

## How to Prevent Users from Modifying Profiles in Contact Center Client (with Security Roles)

### PURPOSE OF THIS ARTICLE

This article explains how to set up security roles to prevent users from being able to modify profiles in Contact Center Client - either shared profiles, or both shared and personal profiles.

Administrators may wish to prevent users from being able to alter these profiles because users often do so by accident (especially in the case of shared profiles).

### INSTRUCTIONS

1. Go to the Security Roles section. (In CCM 7x, this is in YourSite Explorer. In CCM 6x, it is in CCMWeb, under YourSite > Security > Security Roles)
2. Create a new security role, or, if you have an existing role you would like to modify, open it for editing.
3. In the properties for the security role, go to the Advanced tab, and look under the heading "Real time". There will be two checkboxes:
  - 'May manage the appearance of real-time monitors for all users (shared profile)'
  - 'May manage the appearance of real-time monitors for personal use (Personal profile)'If you uncheck the 'Personal profile' box, both will become unchecked, and the users with that security role won't be able to change any profiles (shared or personal); alternatively, you can just uncheck the 'shared profile' box.
4. Save the security role. (In CCM 7x, use the purple floppy-disc icon in the top-left corner of YourSite Explorer to save; in CCM 6x, use the little grey save button in the bottom-right corner of the CCMWeb page.)

(The next steps apply to both CCM 7x and CCM 6x.) 5. To apply the role to users: Go to YSE > Employees and select the employee(s) the role should be applied to. (You can also use Shift click and Control click to select and modify several users at once.) 6. Go to the User Account tab in the Employee properties, and specify the security role. 7. Save in YourSite Explorer.

### IMPORTANT CONSIDERATIONS

Please note:

- One security role may apply to many users, so please be careful when modifying existing security roles.
- Only one security role can be applied to a user at any time - they are not cumulative.

- If an employee already has a security role (other than Local Administrator, which is the default role) applied to him or her, the best practice would be to make a new role and copy the permissions from that role to the new role, and then uncheck the 'Shared Profile' or 'Personal Profile' boxes in the new role.

## ADDITIONAL INFORMATION

Additional information on Security Roles can be found in the CCM User Guide.

## APPLIES TO

CCM 6x, CCM 7x

### **Keywords:**

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