

# **AES**

## **Adaptive Enterprise Solutions**

**...unlocking the dawn of better results for your organization**

### **SYSTEM ADMINISTRATOR SECURITY WIZARD GUIDE**



**Adsystemtech Inc.**

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# Overview of Security Wizard

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Security Wizard is a tool used by System Administrators to begin the security setup of the AES system.

With this tool, Administrators will create and manage Roles and the permissions granted to those Roles, create Regions and Organizations, assign Roles to Organizations, establish Organization Administrators, and assign Reports to Applications.

Note that the Grid Titles tell which record is currently active and the total number of records.

## *Glossary*

**Domain** is the physical instance of the software used for one collaborative; there may be a Production domain and a Training domain

**Application** is the designation given to the collection of pages in the system used for a specific type of program, i.e. HMIS, Head Start, CSBG, or Weatherization; only one Application can be used at a time

**Application Roles** (sometimes just called Roles) determine which pages in a specific Application a User can see and use; the name usually includes reference to both the application and the role, i.e. CSBGCM for Case Managers using CSBG or HMISPM for Program Managers using HMIS

**Organization** is an Agency set up to use the system

**Org Code** is a unique 3-digit code that identifies one Organization; all Program names, User Group names, User names begin with this code

**Program** is a program within the Organization; it will include one or more Program Components, Target Goals and Activities

**Program Area** is a grouping of Programs; each Program must be linked to a Program Area; a Program Area may have more than one Program linked to it; they are used primarily for reporting

**User Group** determines which Programs a User has access to; it will have permission to access one or more Programs

**User** is a Login ID created to log in to the system; it has permissions granted to it for various Groups and Roles

**Active** or **Valid** designates the item is currently being used in the system; since many items may not be deleted after they have been used, there is the option of making an item inactive or invalid

**Grantor** is the group granting rights to its data to a User Group

**Grantee** is the group receiving rights to the data of a Program or Group

## *The Basic Process*

- 1 Create Roles for each Application to be used
- 2 Assign Page Permissions for each Role (use Control and Menu Permissions if needed)
- 3 Create Region(s)
- 4 Create Organizations (in the correct Region)
- 5 Assign Roles to Organization (Use Unions if assigning to multiple Organizations at once)
- 6 Create Local Administrators for each Organization
- 7 Assign Reports and Adhoc Views for each Application

## ***Security Wizard Structure***

There are two main sections of Security Wizard:

- 1 Application Management section
  - a Application Roles is where Roles are created for each Application being used
    - i) Roles give Users access to specific pages in the system
    - ii) An Organization will not have access to an Application until a Role is created for that Application and is assigned to the Organization
  - b Library section includes pages where Permissions are assigned for Pages, Menus and Controls
    - i) Page permissions give the Role access to pages in the system
    - ii) Control permission gives the Role access to specific controls on a page in the system
    - iii) Menu permission gives the Role access to specific menus on a page in the system
  - c Report section allows Reports for each Application
    - i) Each Report Type – General, Application and Adhoc – lists all available Reports
    - ii) Each Report and Adhoc View can be enabled for a specific Application
- 2 Organizational Management section
  - a The Organization Page allows the creation of Regions and Organizations within those Regions
    - i) Once an Organization is saved, the Region and Org Code assigned to it cannot be changed
  - b Each Organization will be assigned a unique 3 digit Org Code; this Code will automatically preface elements within that Organization, such as Program Names, Program Components, User IDs
  - c Roles are assigned to Organizations; this assignment also creates the link between Organizations and the Applications available to it
    - i) Roles can be assigned to one Organization at a time
    - ii) Unions can be created of a group of Organizations and Roles can then be assigned to the entire Union at once
    - iii) If an Application doesn't seem to be available in Security Manager, check Security Wizard to make sure that a Role has been created for that Application and that the Role has been assigned to the Organization
  - d Local Administrators are created on the User Admin page; this will initiate their access to the Security Manager section

# Create Application Roles

Create new Roles and view Roles already created for an Application on this page. Roles determine which pages in the AES system a User may see and use; each Application will have its own set of Roles.

Some Roles will be preset by Adsystem; those Roles (which have a designation of LA in the ROLE(S) OF THE APPLICATION GRID column SYS) will be automatically assigned to all Local Administrator Users created in Security Wizard.

Name the roles something easily identifiable, we suggest using a combination of the Application and use, i.e. Case Managers using HMIS might be HMISCM; Program Managers using CSBG may be CSBGPM. Use the Description field to identify for what purpose the Role will be used.

The screenshot displays the Security Wizard interface for managing application roles. The main window is titled "Security [DEBAgencyAdmin]". The address bar shows "aes://securitywizard/application roles". The left sidebar contains a "Navigator" with a tree view showing "Security Wizard" > "Application Management" > "Application Roles". The main area is divided into two sections. The top section, "Application(s) in Domain {14 of 29}", contains a table of applications. The bottom section, "Role(s) of the Application {1 of 6}", contains a table of roles for the selected application, "HMIS".

ApplicationName	Description	AppID	AppMenuID	Custom	Version	Style
eFactory	V1.0	100026	1		4.4.6.0	
EmployeeFTE	V1.0	100018	1		4.4.6.0	
Encounter	V1.0	100017	1		4.4.6.0	
First5	V1.0	100012	1		4.4.6.0	
FoodService	V1.0	13	1		4.4.6.0	
HeadStart	V1.0	8	1		4.4.6.0	
HEAP	V1.0	5	1		4.4.6.0	
Help	V1.0	100023	1		4.4.6.0	
HMIS	V1.0	100010	1		4.4.6.0	
Housing	V1.0	100013	1		4.4.6.0	

RoleName	ApplicationName	Description	Valid
HMISLA	HMIS	HMIS role for Loc	<input checked="" type="checkbox"/>
HMIS	HMIS		<input checked="" type="checkbox"/>
HMISCM	HMIS	HMIS role for Cas	<input checked="" type="checkbox"/>
HMISswipeCard	HMIS	Swipe Card Role	<input checked="" type="checkbox"/>
HMISswipeCM	HMIS		<input checked="" type="checkbox"/>
HPRP Basic Pag	HMIS	Minimum pages f	<input checked="" type="checkbox"/>

## Navigating the Application Roles Page

- All available Applications will appear in the APPLICATION(S) IN DOMAIN GRID in the top section
- New Roles will be created in the left section
- All Roles linked to the selected Application will appear in the ROLE(S) OF THE APPLICATION GRID on the bottom right side

### **View available Roles**

- 1 Select Application in APPLICATION(S) IN DOMAIN GRID
  - a All linked Roles will appear in the ROLE(S) OF THE APPLICATION GRID
- 2 Click on Role in grid to see information about that Role
  - a Some Roles will be created by Adsystem
  - b Once a Local Administrator and/or Super Administrator is created (*see User Admin page*), that User will automatically have access to appropriate Roles (i.e. that have sys=LA)

### **Create a New Role**

- 1 Select Application in APPLICATION(S) IN DOMAIN GRID
- 2 Click NEW button in lower left section
- 3 Enter Role Name
- 4 Enter Description of Role
  - a This description will be helpful to tell apart the new roles as you create them
- 5 Click to create checkmark in VALID checkbox
- 6 Click SAVE button

### **Copy Existing Role**

- 1 Select Role to copy in ROLE(S) OF THE APPLICATION GRID
- 2 Click COPY button
- 3 Rename Role in Role Name field
- 4 Enter Description
- 5 Make sure VALID checkbox is checked
- 6 Click SAVE button

### **Delete Existing Role**

- 1 Select Application in APPLICATION(S) IN DOMAIN GRID
- 2 Select Role to delete in ROLE(S) OF THE APPLICATION GRID
- 3 Click DELETE button

### **Make an Existing Role inactive**

- 1 Select Application in APPLICATION(S) IN DOMAIN GRID
- 2 Select Role to delete in ROLE(S) OF THE APPLICATION GRID
- 3 Click in VALID checkbox to remove checkmark
  - a The Role remains in the system but will not be available for use

# Assign Page Permissions

Use this page to manage the permissions assigned to each Role. Permission assigned on this page includes all menus and controls on a page; if a Role should have access to only certain items on a Page, manage those exceptions with the Control Permission or Menu Permission pages.

The screenshot shows the Security Wizard application interface. The main window title is "Security-[DEBAgencyAdmin]". The address bar shows "aes://securitywizard/page permission". The Navigator on the left shows a tree structure with "Page Permission" selected. The main area is divided into several sections:



- Application:** A dropdown menu set to "HMIS".
- All Pages in Current Application (1 of 82):** A table with columns: TreeNode, Page, LibraryID. It lists various pages like Client Listing, Demographics, Documents, etc.
- Application Role (7 of 7):** A table with columns: RoleName, ApplicationName, Description. It lists roles like HMISLA, HMIS, HMISCM, etc.
- Page Permission of Current Role (1 of 82):** A table with columns: Page, Valid, LibraryID, Rol. It lists permissions for various pages, with checkboxes in the Valid column.

At the bottom of the window, there are three tabs: "Application: HMIS", "Role: HPRP Basic Pages", and "Page: Customer Listing".


## Navigating the Page Permission Page

- All available Applications will be listed in the Application dropdown
- All Roles available in the selected Application will appear in the APPLICATION ROLE GRID
- All pages in the selected Application will be listed in the ALL PAGES IN CURRENT APPLICATION GRID
  - Note the Grid shows the Name that shows in the Tree, the system page name and the Library ID name
- All Page Permissions linked to the selected Role will appear in the PAGE PERMISSION OF CURRENT ROLE GRID

### Assign Page Permissions to Role

- 1 Select Application in Application Dropdown at the top of page
- 2 Select Role(s) in APPLICATION ROLE GRID in upper right section
  - a To select more than one Role in the grid, click and drag down to select all rows
  - b Or click on the first page, press CTRL and click on each additional Role to add
- 3 Select page(s) in ALL PAGES IN CURRENT APPLICATION GRID on left side of page
  - a To select more than one page in the grid, click and drag down to select all rows
  - b Or click on the first page, press CTRL and click on each additional page to add
- 4 Click right arrow button 
  - a Page will appear in PAGE PERMISSION OF CURRENT ROLE GRID
  - b Use left arrow button to remove permission from Role 
- 5 Repeat for each Page to add
- 6 Repeat for each Role

### Remove Page Permission from Role

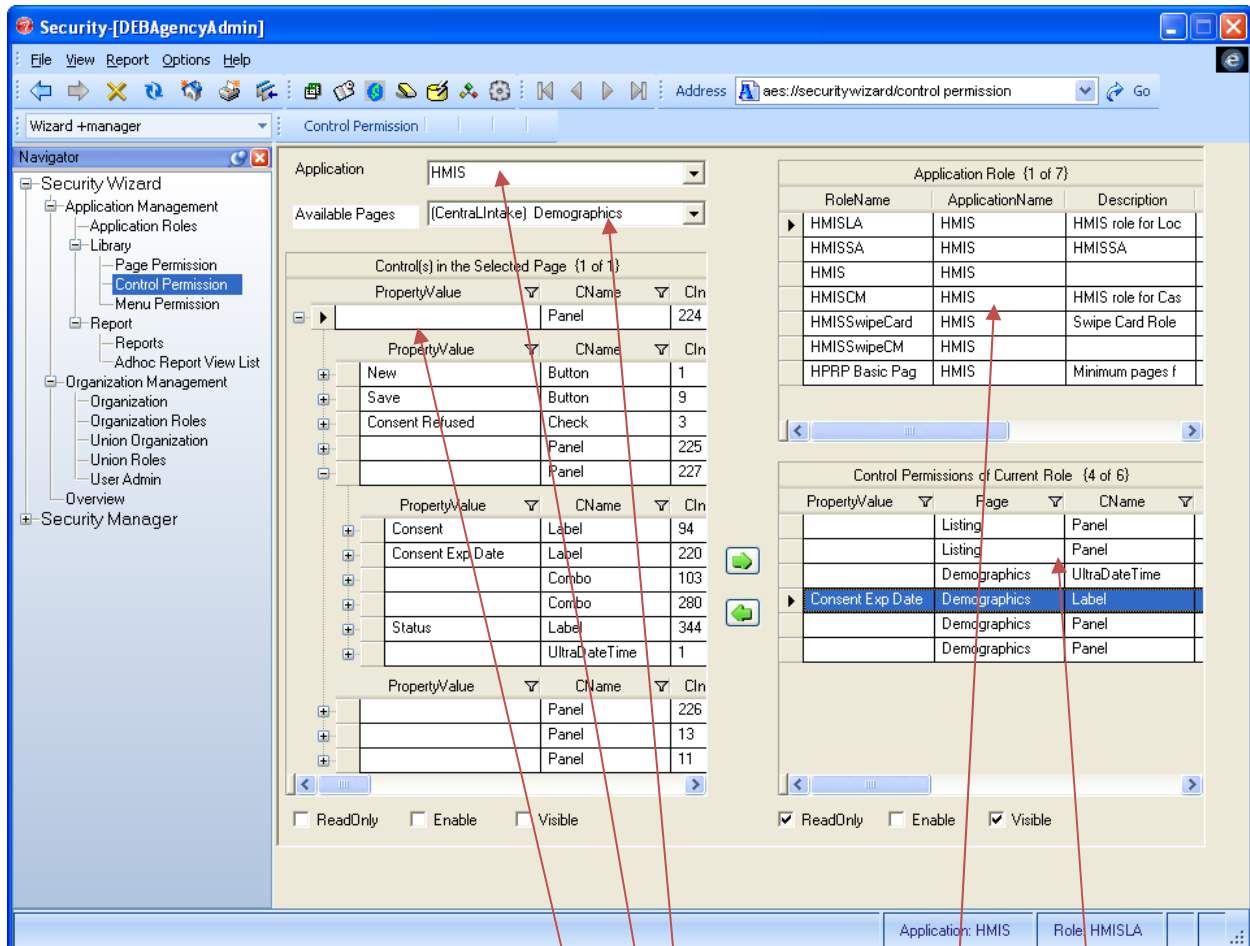
- 1 Select Application in Application Dropdown at the top of page
- 2 Select Role in APPLICATION ROLE GRID in upper right section
- 3 Select page(s) in PAGE PERMISSION OF CURRENT ROLE GRID on right side of page
  - a To select more than one page in the grid, click and drag down to select all rows
  - b Or click on the first page, press CTRL and click on each additional page to add
- 4 Click left arrow button 
  - a Page will disappear from PAGE PERMISSION OF CURRENT ROLE GRID

### View all Page Permissions assigned to Role

- 1 Select Application in Application Dropdown at the top of page
  - 2 Select Role in APPLICATION ROLE GRID in upper right section
  - 3 All linked Pages will appear in PAGE PERMISSION OF CURRENT ROLE GRID on right side of page
- Notice the number of pages assigned to the Role is listed above the PAGE PERMISSION OF CURRENT ROLE GRID

# Assign Control Permissions


Use this page to manage the permissions for Controls on a Page. Pages will appear on this page when there are specific Control items available; otherwise, pages will not be available here. If a Role should have access to everything on a page, it can be granted on the Page Permission page instead.



## Navigating the Control Permission Page

- All available Applications will be listed in the Application dropdown
- All Roles available in the selected Application will appear in the APPLICATION ROLE GRID
- All Pages in that Application will be listed in the Available Pages dropdown
- All Controls in the selected Page will be listed in the AVAILABLE CONTROL(S) IN THE SELECTED PAGE GRID
  - A + next to a row designates that there are child controls hidden, click the + to show those controls
  - Clicking a – will close the section and hide the related controls
- All Control Permissions linked to the selected Role will appear in the CONTROL PERMISSION OF CURRENT ROLE GRID
  - Checkboxes below Grid show the permissions assigned to the selected Control


### Assign Control Permissions to Role

- 1 Select Application in Application Dropdown at the top of page
- 2 Select Role in APPLICATION ROLE GRID in upper right section
- 3 Select Page in Available Pages dropdown
- 4 Select Control in AVAILABLE CONTROLS(S) IN THE SELECTED PAGE GRID on left side of page
  - a A – symbol means there are more menus hidden from view, click the – to view them
  - b A + symbol means all menus available on the selected page are visible
  - c If no Controls appear, there are no available Controls on the selected page
- 5 If the Control access should be Read Only, click to create checkmark in Read Only checkbox
  - a If Role should have full access of Control, make sure no checkmark is in Read Only checkbox
  - b Read Only means the User can see the Control, but not change it
- 6 If the Control should be enabled for this Role, click to create checkmark in Enable checkbox
  - a If Control should NOT be enabled for Role, make sure no checkmark is in Enable checkbox
  - b Enabled means the User can use this Control
- 7 If the Control should be visible for this Role, click to create checkmark in Visible checkbox
  - a If Control should NOT appear for Role, make sure no checkmark is in Visible checkbox
  - b Visible means the User can see the Control
- 8 Click >> right arrow button 

Page will appear in Control Permission of Current Role grid and checkboxes will be marked to indicate permissions assigned to Control.

- 9 Repeat for each additional Role

### Remove Control Permission from Role

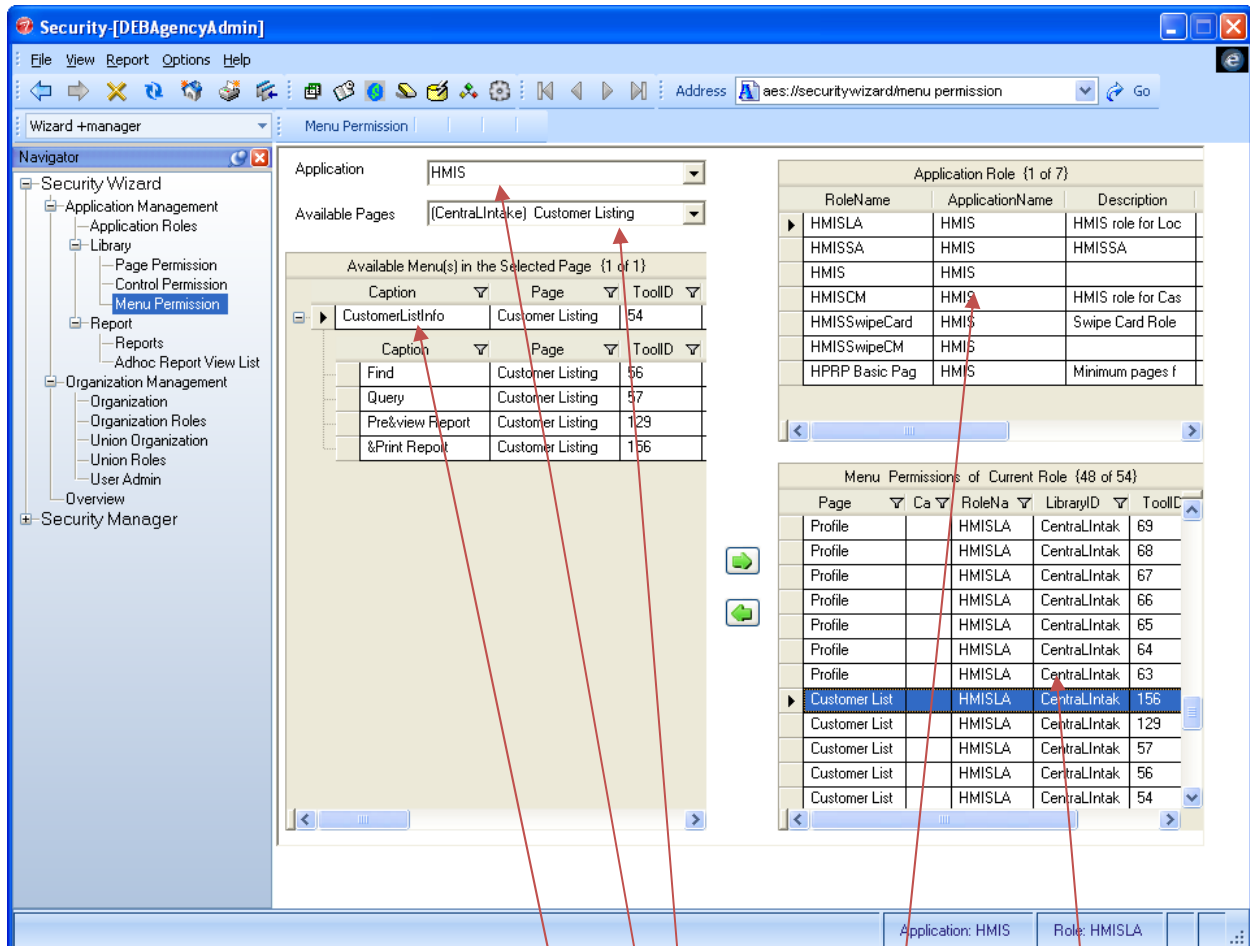
- 1 Select Application in Application Dropdown at the top of page
- 2 Select Role in APPLICATION ROLE GRID in upper right section
- 3 Select Page in Available Pages dropdown
- 4 Select Control in CONTROL PERMISSION OF CURRENT ROLE GRID on right side of page
- 5 Click << left arrow button 
  - a Page will disappear from CONTROL PERMISSION OF CONTROL PERMISSION OF CURRENT ROLE GRID

### View all Control Permissions assigned to Role

- 1 Select Application in Application Dropdown at the top of page
  - 2 Select Role in APPLICATION ROLE GRID in upper right section
  - 1 Select Page in Available Pages dropdown
- All linked Controls will appear in CONTROL PERMISSION OF CURRENT ROLE GRID on right side of page and checkboxes beneath Grid will indicate what type of permissions were assigned to the Control.

# Assign Menu Permissions


Use this page to manage the permissions for menus on a Page. Pages will appear on this page when there are specific Menu items available; otherwise, pages will not be available here. If a Role should have access to everything on a page, it can be granted on the Page Permission page instead.




## Navigating the Menu Permission Page

- All available Applications will be listed in the Application dropdown
- All Roles available in the selected Application will appear in the APPLICATION ROLE GRID
- All Pages in that Application will be listed in the Application Pages dropdown
- All Menus in the selected Page will be listed in the AVAILABLE MENU(S) IN THE SELECTED PAGE GRID
  - A + next to a row designates that there are child controls hidden, click the + to show those controls
  - Clicking a – will close the section and hide the related controls
- All Menu Permissions linked to the selected Role will appear in the MENU PERMISSION OF CURRENT ROLE GRID

### **Assign Menu Permissions to Role**

- 1 Select Application in Application Dropdown at the top of page
- 2 Select Role in APPLICATION ROLE GRID in upper right section
- 3 Select Page in Available Pages dropdown
- 4 Select Menu in AVAILABLE MENU(S) IN THE SELECTED PAGE GRID on left side of page
  - a A – symbol means there are more menus hidden from view, click the – to view them
  - b A + symbol means all menus available on the selected page are visible
  - c If no Menus appear, there are no available Menus on the selected page
- 5 Click right arrow button 
  - a Page will appear in MENU PERMISSION OF CURRENT ROLE GRID
- 6 Repeat steps for additional Menu to add
- 7 Repeat for each additional Role

### **Remove Menu Permission from Role**

- 1 Select Application in Application Dropdown at the top of page
- 2 Select Role in APPLICATION ROLE GRID in upper right section
- 3 Select Page in Available Pages dropdown
- 4 Select Menu in MENU PERMISSION OF CURRENT ROLE GRID on bottom right side of page 
- 5 Click left arrow button
  - a Page will disappear from MENU PERMISSION OF CONTROL PERMISSION OF CURRENT ROLE GRID

### **View all Menu Permissions assigned to Role**

- 1 Select Application in Application Dropdown at the top of page
- 2 Select Role in APPLICATION ROLE GRID in upper right section
  - a All linked Menus will appear in MENU PERMISSION OF CURRENT ROLE GRID on right side of page

# Add Reports to an Application


Use this page to manage the Reports to be available for each Application; Adhoc, Application and General Reports may all be set up on this page. The list of reports on this page comes from the Publisher Tool; it lists all Report rd1 files. These Reports will then be available in the Security Manager and will be assigned to User Groups there.

The screenshot shows the Security Wizard application interface. The Navigator pane on the left is expanded to show the 'Reports' section. The main area displays the 'Reports List (1 of 28)' grid, the 'Application (3 of 29)' grid, and the 'Reports and Applications (1 of 18)' grid. The 'Report Type' dropdown is set to 'ApplicationReport'. The 'Reports List' grid shows a list of reports with columns for ReportID, ReportName, and ReportType. The 'Application' grid shows a list of applications with columns for ApplicationName, Description, and ApplID. The 'Reports and Applications' grid shows a list of reports and applications with columns for ReportName, ReportType, and ApplicationID. Red arrows point from the text in the 'Navigating the Reports Page' section to the Report Type dropdown, the Reports List Grid, the Applications Grid, and the Reports and Applications Grid.


## Navigating the Reports Page

- Report Types will be listed in the Report Type dropdown
- All available Reports of the selected type will appear in the REPORT LIST GRID
- All Available Applications will be listed in the APPLICATIONS GRID
- All Reports available in the selected Application will appear in the REPORTS AND APPLICATION ROLE GRID

### **Assign Report to Application**

- 1 Select Report type in Report Type Dropdown at the top of page
  - a Ad Hoc, Application and General are the three Report types
  - b Available Reports will appear in REPORTS LIST GRID
- 2 Select Application in APPLICATION ROLE GRID in upper right section
- 3 Select Report(s) in REPORTS LIST GRID on left side of page
  - a To select more than one Report in the grid, click and drag down to select all rows
  - b Or click on the first Report, press CTRL and click on each additional Report to add
  - c If no Reports appear, there are no available Reports of the selected type for the selected Application
- 4 Click right arrow button 
  - a Report will appear in REPORT AND APPLICATION GRID

### **Remove Report from Application**

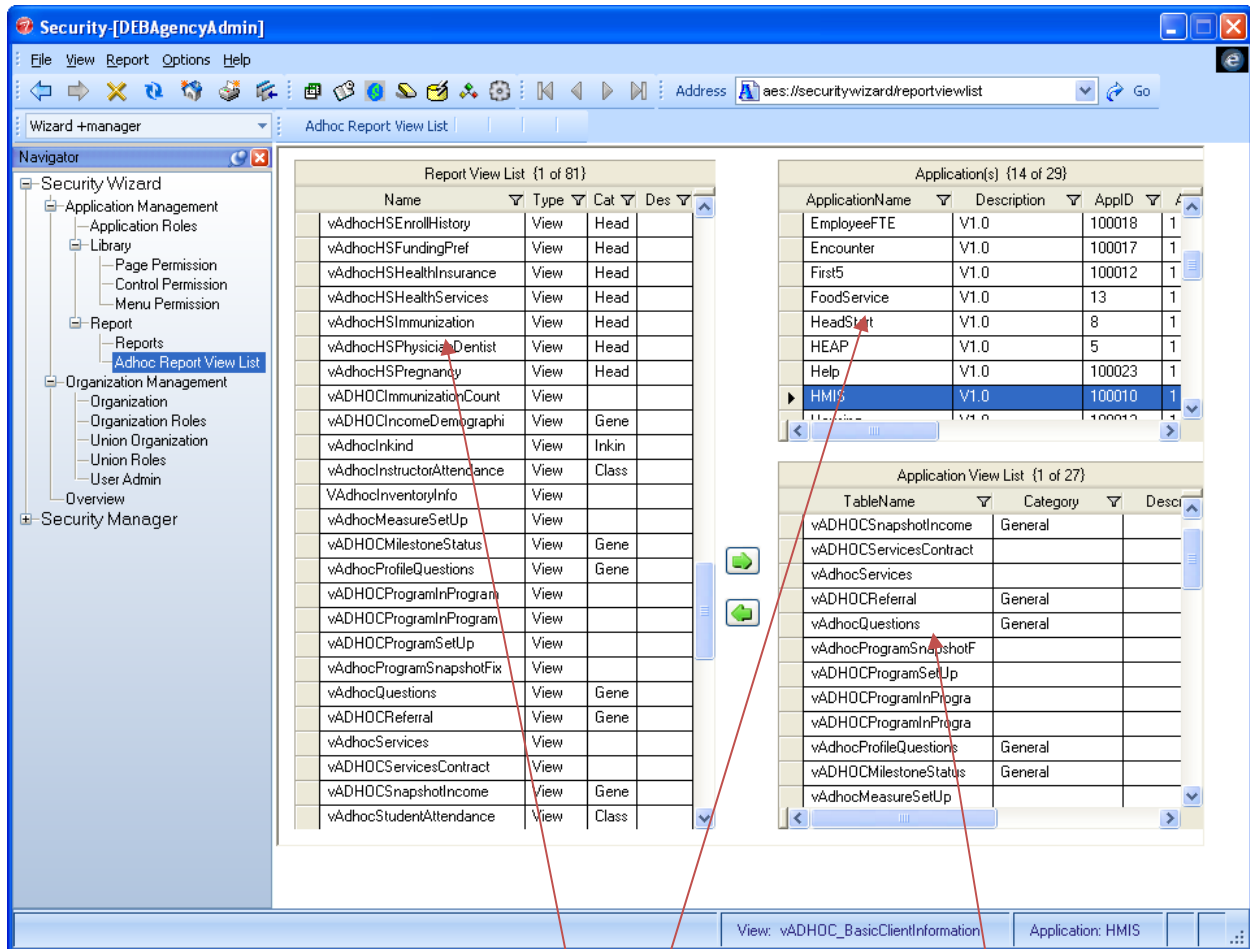
- 1 Select Report type in Report Type Dropdown at the top of page
- 2 Select Application in APPLICATION ROLE GRID in upper right section
- 3 Select Report in REPORT AND APPLICATION ROLE GRID in lower right section 
- 4 Click left arrow button
  - a Page will disappear from MENU PERMISSION OF CONTROL PERMISSION OF CURRENT ROLE GRID

### **View all Reports assigned to an Application**

- 1 Select Report Type in Report Type Dropdown at the top of page
- 2 Select Application in APPLICATION GRID in upper right section
- 3 All linked Reports will appear in REPORT AND APPLICATIONS GRID on lower right side of page

# Add Adhoc Report Views


Use this page to manage the views for Adhoc Reports that you want to be available on the Domain in each Application. Like Reports, Adhoc Views need to be assigned to Applications; they will then be available in the Security Manager to assign to User Groups.




## Navigating the Adhoc Reports Table List Page

- All Adhoc Reports will be listed in the REPORT VIEW LIST GRID
- All Applications will be listed in the APPLICATION(S) GRID
- All Reports available in the selected Application will appear in the APPLICATION VIEW LIST GRID

### **Assign Adhoc Report Views to Application**

- 1 Select Adhoc Report in REPORT VIEW LIST GRID on left side of page
  - a To select more than one Report in the grid, click and drag down to select all rows
  - b Or click on the first Report, press CTRL and click on each additional Report to add
- 2 Select Application in APPLICATION GRID in upper right section
- 3 Click right arrow button 
  - a Report will appear in APPLICATION VIEW LIST GRID in lower right section

### **Remove Adhoc Report View from Application**

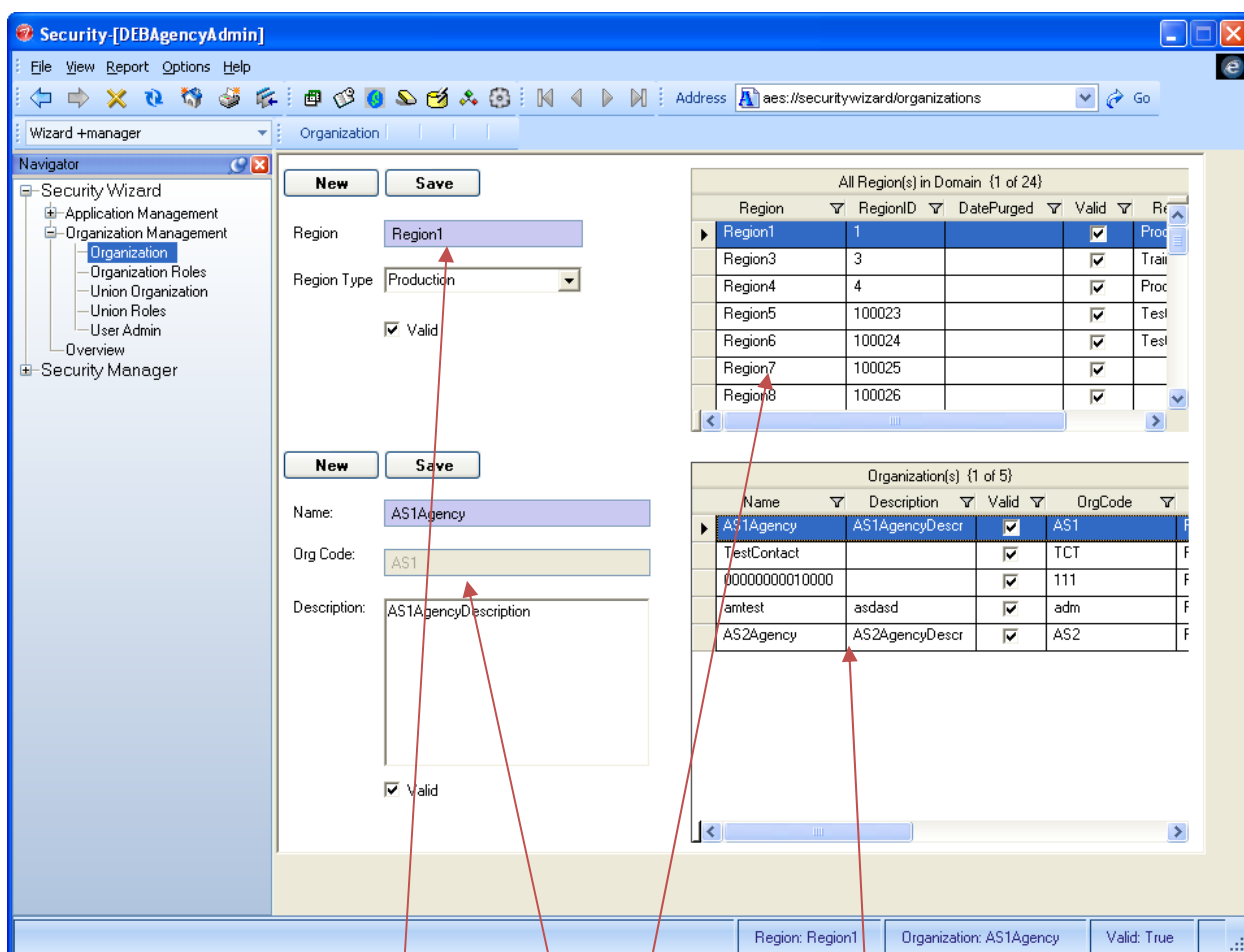
- 1 Select Application in APPLICATION GRID in upper right section
- 2 Select Report in APPLICATION VIEW LIST GRID in lower right section
- 3 Click left arrow button 
  - a Report View will disappear from APPLICATION VIEW LIST GRID

### **View all Reports assigned to an Application**

- 1 Select Application in APPLICATION GRID in upper right section
- 2 All linked Adhoc Report Views will appear in APPLICATION VIEW LIST GRID on lower right side of page

# Create Regions and Organizations

Use this page to create the Regions and Organization in the Domain. Each Organization will be created within one Region; each Region can have multiple Organizations assigned to it. Once an Organization is created, it cannot be moved to a different Region and its Org Code cannot be changed. The Org Code identifies the Organization and automatically precedes the names of all Programs, Users and other items in the system. When a new Organization is created, a Local Administrator will be created with the same Org Code and name AgencyAdmin.



## Navigating the Organization Page

- Create new Regions in the upper left section
- All available Regions appear in the ALL REGION(S) IN DOMAIN GRID
- Create new Organizations in the lower left section
- All available Organization in the selected Region appear in the ORGANIZATION(S) GRID

### **Create a new Region**

- 1 Click NEW button in top section
- 2 Enter Region NAME
- 3 Select Region Type
  - a Production, Test, Training
- 4 Click to create checkmark in Valid box
- 5 Click SAVE
  - a Region will appear in ALL REGION(s) IN DOMAIN GRID

### **Create a new Organization**

- 1 Select Region in ALL REGION(s) IN DOMAIN GRID
- 2 Click NEW button in bottom section
- 3 Enter Agency NAME
- 4 Enter ORG Code
- 5 Enter Description
- 6 Click in VALID checkbox
- 7 Click SAVE button
  - a Organization will appear in ORGANIZATION(s) GRID in bottom right section

### **View all Organizations in a Region**

- 1 Select Region in ALL REGION(s) IN DOMAIN GRID at the top of page
- 2 All Organizations created in the Region will appear in ORGANIZATION(s) GRID in bottom right section

# Assign Roles to Organizations

Use this page to assign Roles to an Organization. If Roles need to be assigned to more than one Organization, the Union Organization and Union Roles pages will be an easier place for the process.

Assigning a Role to an Organization also makes the Application available for that Organization.

The screenshot shows the Security Wizard [DEBAgencyAdmin] interface. The main area is titled 'Organization Roles'. The 'Application' dropdown is set to 'CSBG'. Below it is the 'Application Role (1 of 13)' grid:

RoleName	ApplicationName	Description
CSBGLA	CSBG	
CSBG_PM	CSBG	
1111LA	CSBG	
CSBGCM	CSBG	
CSBGFD	CSBG	CSBG Front Desk
CSBGFD3	CSBG	
CSBGFD4	CSBG	
CSBGX1	CSBG	
CSBG_CJC2	CSBG	
CSBGX1_2	CSBG	Copy of CSBGX1
CSBG_DV	CSBG	Test role
CSBGDCU	CSBG	CSBG DCU
CSBGIMG	CSBG	

To the right is the 'Organization(s) (1 of 18)' grid:

Name	Valid	Description	OrgID
AS1Agency	<input checked="" type="checkbox"/>	AS1AgencyDescr	10
TestContact	<input checked="" type="checkbox"/>		10012
TestCreateOrg	<input checked="" type="checkbox"/>	rrrr	10012
DebTest	<input checked="" type="checkbox"/>	Deb Test Agency	10012
Deb2Test	<input checked="" type="checkbox"/>	Union Test 1	10012
Deb3Test	<input checked="" type="checkbox"/>	Union Test 2	10012
Deb4Test	<input checked="" type="checkbox"/>	Union Test3	10012
00000000010000	<input checked="" type="checkbox"/>		10012

Below that is the 'Role(s) in Organization (1 of 43)' grid:


RoleName	ApplicationName	OrgID	...
SecurityLA	Security	10	20
HelpLA	Help	10	19
TransLA	Trans	10	18
SystemLA	System	10	17
OrganizationLA	Organization	10	16
HRLA	HR	10	15
WXLA	WX	10	14
ORLA	Outreach	10	13
EncounterLA	Encounter	10	12
TreatmentLA	Treatment	10	11
SeniorsLA	Seniors	10	10
HSLA	HeadStart	10	9

At the bottom, there are status bars: 'Application: CSBG', 'Role: CSBGLA', 'Org: AS1Agency', and 'Role in Org: HPRP Basic Pages'.


## Navigating the Organization Roles Page

- All available Applications will be listed in the Applications dropdown
- All available Roles of the selected Application will appear in the APPLICATION ROLE GRID
- All Available Organizations will be listed in the ORGANIZATION(S) GRID
- All assigned Roles to the selected Organization will appear in the ROLE(S) IN ORGANIZATION GRID

### **Assign a Role to an Organization**

- 1 Select Application in dropdown
- 2 Select Role(s) in APPLICATION ROLE GRID on left side
  - a To select more than one Role, click on one and drag cursor down to select multiple records OR click on one record, press CTRL key and click on additional records
- 3 Select Organization in ORGANIZATION(s) GRID
- 4 Click -> button 
  - a Role will appear in ROLE(s) IN ORGANIZATION GRID
  - b Roles that are SYS = LA will be assigned automatically (see Application Roles page for more information)

### **Remove Role from Organization**

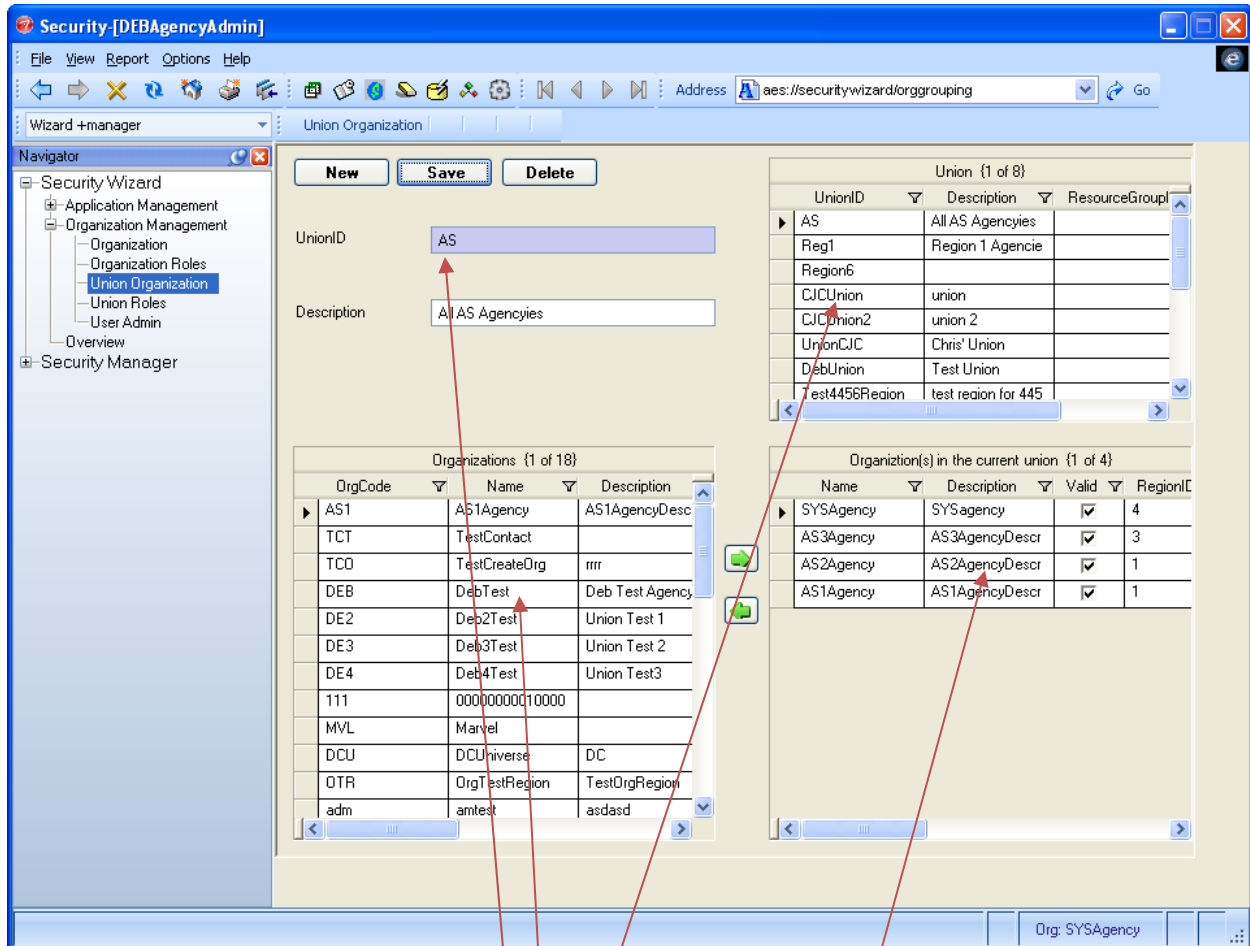
- 1 Select Organization in ORGANIZATION(s) GRID
- 2 Select Role in ROLE(s) IN ORGANIZATION GRID
- 3 Click <- button 
  - a Role will disappear from ROLE(s) IN ORGANIZATION GRID

### **View all Roles assigned to an Organization**

- 1 Select Organization in ORGANIZATION(s) GRID
- 2 All linked Roles will appear in ROLE(s) IN ORGANIZATION GRID on lower right side of page

# Add Organization to a Union

Use this page as an easier way to assign Roles to many Organizations at one time. Unions are temporary groupings of Organizations that are used only for assigning Roles. Create the Unions here and then assign Roles to the Union on the Union Roles page.




## Navigating the Union Organization Page

- Create new Unions in the upper left section
- All available Unions will appear in the UNION GRID
- All Available Organizations will be listed in the ORGANIZATION GRID
- All Organization in the selected Union will appear in the ORGANIZATION(S) IN THE CURRENT UNION GRID

### **Create a new Union**

- 1 Click NEW button
- 2 Enter Union ID NAME
- 3 Enter Description
- 4 Click SAVE button
  - a Union will appear in UNION GRID in the top right section of page


### **Assign Organizations to the Union**

- 1 Select Union in the UNION GRID in upper right section
- 2 Select Organization(s) to add in ORGANIZATION GRID in lower left section
- 3 Click -> arrow 
  - a Organization will appear in ORGANIZATION(s) IN THE CURRENT UNION GRID in lower right section

### **View all Organizations assigned to a Union**

- 1 Select Union in the UNION GRID in upper right section
- 2 Organization will appear in ORGANIZATION(s) IN THE CURRENT UNION GRID in lower right section

### **Remove Organizations from a Union**

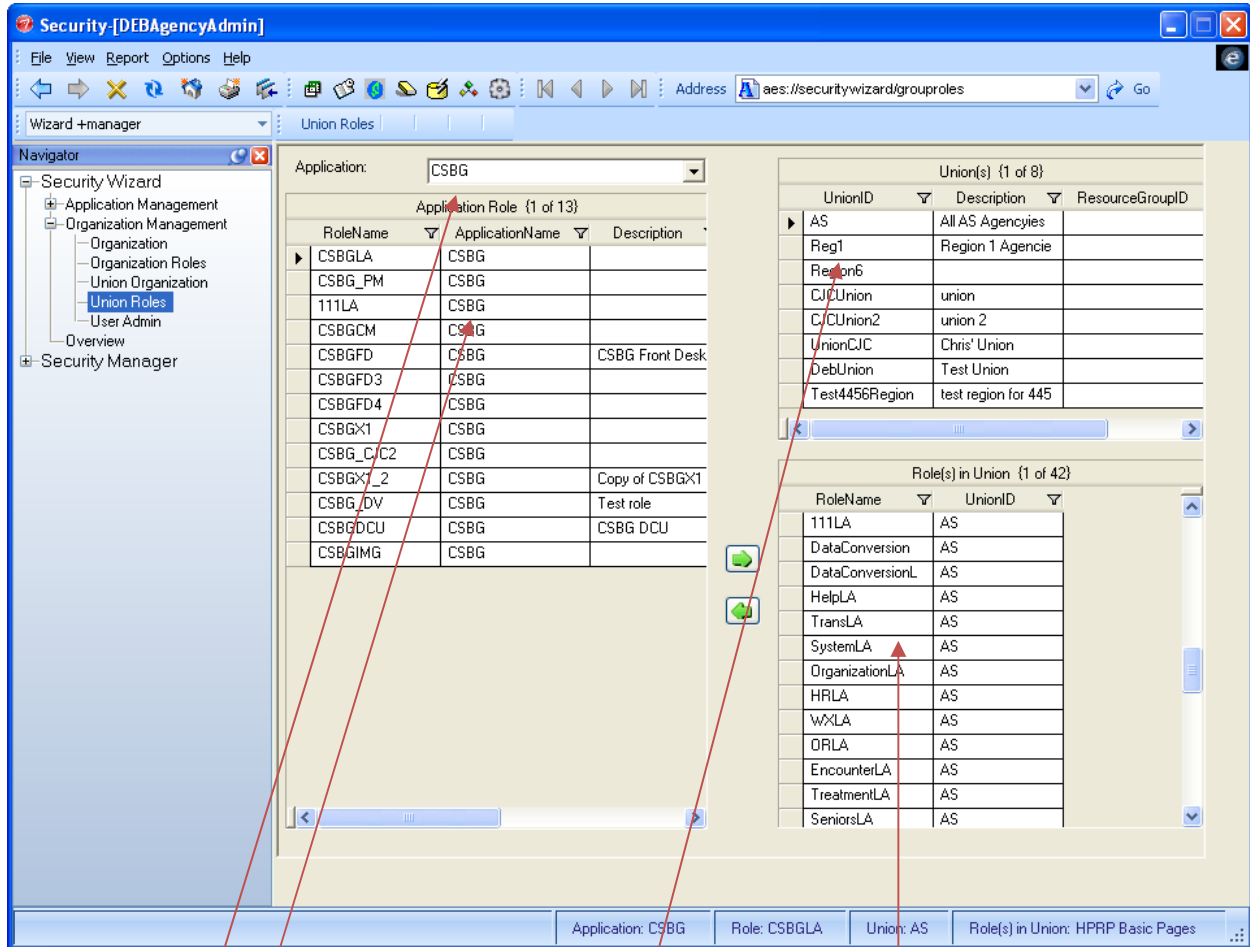
- 1 Select Union in UNION GRID in upper right section
- 2 Select Organizations to delete from Union in ORGANIZATION(s) IN THE CURRENT UNION GRID
- 3 Click <- button 
  - a Organization will disappear from ORGANIZATION(s) IN THE CURRENT UNION GRID

### **Remove a Union**

- 1 Select Union in UNION GRID in upper right section
- 2 Click DELETE button
  - a Note: Deleting an Union will not delete the Organizations

# Add Roles to a Union


Use this page to assign Roles to a Union; a Union is a temporary grouping of Organizations created to ease the task of assigning Roles to a large group of Organizations at one time. Unions are created on the Union Organization page.



## Navigating the Union Roles Page


- All available Applications will be listed in the Applications dropdown
- All available Roles of the selected Application will appear in the APPLICATION ROLE GRID
- All Available Unions will be listed in the UNION(s) GRID
- All assigned Roles to the selected Union will appear in the ROLE(S) IN UNION GRID

### Assign a Role to a Union

- 1 Select Application in dropdown
- 2 Select Role in APPLICATION ROLE GRID on left side
- 3 Select Union in UNION(S) GRID on upper right side
- 4 Click -> button 
  - a Role will appear in ROLE(S) IN UNION GRID
  - b Roles that are SYS = LA will be assigned automatically (see Application Roles page for more information)

► Roles are added to Unions the same way they are added to an Organization; a Union is just a quick way to assign Roles to a number of Organizations all at one time

### Remove Role from Union

- 1 Select Union in UNION(S) GRID on upper right side
- 2 Select Role in ROLE(S) IN UNION GRID 
- 3 Click <- button
  - a Role will disappear from ROLE(S) IN UNION GRID

### View all Roles assigned to a Union

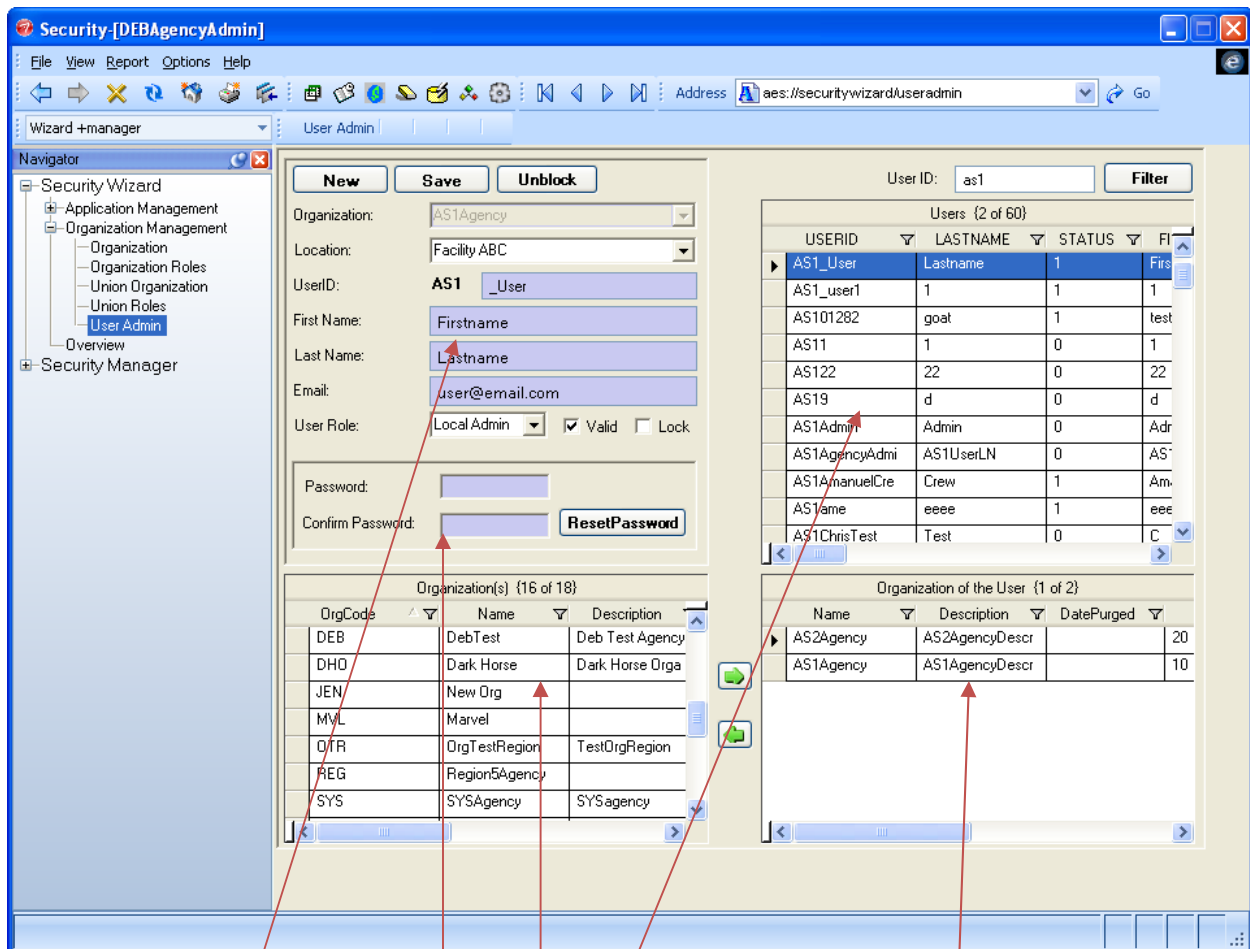
- 1 Select Union in UNION(S) GRID
- 2 All linked Roles will appear in ROLE(S) IN UNION GRID on lower right side of page

# Create Users

Use this page to create the Users who will access both Security Wizard and Security Manager. Users who need access to Security Wizard will have a Super Admin User Role; users who need access only to Security Manager will have a Local Admin User Role. Users who will have access to only the System, without either Security tool, will have a User Role of User.

A new User will be created when a new Organization is created; the User will have the same Org Code and the name AgencyAdmin; he will automatically be assigned the agency and all LA roles.

If a User uses the incorrect password three times, they will be blocked from that IP address for a specific amount of time; they can be unblocked on this page. Users cannot be deleted, but may be made Invalid or their access may be locked temporarily.



## Navigating the User Admin Page

- Create new Users in the upper left section
- All available Organizations will appear in the ORGANIZATION(S) GRID
- All existing Users will be listed in the USERS GRID
- Organizations that the selected User has administrative rights to will appear in the ORGANIZATION OF THE USER GRID
- Passwords can be reset in the middle left section

### Create a new User

- 1 Click NEW button at top of page
- 2 Select Organization in dropdown
- 3 Select Default Location
- 4 Enter User ID (Note the system automatically precedes the User ID with Org Code)
- 5 Enter User First Name
- 6 Enter User Last Name
- 7 Enter User Email address
- 8 Select User Role
  - a Available Roles are determined by current User's permission
  - b User gives access to system only
  - c Local Admin gives access to system and Security Manager
  - d Super Admin gives access to system, Security Manager and Security Wizard

- 9 Click to create checkmark in Valid box
  - 10 Click SAVE button at top of page
- Message will appear with a reminder to set password for new User.

- 11 Click OK
- 12 Enter Password
- 13 Confirm Password

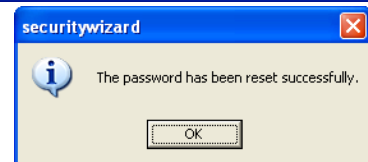
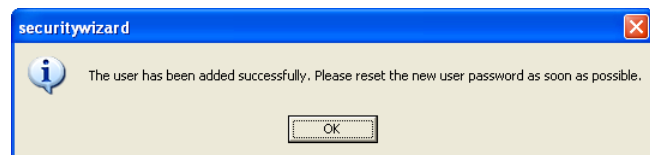
Message will appear saying password set was successful.

- 14 Click OK
- After saving, the Organization field is grayed out and may not be changed.


➤ View existing Users by entering search information in User ID field in upper right corner and click FILTER

➤ Enter ORG Code at the top right of the page, then click FILTER to view all Users in that Organization or leave blank to view all Users

➤ If User is Local or Super Admin, the Organizations they are linked to will be displayed in ORGANIZATION OF THE USER GRID




### Assign additional Organization(s) to Admin User

- 1 Select User in USER GRID in upper right section
  - a Organizations can be added only to Local Admin or Super Admin
- 2 Select Organization(s) in ORGANIZATION(S) GRID in lower left section
  - a A User may be a Local Admin for more than one Organization
  - b To select more than one Organization, click on the first one and drag cursor to select additional records OR click on first one and press CTRL key while clicking on additional records
- 3 Click -> button 
  - a Organization(s) will appear in ORGANIZATION OF THE USER GRID in lower right section

➤ The Local Administrator's own Organization will be assigned automatically, but other Organizations may be added as well

➤ A Local Administrator is created automatically when the Organization is created called XXXAgencyAdmin; he/she will also have the organization added automatically

### Remove Organization(s) from User

- 1 Select User in USER GRID in upper right section
- 2 Select Organization(s) in ORGANIZATION(S) GRID in lower left section
  - a To select more than one Organization, click on the first one and drag cursor to select additional records OR click on first one and press CTRL key while clicking on additional records
- 3 Click <- button 
  - a Organization(s) will disappear from ORGANIZATION OF THE USER GRID in lower right section

### Reset User Password

- 1 Select User in USER GRID in upper right section
- 2 Enter Password
- 3 Confirm Password
- 4 Click RESET PASSWORD button

► An Admin cannot look up a User's password, but can reset it when needed

### Remove User (make invalid)

- 1 Users cannot be deleted but may be made inactive
- 2 Select User in USER GRID in upper right section
- 3 Click in Valid checkbox to remove checkmark
  - a User record still exists, but is no longer active and valid

### Unblock a User

Users are blocked from the current IP Address after entering their password incorrectly three times.

- 1 Select User in USER GRID
- 2 Click UNBLOCK button at top of page

This will unblock the User's access so they will be able to log in again.

► A User is blocked only from the IP Address on the current computer; they may log in on a different computer

### Lock a User from the System

- 1 Select User in USER GRID
- 2 Click to create checkmark in Lock checkbox

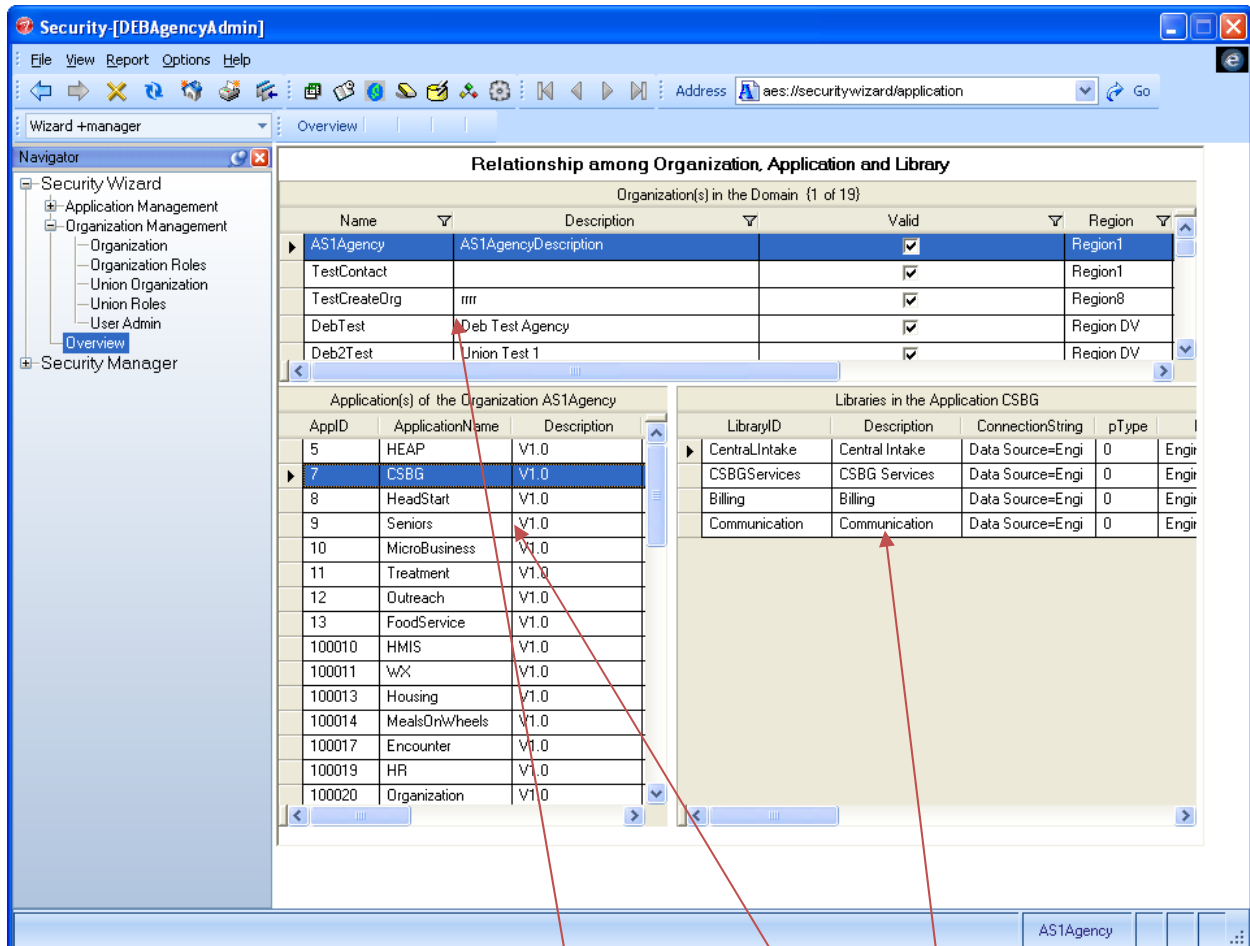
User will not be able to log in to system until their account is unlocked.

### Unlock a User from the System

- 1 Select User in USER GRID
- 2 Click to remove checkmark in Lock checkbox
  - a User will now be able to log in to system

# Overview Page

Use this page to view the relationship between Organizations and its Applications and Libraries. Once an Organization is selected, all Applications assigned to it will appear on the page; once an Application is selected, all Libraries available in it will appear.



## Navigating the Overview Page

- All Organizations will be listed in the ORGANIZATION(S) IN THE DOMAIN GRID
- All Applications of the selected Organization will appear in the APPLICATION(S) OF THE ORGANIZATION GRID
- All Libraries available in the selected Applications will be listed in the LIBRARIES IN THE APPLICATION GRID

## View Applications assigned to an Organization

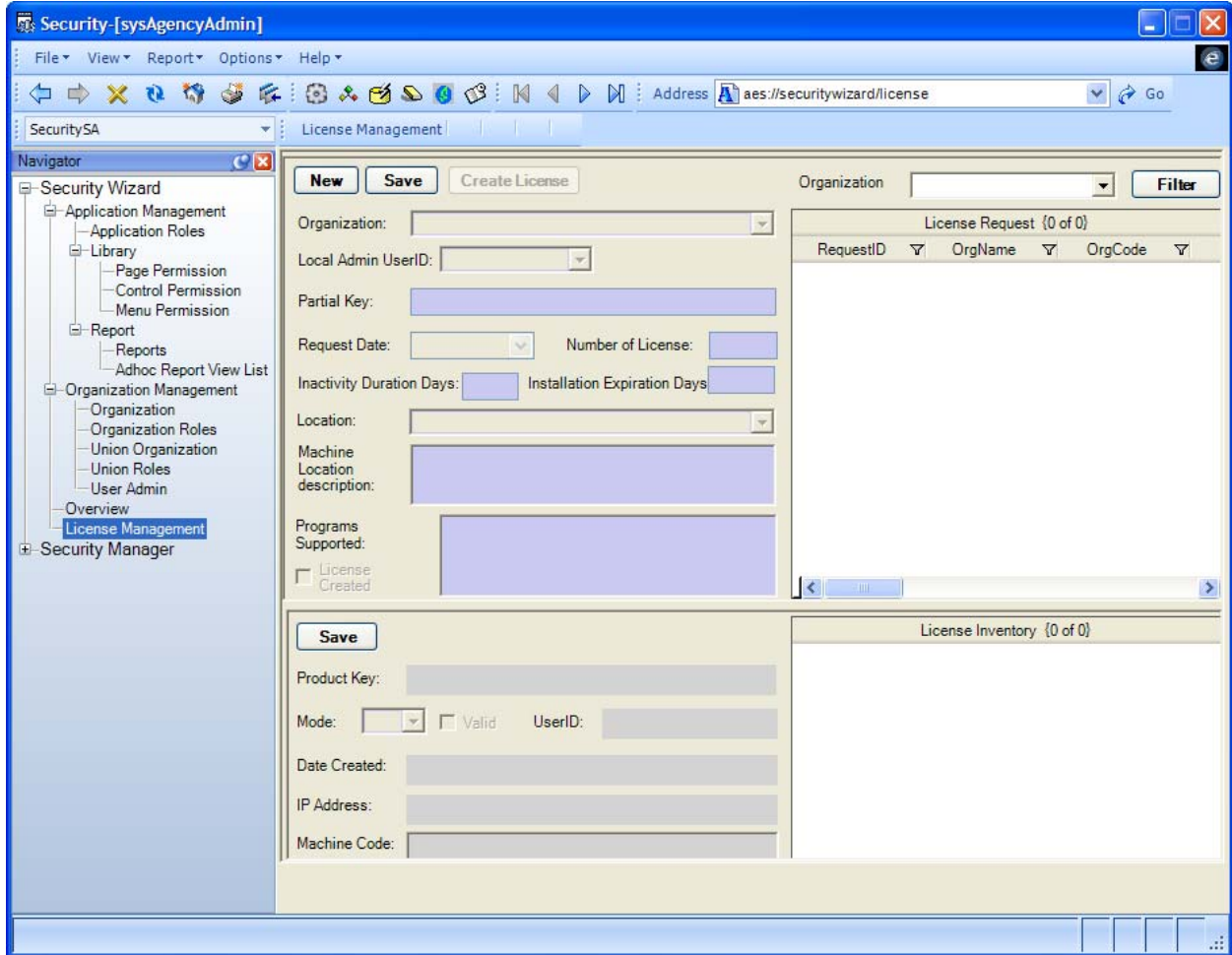
- 1 Select the Organization in the ORGANIZATION(S) IN THE DOMAIN GRID at the top of page
- 2 All Applications will appear in the APPLICATION(S) OF THE ORGANIZATION GRID in left bottom section

## View Libraries available in an Application

- 1 Select the Organization in the ORGANIZATION(S) IN THE DOMAIN GRID at the top of page
- 2 Select the Applications in the APPLICATION(S) OF THE ORGANIZATION GRID in left bottom section
- 3 All Libraries will appear in the LIBRARIES IN THE APPLICATION GRID

# License Management Page

Use this page to create the initial License and then create licenses for each Workstation



### **Create a new License record**

- 1 Click NEW at top of page
- 2 Select Organization in the dropdown
- 3 Select Local Admin User ID
- 4 Enter the Partial Key: Prefix should match the Organization prefix + 8 – character key
- 5 Select Request Date
- 6 Enter number of licenses
- 7 Enter number of inactivity duration dates (60)
- 8 Enter installation expiration date (45)
- 9 Select Location
- 10 Enter Machine Location description
  - a No special characters are supported (i.e. #, \$, %, etc.)
- 11 Enter Programs supported
  - a No special characters supported
- 12 Click SAVE at top of page