

Author: Joel Kristenson

Last Updated: 2015-12-01

Overview

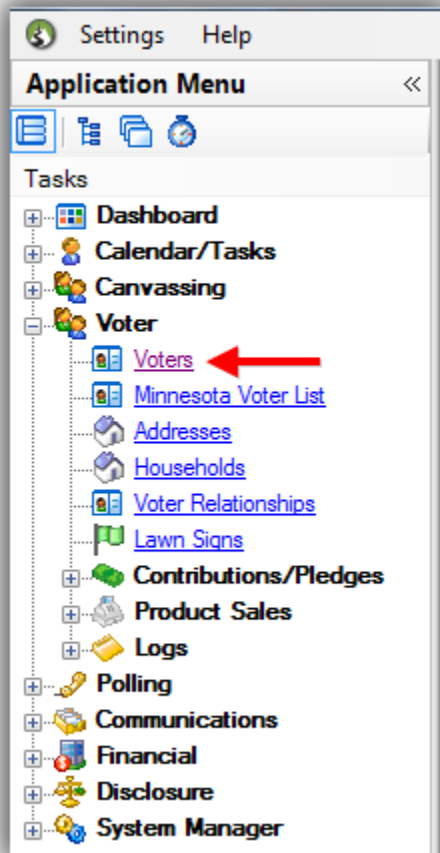
This article will teach you how to quickly revoke a user's access to your database, these steps have been updated in 2015 so that it takes far fewer steps than it used to. *This can be useful if someone leaves your team/organization, gets fired, or you simply want to adjust their security clearance levels. You must have full [administrative security access](#) to the **System Manager** in Trail Blazer in order to add/edit/remove a user.*

Steps

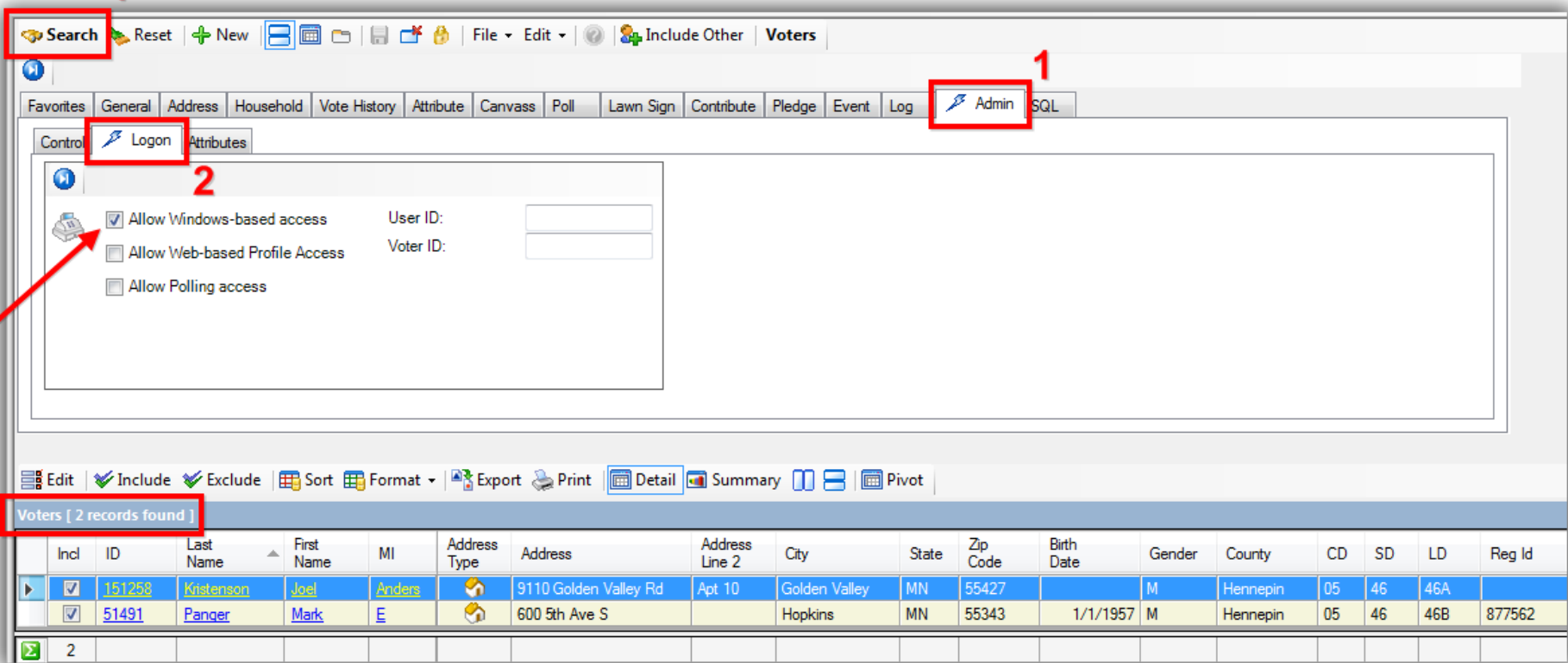
IMPORTANT: *I used the 'political' version of Trail Blazer for this article so when I refer to 'voters' it could be label Donors, Contacts, or something else in your database, but the steps are basically the same.*

First locate this user by pulling up a list of all the **database users**.

Navigate to the **Voters** (*Donors/Contacts*) list.



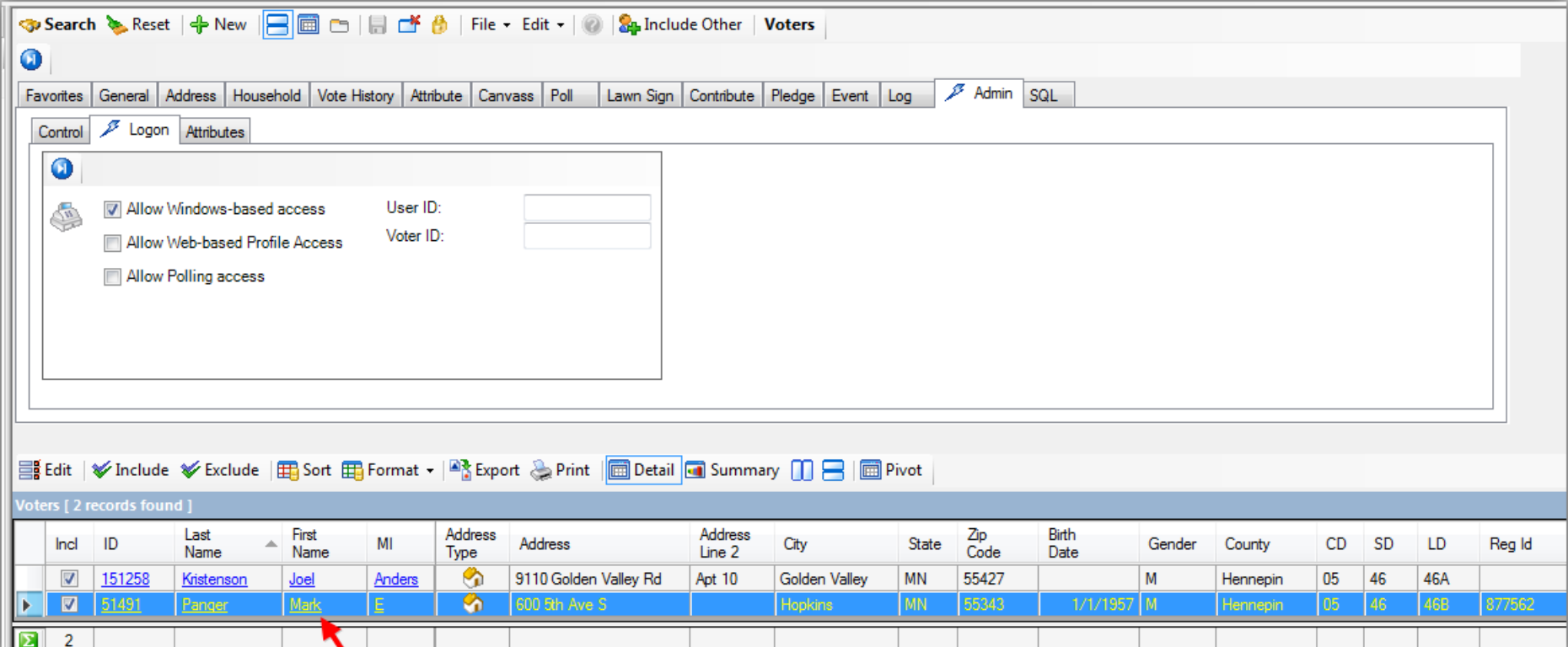
Navigate to the **Admin tab**, the **Logon** sub-tab, check **Allow Windows-based Access**, and click [Search]. *In my example it produced two user records with access to my database.*



The screenshot shows the TrailBlazer Admin interface. The 'Admin' tab is selected (1). The 'Logon' sub-tab is active (2). The 'Allow Windows-based access' checkbox is checked (3). The 'Search' button is highlighted (4). Below the settings, a table displays two user records:

Incl	ID	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Birth Date	Gender	County	CD	SD	LD	Reg Id
<input checked="" type="checkbox"/>	151258	Kristenson	Joel	Anders		9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427		M	Hennepin	05	46	46A	
<input checked="" type="checkbox"/>	51491	Panger	Mark	E		600 5th Ave S		Hopkins	MN	55343	1/1/1957	M	Hennepin	05	46	46B	877562

Select the user you need to **revoke** or **limit security access** for by clicking on any of the **blue** hyperlinks to open their **record card**. *In this example I selected the user "Mark Panger" as displayed in the picture below:*

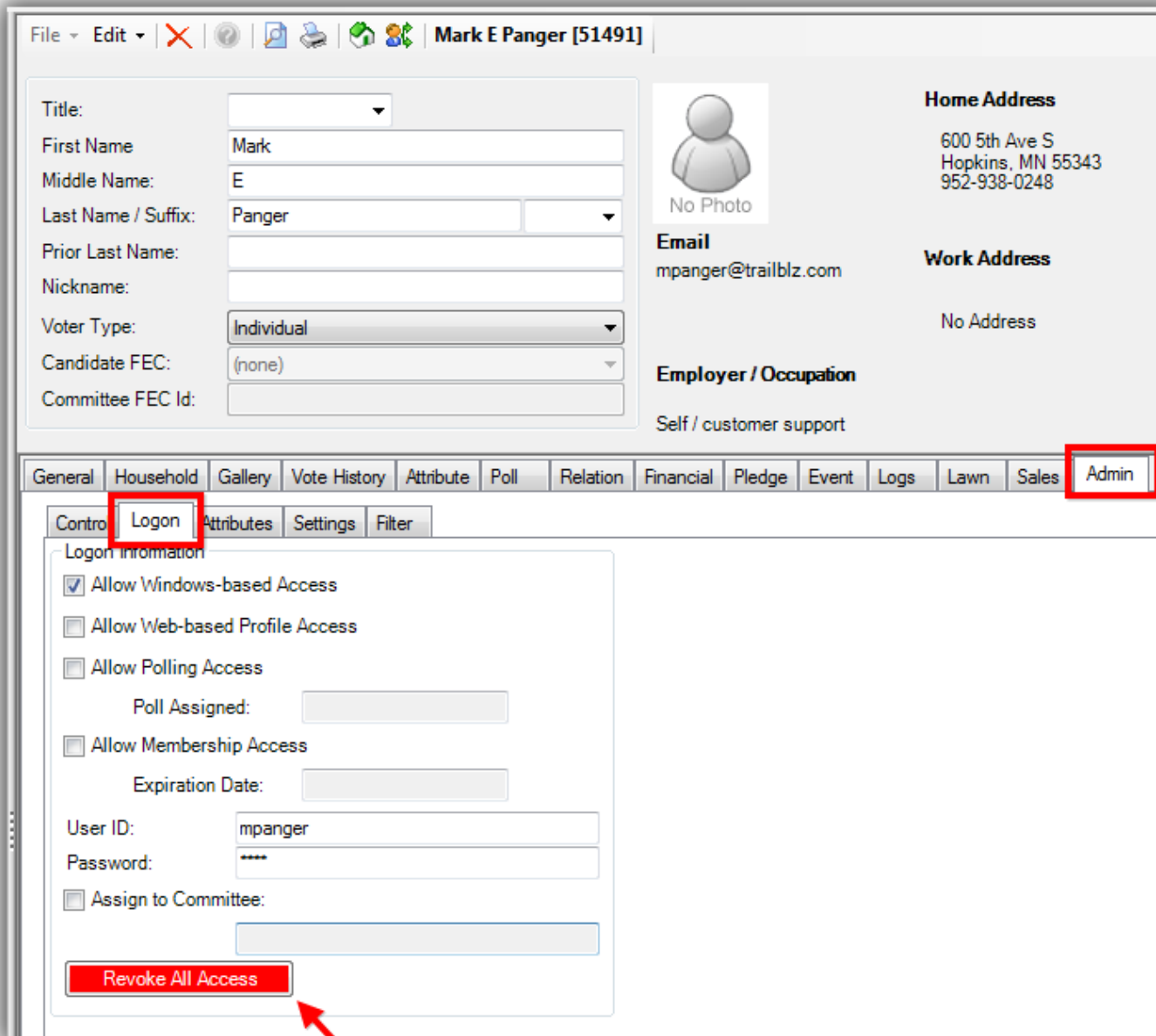


The screenshot shows the TrailBlazer interface with the 'Admin' tab selected. Under the 'Logon' sub-tab, there are three checkboxes: 'Allow Windows-based access' (checked), 'Allow Web-based Profile Access' (unchecked), and 'Allow Polling access' (unchecked). Below the checkboxes are input fields for 'User ID:' and 'Voter ID:'. At the bottom, a table of voters is displayed with 2 records found. A red arrow points to the name 'Mark' in the table.

Incl	ID	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Birth Date	Gender	County	CD	SD	LD	Reg Id
<input checked="" type="checkbox"/>	151258	Kristenson	Joel	Anders		9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427		M	Hennepin	05	46	46A	
<input checked="" type="checkbox"/>	51491	Panger	Mark	E		600 5th Ave S		Hopkins	MN	55343	1/1/1957	M	Hennepin	05	46	46B	877562

Click on any of the hyperlinks to open the user's record card.

Navigate to the **Admin** tab, and the **Logon** sub-tab, and click the **red [Revoke All Access]** button as shown in the image below:



File Edit X [Icons] Mark E Panger [51491]

Title: [Dropdown]
First Name: Mark
Middle Name: E
Last Name / Suffix: Panger [Dropdown]
Prior Last Name: [Text]
Nickname: [Text]
Voter Type: Individual [Dropdown]
Candidate FEC: (none) [Dropdown]
Committee FEC Id: [Text]

Home Address: 600 5th Ave S
Hopkins, MN 55343
952-938-0248

Work Address: No Address

Email: mpanger@trailblz.com

Employer / Occupation: Self / customer support

General Household Gallery Vote History Attribute Poll Relation Financial Pledge Event Logs Lawn Sales **Admin**

Control **Logon** Attributes Settings Filter

Logon Information

- Allow Windows-based Access
- Allow Web-based Profile Access
- Allow Polling Access
Poll Assigned: [Text]
- Allow Membership Access
Expiration Date: [Text]

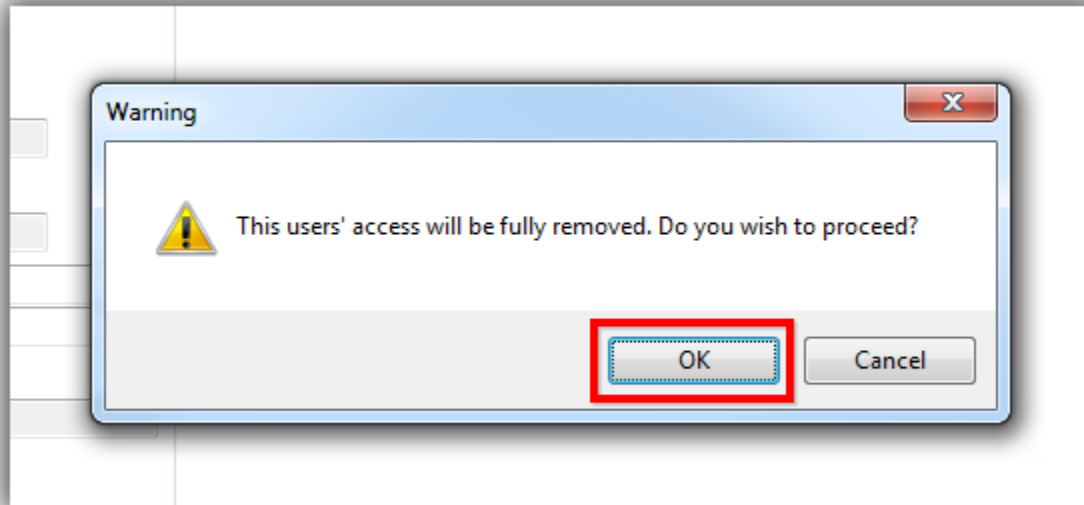
User ID: mpanger
Password: ****

Assign to Committee: [Text]

Revoke All Access


Click this button to remove all

Click **[OK]** to proceed.



Click **[Save and Close]** to finish this procedure.

File Edit [X] [?] [Print] [Home] [Refresh] [Mark E Panger [51491]]

Title: [Dropdown]	 No Photo	Home Address 600 5th Ave S Hopkins, MN 55343 952-938-0248
First Name: Mark		Email mpanger@trailblz.com
Middle Name: E		Work Address No Address
Last Name / Suffix: Panger [Dropdown]		Employer / Occupation Self / customer support
Prior Last Name:		
Nickname:		
Voter Type: Individual [Dropdown]		
Candidate FEC: (none) [Dropdown]		
Committee FEC Id:		

General Household Gallery Vote History Attribute Poll Relation Financial Pledge Event Logs Lawn Sales Admin

Control Logon Attributes Settings Filter

Logon Information

- Allow Windows-based Access
- Allow Web-based Profile Access
- Allow Polling Access
Poll Assigned: [Text Box]
- Allow Membership Access
Expiration Date: [Text Box]

User ID: mpanger
Password: ****

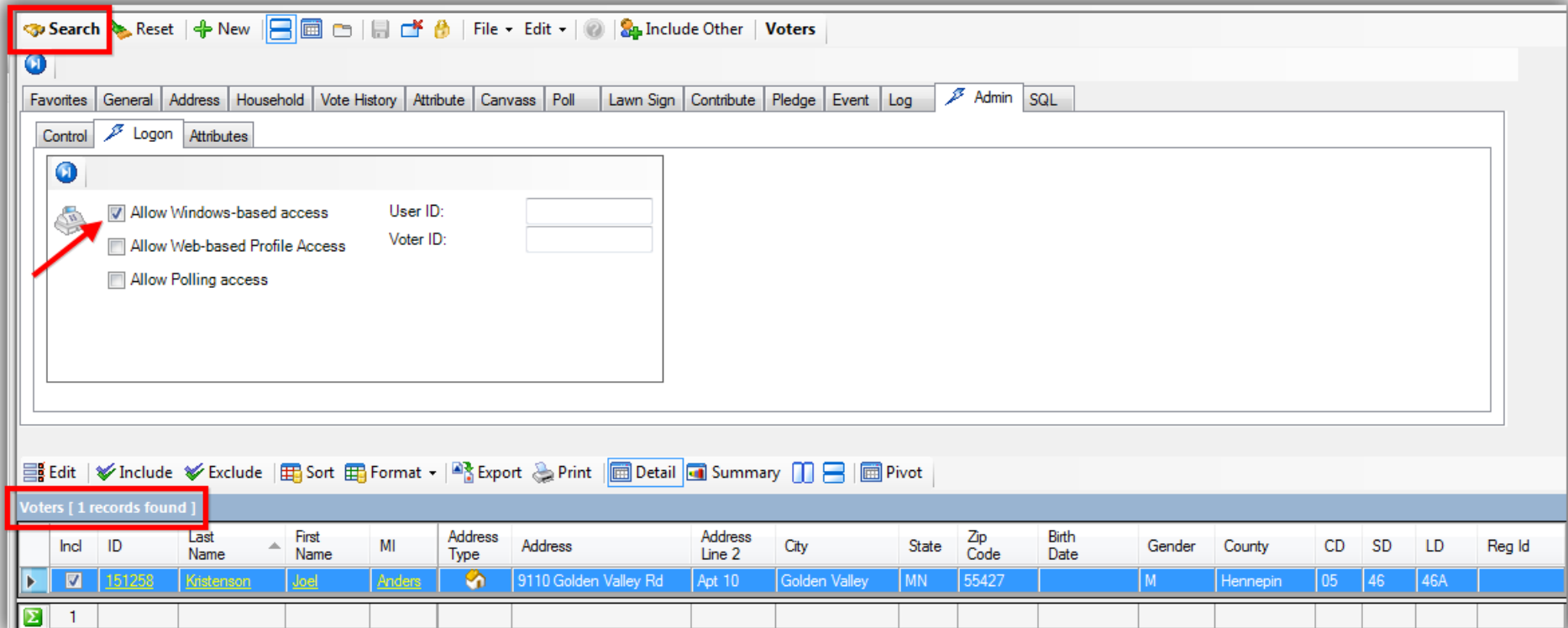
Assign to Committee:
[Text Box]

Revoke All Access

Ligon = Joel Kristenson

Email... Save Save and Close Cancel

Click **[Search]** once you're back in the **Voters (Donors/Contacts)** list to refresh the list of **DB Users**. *In my example the list dropped from 2 users to 1.*



The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with options like Search, Reset, New, File, Edit, and Include Other. Below this is a toolbar with various icons. The main area is divided into tabs: Favorites, General, Address, Household, Vote History, Attribute, Canvass, Poll, Lawn Sign, Contribute, Pledge, Event, Log, Admin, and SQL. The 'Admin' tab is active, showing a 'Control' section with three checkboxes: 'Allow Windows-based access' (checked), 'Allow Web-based Profile Access' (unchecked), and 'Allow Polling access' (unchecked). A red arrow points to the 'Allow Windows-based access' checkbox. Below the control section is a table of voters. The table has columns for Incl, ID, Last Name, First Name, MI, Address Type, Address, Address Line 2, City, State, Zip Code, Birth Date, Gender, County, CD, SD, LD, and Reg Id. The table shows one record for a user with ID 151258, Last Name Kistenson, First Name Joel, and MI Anders. The 'Search' button in the top left corner is highlighted with a red box.

Incl	ID	Last Name	First Name	MI	Address Type	Address	Address Line 2	City	State	Zip Code	Birth Date	Gender	County	CD	SD	LD	Reg Id
<input checked="" type="checkbox"/>	151258	Kistenson	Joel	Anders		9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427		M	Hennepin	05	46	46A	

That sums up the basic steps to remove a user's security as well as the email notifications they receive for online occurrences.

For more information, continue reading to see what actually takes place in their record card when the security is revoked, and take a look at the **Related Resources** at the bottom for quick links to other related **articles & videos**.

This is what happens to the '**Security** and **Notification**' attributes in a user's record card when their security is **revoked**:

File Edit | Mark E Panger [51491]

Title: [Dropdown]
First Name: Mark
Middle Name: E
Last Name / Suffix: Panger
Prior Last Name:
Nickname:
Voter Type: Individual
Candidate FEC: (none)
Committee FEC Id:

Home Address:
 600 5th Ave S
 Hopkins, MN 55343
 952-938-0248

Work Address:
 No Address

Email:
 mpanger@trailblz.com

Employer / Occupation:
 Self / customer support

General Household Gallery Vote History Attribute Poll Relation Financial Pledge Event Logs Lawn Sales Admin

Control Logon Attributes Settings Filter

Attribute	Yes	Date	Note
Notification by Email	<input type="checkbox"/>		
Web Services	<input type="checkbox"/>		
Notify on Donation	<input type="checkbox"/>		
Notify on Event Signup	<input type="checkbox"/>		
Notify on New Purchase (Shopping Cart Invoice)	<input type="checkbox"/>		
Notify on Signup (Short Form)	<input type="checkbox"/>		
Notify on Signup Email Only	<input type="checkbox"/>		
Notify on Signup Self Built Form (aka PostBack)	<input type="checkbox"/>		
Notify on Signup with Groups	<input type="checkbox"/>		
Security	<input type="checkbox"/>		
Applications	<input type="checkbox"/>		
Calendar	<input type="checkbox"/>		
Data	<input type="checkbox"/>		
Allow Read Access	<input type="checkbox"/>		
Allow Write Access	<input type="checkbox"/>		
Email	<input type="checkbox"/>		
Activities	<input type="checkbox"/>		
Allow Sending of Individual Email	<input type="checkbox"/>		
Allow Sending of Mass Email	<input type="checkbox"/>		
Receive Mass Email Drafts	<input type="checkbox"/>		
Financial	<input type="checkbox"/>		
Polling	<input type="checkbox"/>		
Security Management	<input type="checkbox"/>		
Text	<input type="checkbox"/>		
Voter	<input type="checkbox"/>		
Activities	<input type="checkbox"/>		
Contribution	<input type="checkbox"/>		
Data	<input type="checkbox"/>		
Global	<input type="checkbox"/>		
Start Page	<input type="checkbox"/>		

All security and notification attributes get unchecked when a user's access is revoked.

IMPORTANT! *Never give out your username/password/database name (unless you are creating a new user) and always keep them stored in a secure place. Never share the same user account for 2 individuals (the reason being that you can more easily perform audits and track work and it increases security *unless you're using the [mobile poll watching application](#)). If you have any questions or are uncertain about users and security, give the Trail Blazer support team a call at 1-866-909-8700.*



Trail Blazer™

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

Related Resources

Article: [Adding a Database User and Setting Security Settings](#)

Article: [How to Change your Username, and Password Credentials](#)

Article: [Email Notification of Web Occurrences](#)

Article: [Website Email Notification](#)

Article: [Mobile Base Camp Articles](#)

Video: [Multiple Database Logon](#)

Video: [Eblasts – Setting people up to receive test \(draft\) emails](#)

Video: [Mobile Base Camp](#)

Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

✉ **Email:** support@trailblz.com

f **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

t **Twitter:** <https://twitter.com/trailblazersoft>

** As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

[Click here](#) to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

** After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive trainings.*

** This service is included in your contract.*