Contents

Security Templates

Purpose

With new features becoming available in info:HR and ESS, granting access to employees is a task that makes most administrators cringe. The thought of going through the security screens for all employees, enabling features, is not a priority even though the new features would be very useful.

Security Templates are a powerful tool that provides the ability to grant access consistently and easily to employees in a couple of clicks. Granted, it will take some time to set up in the beginning but the payoff down the road is worth it. Once your templates are set up, adding a feature to your entire work force is as simple as changing just your templates.

The steps below will take you through how to set up security template and how to assign the template to your employees. Typically, templates should be set up for each level of user e.g. employee, supervisor, manager etc. For the purposes of this document we will be setting up a supervisor template so that we can easily illustrate the additional elements of a security profile.

Prior to beginning this process, best practice would be to determine what aspects of info:HR you wish your supervisor to have access to. There are many questions to consider, for instance if you would like to have your supervisors begin using the system to manage their employees' attendance records. One question you will have to ask yourself; do I want the supervisor to have the ability to view, add or delete attendance records? There are different security settings to allow access to one or all of those functions.

Getting Started

Security may be granted to users on many levels and areas. Let's take a look at some of the screens you will be accessing and how to navigate the *Security Master*.
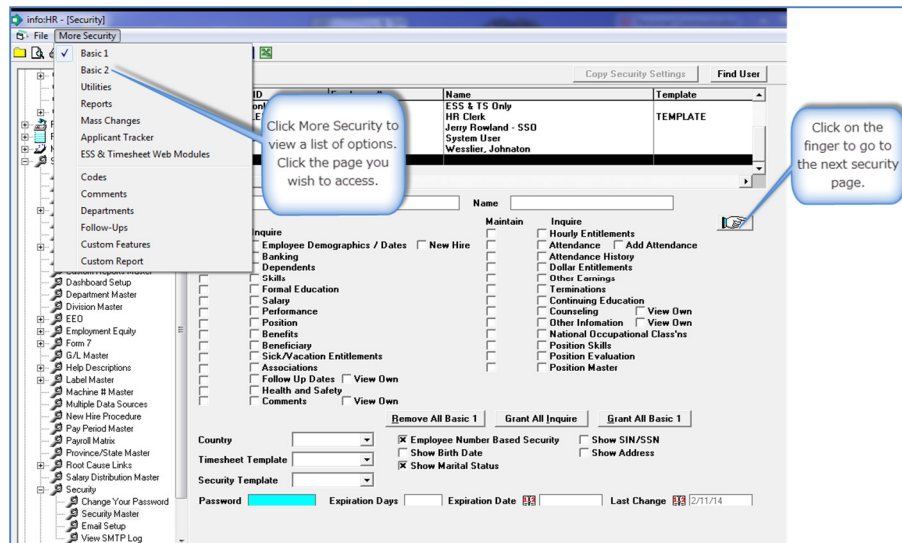
Security Screens

For a complete description of all screens and functionality please refer to the user manual on the client portion of our website titled *Setup.*

To move through the various security screens you may either use your mouse and click *More Security* at the top left of your screen to view the *Security Screen* Menu and then click on the screen label you wish to view, or you may use the *Finger* ( ) icons to move to the next screen. Some screens, such as Department security, can only be accessed by using the *More Security* Menu.

Buttons

Buttons will carry the specific label of the security screen you are viewing, e.g. **Grant All *Basic 1***. Below are the functional definitions of the button.

> **Remove All –** Provides the ability to delete all checks on this screen for the selected user.
> **Grant All Inquire –** Provides the ability to automatically check the "Inquire" for all check boxes on this screen for the selected user.
> **Grant All** – Provides the ability to automatically check the "Inquire", "Add" and "Maintain" for all check boxes on this screen for the selected user.
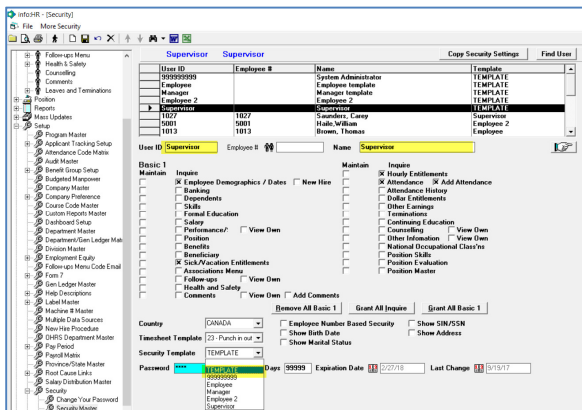
Creating a Template

1. ***Setup ➤ Security ➤ Security Master***
2. Click on the ***New*** record button (🗋)
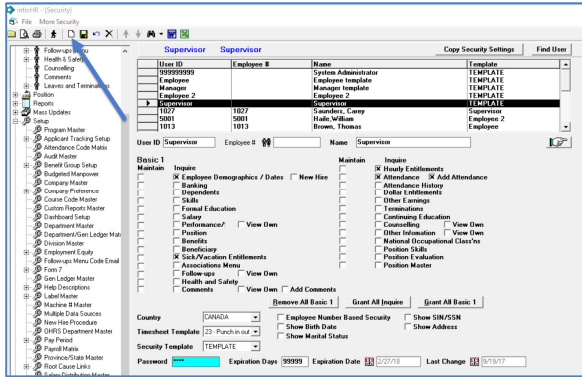
3. Enter a ***User ID*** and a ***Name***, and select ***TEMPLATE*** from the ***Security Template*** drop down menu and assign a ***Password***. ***Employee #*** is not required and should not be entered on the template.

Note: This record is a template only; it should not be used to access the system.

4. ***Save*** the record (💾). Upon saving, the system will ask you to confirm the password. Retype the password and click ***Verify***.
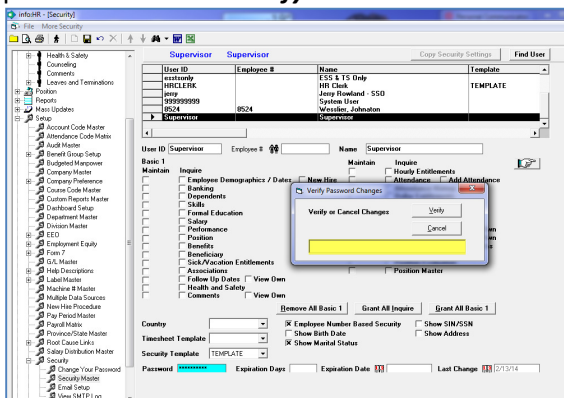
Your Template is now ready to have security assigned.

Assigning Security

1. Using the *Supervisor Template* begin assigning security by simply clicking on the check boxes of the security items you would like to grant to Supervisors.

Levels of Security

Maintain - when granted allows users to make changes to the field including adding and deleting information. If Maintain is checked, Inquire automatically gets checked.

Inquire – when granted (without Maintain checked) allows users to view the information only.

New Hire – allows users to add a New Employee.

Add Attendance – allows users to add attendance records. This setting is useful for clients using ESS. Supervisors may be allowed to add attendance records but you may not want them to edit or delete any existing attendance records in ESS.

Add Comments – allows users to add Comment records. This setting is useful for clients using ESS. Supervisors and employees may be permitted to enter comment records, although you may not want them to be able to edit or delete any existing comment records in ESS.

View Own - allows the login id to view their personal records as well as the records of any other employees they are able to view (via *Department Security*).

Employee Number Based Security – will allow users access to their information only. For a supervisor to view their employees this must be unchecked.

2. Go through each *Security Screens* clicking on the check boxes to apply security to the template. When you are satisfied with the security selection click *Save* (🖫) to save the Template. It is best to save before moving on to the next security screen.

3. Assign **Code Security**. Go to **More Security ➧ Codes.**
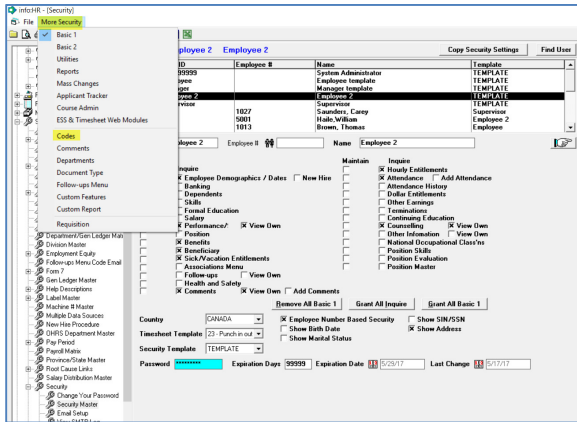
The codes look up window will open. Highlight the code table you wish to assign access to then click **Edit** (Edit).
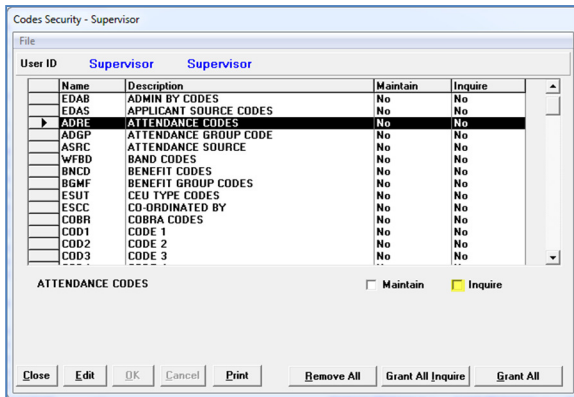
4. Click **Maintain** or **Inquire**.

Note: If you would like to select a security level for all codes you may use the **Grant All** buttons. Typically, **Grant All Inquire** access is given to all codes. By limiting the user to what screens they can view, it reduces the need to limit what codes the user can see. For example, if the user cannot view or maintain the Benefit screen, giving them access to the Benefit Code would not be harmful since they do not have access to the screen that contains the benefit code.

5. Click **Close** (Close) when finished.
6. Repeat the above instructions for **Comments**, **Follow-ups and Document Type** code tables.

**Note:** **Grant All Inquire** is not recommended for **Comments** and **Follow-ups**.

Department Security must be assigned on an individual basis. By default, the template has access to all departments. Please see the **Department Security** section of this document.
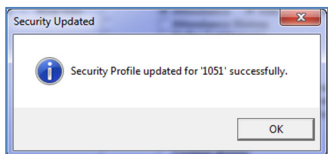
Applying the Template

Now that the template has been created, the next step is to apply it to the appropriate Users.
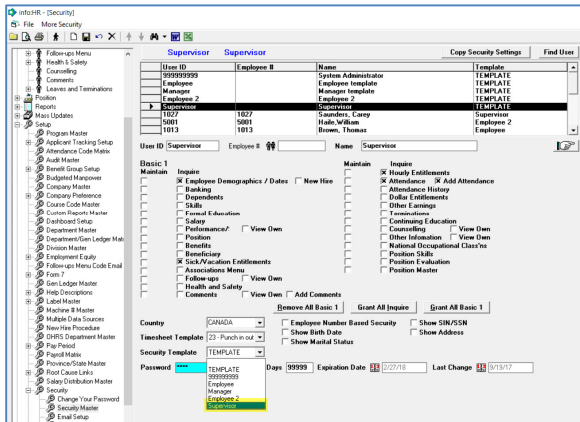
1. Click on the security record of a person who is a supervisor.
2. Select the *Supervisor* template from the *Security Template* dropdown list. Click *Save* (⊟), to assign the *Template* to this user.
3. An alert window will come up notifying you that the security profile cannot be altered except for certain fields.
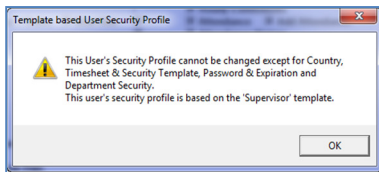
4. Click *OK*.
5. A second alert window will come up notifying you that the security profile has been updated.

6. Click *OK*.

The template is now assigned to the Supervisor. If you are applying the template to a new User ID you will now assign *Department Security*. If you have applied this template to an existing User ID it is always best practice to review the *Department Security* to ensure they have access to the appropriate employees.

Department Security

Supervisors will require access to the departments or other business units they are responsible for. This level of security must be assigned individually to each supervisor; it isn't inherited from the template.
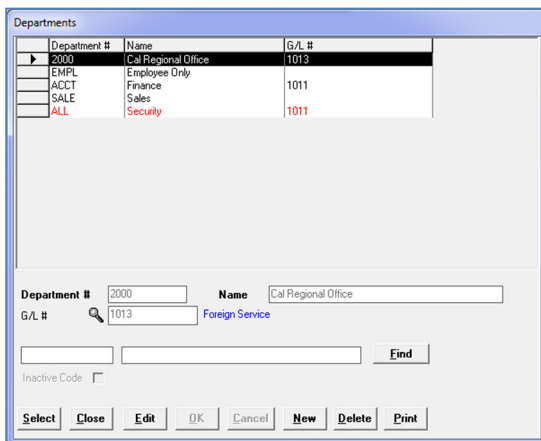
1. Select the supervisor you wish to add department security to.
2. Go to **More Security ▶ Departments**
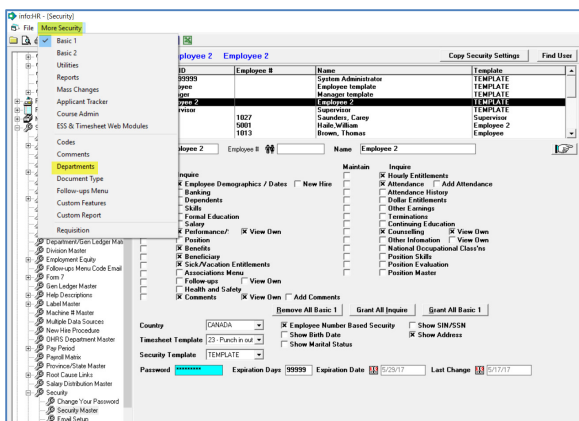
3. Use the selection criteria to provide access to groups of employees.
4. Click on **Edit** (Edit).
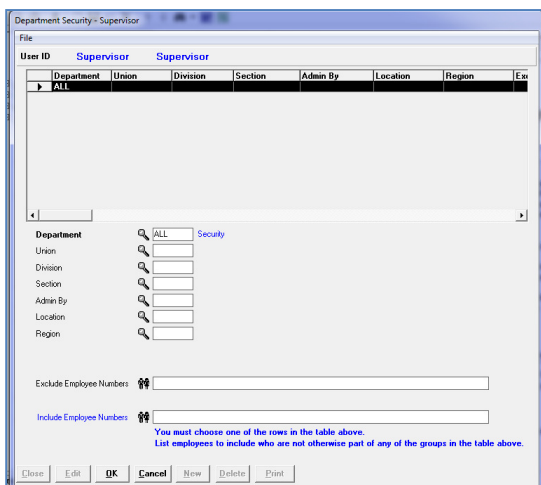
5. Click the **Magnify Glass** (🔍) for **Department**.

6. Select the appropriate **Department** from the list.

Note: *Do not select **Departments** highlighted in red, they are inactive **Department** codes.

7. Click **OK**.
8. Click the **New** (New) button to create a new **Department** record, if needed.
9. Apply the appropriate selection criteria.
10. Click **Save** (💾).

Note: When using the selection criteria, only employees matching the selection criteria will be viewed by the Supervisor.

- **Exclude Employee Numbers** provides the ability to exclude employees who match the selection criteria but the supervisor is not entitled to view.
- **Include Employee Numbers** provides the ability to include employees who may not otherwise match the selection criteria.

Once you have assigned the security access for one supervisor it is best practice to log in as the supervisor to ensure there is the correct access to all areas required. When you are satisfied, repeat the above steps for each user requiring Supervisor security access.

Making Changes

Changes may be made to the template at any time. When changes are made they will change the access for all users associated with the template. Example: There are 12 supervisors on a Supervisor template. A decision has been made to give access to supervisors to view Formal Education. When this change is made to the template, upon saving the change all 12 Supervisors will have access to view Formal Education for their Departments.

Changing a Template

1. Select the template you wish to change. Make sure you are changing the Template, not an individual user record.
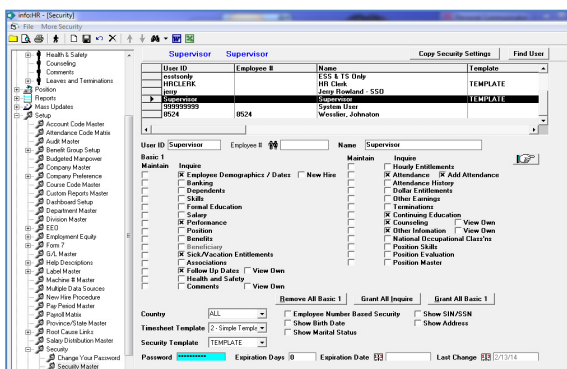
2. Make the security changes.
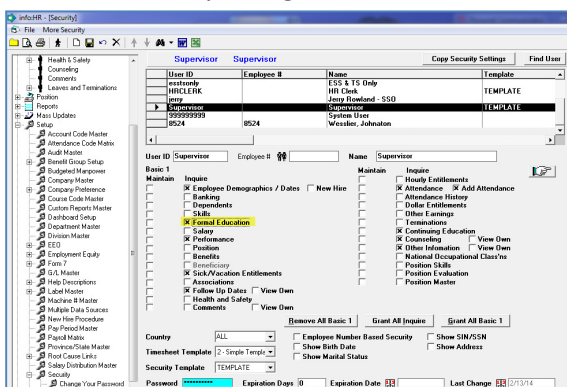
3. Click **Save** (). The changes made will automatically be applied to all users assigned to the template.