

Deactivate a CRM user (Freeze / Inactivate) - GBU Data Steward

Overview

Who: GBU Data Stewards

What: Check user's record, re-assign to a substitute and create a Freshdesk ticket, to ask inactivation of the license.

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Step-by-step

PREAMBULE: About user deactivation...

GBU CRM Champion is responsible to follow activity of users (users **not logging in for more than 3 months**) using dashboard [User Management](#) and request User deactivation via Freshdesk if needed :

- End of Contract with Solvay
- User moving to another GBU
- Change of Job that Core CRM system access is not required or forbidden (example: from Sales to Procurement).
- Other reasons.

Additionally, in order to respect Solvay policy, Off Boarding process in Service one will generate request for **User having left Solvay** and still active in core CRM to be deactivated .

First step of inactivation is to change licence to a Community basic if needed and to Freeze user in order to wait for more information (ex: critical user in a queue must be replaced).

FYI: Freezing a user will disable SSO (single sign on) so prevent user access and downgrading licence from full to community basic will keep available full licences in core CRM pool .

I. Report about user "Freeze"

Data Steward can identify users who do not use CRM or must be deactivated.

User FREEZE / Need data re-assignment ?

Report Generation Status: Complete

Report Options:

Summarize information by:GBUViewAll UsersTime FrameDate FieldLast LoginRangeCustomFromTo

Run ReportHide DetailsCustomizeSaveSave AsDeletePrintable ViewExport DetailsSubscribe

Filtered By: EditUsername contains freezeClear

Grouped By: GBUSorted By: GBU

Last Name	Full Name	Active	Profile	Country	Region	Site	Organizational Role	GBU	BU	Username	Created Date	Last Login	Comment
GBU: MBU (2 records)													
Romero - FREEZE	Felipe Romero - FREEZE	✓	Community Basic	Colombia	LAM	BOGOTA (CALLE 108)	Customer Service	Novecare	-	felipe.romero@solway.com.crm.freeze	15/09/2016 16:02	27/04/2017 18:19	20170510 - User Inactivation / LCH --> Freeze to be analyzed by GBU
Mendea - FREEZE	Ana Mendea - FREEZE	✓	Community Basic	Romania	EMEA	BUCURESTI (STR. DOMNITA RUXANDRA)	Customer Service	Novecare	-	ana.mendea@solway.com.crm.freeze	01/10/2015 15:32	09/09/2016 10:14	20170503 - Maternity leave until 09/2017 20170130 - Users not logged last 90 days - 002
GBU: Special Chem (3 records)													
Nerey - FREEZE	Lesa Nerey - FREEZE	✓	Community Basic	United States	NAM	HOUSTON (BUFFALO SPEEDWAY), TEXAS	Quality / Supply Chain / Others	Peroxides	Peroxides	lesa.nerey@solway.com.crm.freeze	02/09/2015 16:35	27/04/2017 13:58	2016/11/08: Freshdesk #67275 QV access 20170522 - Inactivation LCH / Freeze and need approval
Yao - FREEZE	John Yao - FREEZE	✓	Community Basic	China	APAC	SHANGHAI (XINZHUANG RUTH HOTEL)	Commercial Management	Special Chem	Catalysis	john.yao@solway.com.crm.freeze	11/04/2016 15:40	21/04/2017 10:06	20170522 - Inactivation / LCH / Freeze

II. Check the user's record criticity

Overview Report available to help you :

Use report on Account Teams to find accounts to update :

- **F**o**l**d**e**r : G B U D a t a S t e w a r d R e p o r t s
- **R**e**p**o**r**t : A c c o u n t T e a m s - U p d a t e M e m b e r s

• **L**
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[h](https://solvera-y-crm.com/y-sale-source.com/01Z2400000EXUZ)
[tt](https://solvera-y-crm.com/y-sale-source.com/01Z2400000EXUZ)
[p](https://solvera-y-crm.com/y-sale-source.com/01Z2400000EXUZ)
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[UZ](https://solvera-y-crm.com/y-sale-source.com/01Z2400000EXUZ)

Use Login-as to re-execute the report. It will allow you to see report, click on it and do changes. Note: <i>Team member role</i> does not have any impact on rights on the account, it is just a label.	
Fill the <i>Account access level</i> using the picklist. Note: Select read access, or write access.	
III. Create a Service one request in BMC Helix to ask user inactivation (Generic access Management)	

Related articles

Related docs

Can't find information?

- [Web support contact](#)