

Security Console

Agenda

This course will provide basic instruction for security administration

- This course will cover:
 - Basic Security Console functions
 - Security Roles and Entity Class configuration
 - Differences in Windows and Web Security
 - Adding a User
 - Assigning security to a user
 - Entity class and Site ID interaction
 - Best practices for security

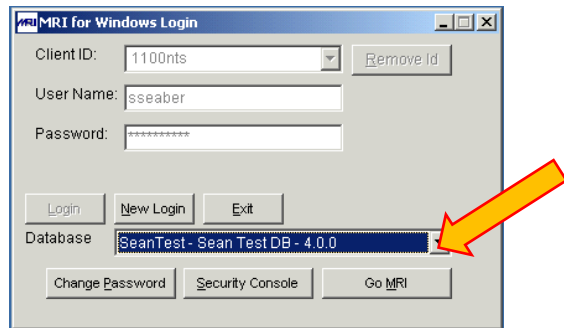
The Basics

In this section we will cover:

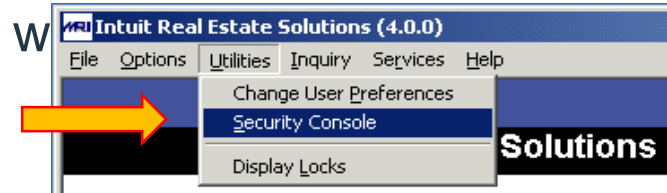
- Logging into the Security Console
- Security Console overview
- Reports
- Synchronize Security
- Locks
- Clear Workstation

Logging into the Security Console

- Option 1: On the login screen (available if you do not have network login enabled).

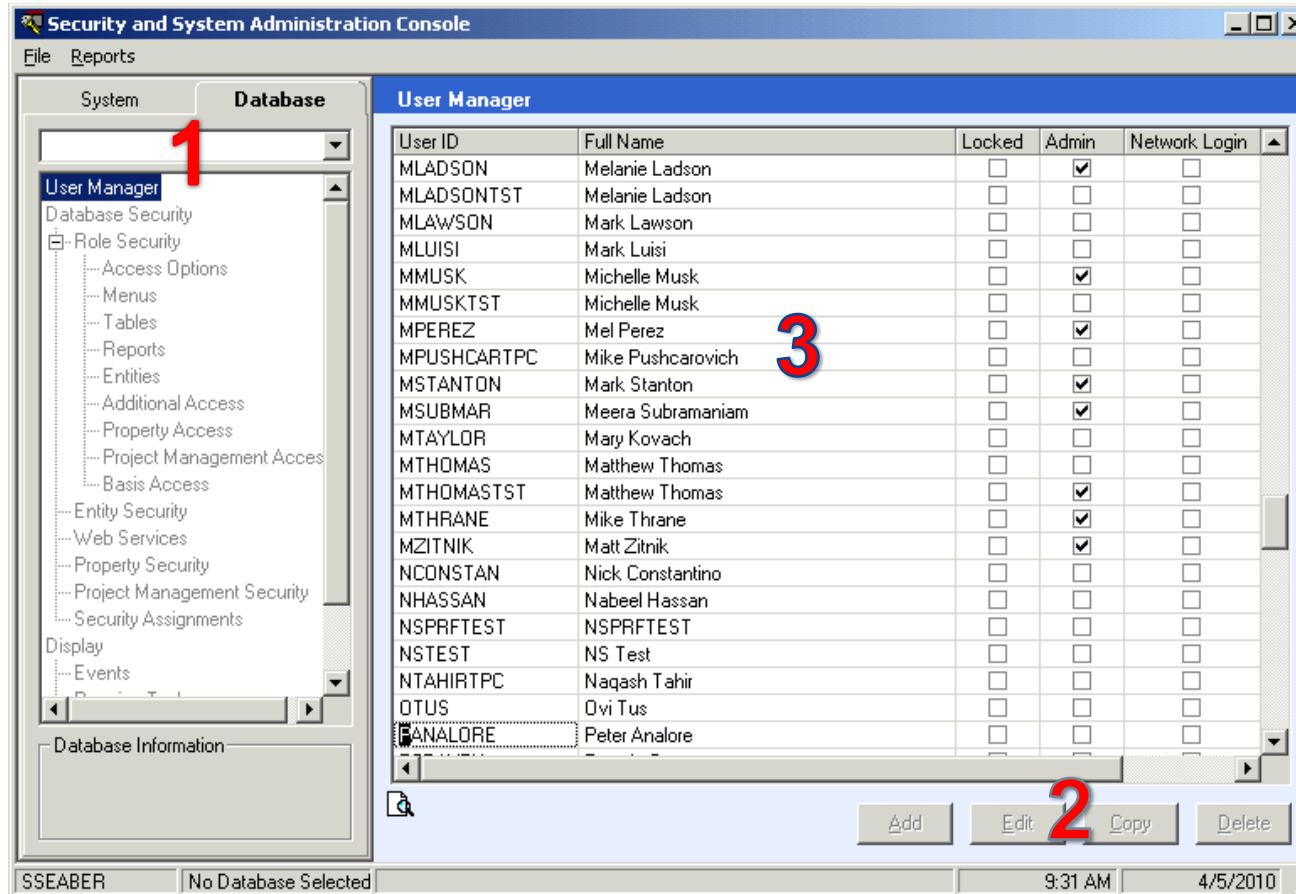


- Option 2: On the home screen of the MRI application in the



- Both will bring you to the same interface:

Security Console



1. You must select a database to get started. If no database is selected, you will see the left window grayed out.
2. Until you select a database, your access buttons will be grayed out.
3. The large middle section will list all of your users.

Reports



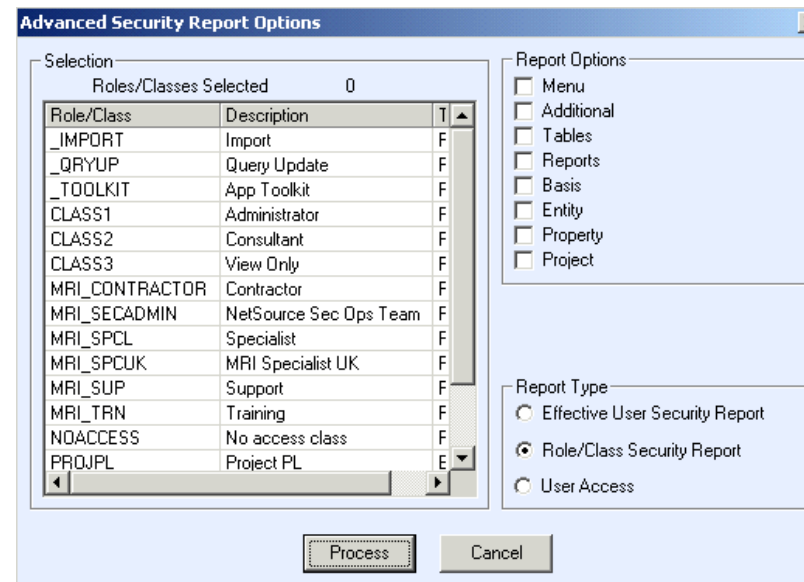
There are three report categories: **Excel, Audit, and User.**

- Excel reports are various security reports available in Excel format.
- Auditing must be turned on for Audit report to be active.
- User reports are various reports regarding user access and can be saved in multiple formats.

Excel reports:

There are 3 Excel report options:

- Effective User Security Report
- Role/Class Security Report
- User Access



Reports

User Reports:

- Three user report options:
 - User Access
 - User Access by Role/Class
 - MRI Login Report
- Reports are saved in one of three formats:
 - PDF
 - HTML
 - RTF

Advanced Security Report Options

Selection
Users Selected: 0

User ID	Full Name
AANDERSO	Andrea Anderson
ABIESIADECKI	Aileen Biesiadecki
ABISBEE	Annette Bisbee
ACLINE	Amy Cline
AFRANK	Alex Frank
AGLASS	Aaron Glass
AHOWELL	Alison Howell
ALESKO	Amorous Lesko
ALOCKLAR	Amanda Locklar
AMCCORD	Armelia McCord
ASPANN	Antworne Spann
AZOLATPC	Alex Zola
BAMREIHN	Brian Amreihn
BBRIGADIER	Benton Brigadier
BDAUGHER	Brian Daugherty

Report Options:
 User Access
 User Access by Role/Class
 MRI Login Report

Dates:
Begin: 12/27/2009
End: 01/27/2010

Security Type:
 Role
 Entity

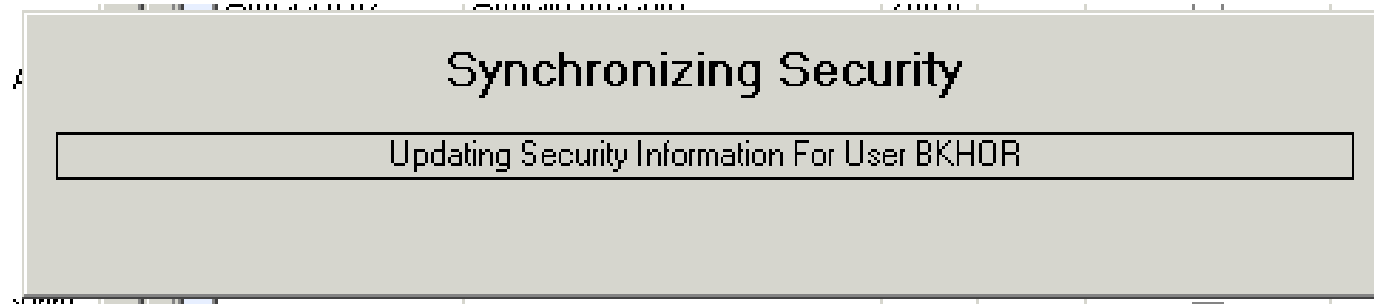
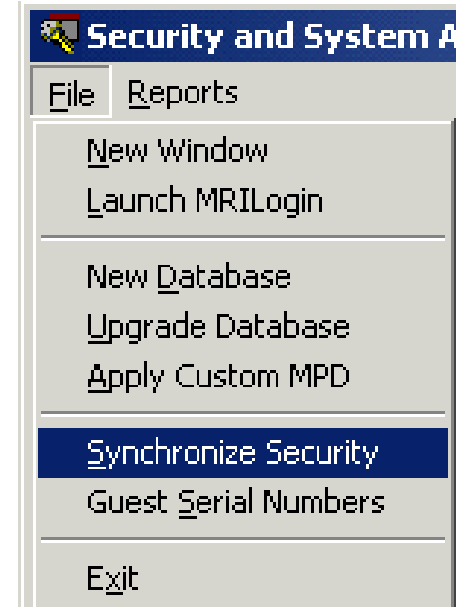
Select All Unselect All Process Cancel

Export to:

PDF HTML RTF

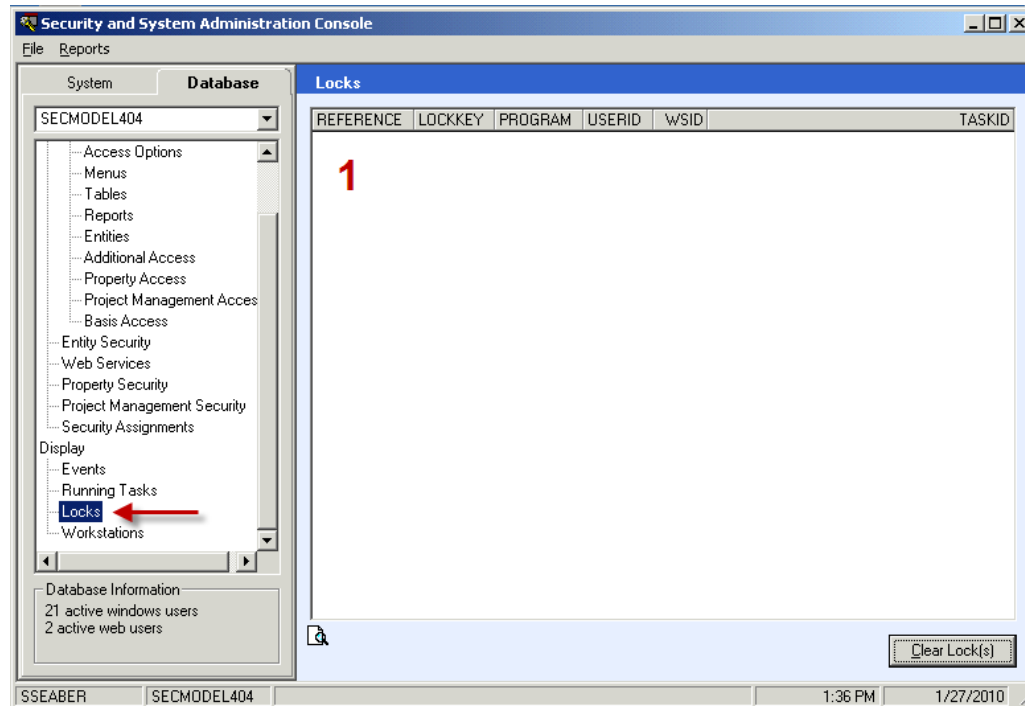
Synchronize Security

- Synchronize Security will functionally refresh security for all users
- What might this be used for?
- Synchronize Security utilizes significant resources, so use this with caution



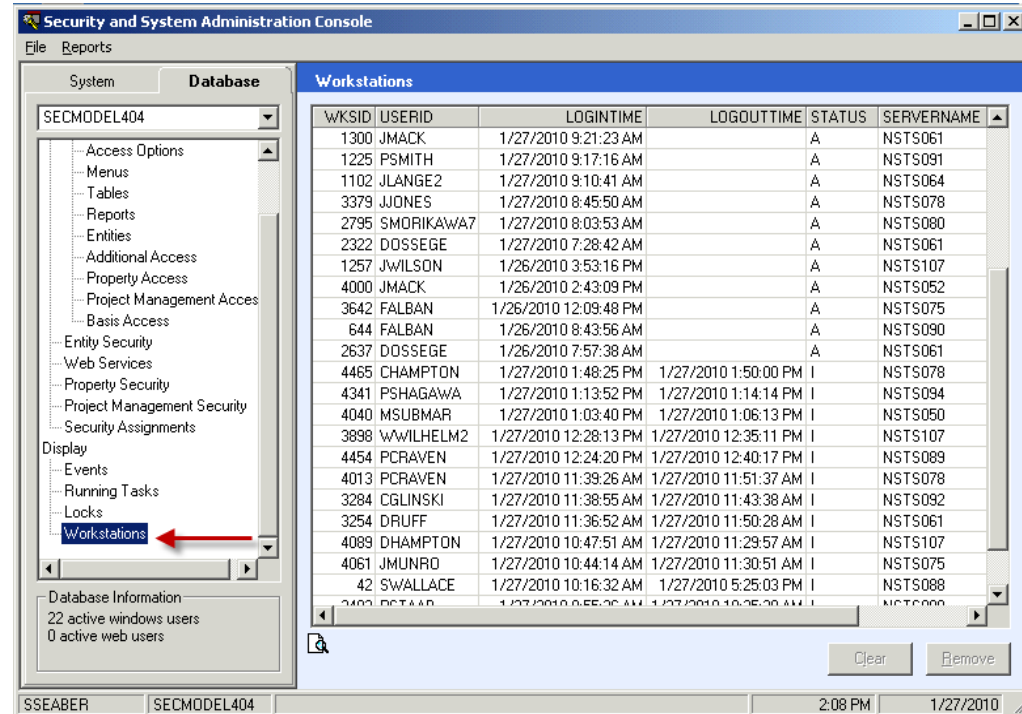
Locks

- **Lock functions:**
 - Prevent data corruption
 - Prevent schema changes by multiple users
 - Allow proper updating to tables
- **Locks occur because:**
 - Program function
 - Task shut down incorrectly
 - User session lost
- **How to clear:**
 - Select database
 - Click Locks
 - Right panel populates with tasks
 - Choose the correct lock and click Clear Lock(s)
 - Be careful of the locks you clear



Clear Workstation

- The workstation tracks active and inactive MRI sessions.
- Status:
 - (A) Active
 - (AW) Active Web
 - (I) Inactive
- Active records (A or AW) utilize a concurrent user on your license.
- Caution should be used when clearing active sessions.



The screenshot shows the 'Security and System Administration Console' window. The 'Database' tab is selected, and the 'Workstations' option is highlighted in the left-hand navigation menu with a red arrow. The main area displays a table of workstation sessions.

WKSID	USERID	LOGINTIME	LOGOUTTIME	STATUS	SERVERNAME
1300	JMACK	1/27/2010 9:21:23 AM		A	NSTS061
1225	PSMITH	1/27/2010 9:17:16 AM		A	NSTS091
1102	JLANGE2	1/27/2010 9:10:41 AM		A	NSTS064
3379	JJONES	1/27/2010 8:45:50 AM		A	NSTS078
2795	SMORIKAWA7	1/27/2010 8:03:53 AM		A	NSTS080
2322	DOSSEGE	1/27/2010 7:28:42 AM		A	NSTS061
1257	JWILSON	1/26/2010 3:53:16 PM		A	NSTS107
4000	JMACK	1/26/2010 2:43:09 PM		A	NSTS052
3642	FALBAN	1/26/2010 12:09:48 PM		A	NSTS075
644	FALBAN	1/26/2010 8:43:56 AM		A	NSTS090
2637	DOSSEGE	1/26/2010 7:57:38 AM		A	NSTS061
4465	CHAMPTON	1/27/2010 1:48:25 PM	1/27/2010 1:50:00 PM	I	NSTS078
4341	PSHAGAWA	1/27/2010 1:13:52 PM	1/27/2010 1:14:14 PM	I	NSTS094
4040	MSUBMAR	1/27/2010 1:03:40 PM	1/27/2010 1:06:13 PM	I	NSTS050
3898	WILHELM2	1/27/2010 12:28:13 PM	1/27/2010 12:35:11 PM	I	NSTS107
4454	PCRAVEN	1/27/2010 12:24:20 PM	1/27/2010 12:40:17 PM	I	NSTS089
4013	PCRAVEN	1/27/2010 11:39:26 AM	1/27/2010 11:51:37 AM	I	NSTS078
3284	CGLINSKI	1/27/2010 11:38:55 AM	1/27/2010 11:43:38 AM	I	NSTS092
3254	DRUFF	1/27/2010 11:36:52 AM	1/27/2010 11:50:28 AM	I	NSTS061
4089	DHAMPTON	1/27/2010 10:47:51 AM	1/27/2010 11:29:57 AM	I	NSTS107
4061	JMUNRO	1/27/2010 10:44:14 AM	1/27/2010 11:30:51 AM	I	NSTS075
42	SWALLACE	1/27/2010 10:16:32 AM	1/27/2010 5:25:03 PM	I	NSTS088
2402	DCTAB	1/27/2010 9:55:30 AM	1/27/2010 10:35:30 AM	I	NSTS099

Security and System Administration

In this section we will cover:

- Web vs. Windows
- Managing Security Roles
- Managing Entity Classes
- Adding Users
- Assigning rights to user ID's
- Setting up Web security

Web vs. Windows Security

What is shared:

- Tables access
- Reports access
- Entity access
- Additional Access options

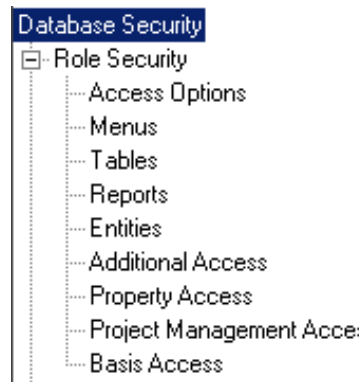
What is not shared:

- Menu access
- Reports access

Managing Security Roles

Let's create a new security role:

- Select Database Security



- Select the Role tab
- Click the Add button

A screenshot of a dialog box titled "Add New Role". It contains two text input fields: "Name" and "Description". Below the fields are three buttons: "Save", "Save and Add New", and "Cancel".

A screenshot of a window titled "Database Security Details". It has a checkbox for "Security Enabled" which is checked. Below it is a "Global Role" dropdown menu. The main area has tabs for "Roles", "Entity Classes", "Property Classes", and "Project Classes". The "Roles" tab is active, showing a table with columns "Role" and "Description".

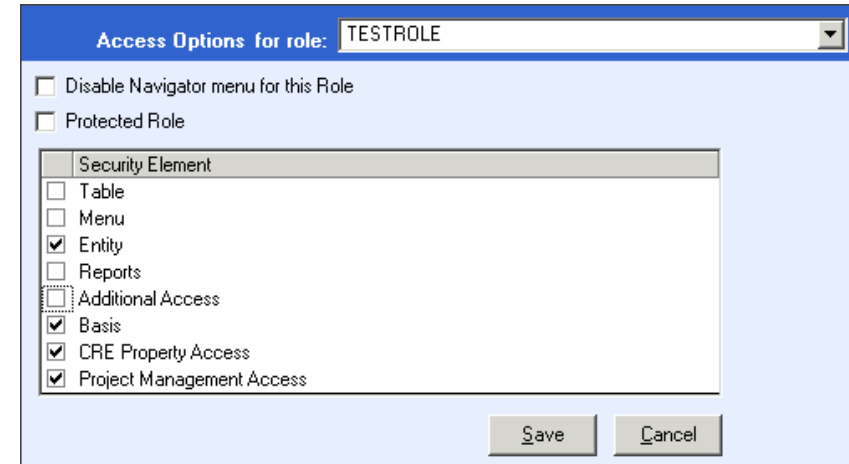
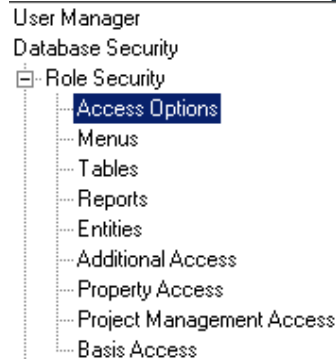
Role	Description
_IMPORT	Import
_QRYUP	Query Update
_TOOLKIT	App Toolkit
CLASS1	Administrator
CLASS2	Consultant
CLASS3	View Only
MRI_CONTRACTO	Contractor
MRI_SECADMIN	NetSource Sec Ops Team
MRI_SPCL	Specialist
MRI_SPCUK	MRI Specialist UK
MRI_SUP	Support
MRI_TRN	Training
NOACCESS	No access class
RACH	Rach Test

- Type in the Name of the new security role.
- Type in a meaningful description for the role.
- You can also copy an existing role or delete a role in this window.

Managing Security Roles

Now to set up security for the new role

- Select Access Options.



- In the dropdown box, select the role.
- You will notice that by default, when a new role is created, all security sections are checked, which means Global Access has been granted.
- You will want to uncheck the sections that you want to manage manually, and leave checked those you want to have global access.

Managing Security Roles

Menu Security

- Select Menus

- User Manager
- Database Security
- Role Security
 - Access Options
 - Menus**
 - Tables
 - Reports
 - Entities
 - Additional Access
 - Property Access
 - Project Management Access
 - Basis Access

Menu Access for role: TESTROLE

Menu Group: MRI

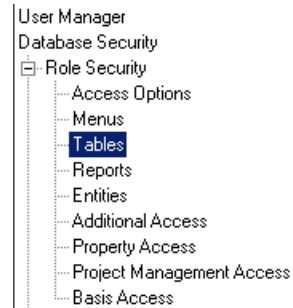
- MAIN
 - Application Toolkit
 - General Ledger
 - MRI Utilities
 - ViewPoint
 - Accounts Payable
 - Residential Management
 - Custom
 - Reports
 - ForeSight
 - Distributive Processing
 - JobCost
 - Exit
 - Corporate AR
 - Commercial Management
 - LeaseFlow

- MAIN
 - Application Toolkit
 - General Ledger
 - MRI Utilities
 - View/Edit Data
 - MRI Query
 - Import Data
 - Export Data
 - Convert
 - Cabinet Maker
 - Database Design
 - Upsize
 - CAEXP
 - Document Storage
 - Audit Trail
 - ViewPoint
 - Accounts Payable
 - Residential Management
 - Custom
 - Reports
 - ForeSight
 - Distributive Processing
 - JobCost
 - Exit
 - Corporate AR
 - Commercial Management
 - LeaseFlow

Managing Security Roles

Table access

- Select Tables



- Tables can be granted Full, View, Add, Update, or Delete access. This defines the rights a user has to the data in a specific table.

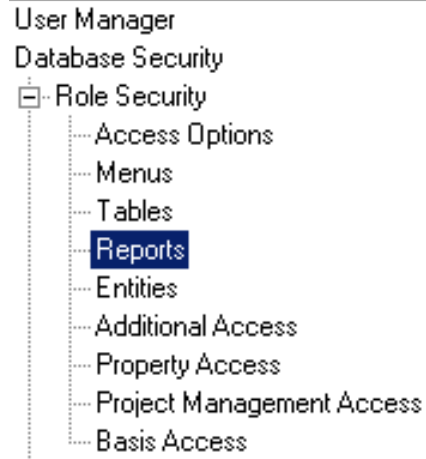
Filter by

	F	V	A	U	D	App ID	Table Name	Description
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BASE	ACCOUNT	Account Table
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BASE	ACCOUNTADDR	Account Addresses
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BASE	ACCOUNTASSOCFB	Account Association
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BASE	ACCOUNTCONT	Account Contact
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BASE	ACCOUNTTYPE	Account Types
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AP	ACCTGRPRULEHDR	Account Group Rule Header
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AP	ACCTGRPRULES	Account Group Rules
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	GL	ACCTREL	Account Relationships
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AP	ACCTRULEDTL	Account Rule Detail
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MRIWEB	ACHBATCH	ACH Batch Header and Footer Info

Managing Security Roles

Report Access

- Select Reports.



Report Access for role: TESTROLE

Filter by

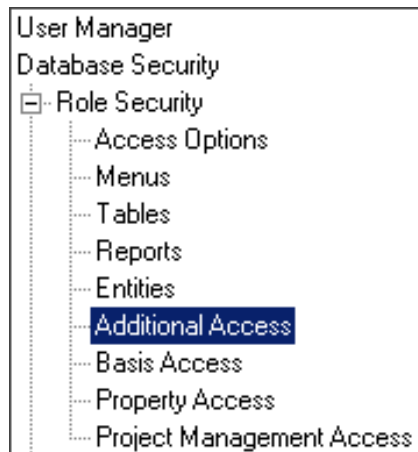
Access	App ID	Report ID	Description
<input type="checkbox"/>	AP	1CKBIGST	1 Check Big Stub
<input type="checkbox"/>	AP	1CKBSTJC	1 Check Big Stub w/Job Cost Info
<input type="checkbox"/>	AP	1CKBSTMEMO	1 Check Big Stub w/Memo Field
<input type="checkbox"/>	AP	1CKTOP1ST	Check on top with 1 stub
<input type="checkbox"/>	AP	1CKTOP2ST	Check on top with 2 stubs
<input type="checkbox"/>	AP	2CHKLET	Two Checks on Letter Size
<input type="checkbox"/>	BASE	ADVSECUSERS	User Class Listing for Advanced Security
<input type="checkbox"/>	AH	AH_CERTLST	Certification Listing
<input type="checkbox"/>	AP	CK1UP1S	Check With 1 Stub
<input type="checkbox"/>	AP	CK1UP2S	Check With 2 Stubs
<input type="checkbox"/>	AP	CKCPYLGL	Check with Copy Legal Size

- Reports have two statuses: **Enabled** and **Disabled**. If the report is checked, access has been granted in Windows.

Managing Security Roles

Additional Access

- Select Additional Access



A screenshot of the 'Filter by' dropdown menu. It contains a list of access options with columns for 'Access', 'App ID', and 'Description'. All checkboxes are currently unchecked.

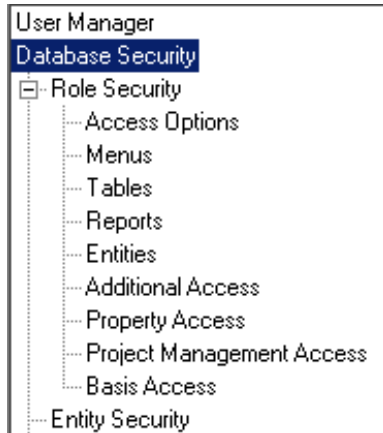
Access	App ID	Description
<input type="checkbox"/>	AH	Prevent modification of recurring HUD charges
<input type="checkbox"/>	AP	Allow entry of manual check payments
<input type="checkbox"/>	AP	Allow entry of paid invoices
<input type="checkbox"/>	AP	Allow entry of bank statement adjustments
<input type="checkbox"/>	AP	Allow link for viewing original invoices in third-party systems
<input type="checkbox"/>	AP	Allow modification to starting check number when printing checks
<input type="checkbox"/>	AR	Allow entry of charge during corporate receipts
<input type="checkbox"/>	BASE	Allow deletion of reports that user does not own
<input type="checkbox"/>	BASE	Allow data export
<input type="checkbox"/>	BASE	Allow data import
<input type="checkbox"/>	BASE	Allow modification of database via MRIQRY
<input type="checkbox"/>	BASE	Allow entry, deletion, and modification of merge documents
<input type="checkbox"/>	BASE	Allow Web Service Stored Procedure Calls
<input type="checkbox"/>	BASE	Allow saving of pick list layouts.
<input type="checkbox"/>	BASE	Allow Web Service API Calls
<input type="checkbox"/>	BASE	Allow modification and deletion of existing queries
<input type="checkbox"/>	CM	Allow entry of security deposit adjustments
<input type="checkbox"/>	CM	Allow modification of batch control amounts

- Additional Access options have two statuses: Enabled and Disabled. If the option is checked, access has been granted in Windows.
- Additional access options control many MRI features that are not specifically controlled by menu buttons, table access, or report access.

Managing Entity Classes

Lets create a new entity class:

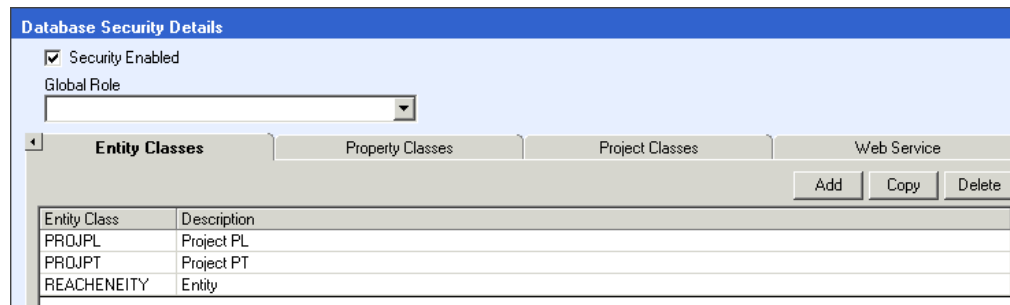
- Select Database Security



A screenshot of a dialog box titled 'Add New Entity Class'. It contains two text input fields: 'Name' with the value 'TESTCLASS' and 'Description' with the value 'Test Entity Class'. Below the fields are three buttons: 'Save', 'Save and Add New', and 'Cancel'.

- Add New Entity Class opens.
- Give the new entity class a meaningful name and description.

- Select the Entity Classes tab, and then click the Add button.



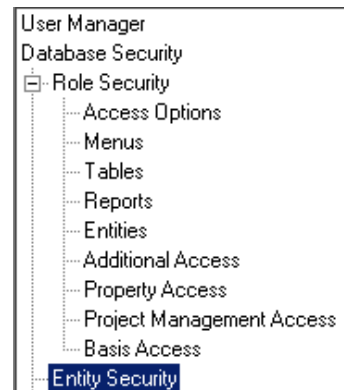
A screenshot of the 'Entity Classes' tab in the software. It shows a table with columns 'Entity Class' and 'Description'. The table contains four rows: 'PROJPL' with description 'Project PL', 'PROJPT' with description 'Project PT', 'REACHENEITY' with description 'Entity', and 'TESTCLASS' with description 'Test Entity Class'. The 'TESTCLASS' row is highlighted in blue.

Entity Class	Description
PROJPL	Project PL
PROJPT	Project PT
REACHENEITY	Entity
TESTCLASS	Test Entity Class

Managing Entity Classes

Now that the class has been created we can make some changes to it.

- Select Entity Security
- Use the dropdown menu at the top to select your entity class:



A screenshot of the 'Entity Class Access' form. At the top, there is a dropdown menu for 'Entity Class' with 'TESTCLASS' selected, and another dropdown for 'Assign by' with 'ENTITY' selected. Below these is a table with columns 'F', 'V', 'ID', and 'Description'. The table contains four rows of data.

F	V	ID	Description
<input type="checkbox"/>	<input type="checkbox"/>	000011	Rach Marie
<input type="checkbox"/>	<input type="checkbox"/>	000012	Rach Aderhold
<input type="checkbox"/>	<input type="checkbox"/>	PL01	Could be
<input type="checkbox"/>	<input type="checkbox"/>	PT02	Bought

Managing Entity Classes

- You will see 4 columns. **F** for full access, **V** for view access, **ID** for the entity ID, and **Description** which contains the entity description.

F	V	ID	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	000011	Rach Marie
<input type="checkbox"/>	<input checked="" type="checkbox"/>	000012	Rach Aderhold
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PL01	Could be
<input type="checkbox"/>	<input type="checkbox"/>	PT02	Bought

- Depending on your license you might also have Property Security or Project Management Security. These function in a similar way to Entity Class.

..... Property Security
..... Project Management Security

Entity Class and Site ID

Similarities , Differences, and how do they work together?

- Both function as a simple filter only allowing users to see data from specific entities.
- Entity classes act as a simple filter only.
- Site ID's have added functionality including:
 - home office status vs. site status
 - Approval rights for various modules
 - Site specific vendors, banks etc.
- Employing both will double-filter the user. The user will only see the Entities shared by both Entity Class and Site ID.

Adding a User

Let's add a user.

- Select User Manager
- Then click the Add button
- This will open the New User Detail screen.

The screenshot shows the 'Security and System Administration Console' window. The 'Database' tab is active, and the 'User Manager' option is selected in the left-hand tree view. The main pane displays a table of users:

User ID	Full Name	Role	Entity	Named License	Inquiry User	Locked
SSEABER	Sean Seaber	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SSEABERTST	Sean Seaber	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SSEABERTST2	Sean Seaber	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SSEABERTST3	Sean Seaber	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SSMITH	Steve Smith	/NOA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STAKAHASHI	Shinya Takahashi	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STAKAHASHITS	Shinya Takahashi	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STORRESTCP	Santos Torres	/NOA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STSE	Samon Tse	/NOA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STWCGC	Web Service Guest Card			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SUZSMITH	Suzanne Smith	/NOA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SWALLACE	Stephan Wallace	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TBILA	Tom Bila	/NOA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TCARBONE	Ted Carbone	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TCARBONE7	Ted Carbone	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
TCOHEN	Tamara Cohen	/NOA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TMCCARTN	Teresa Mccartney	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TSMITH	Theresa Smith	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TVONGTPC	Thai Vong	/NOA		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TWATSON	Tom Watson	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TWATSON7	tom watson	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
VOKEEFE	Virginia O'Keefe	/MRI		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The 'Add' button at the bottom right of the table is highlighted with a red arrow.

Adding a User

1. User ID
2. Full Name
3. Password
4. Default View
5. Default Database
6. Network Login
7. Force Password Change
8. Disable Login
9. Locked/Failed Login
10. Allow Application Unlocks
11. Web Service User
12. Administrator
13. Named User License
14. Inquiry User
15. IRES Support

User Detail Client ID: 1100NTS

User ID: 1
Full Name: 2
Password: 3
Verify Password: 3
Default View: 4
Default Database: 5

Network Login (6)
 Force Password Change (7)
 Disable Login (8)
 Locked/Failed Login (9)
 Allow Application Unlocks (10)
 Web Services User (11)

Administrator (12)
 Named User License (13)
 Inquiry User (14)
 IRES Support (15)

Security Assignments
Assign Security in: SECMODEL404

Administrator Rights
Menu Group:
Entity Class:
Property Class:
Project Class:

Available Roles

Role	Description
_IMPORT	Import
_QRYUP	Query Update
_TOOLKIT	App Toolkit
CLASS1	Administrator
CLASS2	Consultant
CLASS3	View Only
MRI_CONTRACTOR	Contractor
MRI_SECADMIN	NetSource Sec Ops Team

Assigned Roles

Role	Description
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Buttons: Save and Add New, Save, Cancel, Apply

Adding a User

1. Menu Group
2. Entity Class
3. Available Roles
4. Administrator Rights
5. Assign Security in
6. Property Class
7. Project Class
8. Assigned Roles

User Detail Client ID 1100NTS [Copy] [Delete]

User ID: []
Full Name: []
Password: []
Verify Password: []
Default View: []
Default Database: []

Network Login
 Force Password Change
 Disable Login
 Locked/Failed Login
 Allow Application Unlocks
 Web Services User

Administrator
 Named User License
 Inquiry User
 IRES Support

Security Assignments Assign Security in: SECMODEL404 [5]

Menu Group [1] Property Class [6]
Entity Class [2] Project Class [7]

3 Available Roles

Role	Description
_IMPORT	Import
_QRYUP	Query Update
_TOOLKIT	App Toolkit
CLASS1	Administrator
CLASS2	Consultant
CLASS3	View Only
MRI_CONTRACTOR	Contractor
MRI_SECADMIN	NetSource Sec Ops Team

Assigned Roles

Role	Description
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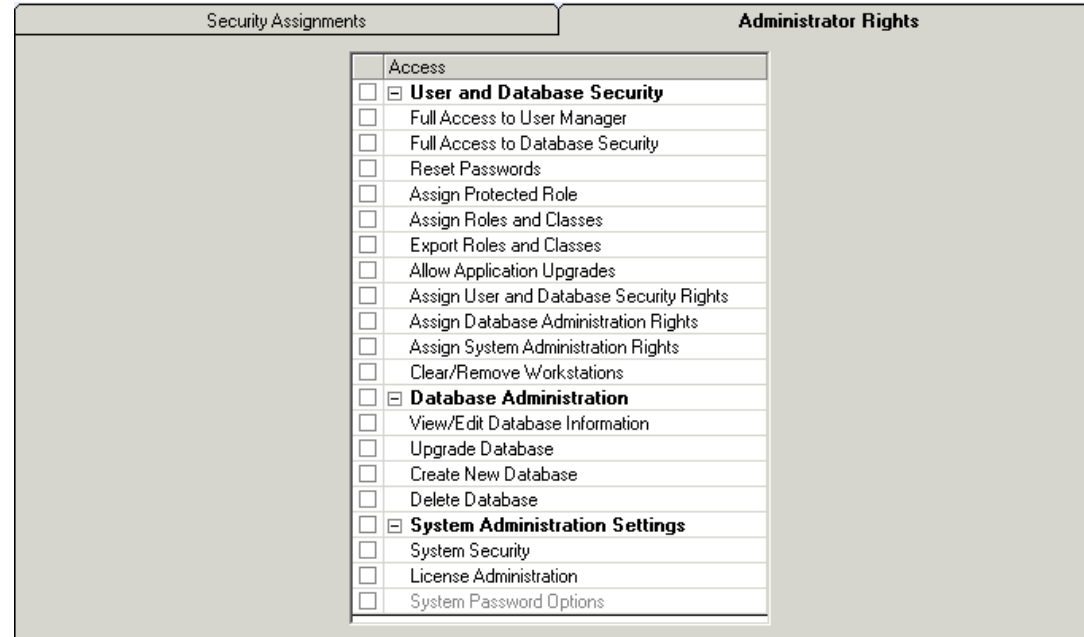
[8]

[Save and Add New] [Save] [Cancel] [Apply]

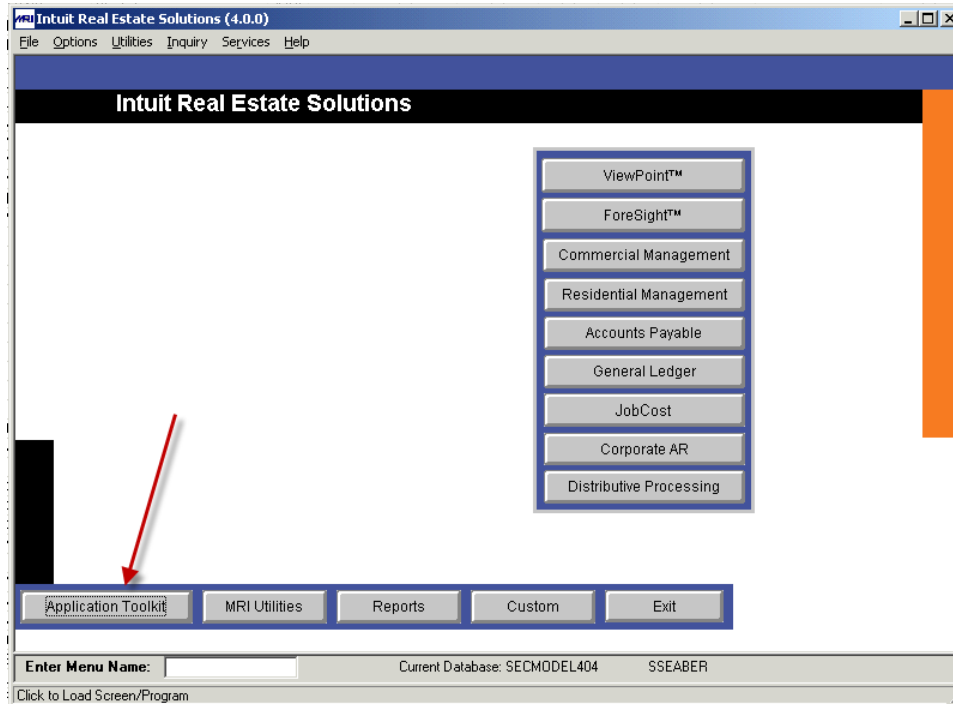
Adding a User

Administrator rights

1. Full Access to User Manager
2. Full Access to Database Security
3. Reset Passwords
4. Assign Protected Role
5. Assign Roles and Classes
6. Export Roles and Classes
7. Allow Application Upgrades
8. Assign User and Database Security Rights
9. Assign Database Administration Rights
10. Assign System Administration Rights
11. Clear/Remove Workstation
12. View/Edit Database Information
13. Upgrade Database
14. Create New Database
15. Delete Database
16. System Security
17. License Administration
18. System Password Options

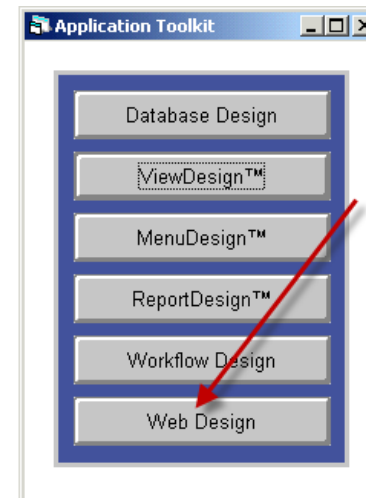


Web Menu Security



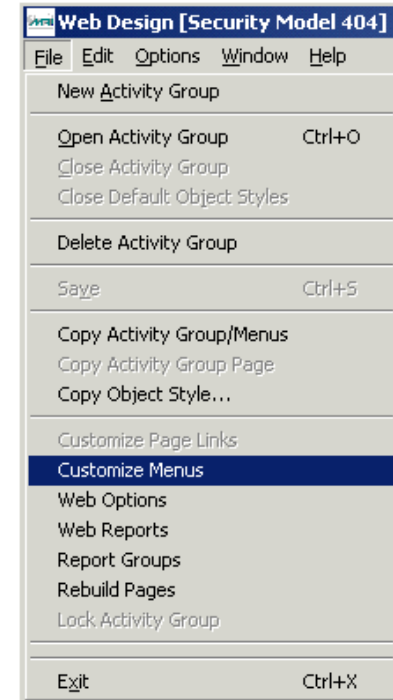
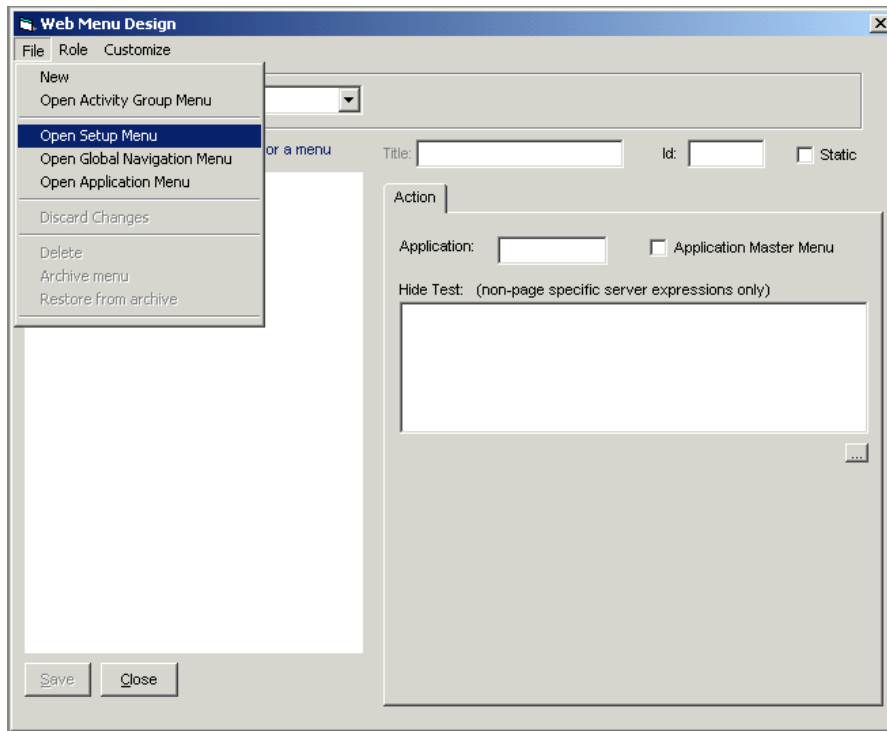
To open Web Design, select Application Toolkit, then select Web Design.

This will open the Web Design interface



Web Menu Security

- Select **File** on the top menu bar, then select **Customize Menus**.
- Close the pop-up for “Select Existing Menu”
- This brings us to the Web Menu Design interface.



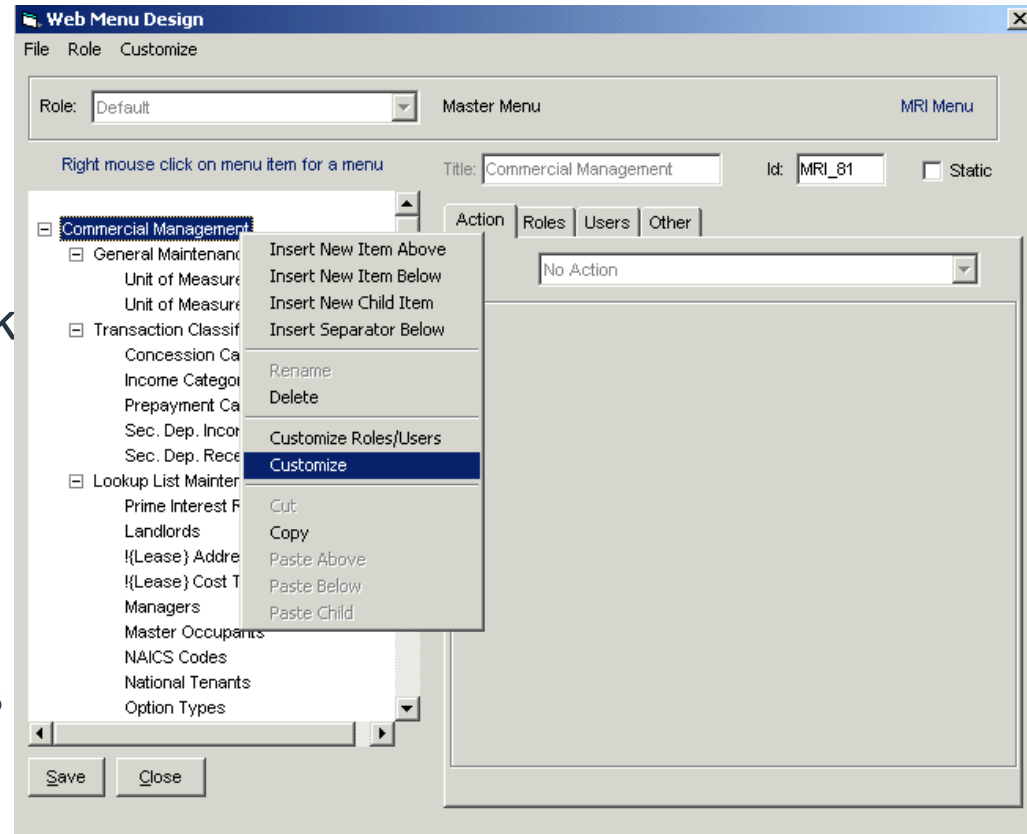
Under File, you can select:

- Open Setup Menu
- Open Global Navigation Menu
- Open Application Menu



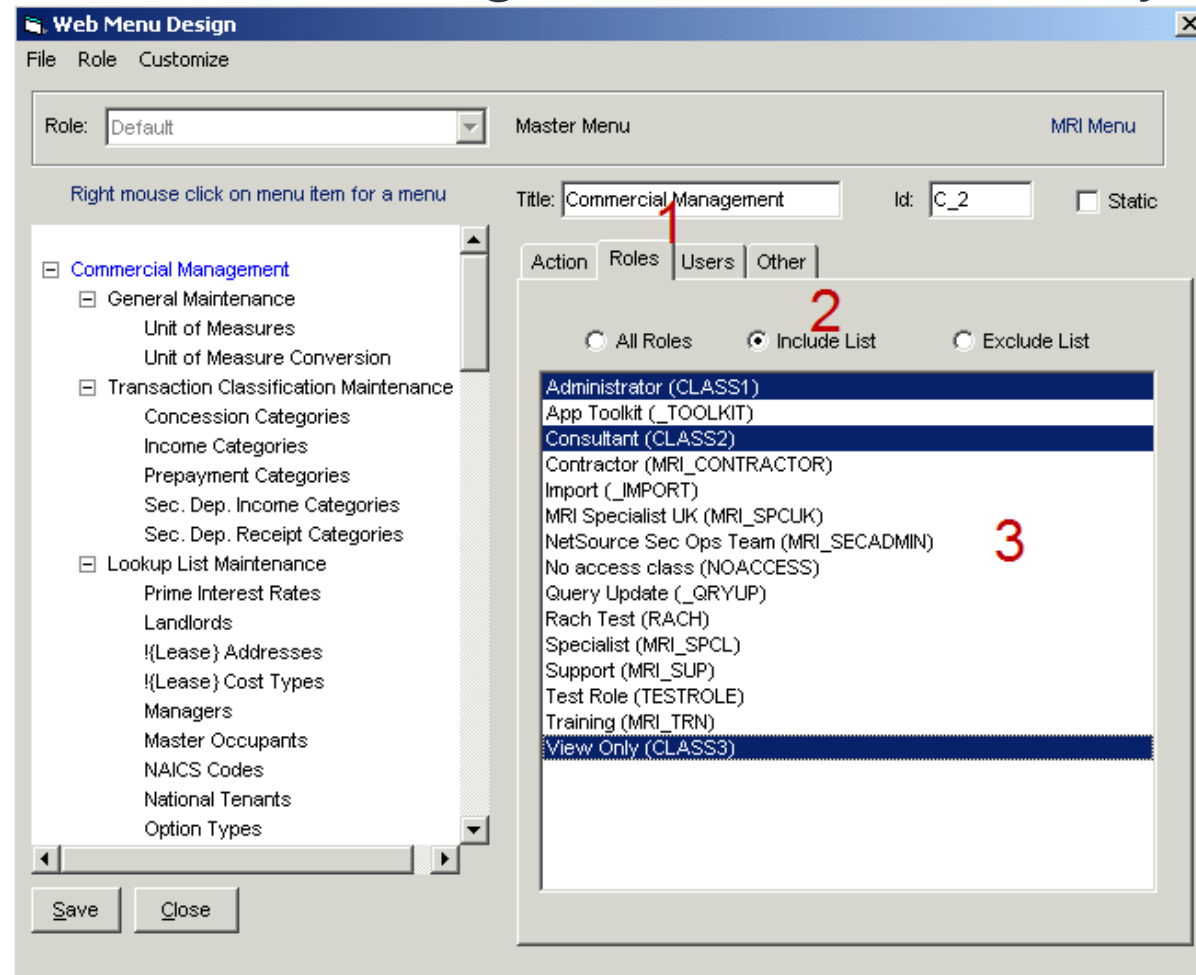
Web Menu Security

- This will populate the left hand window with the navigation menu.
- You can select then right-click on a menu item to open the options menu.
- We will select **Customize** to change who has rights to this menu item.



Web Menu Security

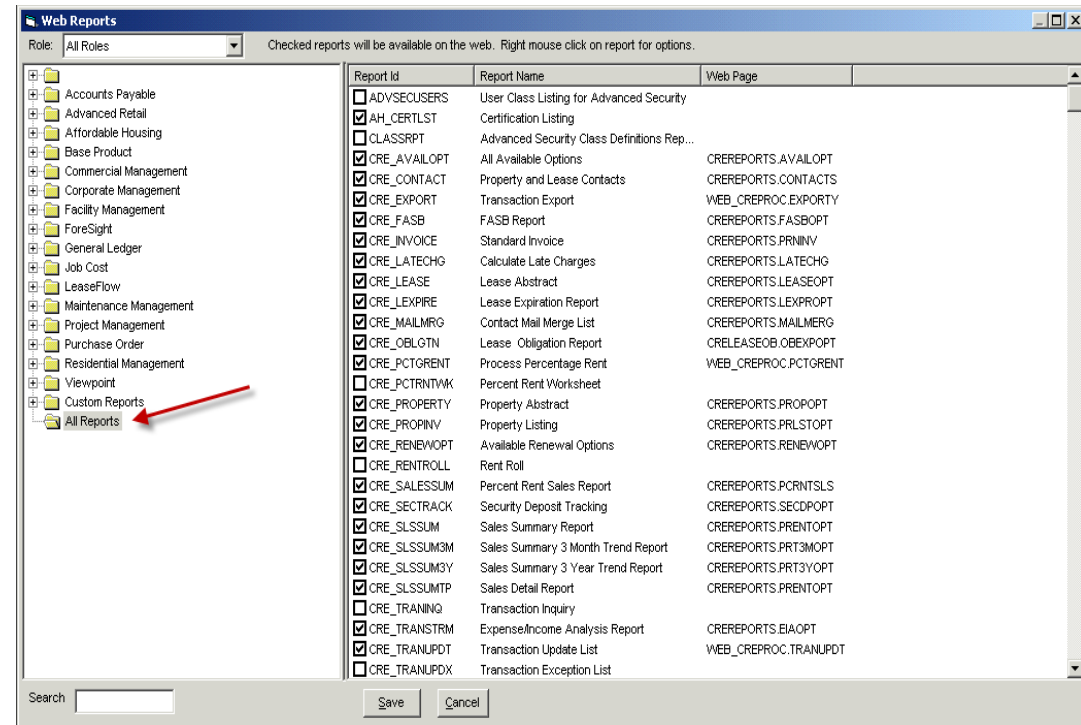
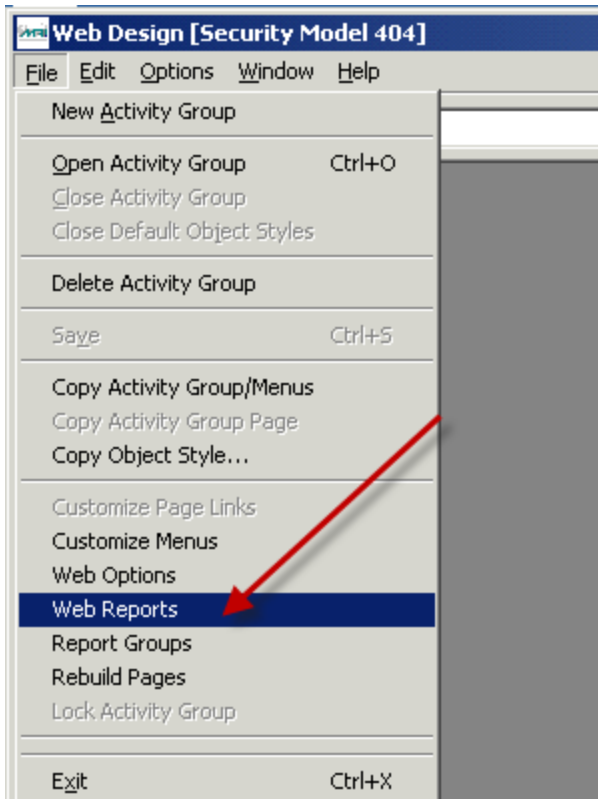
How do I change the menu security?



Web Enable Reports

How do I web enable a report?

From the Web Design main page, select File then Web Reports



This will open the Web Reports window. You will need to select a folder in the left window to look for the report you desire to web enable. Select that folder to open the list in the right window.

Web Enable Reports

We have 3 columns to look at:

- Report ID
- Report Name
- Web Page

Report Id	Report Name	Web Page
<input type="checkbox"/> ADVSECUSERS	User Class Listing for Advanced Security	
<input checked="" type="checkbox"/> AH_CERTLST	Certification Listing	
<input type="checkbox"/> CLASSRPT	Advanced Security Class Definitions Rep...	
<input checked="" type="checkbox"/> CRE_AVAILOPT	All Available Options	CREREPORTS.AVAILOPT
<input checked="" type="checkbox"/> CRE_CONTACT	Property and Lease Contacts	CREREPORTS.CONTACTS
<input checked="" type="checkbox"/> CRE_EXPORT	Transaction Export	WEB_CREPROC.EXPORTY
<input checked="" type="checkbox"/> CRE_FASB	FASB Report	CREREPORTS.FASBOPT
<input checked="" type="checkbox"/> CRE_INVOICE	Standard Invoice	CREREPORTS.PRMINV
<input checked="" type="checkbox"/> CRE_LATECHG	Calculate Late Charges	CREREPORTS.LATECHG
<input checked="" type="checkbox"/> CRE_LEASE	Lease Abstract	CREREPORTS.LEASEOPT
<input checked="" type="checkbox"/> CRE_LEXPURE	Lease Expiration Report	CREREPORTS.LEXPURE
<input checked="" type="checkbox"/> CRE_MAILMRG	Contact Mail Merge List	CREREPORTS.MAILMRG

Report ID must be checked to web enable a report, and there must be a Web Page associated with the report to give it runtime options.

Web Enable Reports

Adding a Web Page

Right-click on the report for which you want to add a Web Page, select Edit, and this will open a new window where you can add the page.

Report Name: WEB_RMERCPTS Mri Report

Description: RM EBatch Receipts

Application: Residential Management

Category: Transactions

Web page containing run time options:

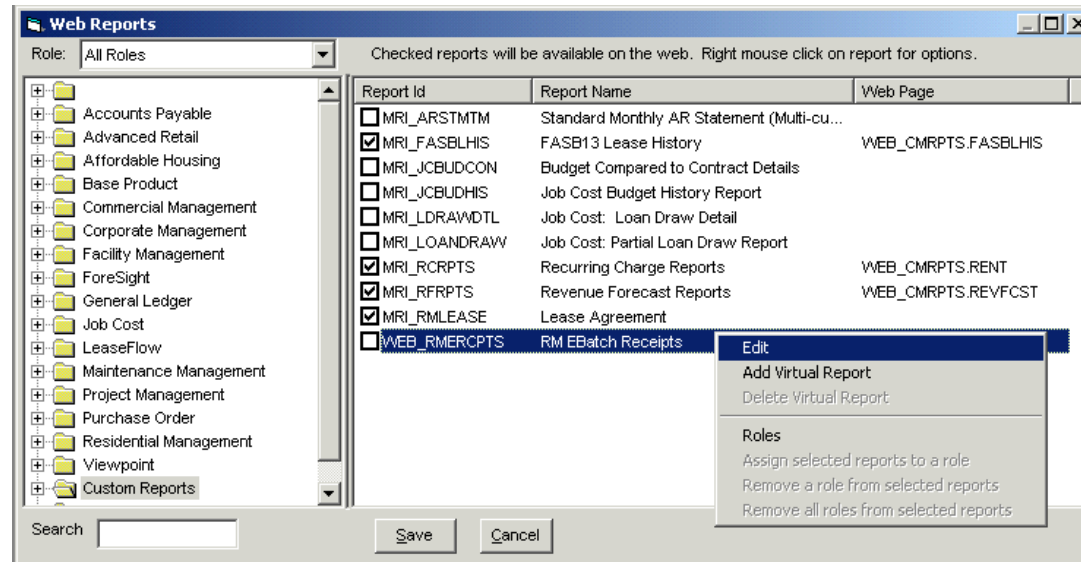
Group:

Page:

If all reports have the same base table for selection specify it here:

Otherwise list the reports separated by a comma:

Block from appearing on 'Personalize Reports'



Under the section: Web page containing runtime options, you can link the web page with the desired runtime options.

Best Practices

In this section we will cover best practices for the following topics:

- User Access Setup
- Menu Setup
- Reports
- Tables
- Additional Tips and Tricks

User Access Setup

- Keep it simple. The simpler the security roles, the simpler the troubleshooting.
- Multiple security roles can be assigned to a user but limit to 5.
- Make security roles descriptive. For example: Property Manager, AP Clerk, Leasing Agent, etc.
- Only one Entity, Property, Project class, or Site ID can be assigned to a single user. Site ID and Entity Class can be assigned together to work as a double filter.
- Adding a Site ID, Property class, Project class, or Entity class to a user will not allow them to add new entities to the database.

Menu Setup

- Create separate security roles for Web access vs. Windows access.
- Menu access is the best place to start for building security. By turning off access to certain modules you can control much of security.
- When changing to a custom menu for a security role that already has menu settings, all settings will be lost.
- After setting up Web menu security and saving it, you can archive these settings. This might be useful if your web security gets corrupted.

Reports

- Not all reports are just reports; some update data or trigger executables.
- Granting global access to a role for reports will automatically add any newly created reports to their access.
- If a report designer does not have global access to reports, once the report has been saved, they will not be able to see it.

Tables

- Some tables cross modules and functions.
- It is recommended that you start by granting view access to tables, then if there is a need for access beyond View try Update and Add before granting Full access.
- Field level security can be assigned for each table to further control security, though you only have Full, View, and Hide as options.

	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AH	AH236HIST	Excess Income Report History
+	F	V	H	Field Name	Description		
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CONTRACTNO	Contract Number		
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PERIOD	Period		
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RMPROPID	Property Id		
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EXCESSAMT	Excess Income Amount		
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AMTRETAINED	Amount Retained for HUD approved purpose		
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DATEPROCESS	Date 236 Report Run		
+	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	INVOICE	AP Invoice Number		

Additional Tips and Tricks

- Every tab in a security role must have at least 1 property defined, or a corrupt security class may result.
- The more roles or classes in your database, the more it will impact your performance.
- Sometimes modular security is the best solution for complex security needs.
- Recommend Entity, Property Access, Project Management Access, and Basis Access be set to global access. Access can be managed with separate entity classes which are more effective and have less impact on performance.
- For MRI 4.0 versions and older (3.0, 2.X, etc) the highest access that is granted wins. So if two security classes are assigned to a user, and one grants view access to the BANK table, and another grants full access to the BANK table, the user will have full access.
- Customized menus, views, and tables can break security. If one is involved look there first.
- Understand your security needs before you begin building out security.

Course Summary

In this course you learned the following:

- Basic Security Console functions
- Security Roles and Entity Class configuration
- Differences in Windows and Web Security
- Adding a User
- Assigning security to a user
- Entity class and Site ID interaction
- Best practices for security