

ServTraq Data Security: Removing Inactive Accounts

Background:

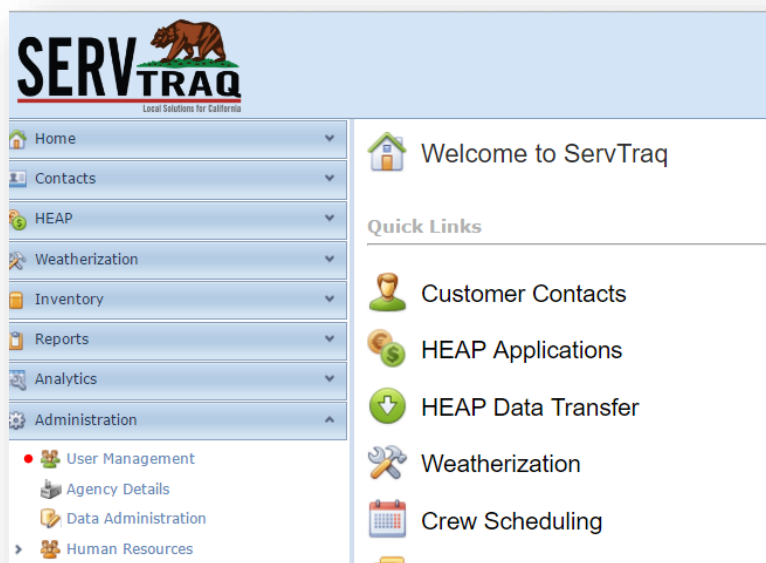
When an employee separates from an organization, removing database access to ServTraq® is an information security essential. At the lowest level, the employee had access to customer records, at the highest level, possible access to employee records. Safeguard your database information by restricting access to only *active* employees. To remove an inactive ServTraq account follow the steps outlined below.

Requirement:

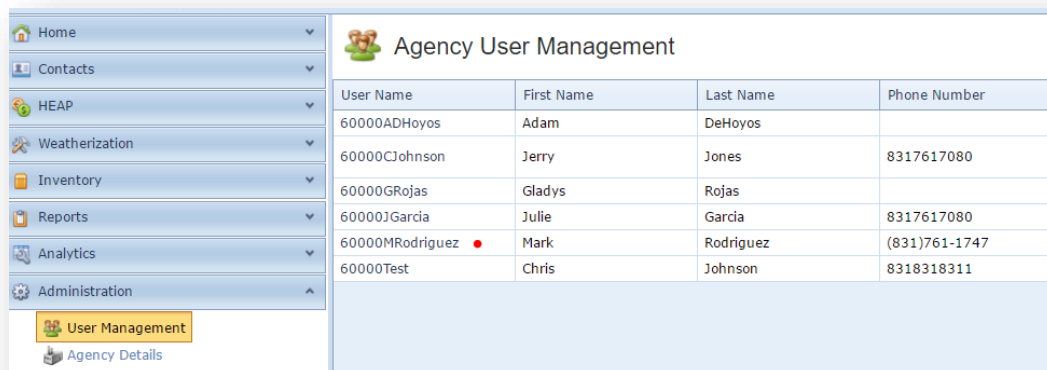
Agency Admin user permissions.

Procedure:

- 1) Go to **Administration>User Management**



- 2) Click on the **User Name**



User Name	First Name	Last Name	Phone Number
60000ADHoyos	Adam	DeHoyos	
60000CJohnson	Jerry	Jones	8317617080
60000GRojas	Gladys	Rojas	
60000JGarcia	Julie	Garcia	8317617080
60000MRodriguez	Mark	Rodriguez	(831)761-1747
60000Test	Chris	Johnson	8318318311

3) Scroll to the User Details section and click **Delete User**

The screenshot shows a web application interface for editing user details. On the left is a navigation menu with the following items: Home, Contacts, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. The Administration menu is expanded, showing sub-items: User Management, Agency Details, Data Administration, and Human Resources. The main content area is titled 'Edit User Details' and includes a '<< Back to User List' link. It is divided into two sections: 'User Roles' and 'User Details'. The 'User Roles' section contains a list of roles with checkboxes, all of which are checked: AgencyAdmin, HEAPAdmin, HEAPBasic, HEAPTransfer, HR, Inventory, WXAdmin, and WXBasic. The 'User Details' section contains fields for 'User Name' (60000MRodriguez), 'Email:*' (mark@energyservices.org), and 'Comment'. There is also a checkbox for 'Is Locked Out?' which is checked. At the bottom of the 'User Details' section are two buttons: 'Unlock User' and 'Delete User'.

Edit User Details

<< Back to User List

User Roles

Roles:

- ☒ AgencyAdmin
- ☒ HEAPAdmin
- ☒ HEAPBasic
- ☒ HEAPTransfer
- ☒ HR
- ☒ Inventory
- ☒ WXAdmin
- ☒ WXBasic

User Details

User Name: 60000MRodriguez

Email:* mark@energyservices.org

Comment:

Is Locked Out?: ☒

Unlock User Delete User