CHAPTER 15

Users & Security

DeepEnd provides a robust User Security System that can be easily configured to meet your needs. This chapter describes this security system and explains how to set up users and their permissions. The following topics are covered:

- Security System Overview
- User/Group Administration
- User/Group Permissions
- Reports

Security System Overview

Secured Items

"Secured Items" are processes or user interface elements (data entry forms, textboxes, menu options, etc.) that should not be available to all users and they form the foundation of the DeepEnd Security System. The secured items in DeepEnd are pre-defined and built into the program. You cannot add or delete secured items – you can only specify the level of permission each user group (or user, by exception) is granted. Users and groups can be granted *Full* access, *Read-Only* access or *No* access to secured items. Some secured items, due to their nature, provide only Full access or No access.

The following table lists the different Types of secured items and the levels of user access that can be set for each type.

Type	Description	Full	Read Only	None
Menu Pad	Titles across the top of the system menu	✓	N/A	✓
Menu Bar	Menu options in dropdowns under the Menu Pads	✓	N/A	✓
Form	Typically data entry forms – e.g. Customers form	✓	✓	✓
Control	Data entry objects found in data entry forms. - e.g. textboxes, lists, grids, buttons, etc.	✓	✓	✓
Process	Process that have no visible user interface elements. - e.g. Opening the cash drawer	✓	N/A	✓
Report	Printed reports, most of which are summoned from the Report Catalog form	✓	N/A	✓

See *Appendix "A"* for a complete list of Secured Items in DeepEnd.

Users & User Groups

Anyone needing to use DeepEnd must login by entering a valid User ID and Password. Users are added to the system by the System Administrator.

Each user should be given their own User ID and Password. User ID's and Passwords should never be shared.

Users are also assigned to User Groups to make it easier for the System Administrator to manage the permissions each user has. When a user is assigned to a group, the user is said to be a *Member* of that group.

DeepEnd has the following User Groups built in…

- Administrators
- Managers
- Technicians
- Sales People
- Cashiers
- Users

…and you can add as many other groups as you wish. You can also rename or delete these pre-defined groups if they do not suit your needs.

User Permissions

After successful login, the tasks the user can perform and the features they can access are policed according to their security permissions. For the most part, these permissions are assigned to groups rather than to individual users and all users that are members of a particular group inherit the permissions that are defined for that group.

In cases where a user is a member of more than one group, DeepEnd grants the least restrictive permission of all of the groups of which the user is a member. For example, let's say a user is a member of both the Technicians Group and the Users Group and Users can add new customers while Technicians cannot. The user would be allowed to add new customers because he/she is a member of the Users Group and the Users less restrictive permissions would take precedence over the Technicians more restrictive permissions.

User Permission Exceptions

At some point, you will probably have a case where a user needs to be able to perform a task that is not allow by the permissions defined for the groups of which the user is a member. DeepEnd provides the ability to define Permission Exceptions that take precedence over group permissions. By defining permission exceptions, a user can be assigned more restrictive or less restrictive permissions than his/her inherited group permissions.

User Permission Overrides

Some tasks logically should require special authorization by a manager or other person in charge. Examples include price or credit limit overrides.

DeepEnd provides temporary permission overrides for specific restricted tasks so that processes do not need to be aborted due to insufficient user permission. An authorized person can enter their User ID and password to perform the restricted task and enable the process to continue. The permission override applies only to that specific restricted task and the logged-in user's permissions remain in affect for all subsequent activity.

User/Group Administration

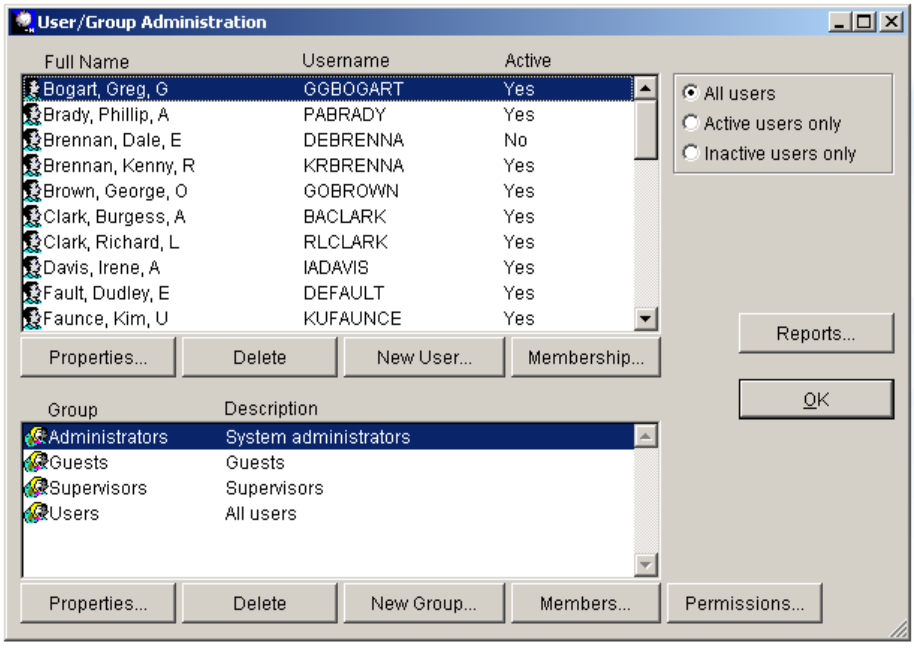
The User/Group Administration form is used for entering and maintaining users, groups and user group memberships. Every aspect of the DeepEnd Security System can be accessed from this starting point. Please note that this form is not available in the POS module – it can only be accessed in the Core Service program (DS.EXE).

By default, only the System Administrator has full access to this form. The Administrator originally installed is…

User ID: MANAGER
Password: PASSWORD

This User ID and/or Password should be changed as soon as possible after installation. Otherwise, anyone who reads this chapter can log in as an administrator. Additionally, you should not grant non-administrators full access to this form because this would severely compromise system security.

To display the User/Group Administration form, select **Tools | System Administration** from the menu.

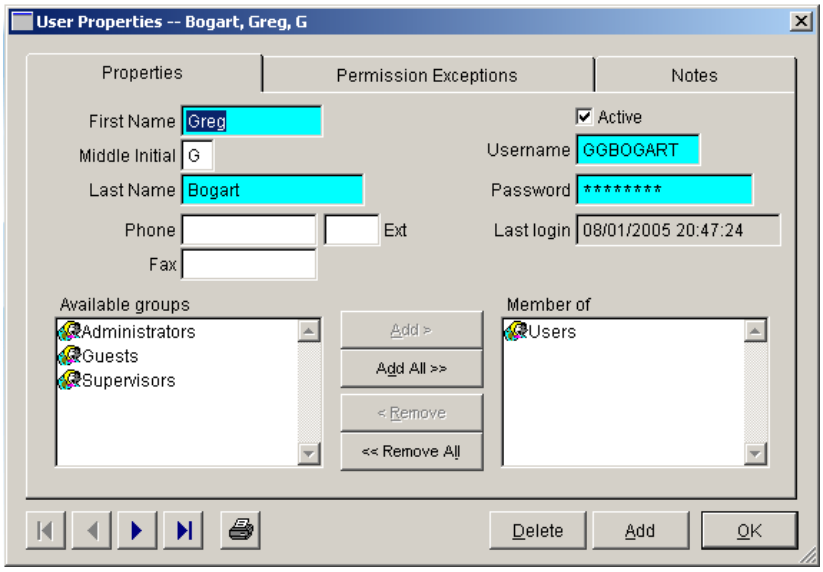


The upper list contains the names of users that have been created. The radio buttons to the right of the list enable you to filter the list according to the users' Active status. You can display **All Users**, **Active users only** or **Inactive users only**.

Adding a New User

STEPS

1. Click **New User…** below the users list.
2. The User Properties form is displayed in Add Mode ready for data entry. Enter all of the basic user information in the **Properties** page.
   Note that the *First Name*, *Last Name*, *Username* and *Password* are required
   fields.



3. To add the user to one or more groups, select the desired groups from the **Available list** and move them to the **Member of** list.
4. If there are any additional notes about the user that you wish to enter, select the **Notes** page and type them in.
5. You can also define any required Permission Exceptions. See *User Permission Exceptions* later in this chapter for detailed instructions.
6. Click **Save** to save the new user or **Cancel** to cancel the new entry.

Setting User Properties

STEPS

1. Select the desired user in the Users list.
2. Click **Properties…** below the users list.
   The User Properties form is displayed showing the information for the selected user *(see illustration above)*.
3. Change the user properties as necessary.
   Common changes include entering a new password or setting the user status to *Inactive*.
4. To add the user to one or more groups, select the desired groups from the **Available** list and move them to the **Member of** list.

5. To remove the user from one or more groups, select the desired groups from the **Member of** list and move them to the **Available** list.
6. If there are any additional notes about the user that you wish to enter, select the **Notes** page and type them in.
7. You can also define any required Permission Exceptions. See *User Permission Exceptions* later in this chapter for detailed instructions.
7. Click **Save** to save the changes or **Cancel** to discard the changes.

Deleting a User

STEPS

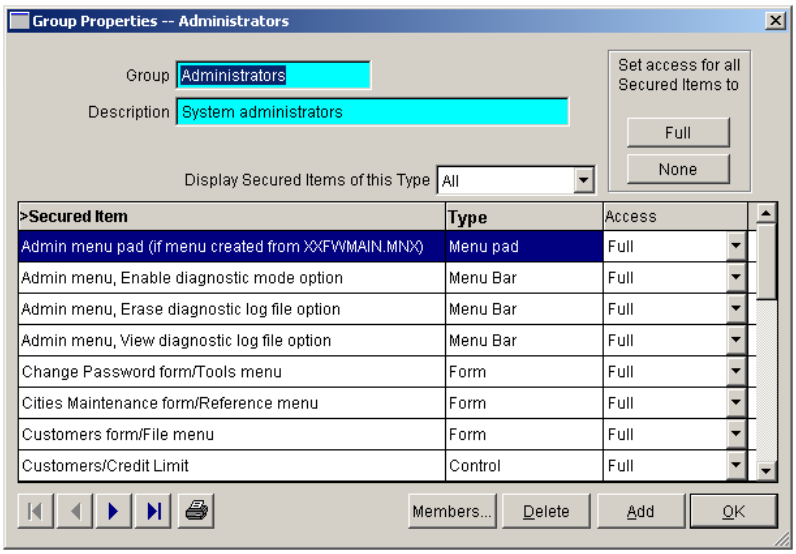
1. Select the desired user in the Users list.
2. Click **Delete** below the users list..
3. Click **Yes** to confirm the deletion or **No** to cancel the deletion

Users can only be deleted if they have no transaction history. Users that are linked to activities such as sales, service, inventory transfers, etc. cannot be deleted. In cases where a user should no longer appear in the user picklist or be able to log in (such as when a user no longer works for you), you can set the user's status to Inactive.

Adding a New Group

STEPS

1. Click **New Group…** below the users list.
2. The Group Properties form is displayed in Add Mode ready for data entry. Enter the Group Name and Description. Note that these are required fields.



3. You can also define group permissions here. See *Setting Group Permissions* later in this chapter.
4. Click **Save** to save the new user or **Cancel** to cancel the new entry.

Setting Group Properties

STEPS

1. Select the desired group in the Groups list.
2. Click **Properties…** below the groups list.
   The Group Properties form is displayed showing the information for the selected group *(see illustration above)*.
3. Change the group Name and/or Description as necessary.
4. You can also re-define group permissions here. See *Setting Group Permissions* later in this chapter
5. Click **Save** to save the changes or **Cancel** to discard the changes.

Deleting a Group

STEPS

1. Select the desired group in the groups list.
2. Click **Delete** below the groups list.
   Note that the **Delete** button is disabled when the current logged-in user is selected.
3. Click **Yes** to confirm the deletion or **No** to cancel the deletion.

Groups can only be deleted if they have no member users. If you wish to delete a group that has member users, you must first remove all users from the group. Please note that you cannot delete a user from a group if that user is not also a member of at least one other group. All users MUST be a member of at least one group. See Group Membership later in this chapter.

User/Group Membership

Every user must be a member of at least one group. This section describes how to add users to and delete users from groups. Please note that the following instructions assume that the User/Group Administration form is currently open and also assumes familiarity with Mover Lists.
See also: *Mover Lists* in *Chapter 2 – User Interface Overview*.

There are two different approaches you can take.

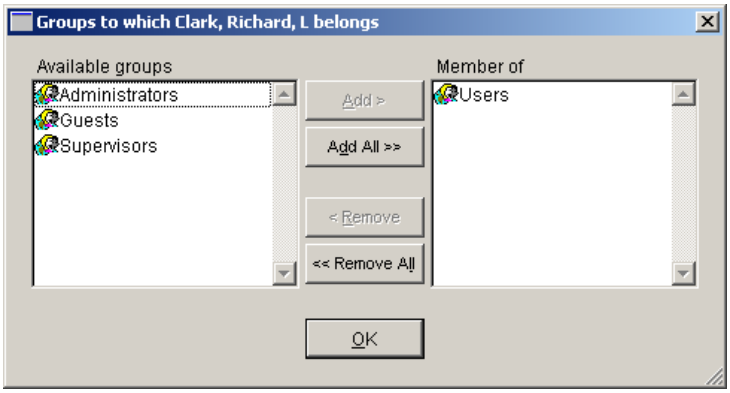
- Modify a User's properties and select all of the Groups to which the user should be added.
- Modify a Group's properties and select all of the Users that should be added to the group.

Defining User Membership

This section describes how to specify the groups of which a user is a member.

STEPS

1. Select the desired user in the users list.
2. Click **Membership…** below the users list.



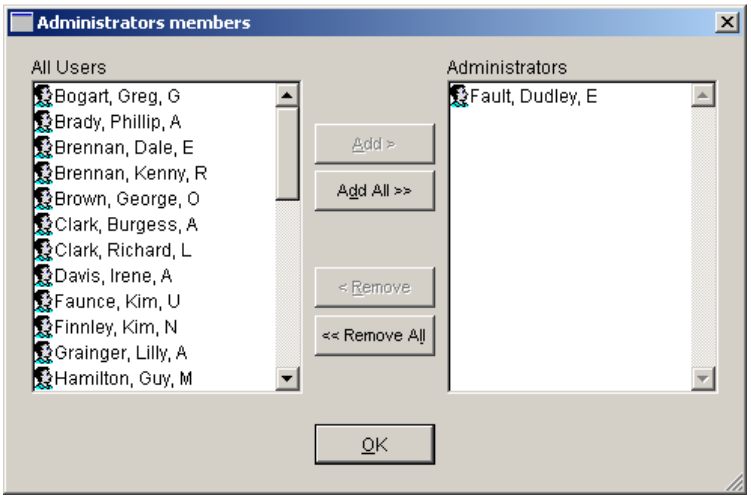
3. To add the user to a group, move the group from the **Available groups** list to the **Member of** list.
4. To remove the user from a group, move the group from the **Member of** list to the **Available groups** list.
5. Click **Save** to save the changes or **Cancel** to discard the changes.
6. Click **Ok** to close the window and return to the User/Group Administration form.

Defining Group Members

This section describes how to specify which users are members of a group.

STEPS

1. Select the desired group in the groups list.
2. Click **Members…** below the groups list.



3. To add a user to the group, move the user from the **All Users** list on the left to the **<Group Name>** list. Note that the tile of the list on the right is always the name of the group that you selected in Step 1.
4. To remove a user from the group, move the user from the **<Group Name>** list to the **All Users** list.

5. Click **Save** to save the changes or **Cancel** to discard the changes.
6. Click **Ok** to close the window and return to the User/Group Administration form.

User/Group Permissions

This section describes how to grant or deny access to secured items so that users cannot do or see things for which they are not authorized. Please note that the following instructions assume that the User/Group Administration form is currently open.

There are three different places where you can set user permissions…

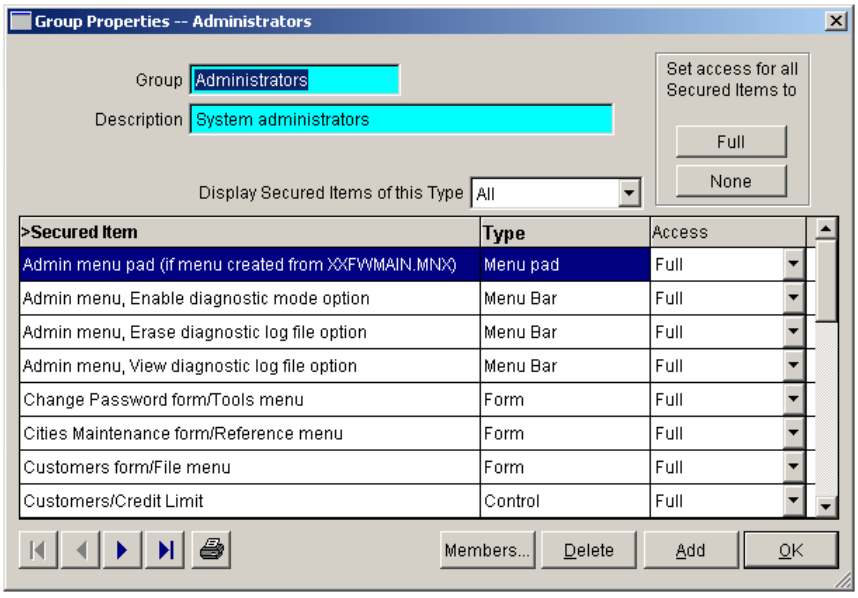
- Group Properties form
- Group Permissions to Secured Items form
- User Properties form :: Permission Exceptions page

Group Properties

This form enables you to define permissions for a specific user group and is particularly handy when you need to set permissions for a new group that you just added.

STEPS

1. Select the desired group in the Groups list.
2. Click **Properties…** below the groups list.
   The Group Properties form is displayed showing the information for the selected group.



3. In the secured items list, select the secured item for which you wish to set the access level for the group.

4. In the **Access** column, select the desired access level from the dropdown list.
5. Repeat Steps 3 & 4 for all of the secured items that you wish to set.
6. Click **Save** to save the changes or **Cancel** to discard the changes.

There are also some other form controls on this form that you can use to speed this process up.

Display Secured Items of this Type — By selecting a secured item Type from this dropdown list, the secured items list is filtered to display only secured items of this type.

Set access for all Secured Items to — This gives you a quick way to set the security for all secured items in the list to the same access level. If you have filtered the secured items list (described above) to display only one Type, only secured items of that Type will be affected.

Full — Sets the access level for all items to *Full Access*

None — Sets the access level for all items to *No Access*

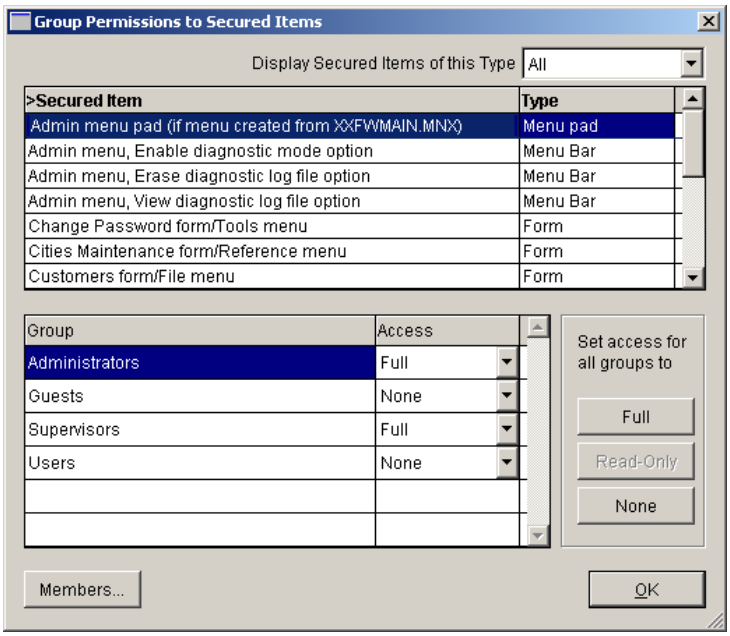
Group Permissions to Secured Items

This form enables you to define permissions for all secured items and all user groups providing one place to make all of your security settings.

This form is also particularly handy following an upgrade to DeepEnd where one or more new secured items are added to go along with new functions and features that were added to the program as part of the upgrade.

STEPS

1. In the User/Group Administration form, click **Permissions…**
   The *Group Permissions to Secured Items form* is displayed.



2. In the secured items list, select the secured item for which you wish to set the access level.
3. In the user groups list, select the group for whom you wish to set the access level for the selected secured item.
4. In the **Access** column, select the desired access level from the dropdown list.
5. Repeat Steps 3 & 4 for all of the groups whose access level you wish to set for the selected secured item.
6. Repeat Steps 2 thru 5 for all of the secured items for you wish to set permissions.
7. Click **Save** to save the changes or **Cancel** to discard the changes.
   NOTE: If you have a considerable number of settings to make, it is a good idea to periodically save your changes to prevent loosing your work in the event of a power outage or system failure.

There are also some other form controls on this form that you can use to speed this process up.

Display Secured Items of this Type By selecting a secured item Type from this dropdown list, the secured items list is filtered to display only secured items of this type.

Set access for all groups to This gives you a quick way to set the security for all groups in the list to the same access level for the select secured item. If you have filtered the secured items list (described above) to display only one Type, only secured items of that Type will be affected.

Full Set the access level for all items to *Full Access*

Read-Only Sets the access level for all items to *Read-Only Access* This setting applies only to the secured item types **Form** and **Control**.

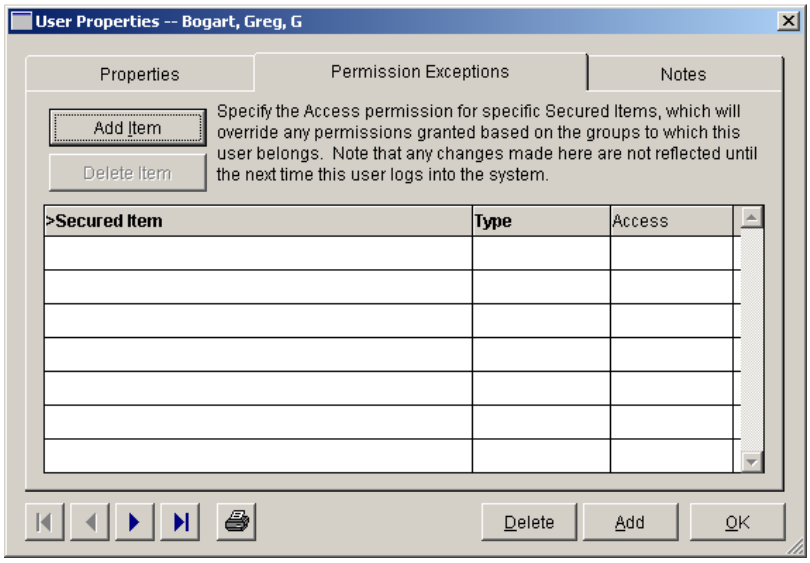
None Sets the access level for all items to *No Access*

User Permission Exceptions

STEPS

1. Select the desired user in the Users list.
2. Click **Properties…** below the users list.
   The User Properties form is displayed showing the information for the selected user.
3. Click the **Permission Exceptions** page tab.

4. Add and Delete the Permission Exceptions as needed.



Adding an Exception

a) Click **Add Item**. The Secured Items picklist is displayed.
b) Select the desired secured item from the picklist.
c) In the **Access** column, select the desired access level from the dropdown list.

Deleting an Exception

a) In the Exceptions list, select the secured item you wish to delete.
b) Click **Delete Item**.
c) Click **Yes** to confirm the deletion or **No** to cancel the deletion.

5. Click **Save** to save the changes or **Cancel** to discard the changes.

Reports

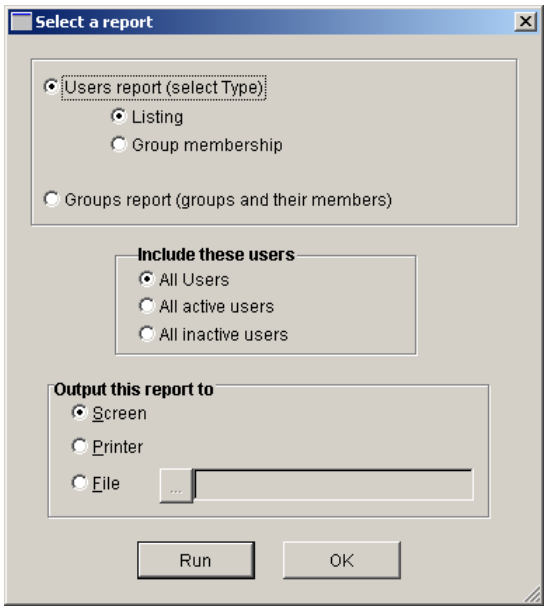
There are three reports that you can use to review your users and group memberships

Users Listing	Simple listing of Users
Users and the Groups to which they belong	Simple listing of Users and the Groups to which each belongs
Groups and their Members	Simple listing of Groups and the Users who are Members

Running the Reports

STEPS

1. In the User/Group Administration form, click **Reports…**
   The Select a Report dialog is displayed.



2. Select the report you wish to run.
3. Specify the scope and output options

Include these users
Select **All Users**, **All Active Users** or **All Inactive Users**.

Output this report to
Select **Screen**, **Printer** or **File**.
If you select **File**, enter the file name (with directory path) or click the ellipses button to use the **Open** dialog to specify the file name and location.

4. Click **Run**.

These reports can also be run from the Report Catalog form.