Mobile Server Security Editor

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Overview

Security Editor allows administrators to create, edit, and delete system users and groups. Security access to individual plugins and features for each group can be adjusted as well. In this document, you will learn how to create, edit, and delete system users and groups, as well as how to modify the securities for each group.

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Security Editor

To access Security Editor, click the **Security Editor** button in the top left corner of the Mobile Server window.

System Users

Creating a New User

To create a new user, click the **New** button in the System Users pane.

The New User window will open. Input the desired User Name, then select the desired Security Group from the dropdown menu.

Click the **OK** button to confirm these details. The user will be added to the System Users table.

Deleting a User

Select the user that you want to delete, then click the **Delete** button in the System Users pane.

Note: No confirmation window will appear, so double check that you have selected the correct user before deleting!

Editing a User

To edit a user, select that user from the System Users table. Their user information will pop up underneath the System Users table.

User Name – Displays the user name of the selected system user.

Password – For security reasons, this field will not display the password. To add or change a password, click on the ellipse to the right of the field.

Display Name – This name will display in the software instead of the user name. This is an optional field.

Locked – This will show if a user is locked out. A lock can be removed or added by clicking on the checkbox.

Reset Password on Next Login – Checking this box will make the user change their password on their next login.

Security Group – Displays the current Security Group that the user belongs to. This can be changed by using the dropdown menu to the right of the field.

Warehouse – Binds the user to a warehouse. Use the dropdown menu to select a warehouse from the list. The X to the right of the field will clear any data from the field.

System Groups

Creating a New Group

To create a new group, click the **New** button.

Type the desired group name into the window that pops up and click the **OK** button. Your new group will be added to the Security Group list.

Deleting a Group

Note: To delete a group, you will first need to make sure there are no users assigned to it. Follow the directions in the Editing a User section of this document to reassign users.

Select the group you want to delete from the list of groups, then click the **Delete** button. A window will pop up asking you to confirm the action. Click **Yes** to continue and **No** to cancel.

Copying a Group

To copy a group, select the group you want to copy to. This group will be overwritten, so be sure to select the correct group. Then, click the **Copy Security** button above the plugin list.

This will open the Copy Security window. Use the dropdown menu in this window to select the security group you want to copy from.

Click the **OK** button to confirm the copy or **Cancel** to cancel it.

Exporting a Group

To export a security group, click the **Export Security** button. A navigation window will pop up. Navigate to the desired filepath and click the **Save** button to confirm. Upon completion, another window will pop up to confirm the success of the save.

Importing a Group

To import a security group, select the group that you want to import securities to, then click the **Import Security** button. A navigation window will pop up. Navigate to the Mobile Server Security file and select it. Then click the **Open** button to import the security file into the previously selected group.

Editing a Group’s Securities

To edit a group’s security settings, select the group you want to edit from the Security Group list. The list of securities will be displayed in the list on the right.

The blank box above the list is the search box. The enabled box on the left of the search box can be used to filter securities by their status. A blank box means you can only see disabled securities, a checked box means you can only see enabled securities, and a filled in box means you can see all of the securities.

Securities with an asterisk next to them have sub-securities that can also be adjusted when they are selected. These sub-securities are displayed in the pane underneath the security list.

The following settings, when enabled, will provide the user with a dropdown that displays a list of columns for the associated business object. Users can select these columns for use, in addition to the primary search columns listed in the setting's description, in searches against that business object:

- Additional Contact Search Columns
- Additional Customer Search Columns
- Additional Sales Document Search Columns
- Additional Item Search Columns