

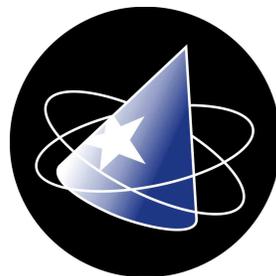
## How To Guide...

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# Security

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## Wiztec Business Suite & WizHR 5



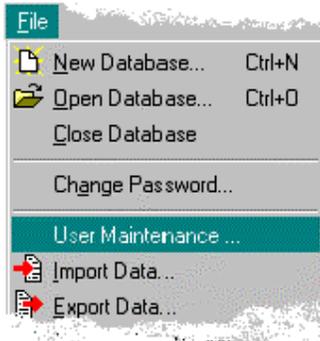
## Table Of Contents

<b>Creating a new user .....</b>	<b>1</b>
Recommendations .....	3
<b>Security Profiles .....</b>	<b>5</b>
A. Creating a template user .....	5
Step 1: Create a new user .....	5
Step 2: Apply Restrictions.....	5
B. Copying the template user.....	5
Recommendations .....	6
<b>Screen Security.....</b>	<b>7</b>
<b>Field Security.....</b>	<b>9</b>
<b>Record Security .....</b>	<b>11</b>
Restrict Employee Records Based on a field in the Employee Details Screen .....	11
Restrict Employee Records (Not Identifiable by any field in the Employee Details Screen) .....	11
A. Applying Filters .....	11
B. Restricting Employee Records (Manual) .....	12
C. Restricting New Employee Records.....	13
a) Triggering the Prompt.....	13
b) Add a New Employee.....	13

## Creating a new user



1. Click on **File** (menu bar)
2. Click on **User Maintenance**



3. Click on the **New User** button (right hand side of dialog box)
4. Key in a **User Code** for the user. (in the case below, BILLY). The user code is not case sensitive, as it may only be keyed in, in CAPS. [Note on assigning user codes.](#)

Ensure that you are giving the user a unique user code (i.e. a user code that no other user has) and that the user code is not in use by another user in any other Wiztec application (e.g. WizRecruit).

It is possible to assign the same user code to the SAME user if you are using a number of Wiztec Applications

5. Key in the users **Forename**

The Forename, Surname and Job Title from this dialog box may be used as merge fields in [Letter Templates](#)

6. Key in the users **Surname**

The Forename, Surname and Job Title from this dialog box may be used as merge fields in [Letter Templates](#)

7. Key in the users **Job Title**

The Forename, Surname and Job Title from this dialog box may be used as merge fields in [Letter Templates](#)

8. Key in a **password** for the user
9. Re-key the password into the **Confirm Password** text box
10. The **Administrator** should remain unchecked (unless the user will be an administrator of WBS)
11. **Allow Login** should be automatically selected (this determines if the user is allowed to log into WBS or not).
  
12. **Match Menu to Outlook bar**

It is possible to [restrict users rights on the Outlook Bar](#) (i.e. adding, moving removing buttons).

If a user is restricted from seeing certain screens on the Outlook Bar, it is also likely that you will not want those users gaining access to those screens from the menu bar (*Outlook bar restrictions primarily affects the Employee and Company options on the Menu bar*).

If the administrator selects to **Match Menu to Outlook Bar**, this severely curtails the options available to the user in the Company Menu.

The only options available to the user on the Company Menu, when this option is selected are:-

- Picklist Settings
- Absence Default Settings
- Apply Holiday Schemes

as well as removing any screens from the Employee Menu option which the user cannot view in the Outlook Bar

To automatically restrict a user from items in the Menu Bar that they do not have access to on the Outlook Bar, select Match Menu to Outlook bar



Match Menu to Outlook Bar	<input checked="" type="checkbox"/>
Copy Outlook Bar Profile from User	<input type="checkbox"/>

### 13. Copy Outlook Bar Profile from User

## Creating a new user

If you have a number of users who will be using the same [Outlook Bar profile](#) (i.e. viewing the same screens), it is possible to copy the Outlook Bar profile for another user (rather than recreating it again)

**User's Details**

Please enter the user's account details below

User Code	BILLY	Administrator	<input type="checkbox"/>
Forenames	Billy	Allow Login	<input checked="" type="checkbox"/>
Surname	Wright	Currently Logged In	<input type="checkbox"/>
Job Title	HR Generalist	Match Menu to Outlook Bar	<input type="checkbox"/>
Password	*****	Copy Outlook Bar Profile from User	<input type="checkbox"/>
Confirm Password	*****		

Outlook Bar Config... OK Cancel Help

In this case, Billy has been set up as a user of WBS. He is allowed to log into the application and has full rights to the Employee & Company menu options (Match Menu to Outlook Bar is not selected).

14. Click on **OK**
15. Click on **Exit**

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If you are using MS Outlook (instead of WizDiary) for diary reminders, [click here](#) for instructions on adding the users profile to the diary list.

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## Recommendations

1. Log in as the user you have just created to ensure that the user has access to areas you requested
2. Ask the user to [change his/her password](#) as soon as they log in

When a new user is set up, they automatically have full access to all screens, fields and menu options.

Once the user is setup, any relevant restrictions must be applied. The restrictions may be any/combination of the following:-

- a. [Field restrictions](#)
- b. [Screen restrictions](#)
- c. [Record restrictions](#)
- d. [Menu bar restrictions](#)

Once the restrictions are in place, it is possible to [modify the Outlook Bar](#) to suit the users needs (i.e. removing icons on the Outlook Bar which the user does not have access to or does not require access to).



## Frequently Asked Questions:

- *I receive a message box when I try to access the User Maintenance screen?*

*"Error 754*

*Administrator Security Level is required for this option"*

*You are not logged on as an administrator of WBS. Contact an administrator to give you administrator rights. If you are not sure who the administrator is, contact Wiztec Support for further information*

- How do I make an existing user an administrator?

- Click on **File**
- Click on **User Maintenance**
- Select the users' User Code
- Click on **Details**
- Click on **Administrator**
- Click on **OK**
- Click on **Exit**

The next time the user logs onto WBS, he/she will have Administrative Rights

- How can I apply restrictions to a user?

## Security Profiles



If you have a large number of users who will be using the same or near same security profile, it is recommended that you create a template user (with all the required security restrictions), each time you want to create a new user, make a copy of the template. This will save time.

### A. Creating a template user

#### Step 1: Create a new user

1. Click on **File**
2. Click on **User Maintenance**
3. Click on **New User**
4. Key in a User Code (e.g. TIMESUPERVISOR). The user code is irrelevant, as it will never be used, this also applies to the Forename, Surname, Job Title and password
5. Job Title, Forename, Surname may be left blank
6. Key in a **password** (e.g. password)
7. Confirm that password in the **Confirm Password** text box
8. Click on **OK**
9. Click on **Exit**

#### Step 2: Apply Restrictions

- a. Apply relevant [screen rights/restrictions](#) to the template user
- b. Apply relevant [field rights/restrictions](#) to the template user
- c. [Modify the Outlook bar](#) to the template user
- d. Apply [record filters](#) to the template user

### B. Copying the template user

1. Click on **File**
2. Click on **User Maintenance**
3. Highlight the template user
4. Click on **Make a Copy button**
5. Key in the new users **User Code**
6. Key in the new users **Forename**
7. Key in the new users **Surname**
8. Key in the new users **Job Title**
9. Key in the new users **Password**
10. Reconfirm the **password**
11. Ensure that **Match Menu to Outlook bar** is checked

12. Ensure that **Copy Outlook Bar Profile from User** is checked. The user code indicated in the drop down list should be the user code you selected in point 3 above
13. Click on **OK**
14. Click on **Exit**

### **Recommendations**

1. Log in as the user you have just created to ensure that the user has access to areas you specified
2. Ask the user to [change his/her password](#) as soon as they log in

## Screen Security



It is possible to restrict a users access to a screen/table. The restriction may vary depending on the functionality you wish the user to have.

Prior to restricting a users access to a screen, the administrator should be aware that there are reporting implications for this user. By default, if a screen/table restriction has been placed on a user, that user will not have access to reports.

While the above is the recommended security policy, it is possible to by-pass this security feature (i.e. the user may be given access to reports even though they are restricted from viewing certain screens/tables) by contacting Wiztec Technical Support.

1. Click on **File**
2. Click on **User Maintenance**
3. Select a **User Code**
4. Click on **Table/Field** rights
5. Each screen is listed in alphabetic order under the **Table Description** column

Section	Table Description	Table Rights
Employee	List of Groups	Full
Employee	Managers and Subordinates	Full
Employee	Master Details	Data Entry
Employee	Medical History	Full
Employee	Notes	Full
Employee	Pay History	Full
Employee	Private Car	None
Employee	Professional Membership	Read Only
Employee	Qualifications	Update Only
Employee	Recruitment Progress	Full
Employee	Reference Assessment	Full
Employee	Reference Details	Full
Employee	Skills	Full
Employee	Timesheet Data	Full
Employee	Timesheet Summary	Full
Employee	Training History	Full
Employee	Training Planner	Full
Employee	Union Record	Full
Employee	Vaccination History	Full

6. Right click on the screen you wish to restrict
7. From the shortcut list, select the restriction type
  - a. **Data Entry** - the user will be able to view all data on the selected screen, will be able to add and edit records, however, the user will not be able to delete records (i.e. the

delete button will be disabled from the sub screen toolbar). In the example above,

*Master Details Employee Details Screen*

- b. **Full** - the user has full rights to the screen. The user will be able to view, add, global up, edit and delete records.
- c. **None** - the user has no rights to the screen. The user will not be able to open the screen (the screen icon will appear grey on the Outlook bar, ideally this screen icon should be removed from the [users Outlook Bar Profile](#)) or report on this screen. In the example above, Private Car
- d. **Read Only** - the user has the ability to view all records, however, the user will not be able to add, edit, global up or delete the records in any way. In the example above, Professional Membership.
- e. **Update Only** - the user has the ability to view all records and edit existing records. However, the user may not add, global up or delete records. In the example above, *Qualifications Education History screen* .

## Field Security



As well as a user being [restricted from a screen/table](#), a user may have limited access to a screen (i.e. the user may be restricted from a number of fields within the screen). The restrictions to fields may be Read Only or None.

1. Click on **File**
2. Click on **User Maintenance**
3. Select a **User Code**
4. Click on **Table/Field rights** button
5. Select a screen/table from the list (in this example, Bank Details)
6. On the right hand side of the dialog box, a list of fields appear
7. By default the Access Rights for all fields will be **Full**
8. Right click on each field and select a right for each field. The options available are:-
  - a. **Full** (the user has full access to view and modify/edit data in the field)
  - b. **None** (the user will have no access to the field, the field will not appear on the screen for this user and the data will not be visible)
  - c. **Read Only** (the user will be able to view data in the field, the field will appear yellow, the user will not be able to edit the data in this field)
9. Repeat this for each field you wish to restrict

Field Description	Access Rights
Account Number	None
Account Type	Read Only
Address	Read Only
Bank Name	Read Only
Branch	Full
Pay Path	Full
Sort Code	Full

10. The result of the restrictions planned in the Bank Details Screen (the example above), will be: -

The screenshot shows a web form with the following fields and annotations:

- Bank Name:** BANK OF IRELAND (Yellow field, read-only)
- Address:** SHANDON STREET, CORK (Yellow field, read-only)
- Branch:** (White field, editable)
- Sort Code:** 900332 (White field, visible)
- Account Type:** (Yellow field, read-only)
- Pay Path:**  (White field, editable)

Annotations on the right side of the form:

- The yellow fields are read only
- The white fields are editable
- This user maynot view the employees bank account number.

**Note:**

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If you place a field restriction on a screen, the user will loose full rights to that screen and will be automatically be changed to Data Entry (*i.e. the user will have no rights to delete records from that screen*).

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## Record Security



**Note:**

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You must be logged on as an administrator to carry out the following

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### **Restrict Employee Records Based on a field in the Employee Details Screen**

It is possible to allow a user access only to a sub group of employees within a database. This sub group may be identified by a value in a field in the Employee Details screen (e.g. all employees in the Marketing division or all employees who *Report To 'Report To' is not a default field in the Employee Details screen. However, it is possible to alter one of the labels in the Add tab to create this field a* specified manager). See [section A](#) below.

### **Restrict Employee Records (Not Identifiable by any field in the Employee Details Screen)**

It is also possible to allow a user access a sub group of employees within a database, where those employees do not have a common field value in the Employee Details screen. This process requires the administrator to manually select employees from each database that the user may view. See [section B](#) below.

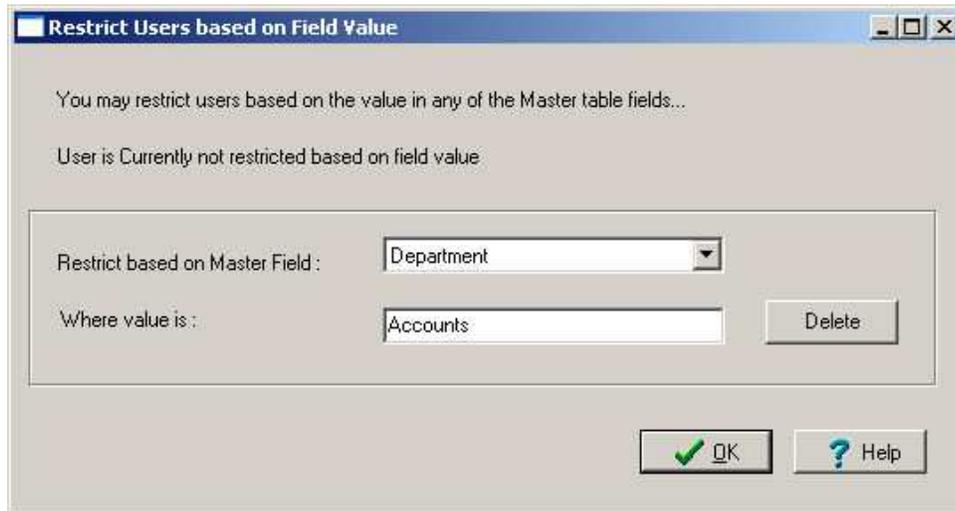
There are disadvantages with this method of record restriction. Tight control is required when new employees are added to the database. It may be an option to limit the number of users who can add new employees to the database (i.e. removing the Add button on the Employee Details screen). See [section C](#) below on the procedure to add new employees to the database.

## **A. Applying Filters**

Complete the following steps to apply a record restriction on a users rights. In the example below, a user will only have access to employees who have been assigned to the Accounts department.

1. Click on **File**
2. Click on **User Maintenance**
3. Select a **User Code**
4. Click on **Record Rights** button (bottom of the dialog box)
5. Click on the drop down arrow to the right of **Database** and select which database contains employee records which you wish to restrict from the user you selected above.
6. Click on **Filter** button
7. Click on the drop down arrow to the right of **Restrict based on Master Field**

8. Click on the field you want to restrict on (e.g. Department). In the current version of WBS, it is possible to restrict users' records rights based on a one field filter only (i.e. multiple field filters are not available)
9. Click in the text box to the right of Where value is : and key in the value you want to restrict on (e.g. Accounts). The spelling in the 'Where Value Is' text box must be exactly as it appears in the field in WBS



10. Click on **OK**
11. Click on **OK** and click on **Exit**

## B. Restricting Employee Records (Manual)

1. Click on **File**
2. Click on **User Maintenance**
3. Select a **User Code**
4. Click on **Record Rights**
5. Click on the drop down arrow to the right of **Database**. Select a database from the drop down list
6. Three columns appear, Restrict Access, Employee No. and Name
7. Select the employees in the database that you do **not** want this user to view (place a tick in the check box to the left of the employees number)



### Note:

**Hint:** If you want to give this users access to a small number of employees in the database, right click anywhere on the data, click on Restrict All, uncheck the employees you want the user to view.

8. Repeat this for each database you want to restrict

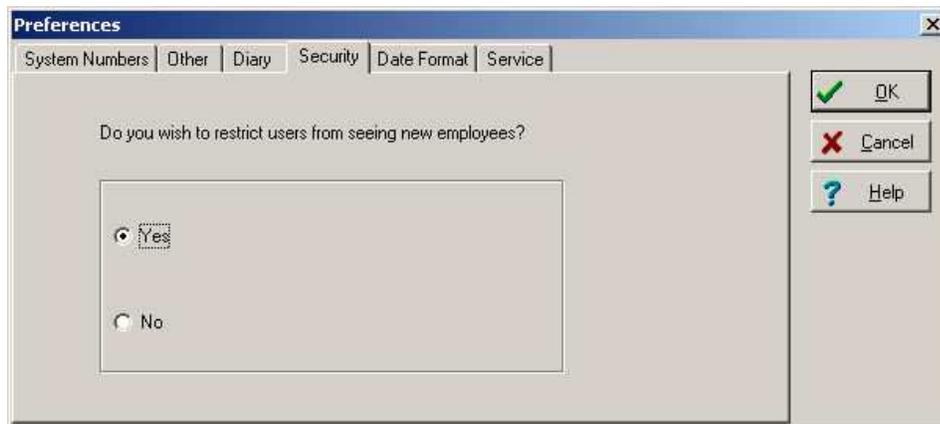
## C. Restricting New Employee Records

As an administrator, you can decide to prompt users to restrict other WBS users from viewing employees who have been added to WBS, as the new employees are being added to the database (e.g. restrict users from seeing Senior Management data). Follow the instructions below to trigger this prompt

### a) Triggering the Prompt

This is an option which should be selected once (i.e. once the option has been selected, it is not necessary to repeat the steps below).

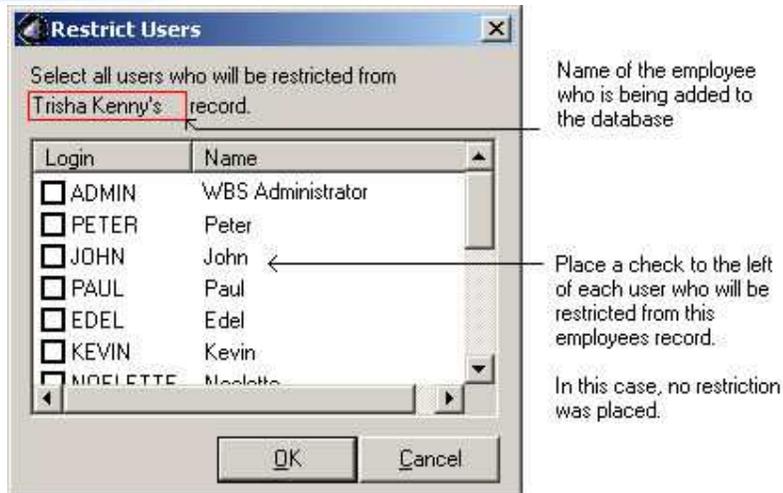
1. Click on **Preferences** (menu bar)
2. Click on **System Preferences**
3. Click on the **Security** tab
4. You are prompted with the question, "Do you wish to restrict users from seeing new employees?" Click on **Yes**



5. Click on **OK**

### b) Add a New Employee

1. Add a new employee as normal
2. Click on **Save** (sub screen toolbar)
3. The following dialog box appears



4. Check (or place a tick beside) the users who you wish to restrict from seeing the employee who has just been added to the database
5. Click on **OK**



#### Frequently Asked Questions:

- *If a new employee is added to the database, will this user be able to view the employee if the employee is assigned to that users area?*

For as long as the record restriction applies, the user will be able to view any employee who fulfills the filter criteria (in the case above, where Department is equal to Accounts)

The user will not be able to view any employee who does not meet the criteria, this include situations where the value may be incorrectly spelt.

For instance, user JOE, may only see employees who are assigned to the 'Human Resources' department. A new employee is added to the database. He is assigned to the 'HR' department. The user JOE will NOT be able to see this employee when he logs onto WBS, as the filter only applies to Human Resources and not HR. For this and other reasons, it is imperative that the pick lists are kept accurate.

Learn more about [pick lists](#)

- The Restrict Users dialog box does not appear when I add a new employee to the database?

Check the setting in the System Preferences dialog box

## Record Security

- Click on Preferences
- Click on System Preferences
- Click on Security
- 'Yes' should be selected

- *How can I tell if a user has record restrictions?*

Can I restrict an entire database of employees from a user?

How do I remove a record filter restriction for a user?

- Click on File
- Click on User Maintenance
- Select the users profile (user name)
- Click on Record Rights
- Click on Filter
- Click on Delete
- Click on OK
- Click on OK
- Click on Exit

The next time this user logs in they will have access to all employees in the currently opened database



↑  
The symbol of the padlock on the Status bar indicates that this user (PETER), has restrictions placed on his record rights