

WELCOME TO
CONNECT



Security Management in New World ERP

P R E S E N T E D B Y



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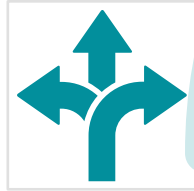
Agenda

The 3 Main Stool Legs of Security Management

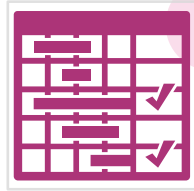
Recent Additions to Security Management

Where to Find More Information

Mastering the 3 Main Stool Legs



- Process Manager



- Permissions



- User-Based

Process Manager

By Process, this module determines:

1. Which functional depts participate in that process.
2. Approval levels for each functional dept that participates in that process.
3. Assign Users at each approval level for a functional dept that participates in that process (also called "the Do").
4. Which users can view a functional dept that participates in that process (also called "the See").

Establish the Process & Main Overview

Process Manager



Process

Manage or Print Components of the Established Process

Effective Date 01/31/2019

The Process

Icon	Description
	Contains...
	Accounts Payable - Change Invoice
	Accounts Payable - Invoice Entry
	ADM_ADM - Admin,Administrative Services
	Level 1 - 1 Approval(s)
	Level 2 - 1 Approval(s)
	ADM_COM - Admin,Com
	ADM_ELC - Admin,Electi
	ADM_HRM - Adm
	ADM_LOS - Admin,Loss Control
	CD_CEF - Comm Dev,Code Enforcement
	CD_EDA - Comm Dev,Economic Development

The Functional Department

The Approval Levels

The Users at one Approval Level

Users - Invoice Entry

Josh Johnson, mnaz, mnaz, NWS

Create Default Approval Routing for that business process.

Process Manager
Purchasing - Entry

Require Sequential Approvals

Approval Levels 3

Entry	1	
Manager	1	\$10000.00
Director	1	

Available Departments: 27

- _MEBdep_01_00 - MEBdep.First Division.Zero
- ADM_COR_CEG - Admin.Community Outreach.Community
- ADM_COR_COM - Admin.Community Outreach.Communic
- BBA - Brooklyn Bridge Alliance
- CD_DSD_PLN - Comm Dev.Development Services.Planning
- CD_epayments - Comm Dev.esuite payments
- CD_PSD_BRL - Comm Dev.Property Services.Business & Rer
- CD_PSD_CEH - Comm Dev.Property Services.Code Enforcen
- CD_PSD_INP - Comm Dev.Property Services.Building Inspec
- FIRE_EMER - Fire.Emergency Preparedness
- O&M_DRK_FOB - O&M.Park Maintenance.Emergenc

Selected Departments: 80

- 5546268 - Des Plaines Test
- ADM_ITS - Admin.Information Technology
- CD_CEF - Comm Dev.Code Enforcement
- CD_DSD_EDA - Comm Dev.Development Services.Economic
- CD_EDA - Comm Dev.Economic Development
- CD_INP - Comm Dev.Inspections
- CD_PLN - Comm Dev.Planning
- ENG_ENG - Eng & Bldg.Engineering
- ENG_INP - Eng & Bldg.Inspections
- FIN_... - Finance Journal Entry
- FRM_... - Fire.Fire Admin

Save Reset

Deploy functional departments into that business process – they inherit this approval process by default but can be customized in the prior screen.

The 'SEE'



- A user must be given Inquiry for a functional department in a process in order to run (SEE) related reports or access related inquiry screens



- A user must be given Inquiry for a functional department in a process in order to SEE what they're entering as they enter transaction data



- The SEE collaborates with both Permissions (Leg 2) and User-Based (Leg 3) settings to determine exactly what a user may SEE

The 'DO'



- A user must be given Entry for a functional department in a process in order to enter related transactions.



- A user must be given Inquiry for a functional department in a process in order to SEE what they're entering as they enter transaction data.



- The DO collaborates with both Permissions (Leg 2) and User-Based (Leg 3) settings to determine exactly what a user may do during transaction entry.

Some Process Manager Rules & Facts

- ❖ A process must have a default approval workflow that is developed in the first icon.
- ❖ After the default workflow is developed, any icon can be used to manage the rest of the process set-up.
- ❖ A process may contain one, a few or all functional departments available.
- ❖ When a unique approval group is required, a new functional department can be created to provide this.
- ❖ Functional departments have nothing to do with General Ledger.
- ❖ The only process that “System Generated” should reside in is General Ledger.

Rules & Facts continued

- ❖ A user may only be at 1 approval level for 1 functional dept in 1 process & this set-up can be changed “on-the-fly”.
- ❖ A user cannot be moved from 1 level to another if that user’s approval is engaged in an unposted transaction for that process & functional dept.
- ❖ Increasing or decreasing approval levels requires planning.
- ❖ If a process is new & unused or is fully disengaged, it can be changed during the current calendar date.
- ❖ If a process is in use, it must be changed on a future calendar date. Assure no unposted transactions exist for that dept in that process before changing.
- ❖ There are no active plans to replace Process Manager with any other tool for the purposes it currently serves. This could change.

Changing Approval Process



1. Assure no unposted transactions exist for that functional dept in that process. Clear them out before the future effective date.
2. Highlight that process and Copy Effective Date.
3. Access the Future Effective Date & make desired changes.
4. All unposted transactions will be restricted by the new approval level workflow beginning 12:01am on the Future Effective Date.

Permissions

Permissions

This module determines:

1. Main Drop-down Menus
2. Icons Displayed on Screens

Permissions

Permissions is the only User Security module that offers “templates”.

In recent versions, the Permissions screen went through a face-lift.

Functionality remained the same.

SECURITY TEMPLATES

Can be changed “on the fly”

The User may have to Log On/Off to see the change, but the change is immediate & won't cause any process conflicts.



User specific



Template overridden



Template rule

Checkboxes only appear under these lists if they apply to that icon or menu

Filter

Search Security Components x

Applications x

Feature Groups x

Permissions x

<input type="checkbox"/>	Security Component	Full	Add	Change	Delete	View	Print	Undo Checkout	Finalize
<input type="checkbox"/>	81. Payment Register	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Accounts Payable - Create Manual Payment Batch Register	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
<input type="checkbox"/>	Accounts Payable - Create Payment Batch Register	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Accounts Payable Payment Process Manager	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Accounts Payable Payment Process Manager - Output Preferences	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Accounts Payable Payment Process Manager - Post Payment Batch and Voided Invoices	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>					

SAVE

Template Permissions - AP Check Payment

Filter

Applications

Feature Groups

Permissions

Permissions

Quick search for specific components.

<input type="checkbox"/>	Security Component	Full	Add	Change	Delete	View	Print	Undo Checkout	Finalize
<input type="checkbox"/>	81. Payment Register	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Accounts Payable - Create Manual Payment Batch Register	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
<input type="checkbox"/>	Accounts Payable - Create Payment Batch Register	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Accounts Payable Payment Process Manager	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Accounts Payable Payment Process Manager - Output Preferences	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Accounts Payable Payment Process Manager - Post Payment Batch and Voided Invoices	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>					

SAVE

Template Permissions - AP Check Payment

Filter

Search Security Components ×

Applications ▼ ×

Feature Groups ▼ ×

Permissions ▼ ×

Permissions

<input type="checkbox"/>	Security Component	Full	Add	Change	Delete	View	Print	Undo Checkout	Finalize
<input type="checkbox"/>	81. Payment Register	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Accounts Payable - Create Manual Payment Batch Register	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
<input type="checkbox"/>	Accounts Payable - Create Payment Batch Register	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Accounts Payable Payment Process Manager	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Accounts Payable Payment Process Manager - Output Preferences	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Accounts Payable Payment Process Manager - Post Payment Batch and Voided Invoices	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>					

Use our pre-determined Feature Groups for quicker look-up on component sets.

SAVE

Filter

Search Security Components x

Applications x

Feature Groups x

Permissions x

Permissions	Full	Add	Change	Delete	View	Print	Undo Checkout	Finalize
<input type="checkbox"/> Security Component								
<input type="checkbox"/> 1. Accumulated Transaction Listing	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		
<input type="checkbox"/> 10. Operating Transfer Listing						<input checked="" type="checkbox"/>		
<input type="checkbox"/> 101. Payroll Hours Register						<input checked="" type="checkbox"/>		
<input type="checkbox"/> 102. Hours Exception Report	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		
<input type="checkbox"/> 103. Hours Entry Worksheet Report	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		
<input type="checkbox"/> 104. Pay Day Register Report	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>		

SAVE USER SECURITY INHERIT

User specific Template overridden Template rule

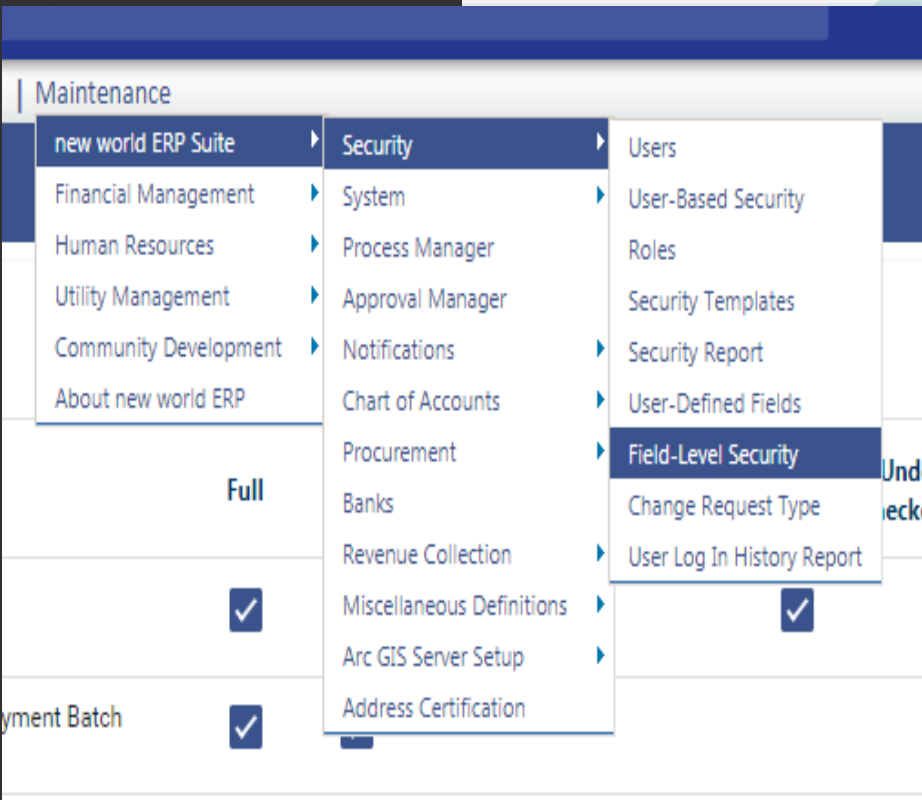
The colors help identify the checkbox status



User specific Template overridden Template rule

Permissions Rules & Facts

- ❖ Best Practice is to apply these to users via Security Templates and never specific to the user.
- ❖ Templates and checkboxes can be managed “on-the-fly” to offer immediate deployment.
- ❖ Develop templates around one group level in the business process.
- ❖ You can run Security Reports based on Permissions.
- ❖ When deciphering Permissions’ checkboxes, consider the screen & screen location group where they would appear and this should help troubleshoot choices.



Field-Level Security adds more checkboxes to Permissions.

The purpose is to allow clients to customize certain fields in their database that they determine should be limited for user access.

Example: Employee or Vendor Social Security numbers can be secured using these additional checkboxes in Permissions.

User Based

User Based

This module determines:

1. Pretty much everything that Leg 1 & 2 do not address.

Examples:

- General Ledger Access
- Sub-Ledger Access
- Journal Access
- Customized Datasets (Payment Codes, Project Categories, Banks, etc)

User-Based Security - General

User Function

Home Department

Home Location/Facility

Budget Level Maintenance Security	Budget Level Forecast Security	Budget Level Reporting Security
Budget Preparation <input checked="" type="checkbox"/>	Budget Preparation <input checked="" type="checkbox"/>	Budget Preparation <input checked="" type="checkbox"/>
Mayor's Version <input checked="" type="checkbox"/>	Mayor's Version <input checked="" type="checkbox"/>	Mayor's Version <input checked="" type="checkbox"/>
Finance Hearing <input checked="" type="checkbox"/>	Finance Hearing <input checked="" type="checkbox"/>	Finance Hearing <input checked="" type="checkbox"/>
Council Proposed <input checked="" type="checkbox"/>	Council Proposed <input checked="" type="checkbox"/>	Council Proposed <input checked="" type="checkbox"/>
Final Adopted <input checked="" type="checkbox"/>	Final Adopted <input checked="" type="checkbox"/>	Final Adopted <input checked="" type="checkbox"/>

Payroll Override Security

Accrual Hours Balance <input checked="" type="checkbox"/>
Maximum Premium Hours <input checked="" type="checkbox"/>
Employee G/L Distribution <input checked="" type="checkbox"/>
Employee Pay Rate <input checked="" type="checkbox"/>
Projects for Employee Hours <input checked="" type="checkbox"/>
Ignore Hours Code Security <input checked="" type="checkbox"/>

View other user's "MyReports"

Administrator Security

myReports

Save

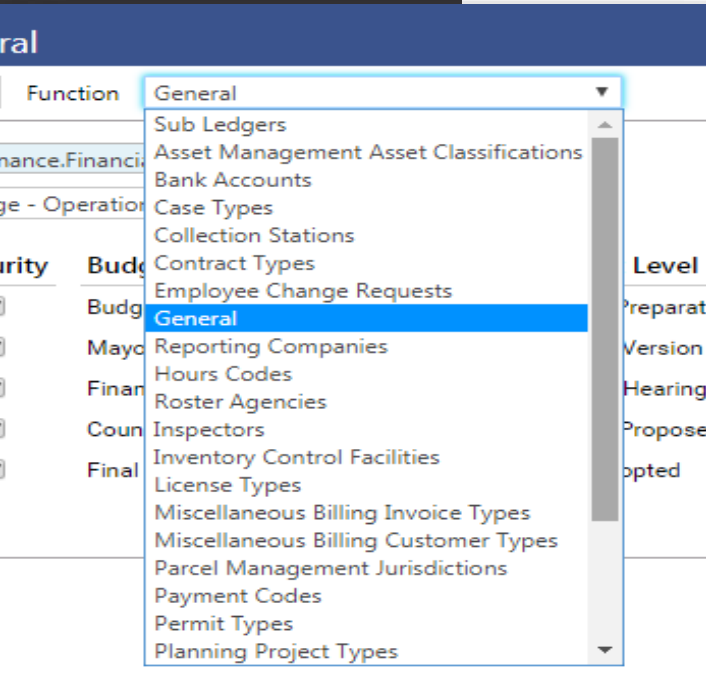
Helps govern what a user can do & see in Annual Budget process.

Helps govern what a user can do & see in Payroll process.

User-Based

Governs a user's access to customized datasets (that are unique to that environment)

...and provides access to the screens to customize a user's access to Sub Ledgers.



User-Based Security - Sub Ledgers

User: Function: Ledger:

General G/L Organizations

- Supervisor
- G/L Budget Override Authority
- Project Budget Override Authority
- Purchase Order Override Authority
- Sub Ledger Detail Authority

Choose the Sub Ledger you need to work with

Journal Entries	Encumbrance Adjustments	Budget Adjustments	Reclassification Entries
Create <input type="checkbox"/>	Create <input type="checkbox"/>	Create <input type="checkbox"/>	Create <input type="checkbox"/>
Remove <input type="checkbox"/>	Remove <input type="checkbox"/>	Remove <input type="checkbox"/>	Remove <input type="checkbox"/>
Post <input checked="" type="checkbox"/>	Post <input type="checkbox"/>	Post <input type="checkbox"/>	Post <input type="checkbox"/>
View <input type="checkbox"/>	View <input type="checkbox"/>	View <input type="checkbox"/>	View <input type="checkbox"/>
Add Transaction <input type="checkbox"/>	Add Transaction <input type="checkbox"/>	Add Transaction <input type="checkbox"/>	Add Transaction <input type="checkbox"/>
Change Transaction <input type="checkbox"/>	Change Transaction <input type="checkbox"/>	Change Transaction <input type="checkbox"/>	Change Transaction <input type="checkbox"/>
Delete Transaction <input type="checkbox"/>	Delete Transaction <input type="checkbox"/>	Delete Transaction <input type="checkbox"/>	Delete Transaction <input type="checkbox"/>

Relates to UN-posted Journals from/in that Sub Ledger.

User-Based Security - Sub Ledgers

User Function Ledger

General

G/L Organizations

Supervisor

G/L Budget Override Authority

Project Budget Override Authority

Purchase Order Override Authority

Sub Ledger Detail Authority

Journal Entries

Create

Remove

Post

View

Add Transaction

Change Transaction

Delete Transaction

Encumbrance Adjustments

Create

Remove

Post

View

Add Transaction

Change Transaction

Delete Transaction

Budget Adjustments

Create

Remove

Post

View

Add Transaction

Change Transaction

Delete Transaction

Reclassification Entries

Create

Remove

Post

View

Add Transaction

Change Transaction

Delete Transaction

Save

Compare Two Users

If box is white a journal can be manually entered.

If it is gray the journals are system generated.

User-Based Security - Sub Ledgers

User Function Ledger

General

G/L Organizations

Supervisor

If checkbox is Gray – this is an Un-Posted System Generated Journal.

Best Practice is View Post ONLY

Purchase Order Override Authority

Sub Ledger Detail Authority

Journal Entries

Create

Remove

Post

View

Add Transaction

Change Transaction

Delete Transaction

Encumbrance Adjustments

Create

Remove

Post

View

Add Transaction

Change Transaction

Delete Transaction

Budget Adjustments

Create

Remove

Post

View

Add Transaction

Change Transaction

Delete Transaction

Reclassification Entries

Create

Remove

Post

View

Add Transaction

Change Transaction

Delete Transaction

User-Based Security - Sub Ledgers

User: nws Function: Sub Ledgers Ledger: Accounts Payable

General G/L Organizations

Supervisor

G/L Budget Override Authority

Project Budget Override Authority

Purchase Order Override Authority

Sub Ledger Detail Authority

Post checkbox here collaborates with Permissions Checkbox to give user ability to Post a transaction.

A user has to have **BOTH** the checkbox here AND checkbox in Permissions in order to Post a transaction in that Sub Ledger.

Journal Entries

Create

Remove

Post

View

Add Transaction

Change Transaction

Delete Transaction

Encumbrance Adjustments

Create

Remove

Post

View

Add Transaction

Change Transaction

Delete Transaction

Budget Adjustments

Create

Remove

Post

View

Add Transaction

Change Transaction

Delete Transaction

Create

Remove

Post

View

Add Transaction

Change Transaction

Delete Transaction

User-Based Security - Sub Ledger

User Fun

See other user's entries in that Sub Ledger for the Functional Depts as provided by Process Manager (Leg #1)

General

G/L Organizations

Supervisor

G/L Budget Override Authority

Project Budget Override Authority

Purchase Order Override Authority

Sub Ledger Detail Authority

See Sub Ledger entry details for Functional Depts as provided by Process Manager (Leg #1)

Journal Entries

- Create
- Remove
- Post
- View
- Add Transaction
- Change Transaction
- Delete Transaction

Encumbrance Adjustments

- Create
- Remove
- Post
- View
- Add Transaction
- Change Transaction
- Delete Transaction

Budget Adjustments

- Create
- Remove
- Post
- View
- Add Transaction
- Change Transaction
- Delete Transaction

Reclassification Entries

- Create
- Remove
- Post
- View
- Add Transaction
- Change Transaction
- Delete Transaction

Save

Compare Two Users

User Based Rules & Facts

- ❖ Best Practice is to disallow removal or editing of Un-Posted System Generated Journals (these are from a Sub-Ledger posting).
- ❖ User-Based security can be managed “on-the-fly” to offer immediate deployment.
- ❖ Annual Budget access may change year-to-year based on that budget level chosen during that year’s Annual Budget Initialization process.
- ❖ User-Based collaborates with both Legs 1 & 2 to provide security access.
- ❖ Some User-Based settings change regularly as the Sub-Ledger process progresses naturally. An example is Payment Codes.

Bonus – Roles and Approval Manager

This module is used for:

1. Certain HR Functions that require approval routing.(most notably Personnel Actions)
2. Grant approval routing.

Roles & Approval Manager Rules & Facts

- ❖ Roles were designed to follow a user's job position – like "HR Director, Department Head, Entry Clerk, etc".
- ❖ Approval Manager was designed to follow to the approval workflow for a business process used by Roles.
- ❖ To change an Approval process, use a Future Date and be sure to clear out all existing unfinished transactions first.
- ❖ The new screen design allows you to review Effective Dates (changes) more easily.
- ❖ Grant Roles & Approval set-ups work exactly the same as HR Roles & Approval set-ups.

Recent Security Management Additions



Security Reports

Maintenance

The screenshot displays a multi-level navigation menu. The 'new world ERP Suite' menu item is expanded, showing a list of modules including Financial Management, Human Resources, Utility Management, and Community Development. The 'Security' menu item is further expanded, showing options like Users, System, Process Manager, Approval Manager, Notifications, Chart of Accounts, Procurement, Banks, Revenue Collection, Miscellaneous Definitions, Arc GIS Server Setup, and Address Certification. The 'Reports' menu item under Security is expanded, listing various reports such as Security Report, User Log In History Report, User-Based Security Report, and several Change Tracking Reports.

- new world ERP Suite
 - Security
 - Users
 - User-Based Security
 - Roles
 - Security Templates
 - User Defined Fields
 - User Defined Mass Update
 - Field-Level Security
 - Change Request Type
 - Reports
 - Security Report
 - User Log In History Report
 - User-Based Security Report
 - User-Based Security GL Organization Report
 - Security Permissions Change Tracking Report
 - User-Based Security Change Tracking Report
 - User-Based Security GL Organization Change Tracking Report
 - eSuite Authentication Log Report
 - Company Suite Settings Change Tracking Report
 - Process Manager Change Tracking Report
 - Approval History Report
 - Security Template Change Tracking Report
- Financial Management
- Human Resources
- Utility Management
- Community Development
- About new world ERP

Several reports have been added for tracking and auditing at
New world ERP Suite > Security > Reports

Copy to New User/Copy to Existing User

- ❖ Found at bottom of page new world ERP Suite > Security > Users as well as inside a selected user from this page.
- ❖ Allows you to copy everything from the selected user to a new user or already existing user.
- ❖ This includes permissions, process manager, and user based!!

1 - 50 of 349 records

New Refresh Permissions **Copy to New User** **Copy to Existing User** User Based Out of Office Reassign Tasks User License Report Compare Two Users

Compare Two Users

Found at bottom of
page new world ERP
Suite > Security >
Users.

Permissions for users defaultnws and lab1
(Permission that only defaultnws has.)

Application	Component	Add	Change	Delete	View	Print	Admin
Suite	Permissions Maintenance		Yes / No		Yes / No		
Suite	Set Component Permissions	Yes / No	Yes / No	Yes / No	Yes / No		

Permission Templates for users defaultnws and lab1

Template Name	User 1	User 2
Address		lab1
Budget Processing		lab1
CD All Access		lab1
CD Case Entry		lab1
CD Case Inquiry		lab1
CD Case Maint		lab1

1 - 50 of 349 records

- New
- Refresh
- Permissions
- Copy to New User
- Copy to Existing User
- User Based
- Out of Office
- Reassign Tasks
- User License Report
- Compare Two Users

Compare Two Users

Select two users for comparison:

First User

Second User

Result Type

- Display permissions only the first user has.
- Display permissions only the second user has.
- Display permissions exactly one user has.
- Display permissions both users have, but different levels.

Submit

Compare Two Users

Also found at bottom of
page new world ERP
Suite > Security > Users
Based Security

Compare Two Users
✕

Select two users for comparison:

First User

Second User

Function Name

Result Type

Submit

Application Name	Function Name	Data Element Name	Sub...	User 1 Name	User 1 Login	Us...	User 1 Access Type	Assi...	User 1 ID	User 2 Name	User 2 Login	User 2 Active Flag	User 2 Access Type	User 2
Financial Management	MB Customer Type	GRANTOR - GRANTOR		lab1	lab1	Y	Full	1	335					
Financial Management	MB Customer Type	STANDARD - STANDARD		lab1	lab1	Y	Full	1	335					

More Information



Help Central has a list of the updates made recently to Security Management. These are found under 'What's New' under both the 2022 and 2023 Foundation sections

New and Updated Features

The following tables contain the descriptions of new and updated features in New World ERP, including patch numbers and dates. Some descriptions are linked to more detailed content:

▣ New in 2023

▣ Community Development

▣ Financial Management

▣ Foundation

Patch #	Date	Program	Feature
2023.1.16	04.01.24	Suite-Security	Function added to sync one Content Manager (CM) user instead of all.
2023.1.11	12.18.23	Management Console	Setting for Notify to suppress messages from being sent.
2023.1.11	12.18.23	Suite-System	System setting to hide shared saved reports created by inactive users.
2023.1.10	11.27.23	Suite-Reports	User-Based Security Compare Two Users report runs for all functions at once.
2023.1.9	11.06.23	Suite-Security	Button to compare user-based security permissions of two users added to User-Based Security page.
2023.1.7	09.25.23	Suite-Security	Approval History Report added to Security Reports menu.
2023.1.7	09.25.23	Suite-Security	Security Template Change Tracking Report added to Security Reports menu.
2023.1.6	09.05.23	Suite-Security	Process Manager Change Tracking Report added to Security Reports menu.
2023.1.1	05.22.23	Suite-Security	Security reports organized into new Reports menu .



Your feedback is important

Please complete the session survey via the mobile app

We read every submission

We use your input to guide content for future sessions and
to improve our presentations



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CONNECT