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# CONNECT

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# Security Management in New World ERP

# PRESENTED BY

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# Agenda

The 3 Main Stool Legs of Security Management

Recent Additions to Security Management

Where to Find More Information

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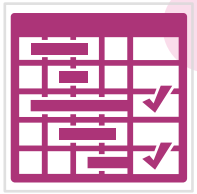
# Mastering the 3 Main Stool Legs

- Process Manager



- Permissions

- User-Based

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# Process Manager

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## 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”).


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Establish the Process & Main Overview

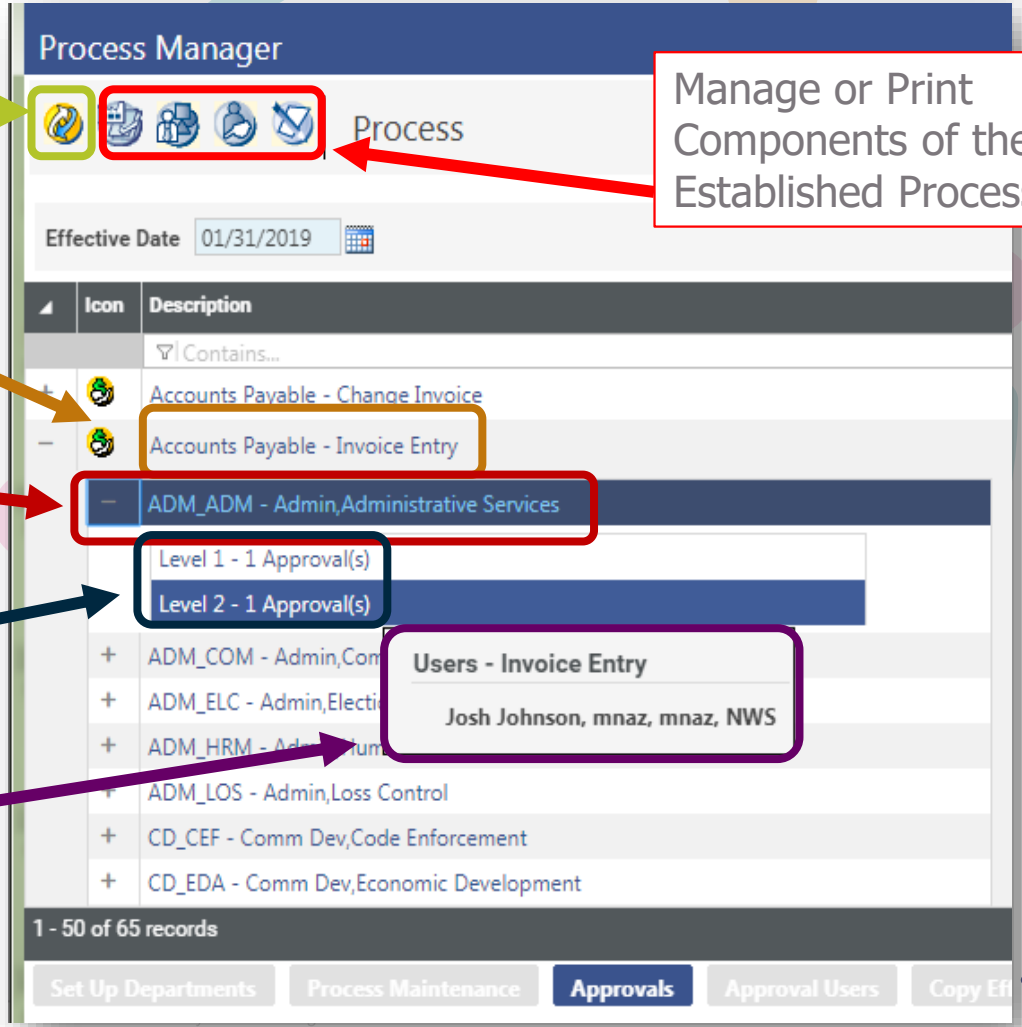
Manage or Print Components of the Established Process

The Process

The Functional Department

The Approval Levels

The Users at one Approval Level

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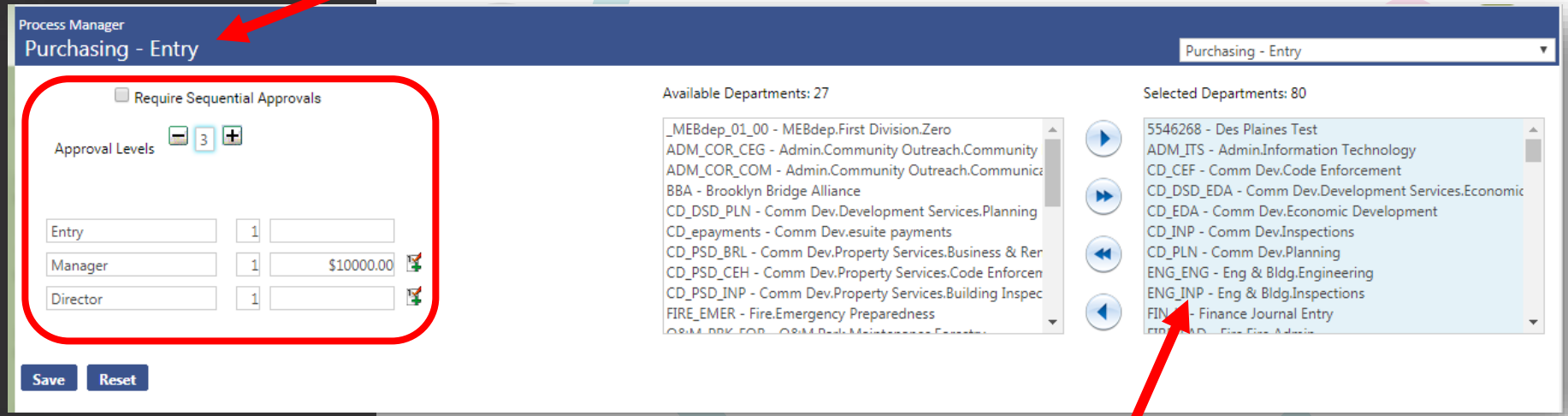
Create Default Approval Routing for that business process.




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

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# 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

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# 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.

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# 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.


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# 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.


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# 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.

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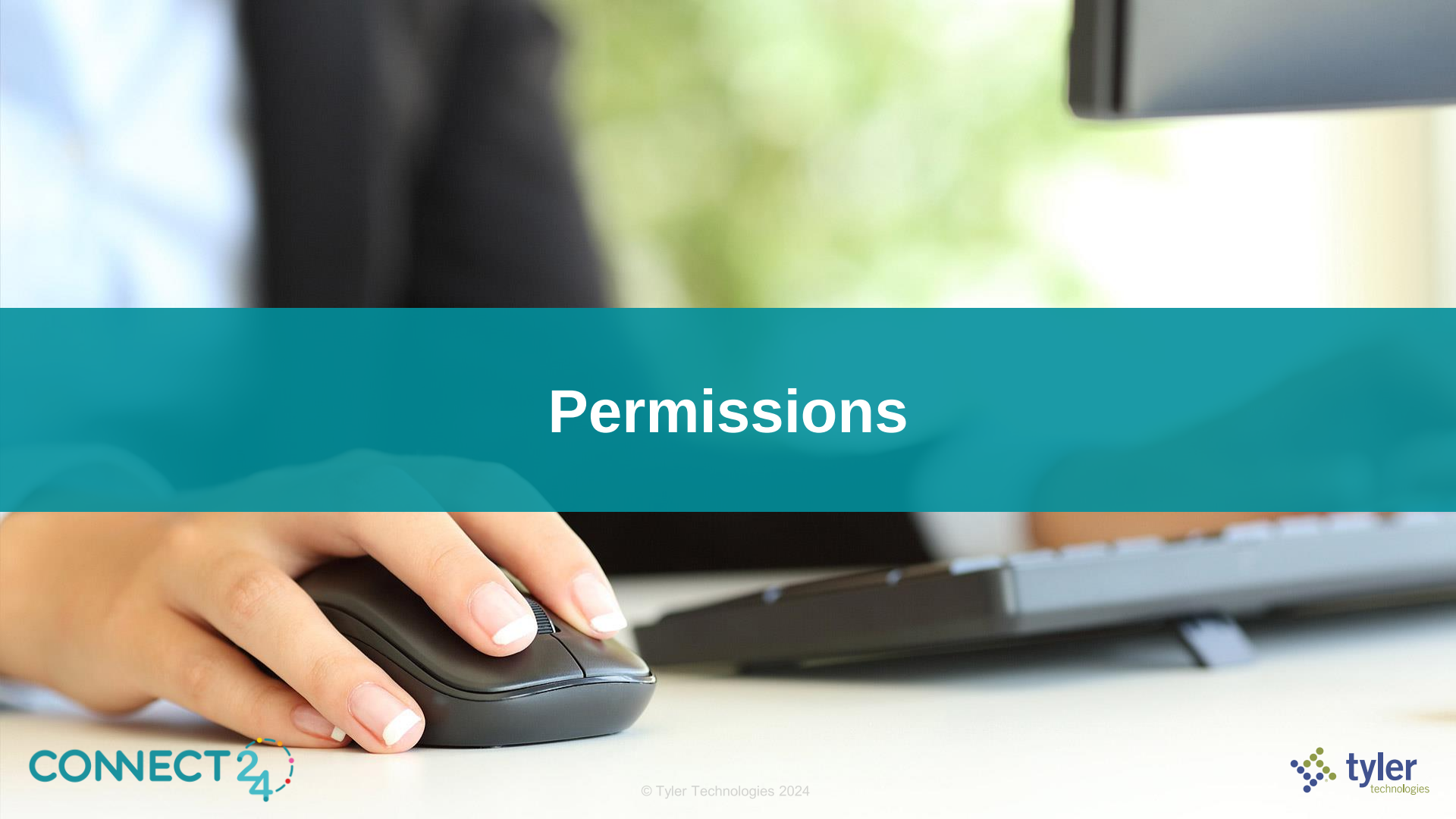

# Permissions

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# Permissions

This module determines:

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

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# 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.*

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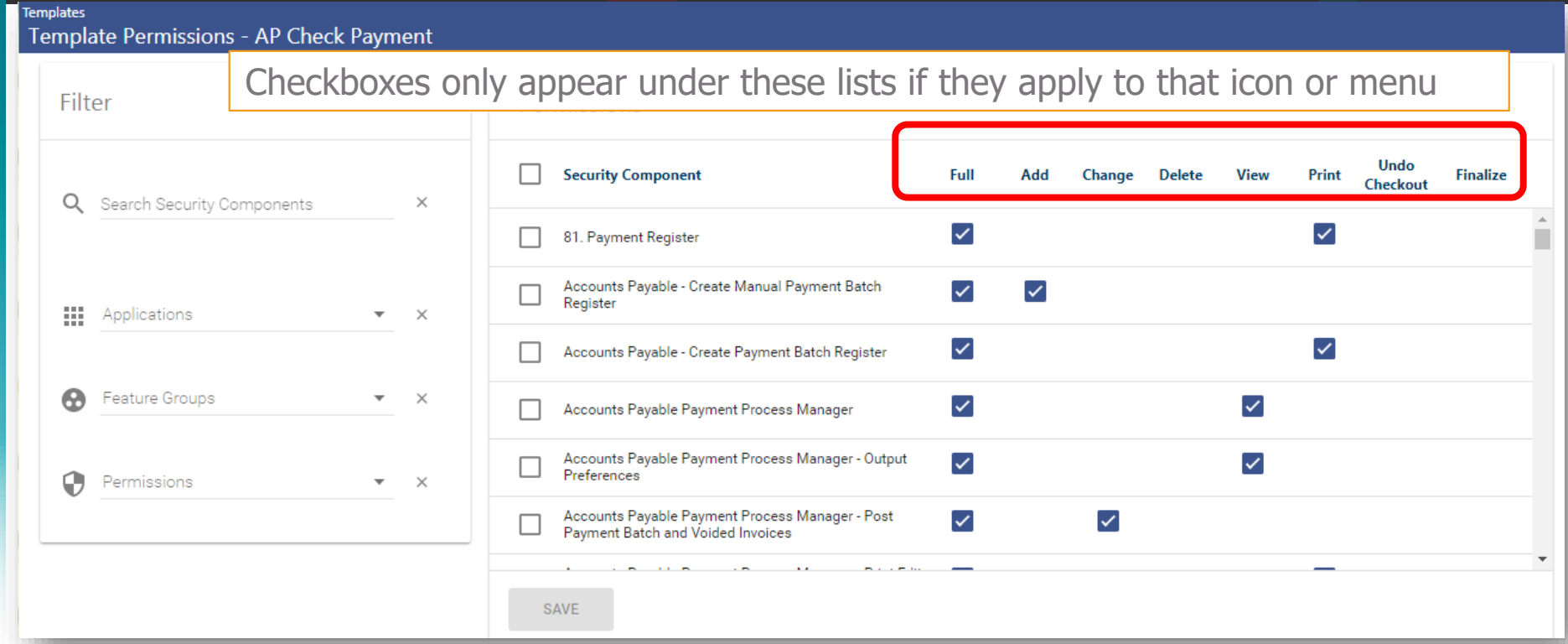


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Templates

# Template Permissions - AP Check Payment

Filter

Search Security Components

Applications

Feature Groups

Permissions

Permissions

Quick search for specific components.

| Security Component | Full | Add | Change | Delete | View | Print | Undo Checkout | Finalize |
|---|---|---|---|---|---|---|---|---|
| 81. Payment Register | ✓ | | | | | ✓ | | |
| Accounts Payable - Create Manual Payment Batch Register | ✓ | ✓ | | | | | | |
| Accounts Payable - Create Payment Batch Register | ✓ | | | | | ✓ | | |
| Accounts Payable Payment Process Manager | ✓ | | | | ✓ | | | |
| Accounts Payable Payment Process Manager - Output Preferences | ✓ | | | | ✓ | | | |
| Accounts Payable Payment Process Manager - Post Payment Batch and Voided Invoices | ✓ | | ✓ | | | | | |

SAVE



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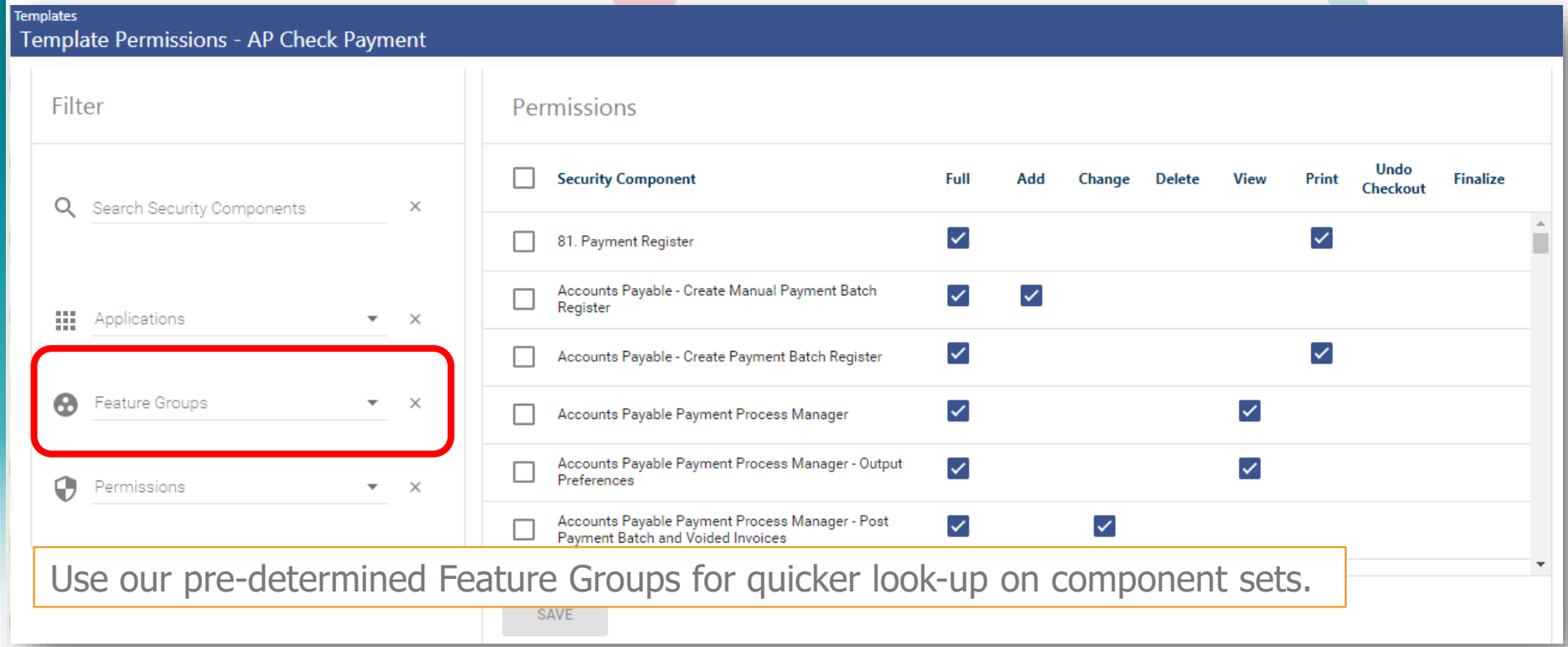


Use our pre-determined Feature Groups for quicker look-up on component sets.

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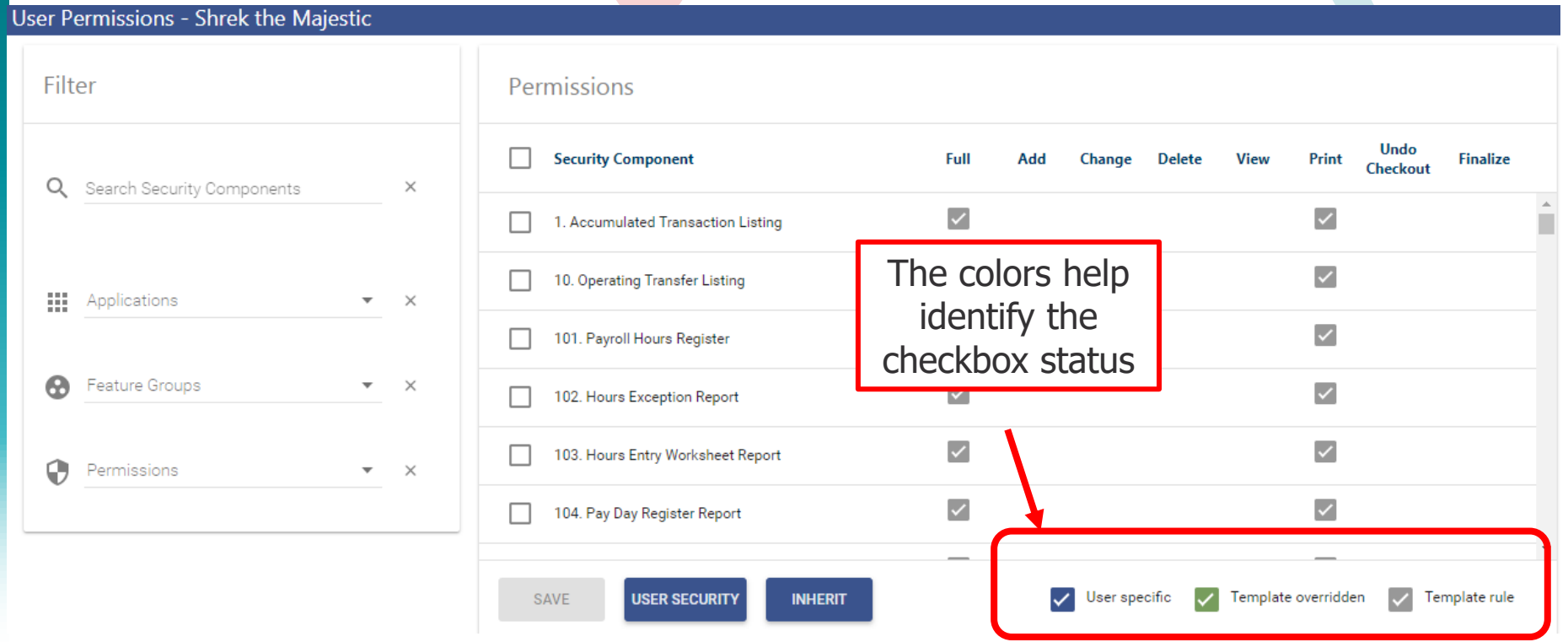


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# Permissions Rules & Facts

- 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.


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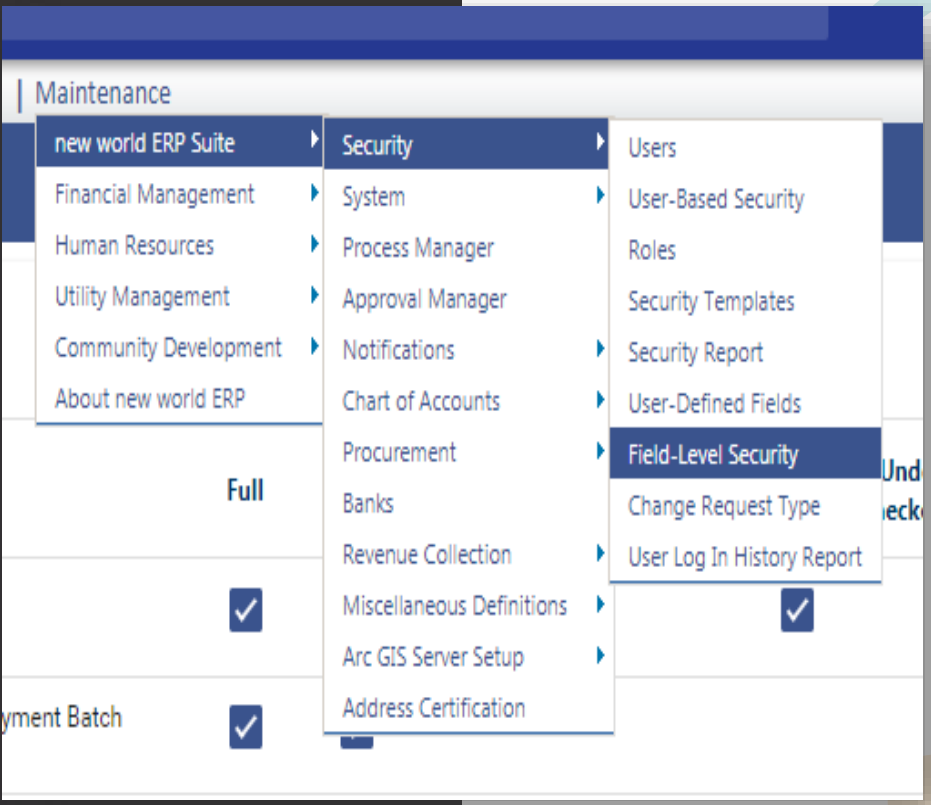


## Field-Level Security adds more checkboxes to Permissions.

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.



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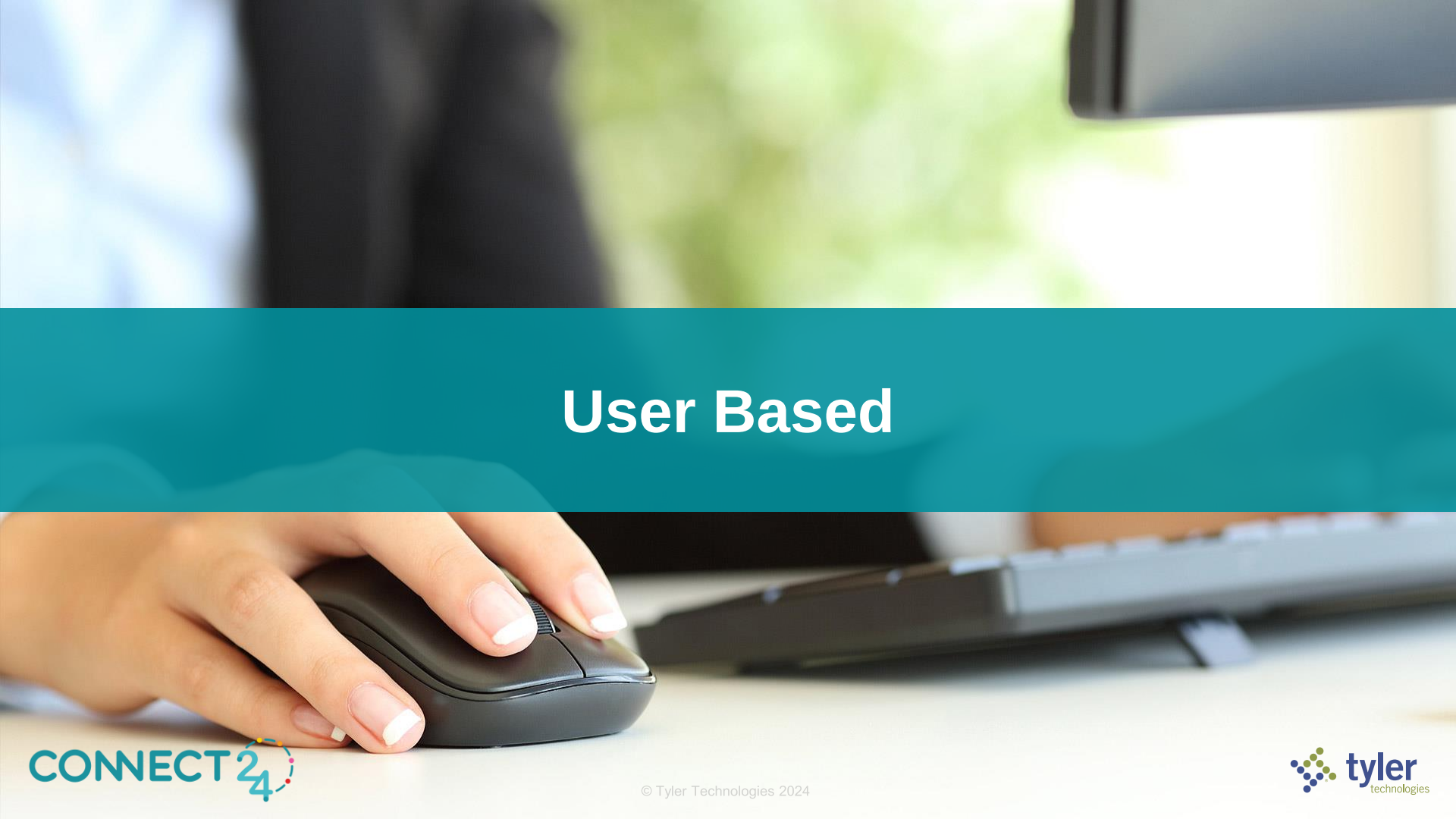

# User Based

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# 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)


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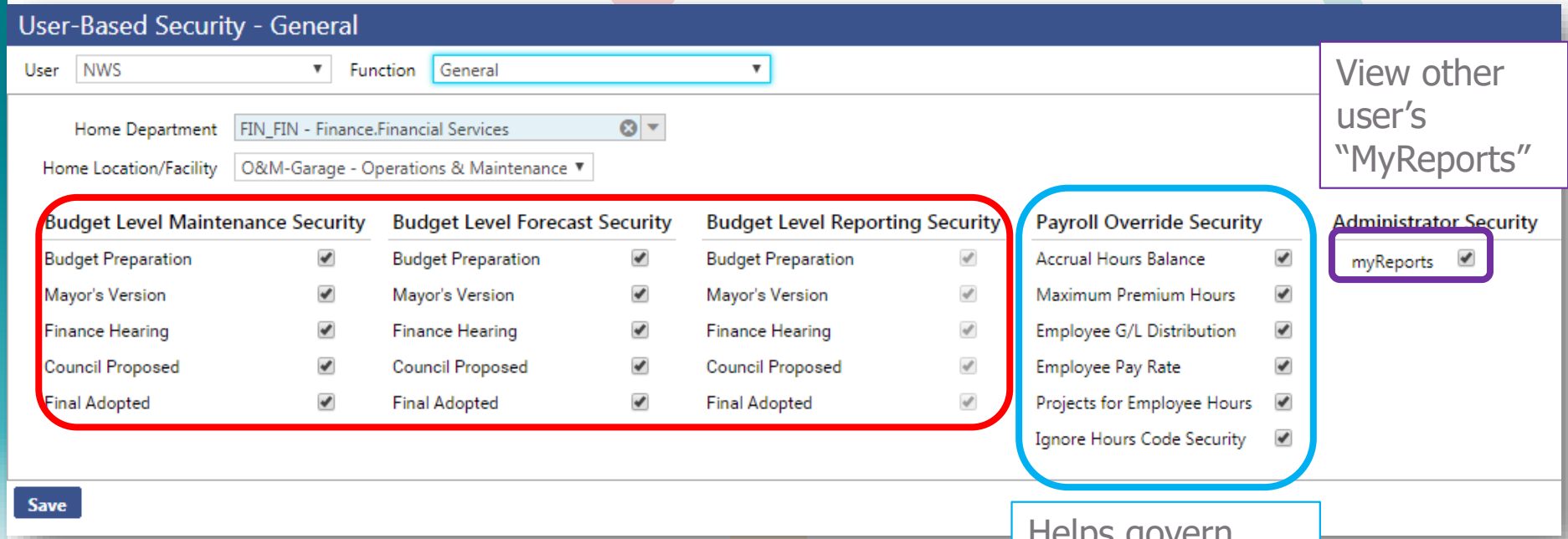


View other user's "MyReports"

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

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

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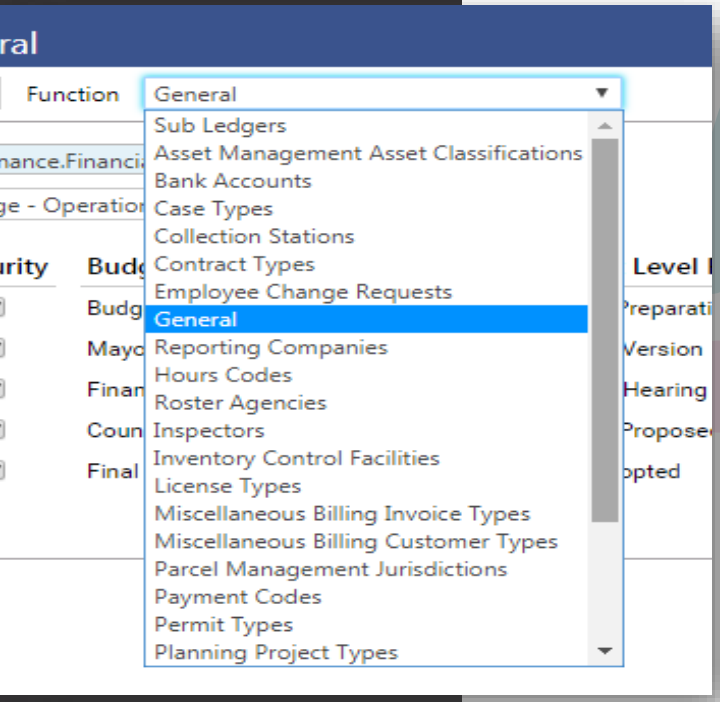


# User-Based

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.

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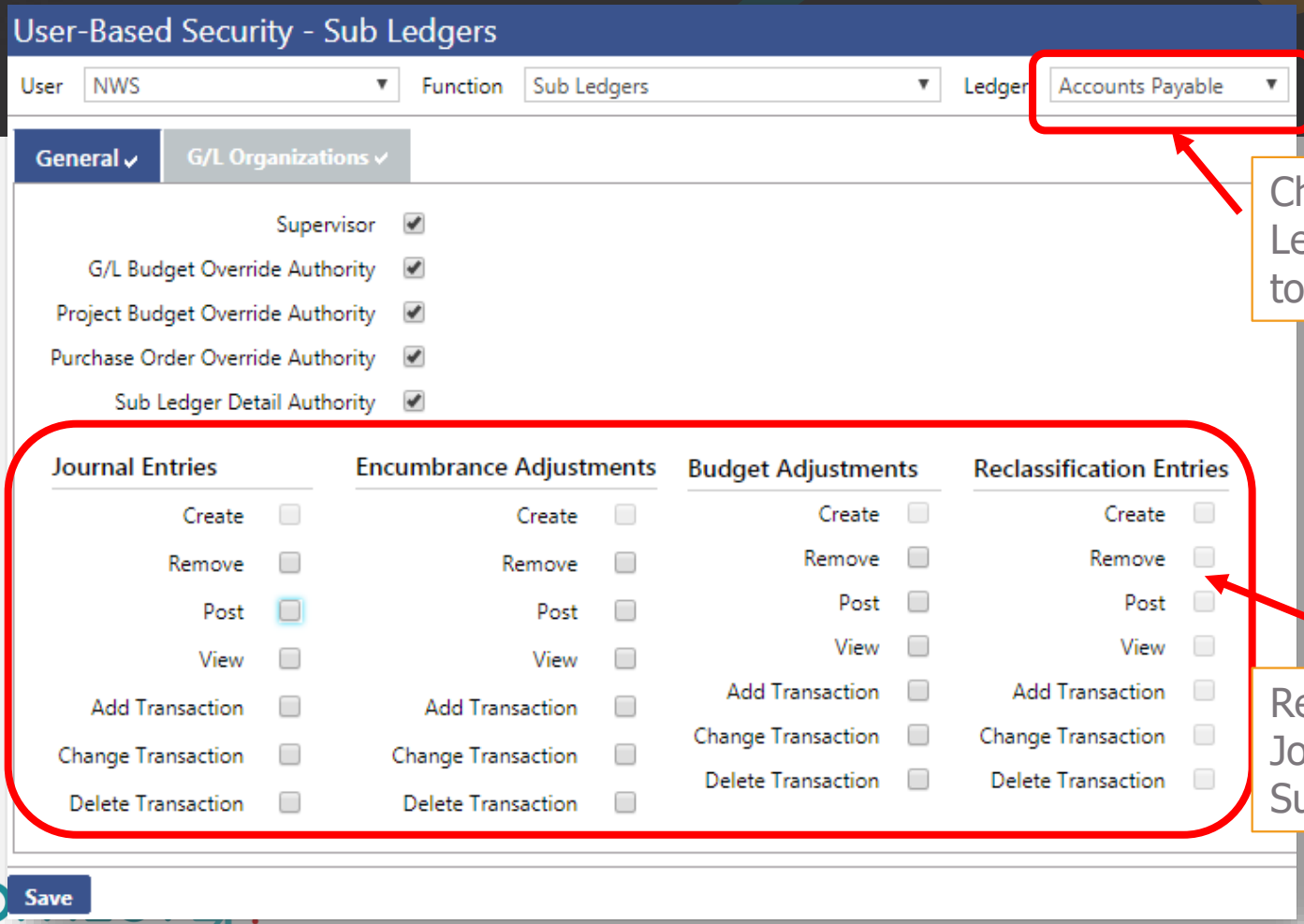


Choose the Sub Ledger you need to work with

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

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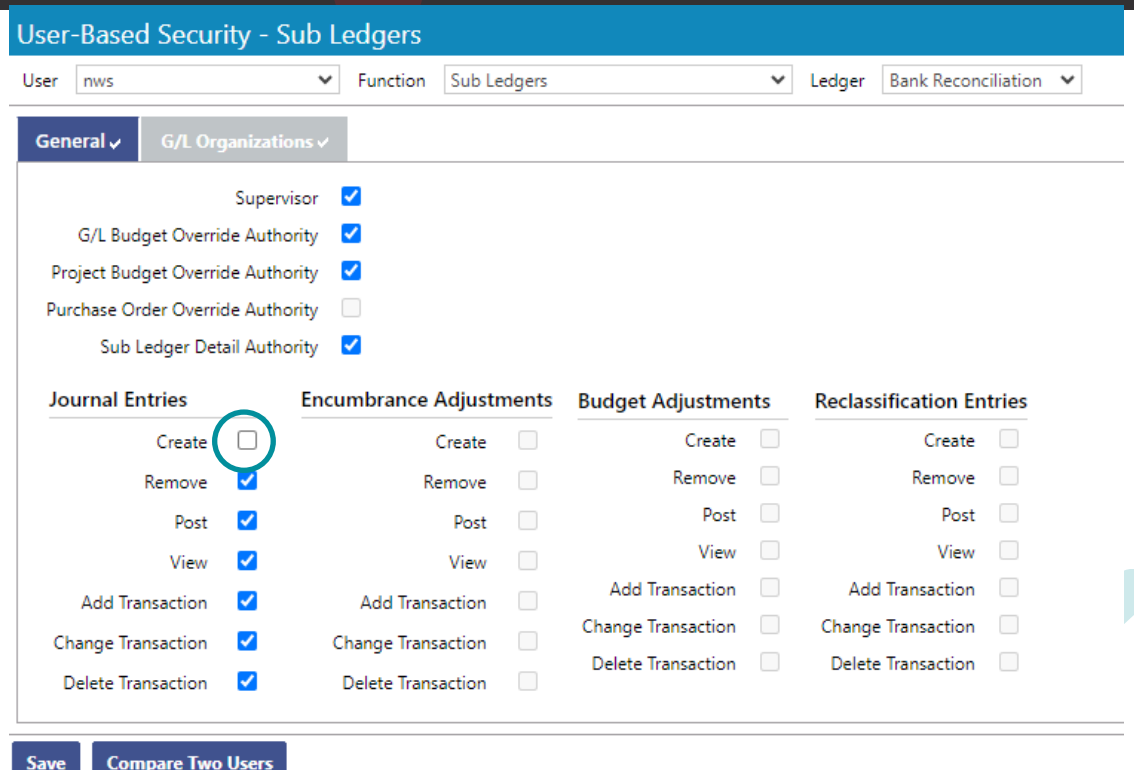
If box is white a journal can be manually entered.

If it is gray the journals are system generated.

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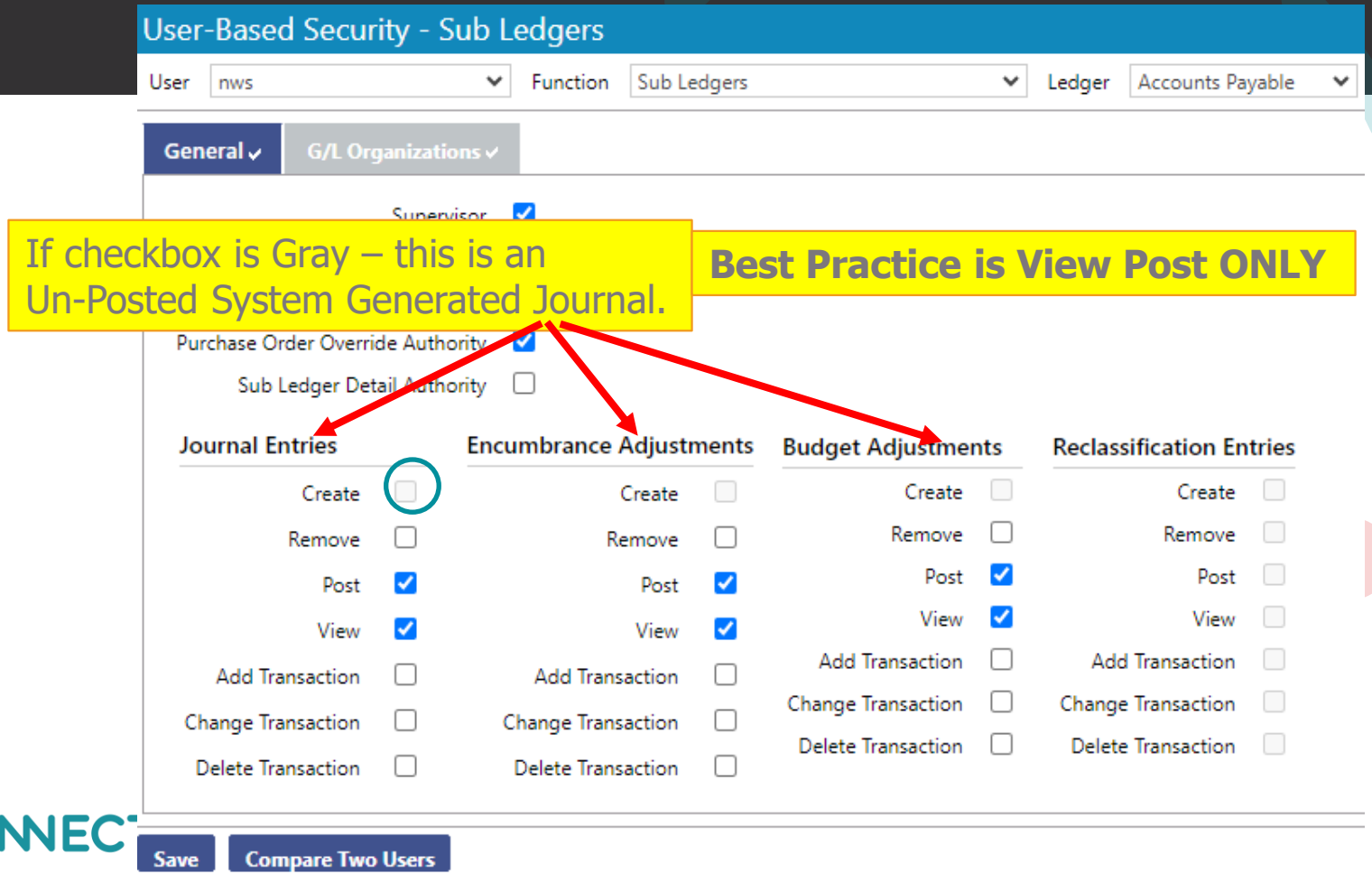
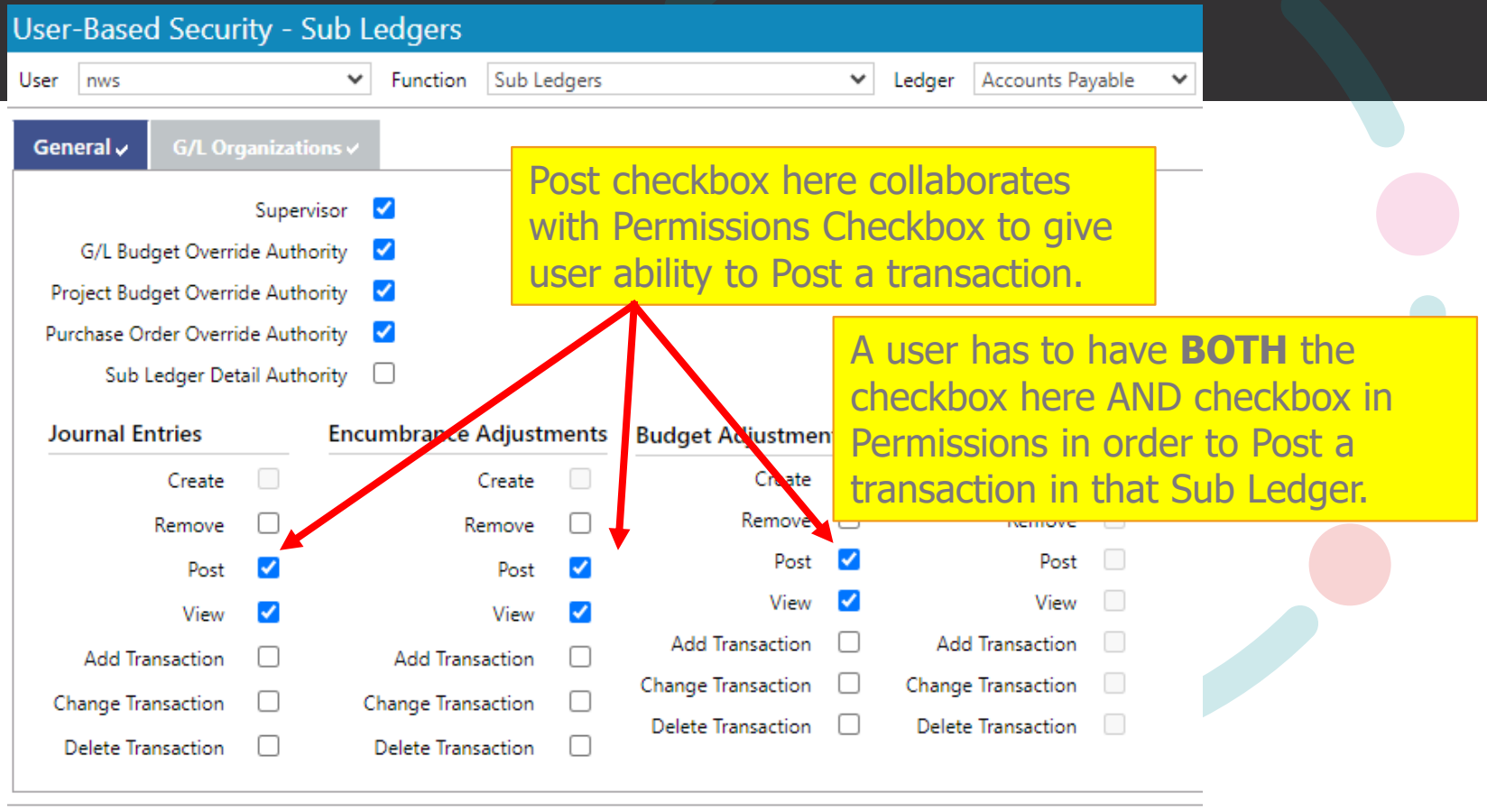

User-Based Security - Sub Ledgers
User nws
Function Sub Ledgers
Ledger Accounts Payable
General
G/L Organizations
Supervisor
Purchase Order Override Authority
Sub Ledger Detail Authority
If checkbox is Gray – this is an Un-Posted System Generated Journal.
Best Practice is View Post ONLY
Journal Entries
Encumbrance Adjustments
Budget Adjustments
Reclassification Entries
Create
Remove
Post
View
Add Transaction
Change Transaction
Delete Transaction
Save
Compare Two Users




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.

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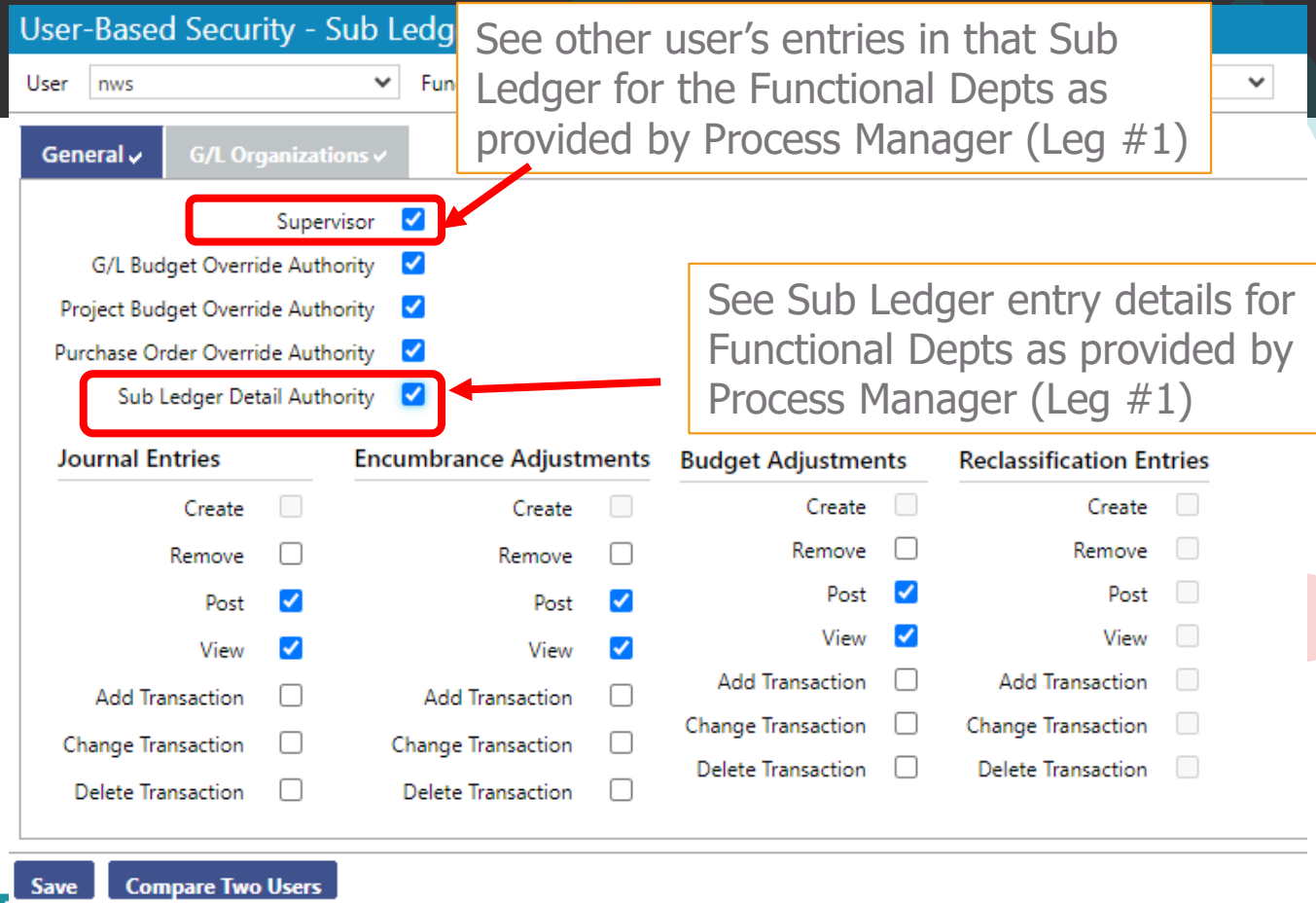


See other user's entries in that Sub Ledger for the Functional Depts as provided by Process Manager (Leg #1)

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

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# 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.


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# 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.

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# 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.


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# Recent Security Management Additions

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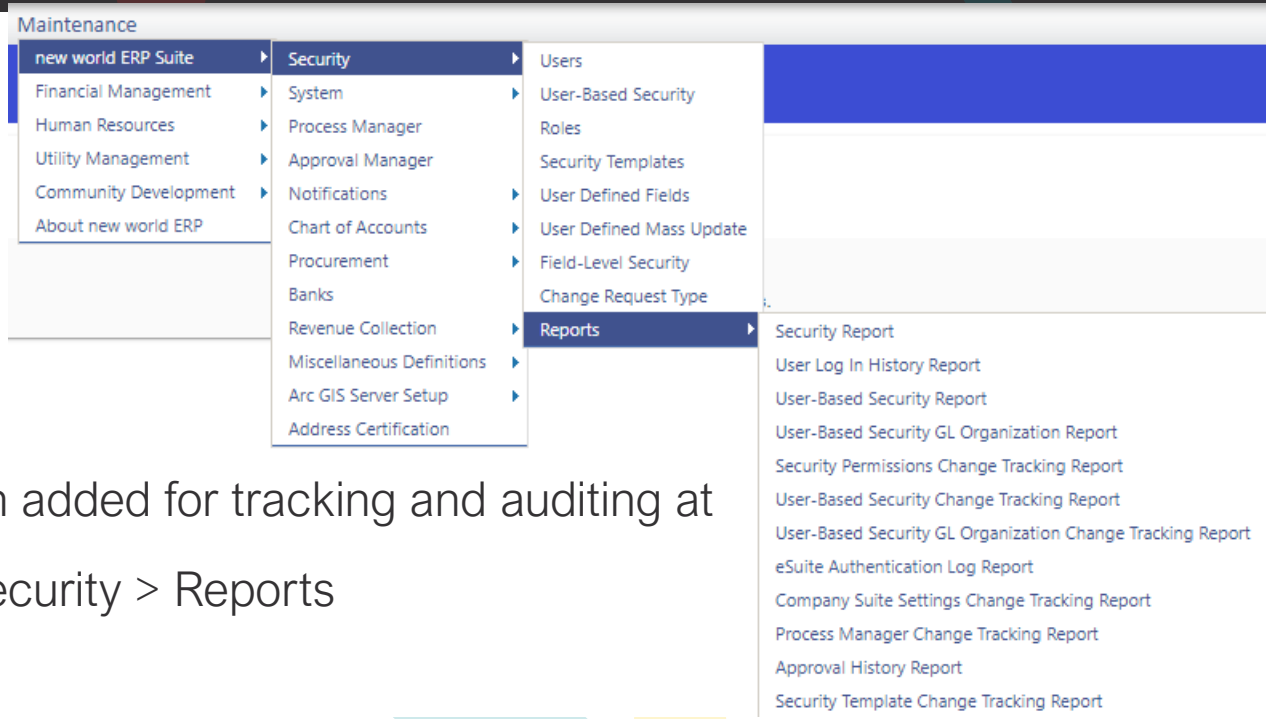
# Security Reports




Several reports have been added for tracking and auditing at

New world ERP Suite > Security > Reports

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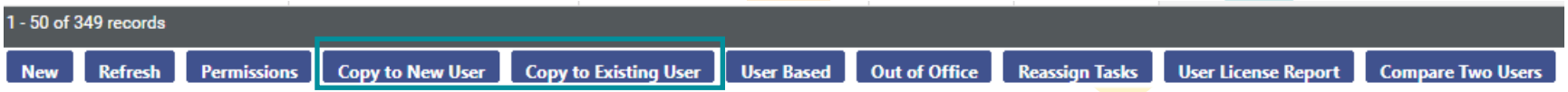
# Copy to New User/Copy to Existing User

- 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!!

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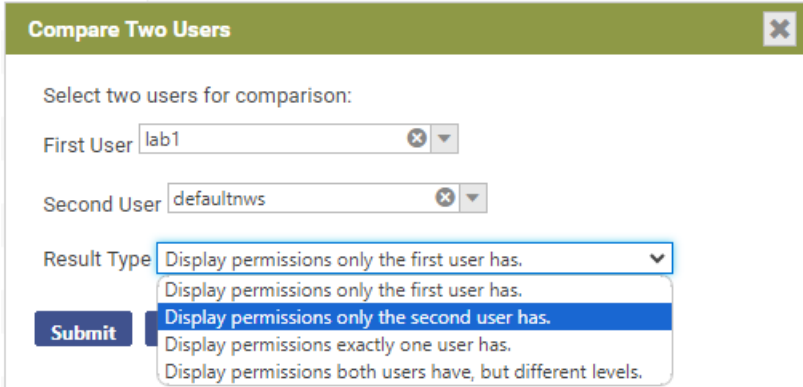
# Compare Two Users

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

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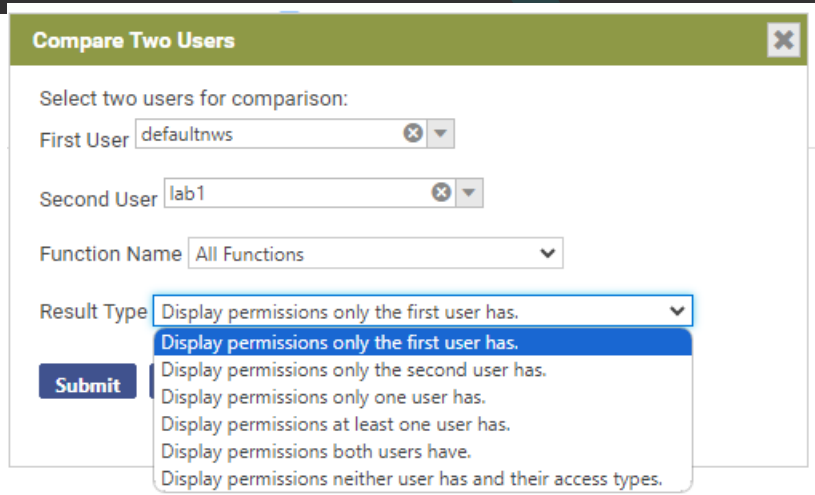
# Compare Two Users

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




| Applicati... | 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 I |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| fm | Contains... | mb | Contains... | Conta | Contains... | Contains... | Co | Contains... | Equa | Equals... | Contains... | Contains... | Contains... | Contains... | Equ |
| fm | Financial Management | MB Customer Type | GRANTOR - GRANTOR | | lab1 | lab1 | Y | Full | 1 | 335 | | | | | |
| fm | Financial Management | MB Customer Type | STANDARD - STANDARD | | lab1 | lab1 | Y | Full | 1 | 335 | | | | | |

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# 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

# Help Central

## 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:

Applications & Maintenance
**What's New**
Year End
More

### 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. |

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We read every submission

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

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