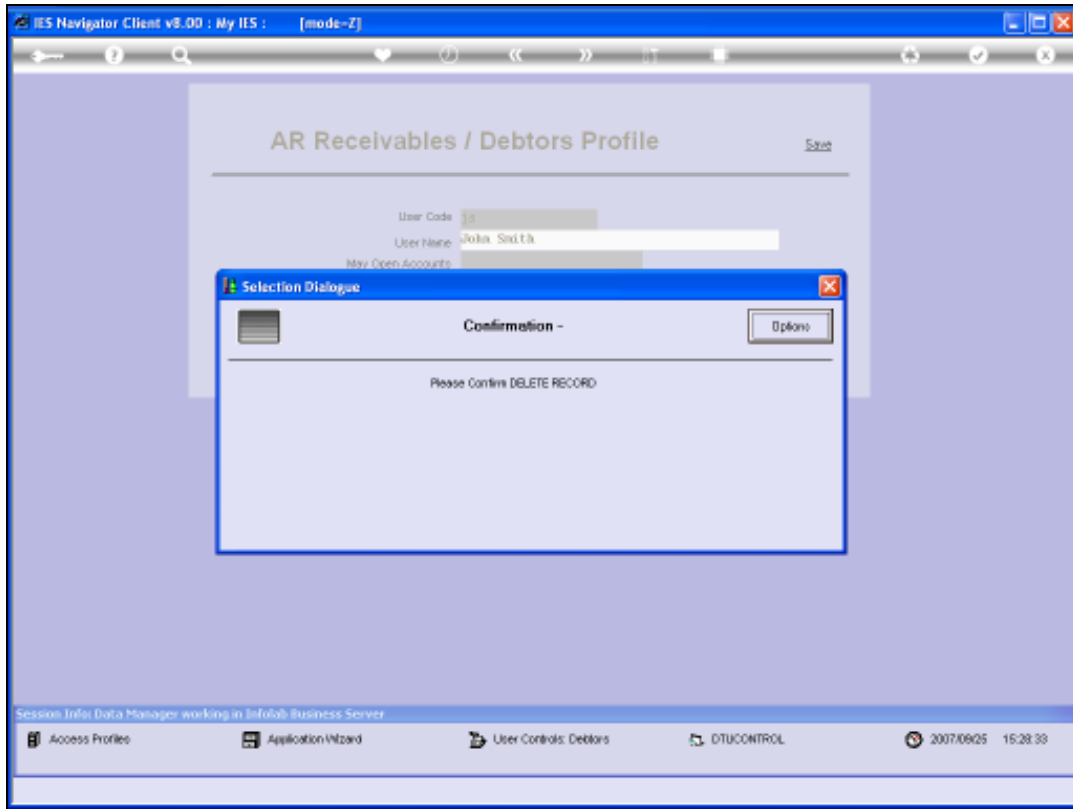


Slide 44

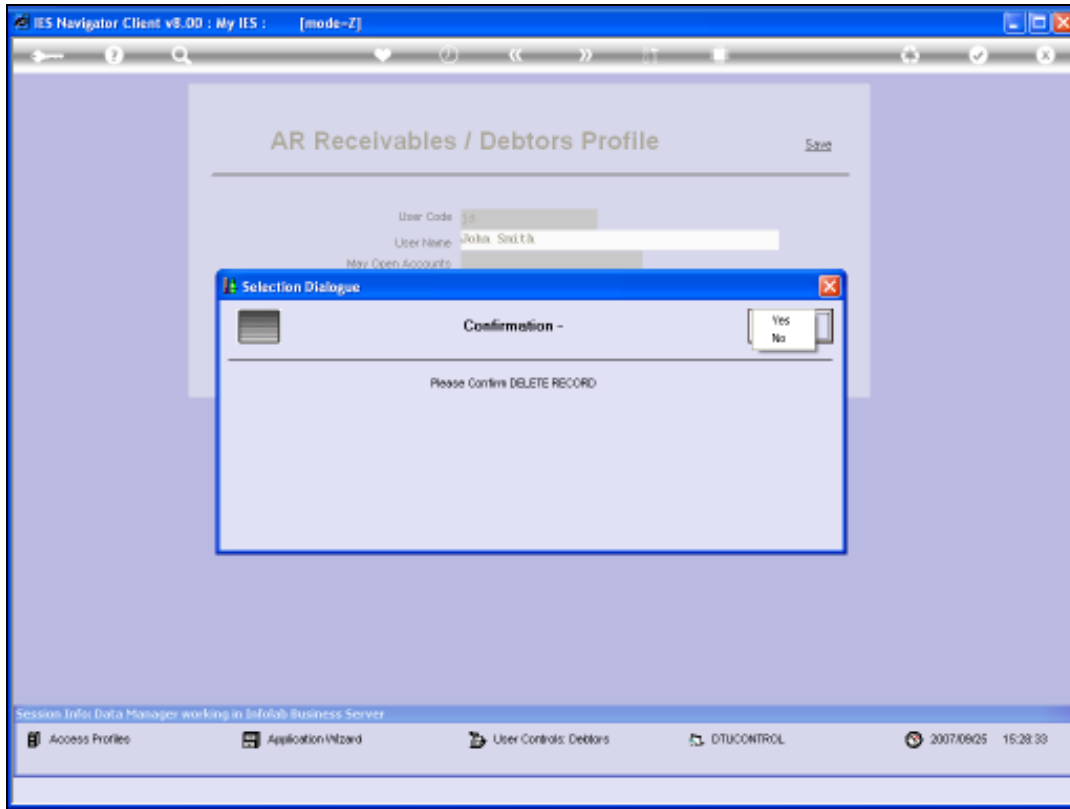


Slide 45

Now choose the Delete Function.



Slide 46



Slide 47

And if we want to Delete, we will simply choose "Yes".



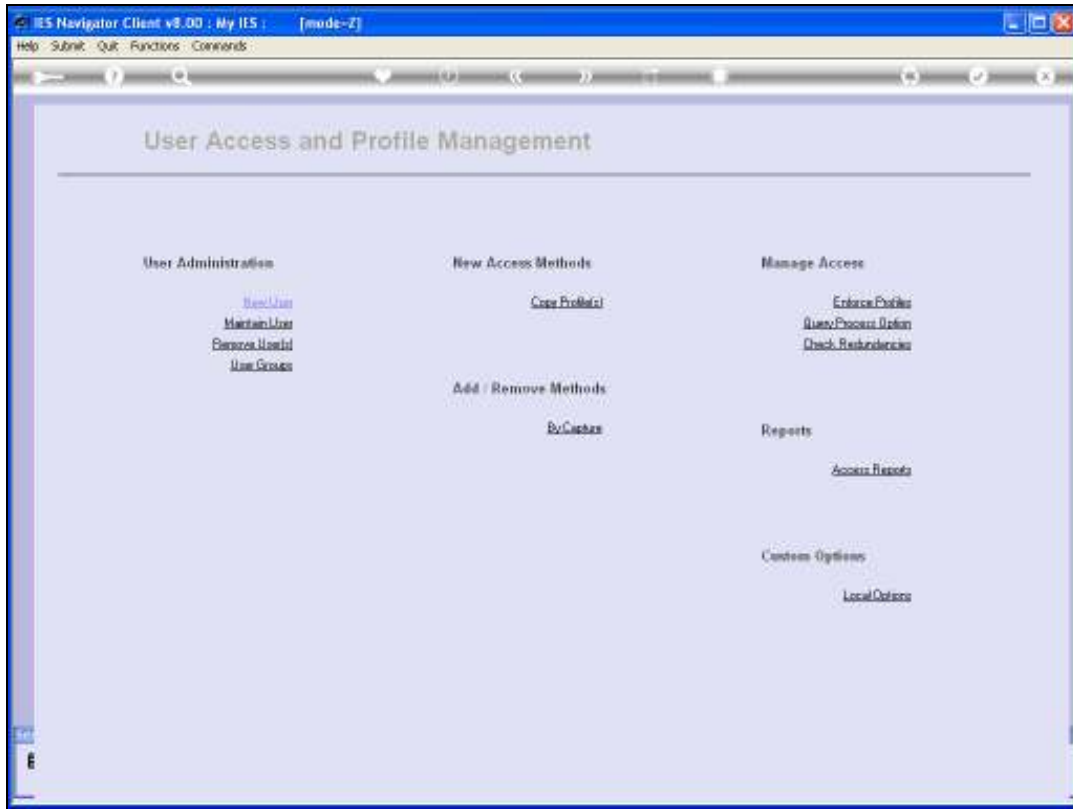
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## Reports on Business Profiles

- ◆ Use the Access Reports to list the existing privileges

Copy of Reports on Business Profiles

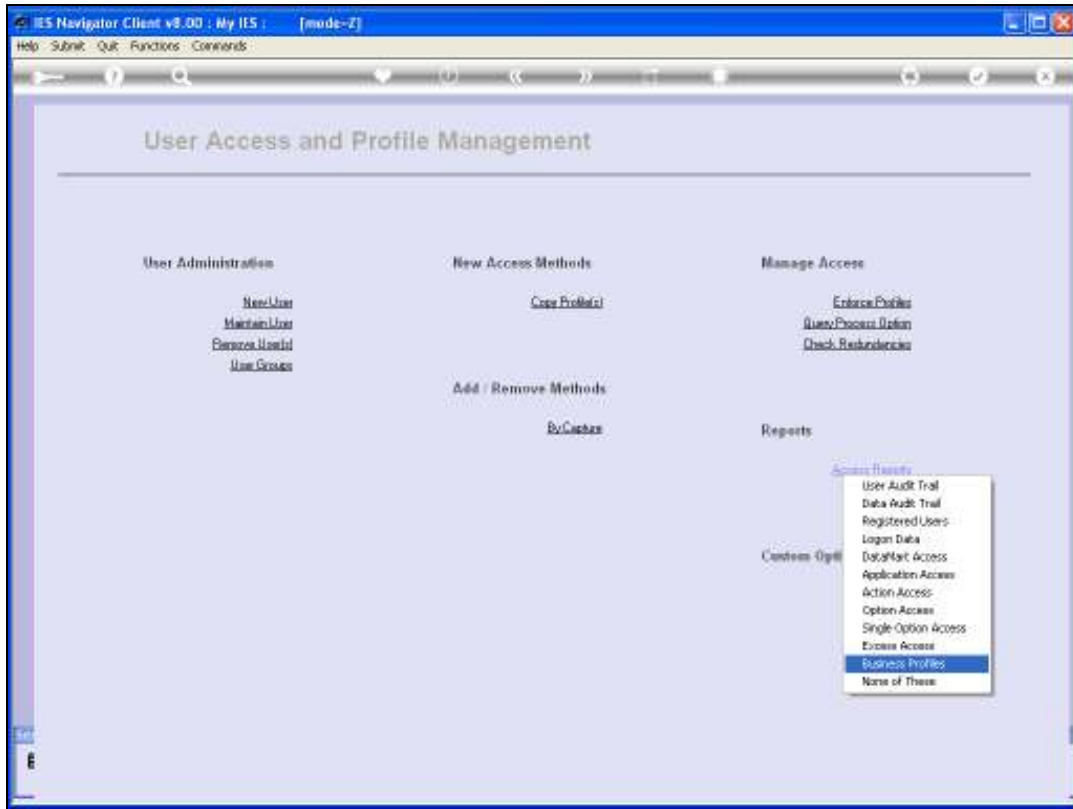
For information on the Privileges listed on our various Business Profiles, for various Users, we can use the Access Reports.



Slide 49

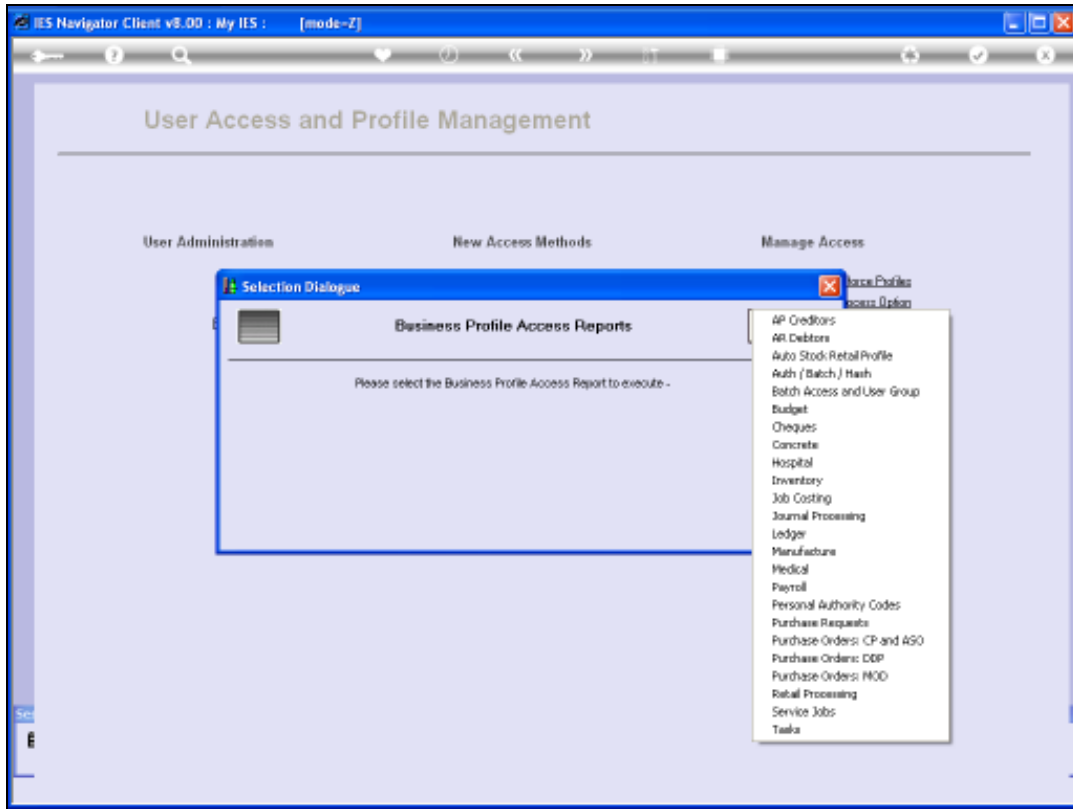


Slide 50



Slide 51

Select the Business Profile Reports.



Slide 52

And Select the Specific Business Profile Type, to Report on.