SYSTEM SECURITY

Introduction

This section of the manual will address Security; System wide, Service Repair and SpeedSearch.

A. Conceptual Overview of Security structure – We will review the 3 basic security options available in your ACS/MASTER system and the impact each has on system access. We will also touch on the ability to create a Custom Menus for controlled system access.

B. Basic Process Training – This step involves what information must be established for each of your security options to function properly. We will review User Security levels, Menu Security levels, SpeedSearch and Service Repair options, as well as Password protection.
This section will also touch briefly on the advantages of creating custom menus; who should have them and how they are used.

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A. CONCEPTUAL OVERVIEW OF SECURITY STRUCTURE

Your ACS/MASTER system provides 3 basic Security Structures:
System Security Maintenance
Service Repair Job Inquiry Security Maintenance
SpeedSearch Security Maintenance

Each of these security structures works in conjunction with the Security Level assigned when setting up the USER ID# (see System Maintenance) for each person or workstation. Using each of these structures you will determine what security level has access to each option or function.

System Security – Use this level of security to determine what menus, modules and specific processing functions each user will see when they log in. Or, allow access to a specific module and limit some functions with passwords. Each of the modules/functions are listed on a predefined spreadsheet that also contains SpeedSearch functions you may wish to restrict.

Service Repair Job Inquiry – Job Inquiry is available in both the Service Repair Module and SpeedSearch; it provides a detailed "look" at job information. Because BOTH cost and price information is available, this security option allows you to control what information will actually display for each user level. **EXAMPLE:** you can allow the labor detail to display; including the actual employee that worked on the job and the tasks he performed, while blocking the actual Cost and Price $ from displaying.

SpeedSearch Security – Because the SpeedSearch function allows the user to access specific information without having to access a specific module or menu, this security option allows you to control the content that each user will see in each of the SpeedSearch functions.

Custom Menus
It is also possible to set up Custom Menus to be used as part of the USER ID# maintenance function. These predefined menus are another way of restricting information that is seen by each user. Once a custom menu is defined it can then be assigned as the Default Menu setting for any User ID#. There are several predefined menus available to you that will be discussed in the next section.

EXAMPLE: If you would like the shop computer to display only Time Clock information, a specific menu for just this purpose can be assigned to the user that logs into this computer.

NOTE: It is strongly suggested that access to all security setting capabilities be set so that only Administration and IT and ACS Customer Support have access at this level.

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This section will review:
Setting individual Security Levels by USER ID#
System Security Menu structure / setting Security by Menu or Function
Job Inquiry Security
SpeedSearch Security
Custom Menus

USER ID# Security
System➜ System Maintenance➜ User Maintenance

Each user is assigned a unique, 3 character USER ID#. (For more detailed information regarding User ID#, please see the System Maintenance section of your installation manual.)

This ID can represent the individual:
JDJ = Jennifer Jones

Or it can represent a department or function:
ACT = Accounting / SHP = Shop / CNT = Counter

Or can be a simple numeric designation:
T01

Each of these USER ID#s is assigned a security level ranging from 0-8.
0 being the most restricted user:
EXAMPLE: Shop computer used for clocking time only.

8 having access to all/most system functions:
EXAMPLE: System Administrator

NOTE: Is it strongly suggested that level 8 be restricted to Administration, IT and ACS Customer Support only.

**It is this User ID security setting upon which your security structure is based.
System Security, SpeedSearch and Job Inquiry all rely on this setting.**

System Security Maintenance
System➜Security Maintenance

This Security option allows the user to define security at 3 separate levels using the security levels set in User ID maintenance. A predefined Excel spreadsheet is available for the user to enter security settings of 0-8 for the spreadsheet options he wishes to restrict to certain security levels.

For the purposes of this training we will use Inventory as our example.

1. The **Menu Level** which includes:
Distribution
Security restriction at this level would require custom menu options to stop Distribution from appearing on the user's menu.

2. The **Module Level** which includes:
Distribution ➜   Inventory
                      Order Processing
                      Purchase Orders
                      Sales Analysis
Security at this level is based on User ID security level and would restrict Module options from appearing on the user's menu. Password protection is not available at this level.

3. The **Processing Level** which includes:

Inventory ➜	Processing	Lotted/Serialized
	Reports	Period End
	Cost/Price Changes	Maintenance
	Physical Inventory	Utilities

Security at this level would restrict Module Processing options from appearing on the user's menu. Both Security levels and Password protection are available at this level.

4. The **Individual Function** Level which includes:
The individual functions for each processing level.
Security at this level would restrict Individual Tasks from appearing on the user's menu. Both Security levels and Password protection are available at this level.

NOTE: As you page down through the Excel Spreadsheet, you will find SpeedSearch options on the last page of the spreadsheet. We will review how to use these options in conjunction with SpeedSearch Security to control user access during SpeedSearch queries.

NOTE: Any user accessing the Security Maintenance Spreadsheet must have MS Excel 2000 or newer installed on their workstation.

Job Inquiry Security Maintenance
Service Repair ➔ Service Repair File Maintenance ➔ Job Inq Security

Job Inquiry may be accessed 2 ways:
Service Repair SpeedSearch
Service Repair Job Entry

Because your job detail includes cost and price information that may be too sensitive for all users, your Job Inquiry Security Maintenance options give you 26 fields by which to set security:

Nameplate Data	Labor Cost Detail Access
Special Instr	Reg Hours
Quote Detail Access	Overtime
Man Hours	Double Time
Labor Cost	Cost
Material Cost	
Price	Cost Summary
Change Access	Cost
Labor Summary Access	Price
Man Hours	Margin
Labor Cos	Margin %
Material Detail Access	
Cost	Job Cost Detail Report
Purchase Order Access	Job Tracking/Scheduling Access

Simply select the security level each field should be restricted to.
When Job Inquiry is accessed from Job Entry OR SpeedSearch, job detail will be displayed EXCLUDING the information that is restricted.

EXAMPLE: If Cost/Price Labor information is set above a users User ID Security setting, Labor Cost Detail could display each employee, the labor code used and then number of hours worked; but not the extended Cost or Price associated with the record.

Again, this restriction will be determined by the security level of the user logged onto the computer where the information is being accessed.

SpeedSearch Security Maintenance
System➔ System Maintenance➔ SpeedSearch Security Maintenance

The convenience of your SpeedSearch function makes it easy to access data without opening each module to search for information. This could allow you to access data from a module that would otherwise have been restricted to any given user based on their security setting.

To address the need for security in relation to SpeedSearch and the data available through this process; we have given you 9 options for setting security:

Customer Sales Data
Customer Cost Data
Vendor Invoice Data
General Ledger Figures
Customer Order/Invoice Sales Data
Customer Order/Invoice Cost Data
Purchase order/Requisition Cost
Inventory Prices
Inventory Costs

Once security levels are set, any user with insufficient security trying to access this information will have only a portion of this data available to them.

Your system may display the record, but not the $ amount associated with the record.

NOTE: There are additional SpeedSearch security settings available in the System Security spreadsheet that may also be used for restricting SpeedSearch access. This will be covered in the section of your training.

Custom Menus

It is also possible to control system access using Custom Menus.

As part of the USER ID maintenance each user is assigned a Default Menu; this field gives us the option of creating a menu designation that will give each user access to specific functions only.

EXAMPLE: The pre-defined Menu mj_dm will give the user access to:
Time Clock Entry
Employee Clock in Inquiry
Employee Clock Display
Material Charges
SpeedSearch

These special menus can be created for you by your ACS Project Manager so they can be assigned to the appropriate users.

B.   BASIC PROCESS TRAINING

We are now ready to take the information reviewed in Phase I and II and apply it so that we can build your System Security Structure.

USER ID information
Each user is assigned a USER ID that gives them access to your ACS/MASTER system.

This information will include BOTH a Security Level and a Default Menu setting.

As a general rule of thumb we suggest the following BASIC structure:
Security Level 0: Generally is given to users requiring access to the shop floor, clocking in and out and job inquiry.

Security Level 4: Generally includes all of the Service Repair options along with access to Distribution including Purchase Orders, Sales Orders and Inventory.

Security Level 6: Generally includes all of Service Repair, all of Distribution and all of Accounting EXCEPT Payroll and General Ledger

Security Level 8: Generally includes everything including Payroll, GL and Administration.

NOTE: For more detailed information regarding User ID set up and maintenance, please review the System Maintenance section of your manual.

System Security Maintenance
Although it is possible to use Menu Maintenance to set security access to Menus, Modules, Processes and Functions in your system, using Security Maintenance makes the process much easier to establish and maintain.

When accessing System Security Maintenance you will receive the following prompt:
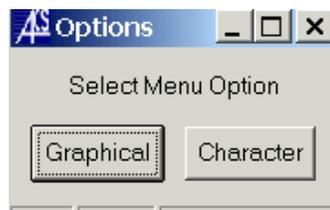
This option will give you access to the correct menus for EITHER the Graphical or Character interface version of the software. If you have users that use **BOTH** the Graphical/Windows and the Character/DOS versions of ACS/MASTER, **YOU WILL HAVE TO SET SECURITY IN BOTH** options as they use different menus.

Upon selecting an option your system will then display an EXCEL spreadsheet showing the detailed security file layout available for Service Repair, Distribution, Accounting, System and SpeedSearch.
These files will be "laid out" much the same way as your menu options:

Distribution ➔Inventory ➔ Processing ➔Functions

What you will need before we can begin building your System Security:
1. Have a list of all users and their USER ID#s and Security levels handy during this process and as you begin to make decisions to restrict access, keep it simple. There is no need to restrict specific functions if setting security at a higher level will provide the protection you need.

2. To access this function, your work station must have MS Excel 2000 or newer installed. The MACRO Security for your Spreadsheets must be set to Medium or Low to allow the Spreadsheet to be created.

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Using Accounts Payable as an example:
Level 1 – Menu: Accounting
Level 2 – Module: Accounts Payable
Level 3 – Process: Processing, Reports, Period End Processing, Maintenance and Utilities
Level 4 – Function: Individual functions for each process listed above

| | | Click To Save Spreadsheet | | | |
Level 1	Level 2	Level 3	Level 4	Security	Password
		Utilities		0	
			Rebuild SA Cross-References	0	
Accounting					
	Accounts Payable			0	
		Processing		0	
			Purchase Order Invoice Entry	0	
			Purchase Order Invoice Register	0	
			A/P Invoice Entry	0	
			Invoice Register	0	
			Payment Selection	0	
			Payment Selection Report	0	
			Check Printing	0	
			Check Register	0	
			Manual Check Entry	0	
			Manual Check Register	0	
			Aging Report	0	
			Cash Requirements Report	0	
		Reports		0	
			Vendor Cross Reference Report	0	
			Vendor Label Printing	0	
			Vendor Detail Listing	0	
			Vendor Comments Listing	0	
			Vendor Name And Address Listing	0	
			Vendor Ledger Cards	0	
			Temporary Vendor Listing	0	
				0	
			Purchase Journal	0	
			Disbursements Journal	0	
				0	
				0	
				0	
				0	
				0	
				0	
				0	
				0	
				0	
				0	
				0	
				0	
				0	
		Utilities		0	
				0	

To restrict access at Level 1 it is suggested that you assign Custom Menus to your users as Security and Passwords are not available at this Level

If your security is set at **level 2**, you will limit who has access to the Module. In this case, Accounts Payable This level allows assignment of Security Level only.

If your security is set at **level 3**, you will limit who has access to the Processing functions. This level allows both Security settings and Passwords

If your security is set at **level 4**, you will limit who has access to specific Functions. This level allows both Security settings and Passwords.

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1. In the example on the previous page, if a Security Level of 6 were assigned at spreadsheet level 2: Module Level/Accounts Payable; no users with a USER ID security of 5 or lower would see Accounts Payable on their menu.

2. If a Security Level of 6 were assigned at spreadsheet level 3: Process Menu Level for AP, it would allow access to Processing, Reports, Period End, Maintenance and Utilities to only those users with level 6 or higher. However, if necessary, it is possible to set each of these processes at a different level.

   Example: The Processing and Reports options could be set to a level 6, while the Period End, Maintenance and Utility options could be set to 8. This would restrict all users with level 7 or below from having Period End, Maintenance and Utilities on their menus.

3. It is also possible to set passwords at the Process Menu level.
   Example: If the Menu level is set to a Security level of 6, any user with security of 6 or above would have access to these options; however, if you added password protection to Period End processing, each time AP Period End Processing was accessed it would require the entry of a password; thus restricting access to those users with the password.

4. At the Function Menu Level it becomes possible to set Security levels and/or passwords for individual functions.

Password Protection

Another feature of your System Security is the ability to set passwords. The sixth column of your Security Maintenance Spreadsheet is a column that allows you to establish passwords. This field is CASE SENSATIVE; when prompted for a password during processing, the password must be keyed in EXACTLY as it appears in this field.

Passwords can be set at Level 3 and 4 of the file layout Security Spreadsheet.
This would give the user menu access, however, upon selection of a protected file they would be prompted for a password.

	A	B	C	D	E	F
1			Click To Save Spreadsheet			
2						
3	Level 1	Level 2	Level 3	Level 4	Security	Password
4	Service Repair					
5		Job Quoting			0	
6			Quote Entry/Maintenance		0	
7			Quote Form Print		0	
8			Open Quote Report		0	
9			Quote Purge		0	
10			Quote Profile Entry		0	
11			Quote Profile Print		0	

SpeedSearch Security – Upon scrolling down to the bottom of your Excel Security Spreadsheet, you will find additional options for controlling who sees SpeedSearch information. These are "laid out" exactly as they appear in your SpeedSearch options.

8 Gui Speed Search			
9			
0 Lookups			0
1	Customer Lookup		0
2	Vendor Lookup		0
3	Inventory Lookup		0
4	Generic Data Base Lookup		0
5 Accounting			0
6	Customer Profile		0
7	Vendor Profile		0
8	General Ledger		8
9 Distribution			0
0	Inventory		0
1	Non Stock Inventory		0
2	Pricing Inquiry		0
3	Open Customer Orders		0
4	Sales Inquiry		0
5	Invoice History		0
6	Open Purchase Orders		0
7	Open Purchase Requisitions		0
8	PO Receipt History		0
9 Service Repair			0
0	Job Inquiry		0
1	Catalog Inquiry		0
2	Equip Storage Inquiry		0
3	Vaughen's Price Inq		0
4 Executive Summary			0

You will note that your options for restricting access allow you to set security at Levels 1 and 2. Level 2 also allows you to password protect any specific options.

If you set the Accounting options to level 6, no users with a security level of 5 or lower will have the Accounting option as part of their SpeedSearch options.

If you leave Accounting options open but set General Ledger at 8, no users with a security level of 7 or lower will have the General Ledger option as part of their SpeedSearch options.

Once all of your security settings have been entered, it is time to save your spreadsheet.

Click To Save Spreadsheet

Select the CLICK TO SAVE SPREADSHEET option at the top of your Excel Spreadsheet and you will receive the following prompt:

-Select Yes to exit
-Select No to return to the Excel Spreadsheet

Security Update From Excel
Security ➔ Security Update From Excel
It is now time to upload your new security settings to your ACS/MASTER system.
Select Security Update from Excel from your System Menu and you will receive the following prompt:

-Select No or Cancel to exit without updating Menu Security.
-Select Yes and you will receive the following prompt:
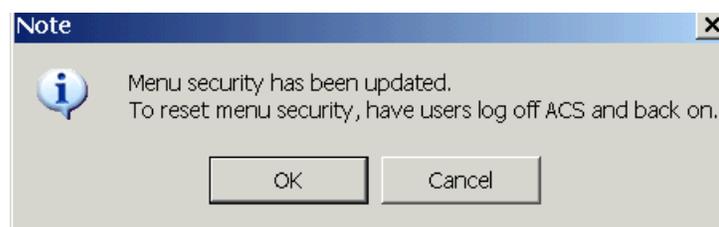
Your update is complete, select OK or Cancel to exit.

NOTE: It will be necessary to have all users log out of ACS/MASTER and log back in for your new security settings to take effect.

REMEMBER: If you have users that work in BOTH Character/DOS and GUI/Windows, it will be necessary to create these settings for BOTH Character and GUI.
Service Repair Job Inquiry Security Maintenance

Service Repair ➔ Service Repair File Maintenance ➔ Job Inq Security

The detailed job information accumulated by your system can be accessed many different ways. In this section, we will be addressing Service Repair SpeedSearch options.

Using the Job Inquiry Security Maintenance option allows you to control what information will actually display for each security level selected.

In this example, note that the Quote Detail Access has some restrictions:
If a level 6 security user were to access this information, they would be allowed access to the Quote man hour's information; however, because the Labor Cost, Material Cost and Price have been set at a level 8, these fields would be "empty" or blank when they perform a query.

Remember: Any user can perform a Job Inquiry; however, not all of the fields will be populated if any of the information requested is above the users' security level.
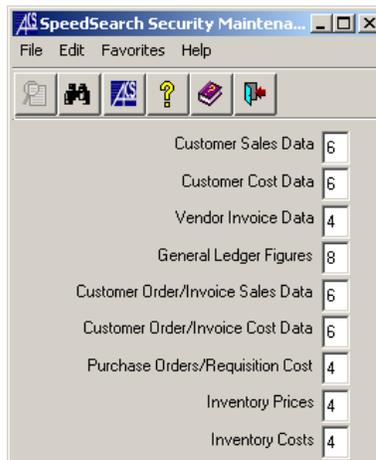
SpeedSearch Security

System ➔ System Maintenance ➔ SpeedSearch Security Maintenance

During System Security training we reviewed how to use the Excel Security Spreadsheet to remove specific SpeedSearch functions based on the security level of each user.
Your SpeedSearch Security Maintenance menu offers additional options.

Let's use Accounting as our example. You may have users that need some basic Customer and Vendor information; but, if Accounting security is set to a level 6 at the System Security level, any user with security of 5 or below would not have Accounting as a SpeedSearch option.

8	Gui Speed Search	
9		
0	Lookups	
1		Customer Lookup
2		Vendor Lookup
3		Inventory Lookup
4		Generic Data Base Lookup
5	Accounting	
6		Customer Profile
7		Vendor Profile
8		General Ledger

However, using SpeedSearch Security, it is possible to leave the Customer and Vendor options at lower security and restrict specific DATA.

Customer Sales Data	6
Customer Cost Data	6
Vendor Invoice Data	4
General Ledger Figures	8
Customer Order/Invoice Sales Data	6
Customer Order/Invoice Cost Data	6
Purchase Orders/Requisition Cost	4
Inventory Prices	4
Inventory Costs	4

In this example, a user set for a security level 4 would be able to access Customer and Vendor information; however, the Customer Sales and Cost detail would be blank.