**BSI UI Analysis- Login & Permissions**

* Login & Permissions
  + **Grid with Columns:**
  + **Type: Editable Type 1 grid**
  + **Columns:**
    - **Login**
    - **Manage Logins and Permissions**
    - **Manage Data Sets**
    - **User Interface Permissions**
    - **Features:**
* **Buttons: Copy, CSV, Excel, Print**
* **Search bar**
* **Ability to add new, edit & delete**

**Related Activities:**

**Data Sets**

**A screenshot of a cell phone

Description automatically generated**

**Flow:**

**A screenshot of a cell phone

Description automatically generated**

**Solution:**

**Move all system related tools to a gear icon drop down**

**Improve the UI with the new ui-library**

**Improve the layout , buttons**

**Links to related screens and add should be buttons in the new ui**

**Use the New improved icons for Add, Edit, Info, etc**

**Will need to configure grid metadata and form field Metadata**

**A picture containing screenshot

Description automatically generated**

To simplify the selection process

Maybe set up user groups. A new user could then be auto assigned permissions based on the group they belong to. We can enable overrides if needed

**Notes from help**

**Note:** Administrative users can edit permissions for all logins.

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| **Tip:** | Use the **Related Activities** links to view features related to**Logins**. |

Use**Logins** to perform the following functions:

* [Add Logins:](javascript:TextPopup(this))

When a new login is created, it is associated with the login company used when logging on to TaxFactory.

* 1. On the **Logins** page, click the **Click here to manage Permissions** link. The **Logins and Permissions** screen is displayed.
  2. In the **Enter** **Login Information** section, type or select the following information.

**Note:** Required fields are marked with an asterisk (**\***).

* + - \* [Login Name](javascript:TextPopup(this))
    - \* [Password](javascript:TextPopup(this))
    - \* [Confirm Password](javascript:TextPopup(this))
    - [Logins](javascript:TextPopup(this))
    - [Data Sets](javascript:TextPopup(this))
    - [Default Permissions for All Datasets](javascript:TextPopup(this))
  1. In the **Enhanced Security Options** section, type or select the following information:

**Note:** The fields in this section are only enabled if the **Enhanced Security** option has been configured in [Configuration](http://www.mybsi.com/ProductHelp/eTaxFactory11/Configuration.htm).

* 1. [Administration Account](javascript:TextPopup(this))
  2. [Profile Never Expires](javascript:TextPopup(this))
  3. [Profile Expires On](javascript:TextPopup(this))
  4. [Number of Days Password has to be reset](javascript:TextPopup(this))
  5. [Number of Login Attempts before Account is locked](javascript:TextPopup(this))
  6. [User must change Password on Next Login](javascript:TextPopup(this))
  7. [Account currently locked](javascript:TextPopup(this))
  8. Click **Save**.

[Edit Logins:](javascript:TextPopup(this))

1. On the **Logins** page, in the **Login** column, click the login you want to edit. The **Logins and Permissions** screen is displayed.
2. In the **Enter Login Information** and **Enhanced Security Option** sections, type over or select the applicable information. See **Add Logins** for field descriptions.
3. Click **Save**.

[Delete Logins:](javascript:TextPopup(this))

1. On the**Logins** page, in the **Login** column, click the login you want to delete. The **Logins and Permissions** screen is displayed.
2. Click **Delete**.

[Manage Permissions:](javascript:TextPopup(this))

1. On the **Logins** page, in the **Login** column, click the login whose permissions you want to manage. The **Logins and Permissions** screen is displayed.
2. On the **Logins and Permissions** page, click the **Click here to manage tool level permission for this login** link. The **Permissions** screen is displayed.
3. From the **Permission for Data Set** drop-down list, select the desired data set description.
4. Click **Refresh** to refresh the screen with the tool permissions for the selected data set description.
5. Edit permissions as desired.

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| **Tips:** | Click **Check All**  to select all tools. |
|  | Click **Uncheck All** to clear selected tools. |

* + [Tool Name](javascript:TextPopup(this))
  + [View](javascript:TextPopup(this))
  + [Save](javascript:TextPopup(this))
  + [Delete](javascript:TextPopup(this))
  + [Run](javascript:TextPopup(this))
  + [Audit](javascript:TextPopup(this))
  + [Hide Sensitive](javascript:TextPopup(this))

1. Click **Save**.