

Security Script

User access of CENTRE screens and data is controlled in three ways. First, by providing users a login and a password, second, by assigning page navigation rights to users via user group permissioning, and third, by limiting the amount of data that can be viewed based on Contract assignments. CENTRE is a contract based system and contracts are assigned to user groups. Since users are assigned to user groups, the contract data access restrictions are therefore transferred to the users.

We begin by navigating to the Administrative tab from the main menu. There we select Main Tables and from the list of options listed we select User Groups.

We are prompted with the User Group search screen where we can apply any combination of filters to narrow down our search and identify the user group in which we are interested.

If the user group in which we are interested is one that we want to create, we select the "New" submenu option and navigate to the New User Group screen.

We enter a unique name for the user group, preferably one that describes the purpose of use or a department to which user accounts will be assigned.

We specify whether user access to CENTRE through this user group will be "Typical," i.e., local users with potentially unrestricted access to CENTRE Modules, or "Custom," which will indicate users that will have controlled/limited navigation rights. "Custom" is mainly assigned to user groups that are created for customers that are given very restricted views of CENTRE data.

Finally, indicate whether or not the new user group will, by default, be automatically assigned any new contracts as they are being created in CENTRE. Indicate whether or not the user group will have, by default, permission to access any new web pages as they are added to CENTRE, and whether or not to have by default permission to any new Special Rights actions as they are added to CENTRE. Special Rights are very a specific list of actions such as Allow use to delete a PartOrder, Allow user to approve POs worth \$2000.00 or above, Allow user to change Contract Remarks, Allow user to change Contract Special Instructions, Allow user to edit PO status, and Allow user to edit status for a closed service record. This list may be extended in the future and selecting the check box labeled "Assign Special Right by Default" will enable the user group to automatically receive permission to any new such actions.

From the "Search User Group" screen, we can identify the new user group record we just created in the "Select User Group" screen. To the right of the user group name we see two links. One is called "Assign Modules" and the other is called "Assign Users."

The "Assign Modules" link takes us to the "User Group Assign Modules" screen where we can select the CENTRE modules to which we wish to restrict the user group. This module assignment controls the number of tabs displayed within the top menu bar in virtually every screen in CENTRE.

The "Assign Users" link takes us to the "Assign User Group Users" screen where we can begin to assign to the user group actual user accounts previously created in CENTRE. This assignment of user accounts to a user group enables the assigned users to inherit all the permissions given to the user group. Please note that a user may belong to more than one user group.

From the "Select User Group" screen, we select the user group we just created and click on the Continue button to view the record in the "Edit User Group" screen.

Here, we can select the Page Right submenu option to display the “Edit User Group Page View Rights” screen. There are many pages in CENTRE and as such we can select to view them by group/module. From the dropdown list located at the top of the screen, select the “Administrative” option. The screen will refresh to only display the pages in the Administrative module. The pages are listed in alphabetical order and to the right of the page name column we see two more columns. The first column contains a link called “User Groups” and the second column contains a check box.

The check box should be checked if we wish to allow the users assigned to this user group to be able to view the page to the left of the check box. A way to check or uncheck all boxes at once is provided at the top right of the screen. Once the desired check boxes are set, we click the Save button at the bottom of the screen to save changes.

The “User Groups” link is used to assign a single page to many user groups at once.

Assigning pages to a user group means that all users assigned to that user group will be able to navigate to those pages, but it does not mean they will be able to edit data displayed in those pages. To enable this feature, we must ensure that all data elements associated with a particular page are enabled. By default, all data elements associated with each page are enabled at the time the page is created in CENTRE. Therefore, if we wish to restrict users of a certain user group from being able to edit data displayed in a particular page, we must select the radio button to the left of the page name and click the Continue button located at the bottom of the screen. Doing so displays the list of data elements that can be controlled. To remove write permission on any one of these data elements, simply uncheck the box to the right and click the Save button at the bottom of the screen.

Going back to the “Edit User Group” screen, we can next select the Assign Contracts submenu option to display the “User Group Contract Assignment” screen. This screen displays the user group for which we are currently in the process of setting permissions, and below it we can see two lists. On the left is a list of available contracts in CENTRE that can be assigned to the current user group, and on the right is a list of contracts that have already been assigned to the current user group.

To assign a contract to this user group, we select it from the list to the left and then click the right arrow button to move it to the list on the right. Then we click the Save button located at the bottom of the screen.

To un-assign a contract, select it from the list on the right and click to the left arrow button to move it back to the list on the left.

Two more buttons are provided in the event that we wish to move all contracts from one list to the other.

Now that we have covered User Groups, let’s review how user accounts are created and managed in CENTRE.

Select the Administrative tab from the main menu to display the administrative screen. From there, select Main Tables and from the ensuing screen select Users from the list of options displayed. In doing so, we will navigate to the “Search For User” screen where we can apply any of the available filters to locate a user account. To create a new user account, select the New submenu option which will display the “New User” screen.



In addition to the required user data such as name, pager number, e-mail, login, password, etc., we see that we must select a User Type. In CENTRE, we have defined three types of users: Employee, Contractor, and Customer. Similarly to the restrictions on the User Group type "Custom," the "Customer" user type, or rather, users of this type will be impacted only when they try to navigate to a few very specific pages in CENTRE. For example, the "New Service Record" screen under the Service Management module will appear differently to a user of type "Customer" than for one of type "Employee."

The new user account is assigned to a Position and a Department. It is important that these assignments are correctly done, as it may impact functionality in other areas of CENTRE. The user account must be assigned to an existing user group; otherwise we will not be able to save the record. Similarly, a unique Login name and password must be provided before being able to save. The password is saved as an encrypted value and if the user forgets it, has to be reset to a temporary value and then changed by the user after logging in to CENTRE from a link provided at the top of virtually every screen.

The Status must be set to Active in order to enable the user to log in to CENTRE.

This completes the CENTRE Security Demonstration. Thank you for your time and patience.

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