Introduction

This Quick guide will introduce you to the use and possibilities of the security functionality in BMS. We encourage you to use the functionality in order to protect various sections of your planning.

Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software.

The guide *may* contain important general notices. These will be marked with an exclamation icon.

Tips and tricks are marked with an Info-icon.

Questions & Answers note relevant to the topic at hand.

Setting up security

The access of various employees to different aspects of BMS can be managed easily by a super-user/administrator. The security is divided into three categories: program functionality, customers and planning boards sections.

The program functionality allows you to manage the access of an employee to various functions throughout BMS. I.e. a person is allowed to read the data, but not change it.

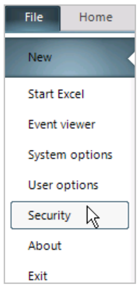
You can choose to assigning particular customers to an employee. If such customers are assigned, an employee will only be able to use the allowed functions with the assigned customers.

Planning board sections are assigned to an employee in order to limit the access to particular planning board sections. Only the assigned sections will be visible if this option is used.

Go to Security

1 Select File

Click on the File in the top ribbon menu.



2 Select Security

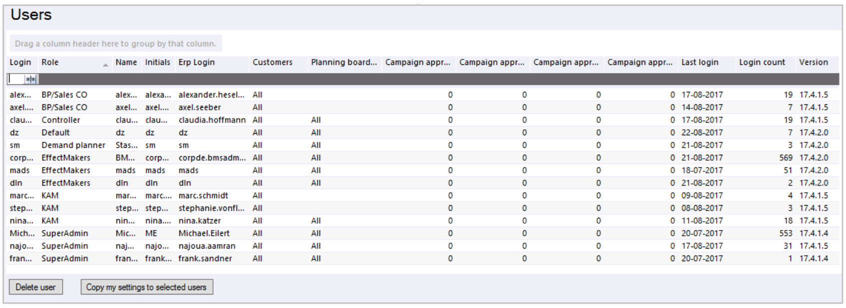
Choose Security from the menu to the left.

Managing users

The users tab is chosen by default, when selecting Security.

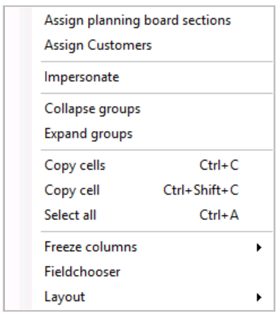
1 Choose a user

Click on the row with the user of interest.



2 Locate the user details

This window can be used to get user information such as: ERP login, BMS login, Name, Last login, Login count and Version.
The administrator can assign roles, accessible customers and planning board sections.



3 Change the user details

Select the user and right click within the window to get a menu. Select the detail you want to change, a corresponding window will open.
For safety reasons, you can edit only one user per time.

Quick guide for BMS

4 Delete a user

Select and press the Delete button, to delete a user.
A confirmation window will ask your approval of the action.

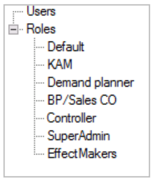
5 Copy my settings to user(s)

Select and click on Copy my settings to selected users, if you want to make another user with your same settings.
A confirmation window will ask your approval of the action.

Managing Roles

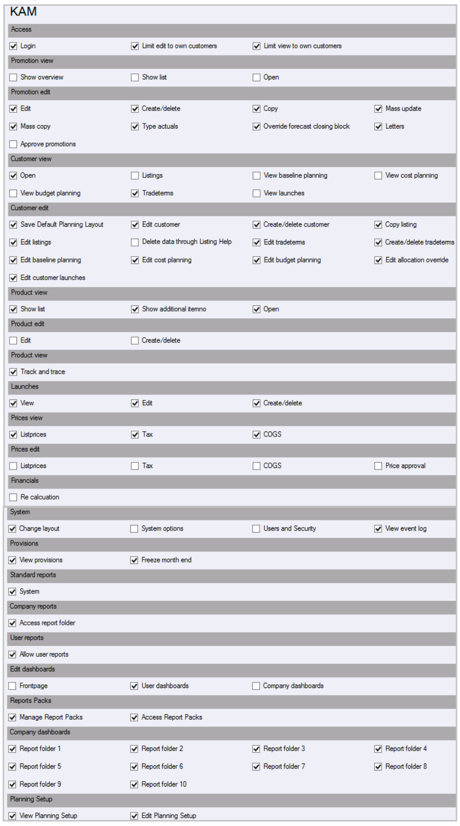
1 Select a role

The left menu of the Security window shows an overview of the defined roles. Left click on a role to see the details.



2 Locate the role settings

Once you have selected a role, you will access a window providing an overview of the access the role has.



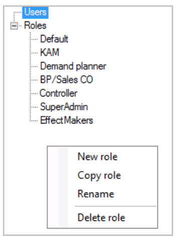
Note that changes are saved simultaneously.

3 Manage the settings

The system allows you to manage which functions are available for the selected role. Such functions are categorized into:

- Access
- Promotion view
- Promotion edit
- Customer view
- Customer edit
- Product view
- Product edit
- Launches
- Prices view
- Prices edit
- Financials
- System
- Provisions
- Standard reports
- Company reports
- User reports
- Edit dashboards
- Reports Packs
- Company dashboards

You can create New, Delete, Copy and Rename roles by right clicking within the left menu of the security window.



In order to limit an employee to only being able to view the assigned customers in the customers list, you need to have both boxes checked.