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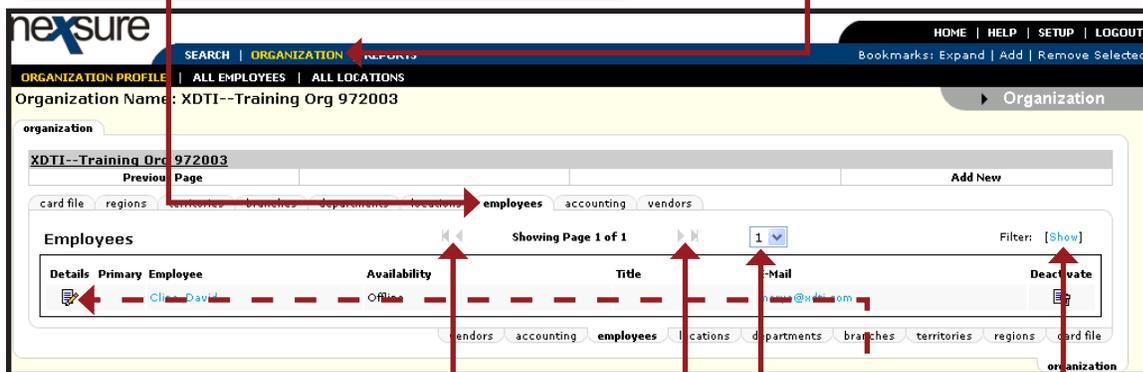
- ✘ Changing Employee Login Names

## Changing Employee Login Names

When an employee is married or divorced, or your company email provider is changed, it may be necessary to change a Login Name. When changing the Login Name, follow these naming conventions; use the company email address assigned to the employee (exclude the .com). Maintaining the conventions ensure the Login Name is unique and not in use by someone else.

The process to change the employee Login Name begins by accessing the **employee security** tab. To access the **security** tab, perform the following:

1. Since all employees are added at the organization level, click **ORGANIZATION** on the **Primary** menu.
2. On the **organization** tab, click the **employees** tab.



3. If the employee is not on the first page of results, use either the navigation tools at the top of the tab to access each page or click **[Show]** and search for the employee.
4. Once the employee is displayed on the **Employees** summary screen, click the **Details**  icon next to that employee to open the **employee detail** tab.

5. Click the **security** tab.

The screenshot shows the nexsure web application interface. At the top, there is a navigation bar with 'SEARCH | ORGANIZATION | REPORTS' and 'HOME | HELP | SETUP | LOGOUT'. Below this, the page title is 'Organization Name: XDTI--Training Org 972003'. The main content area is titled 'organization' and shows 'XDTI--Training Org 972003 >> Mr. David Cline'. There are several tabs: 'card file', 'regions', 'territories', 'branches', 'departments', 'locations', 'employees', 'accounting', and 'vendors'. Under the 'employees' tab, there is a sub-section 'employee detail' with tabs for 'identity', 'additional logins', 'security', 'commissions', and 'accounting transactions'. A red arrow points from the instruction box to the 'security' tab. The 'Employee Information' section includes fields for Prefix (Mr.), First Name (David), MI, Last Name (Cline), Suffix (David), Title, Sex (Male), DOB (10/5/1953), Social Security No. (698-68-5335), and Marital Status (Single). The 'Driver Information' section includes St./Prov. Licensed (AL), License Number (45787544), and Date Licensed (4/15/1969). There is a checkbox for 'Is this the PRIMARY CONTACT for this organization?' (set to No) and a 'Contact Role' dropdown. The 'PRIMARY LOCATION' is 'Waterford, IA [4479 Pontiac Lake Rd Ste 2]'. At the bottom, there is a 'Personal Numbers' table with columns for Details, Phone Type, Phone, Ext, Desc, and Delete.

| Details | Phone Type | Phone          | Ext | Desc | Delete |
|---------|------------|----------------|-----|------|--------|
|         | Home Phone | (256) 487-9852 |     |      |        |

6. Find the **User Accounts** section of the **security** tab. If the employee has been assigned security under the **User Accounts** section of the screen, it must be removed.

Automatically adjust clock for Daylight Savings Time (DST)  
 Login expiration date:  and time:   
 Change of password required:   
 Access allowed from: 4:00:00 AM  
 Access allowed until: 11:59:00 PM  
 Notify admin upon login:   
 Allow login on Saturday:   
 Allow login on Sunday:   
 Login disabled:

**User Accounts** Showing Page 1 of 1 [ Add New ]

| Details | Primary Location                    | Entity Name        | Entity Type | Rights           | Status | Date Created | Remove |
|---------|-------------------------------------|--------------------|-------------|------------------|--------|--------------|--------|
|         | <input checked="" type="checkbox"/> | Atlantic Territory | Territory   | Account Auditors | Active | 11/4/2005    |        |

[accounting transactions](#) [commissions](#) **[security](#)** [additional logins](#) [identity](#) [employee detail](#)  
[vendors](#) [accounting](#) **[employees](#)** [locations](#) [departments](#) [branches](#) [territories](#) [regions](#) [card file](#)  
[organization](#)

7. To remove the security, click the **Remove** icon and confirm the deletion by clicking **OK** in the confirmation warning.

Microsoft Internet Explorer

Are you sure you want to delete this record?

OK Cancel

8. After removing security for the employee, the **Login name:** box becomes active. Enter the new login name and click **Save**.

The screenshot shows the Nexsure web application interface. At the top, there is a navigation bar with 'SEARCH | ORGANIZATION | REPORTS' and 'HOME | HELP | SETUP | LOGOUT'. Below this, there are tabs for 'ORGANIZATION PROFILE | ALL EMPLOYEES | ALL LOCATIONS'. The main content area is titled 'Organization Name: XDTI--Training Org 972003' and 'Organization'. Underneath, there is a breadcrumb trail: 'XDTI--Training Org 972003 >> David Cline'. A 'Save' button is visible in the top right of this section. Below the breadcrumb, there are several tabs: 'card file', 'regions', 'territories', 'branches', 'departments', 'locations', 'employees', 'accounting', and 'vendors'. The 'employees' tab is selected. Underneath, there are more tabs: 'employee detail', 'identity', 'additional logins', 'security', 'commissions', and 'accounting transactions'. The 'security' tab is selected. The main content area shows 'Employee Name: David Cline' and 'User Status:'. Below this, there is a message: 'To add/edit a user for this account, enter the login information and click on the Save/Update link on the navigation bar at the top.' The 'Login Information' section contains the following fields and options:

- Login name:
- New password:
- Confirm new password:
- Time zone:
- Automatically adjust clock for Daylight Savings Time (DST)
- Login expiration date:  and time:
- Change of password required:
- Access allowed from:
- Access allowed until:
- Notify admin upon login:
- Allow login on Saturday:
- Allow login on Sunday:
- Login disabled:

After clicking **Save**, the **Login name:** is changed and no longer available to modify.

The screenshot shows the 'Organization Profile' page for 'XDTI--Training Org 972003'. The user 'David Cline' is selected. The 'Login Information' section includes fields for 'Login name: dave@xdti', 'New password', 'Confirm new password', 'Time zone' (set to Pacific Time), and 'Login expiration date'. At the bottom, there is a message: 'No record(s) found. Click [here](#) to add security.'

9. Click the link **No record(s) found. Click [here](#) to add security.** at the bottom of the screen to add security to the employee record.

10. Select the security template to apply from the **User Rights:** drop-down list. Click **Add** to complete the process. Security is added and the User may now log on with the newly created Login Name.

The 'User Rights Information' dialog box shows the following configuration: Entity Type: Organization, Entity Name: Atlantic Branch, Status: Active, and User Rights: Account Auditors. There are 'Cancel' and 'Add' buttons at the bottom.