Security Console

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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

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The Basics

In this section we will cover:

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

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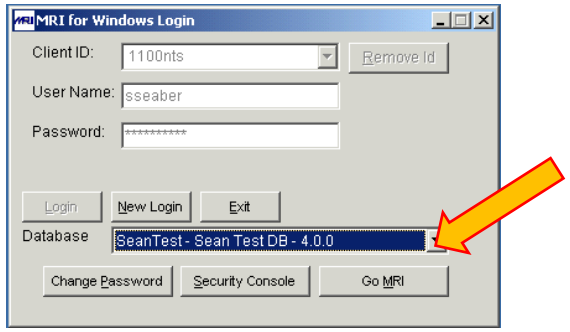
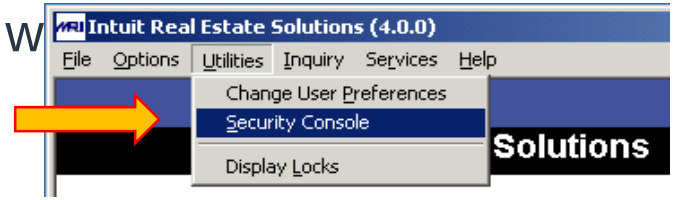
Logging into the Security Console

- 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 w



- Both will bring you to the same interface:

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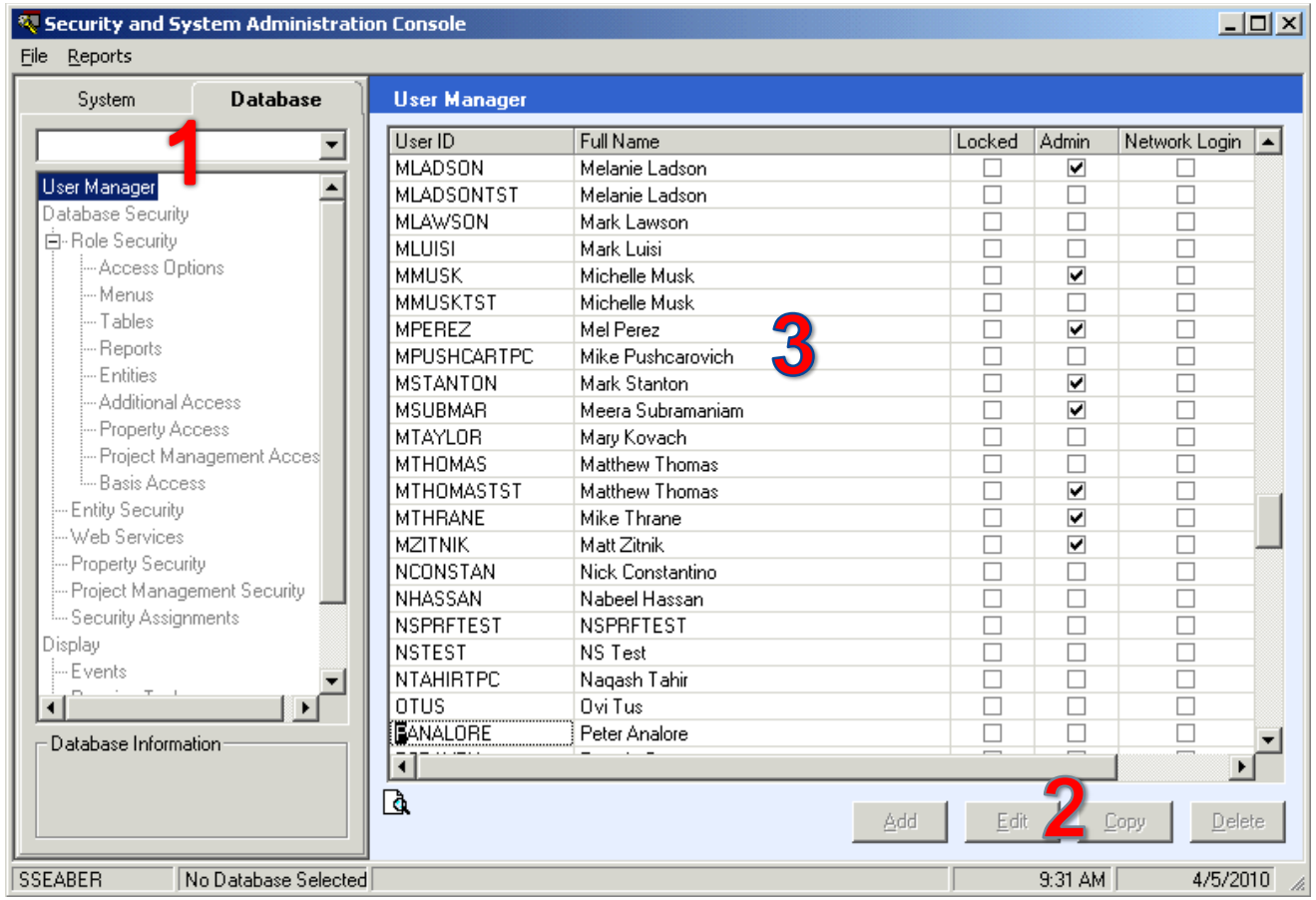
Security Console



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.

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Reports

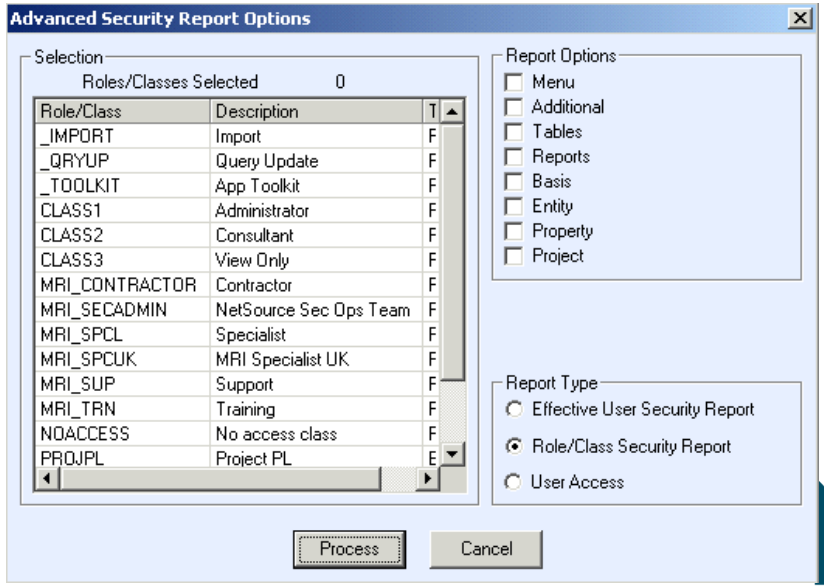
There are three report categories: Excel, Audit, and User.

- 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



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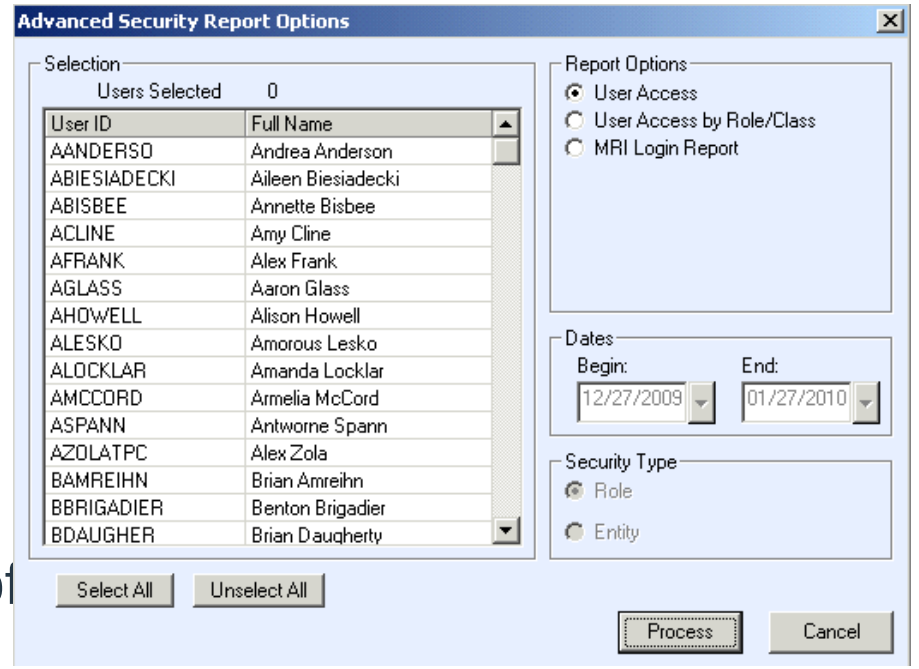
Reports

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



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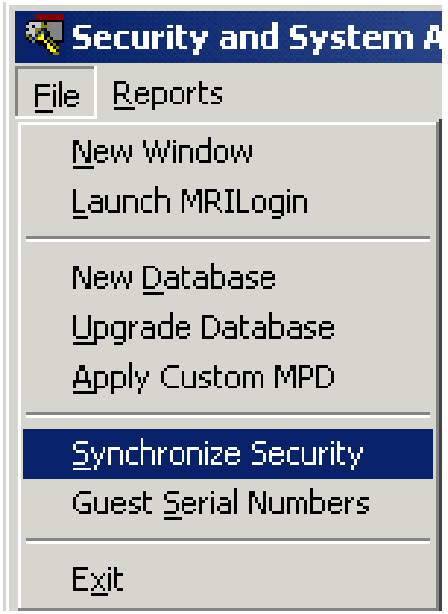
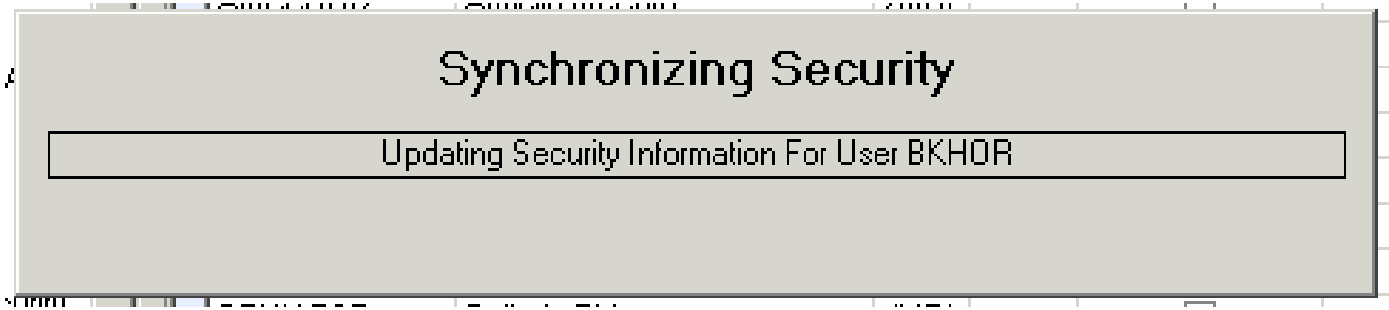
Synchronize Security

- 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





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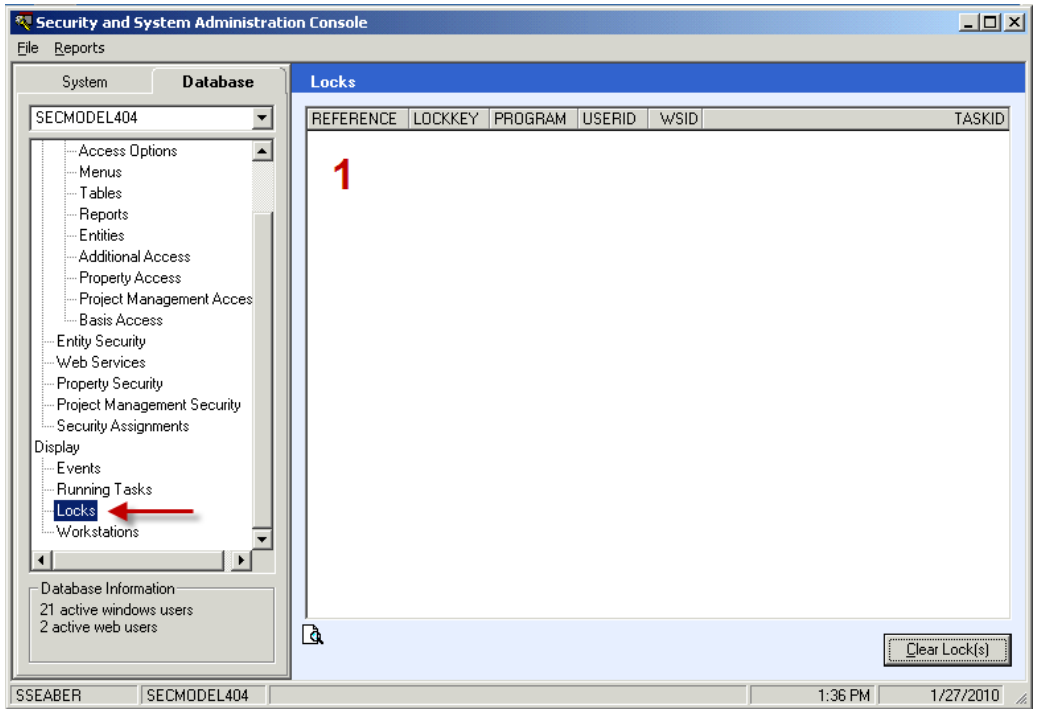
Locks

- **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



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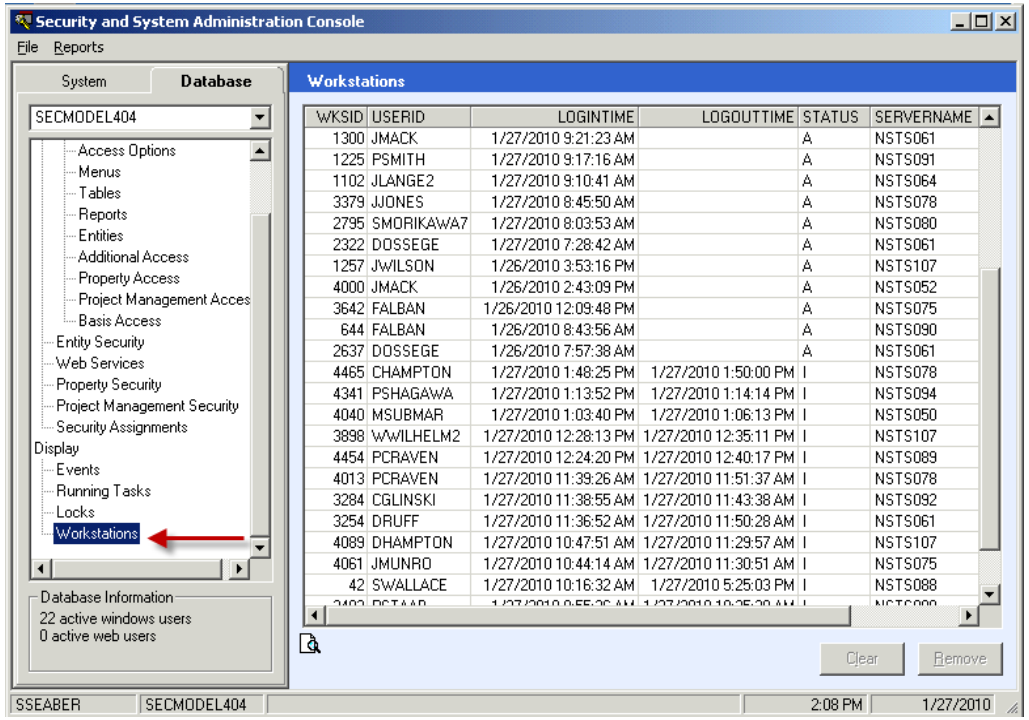
Clear Workstation

- 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.



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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

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Web vs. Windows Security

What is shared:

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

What is not shared:

- Menu access
- Reports access

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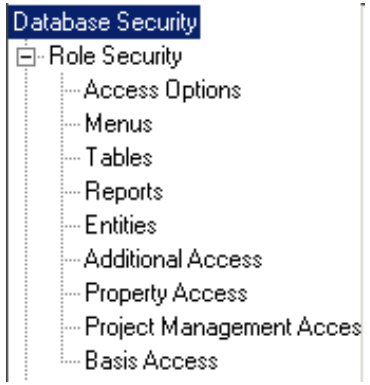
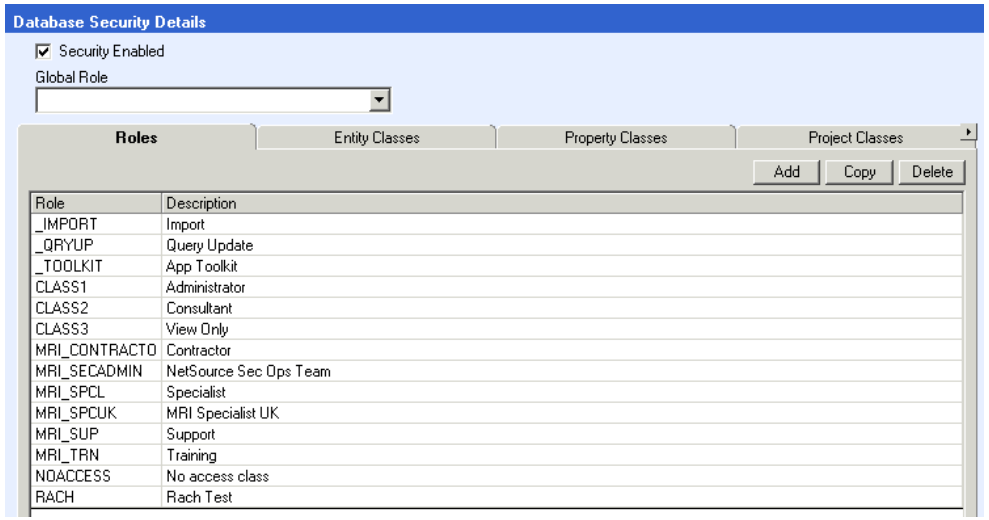
Managing Security Roles

Let's create a new security role:

- Select Database Security



- Select the Role tab
- Click the Add button



- 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.

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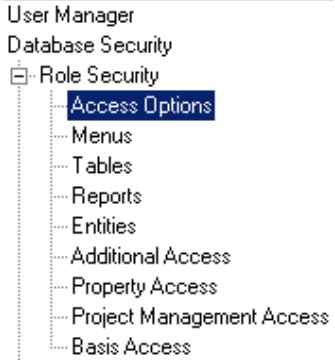
Managing Security Roles

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.

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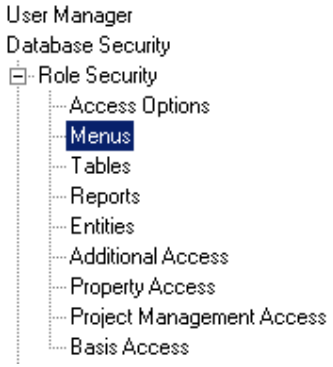
Managing Security Roles

Menu Security

- Select Menus



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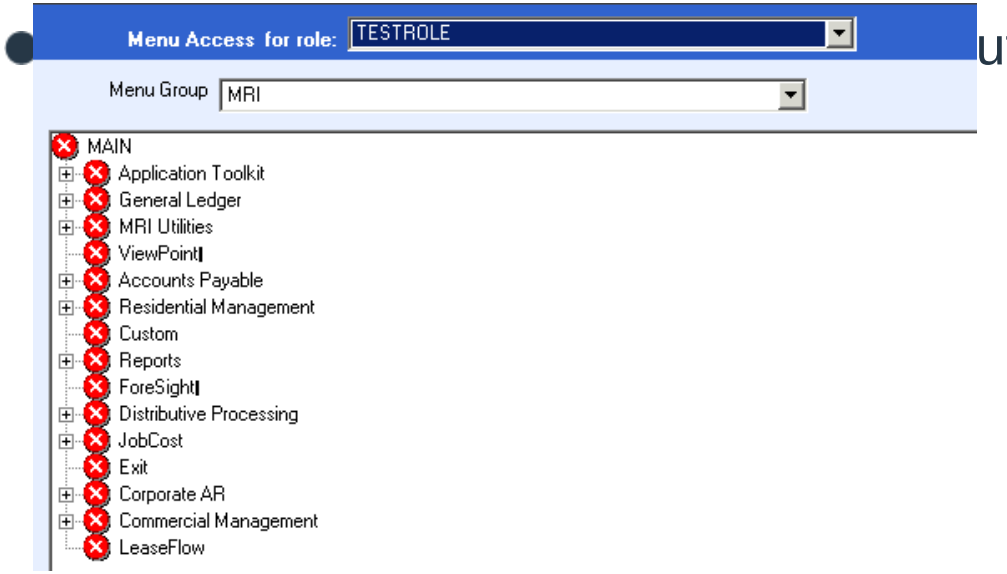

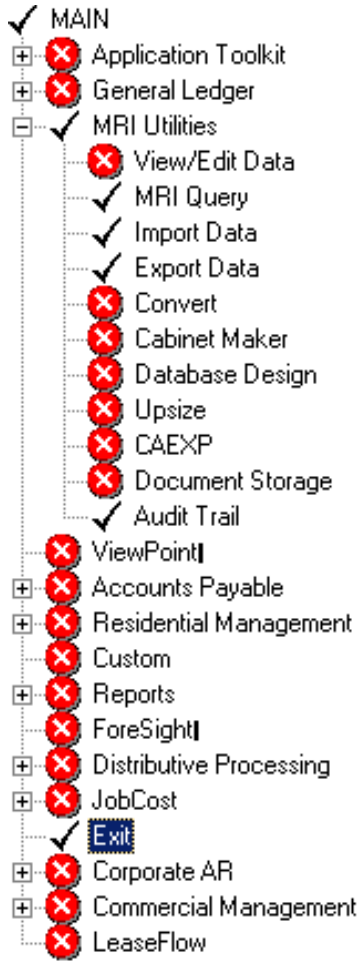

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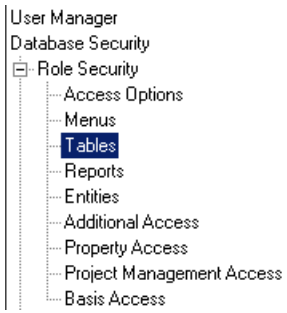
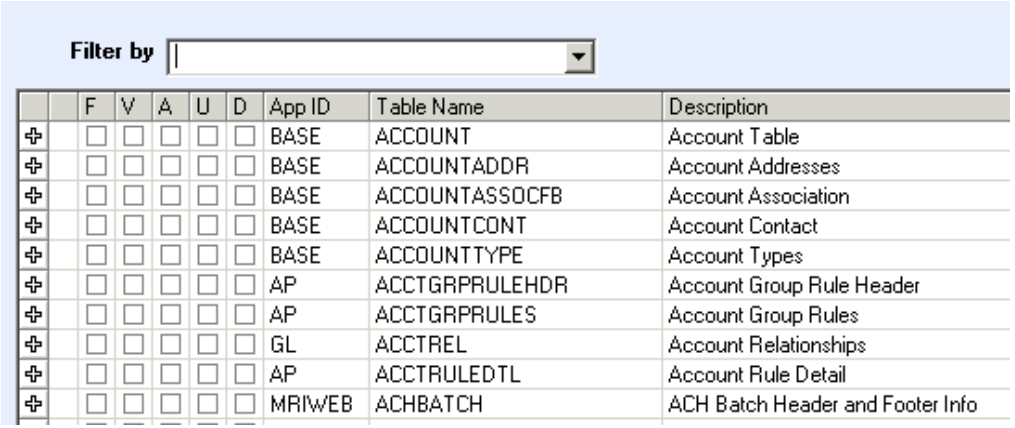
Managing Security Roles

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.



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

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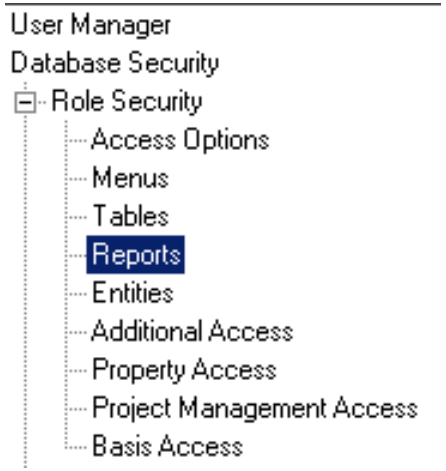
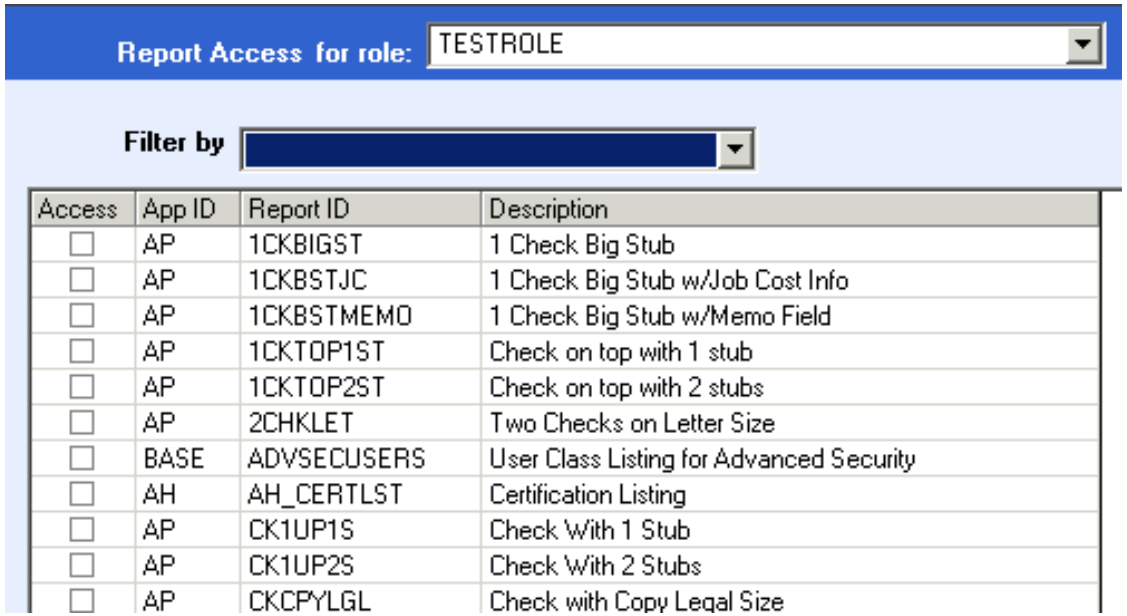
Managing Security Roles

Report Access

- Select Reports.





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

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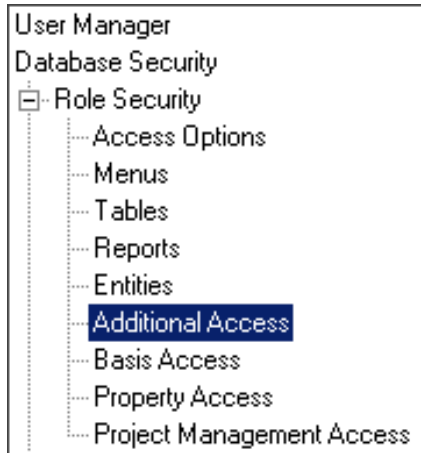
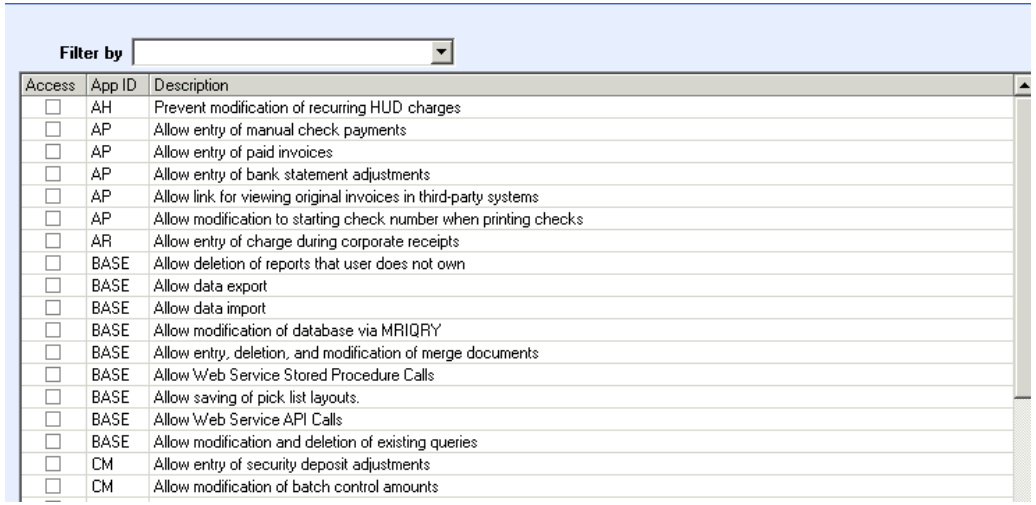
Managing Security Roles

Additional Access

- Select Additional Access





- 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.

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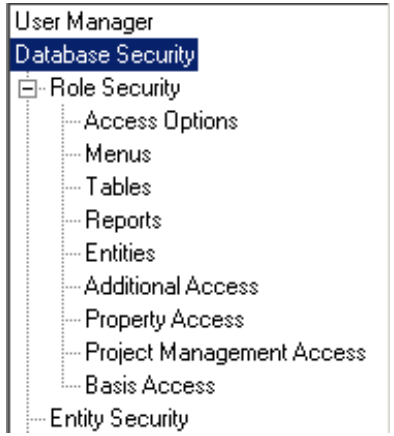
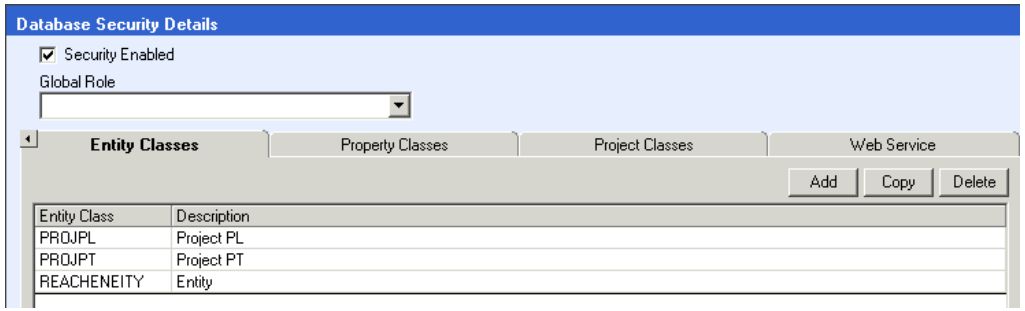
Managing Entity Classes

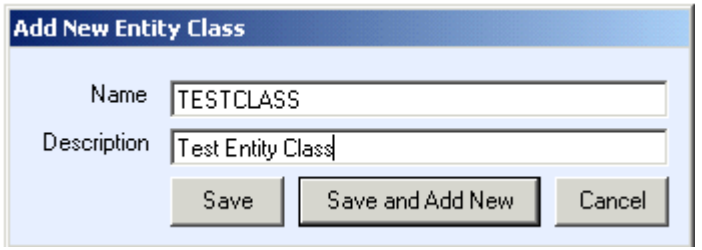
Lets create a new entity class:

- Select Database Security

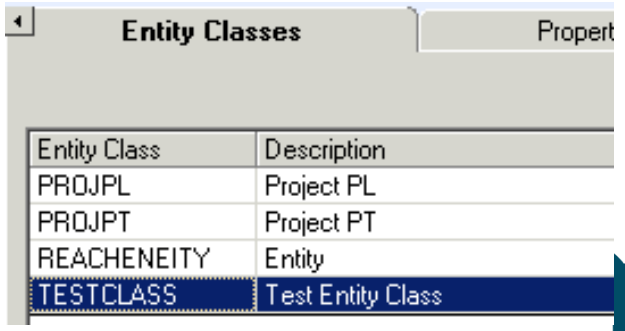


- Select the Entity Classes tab, and then click the Add button.





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



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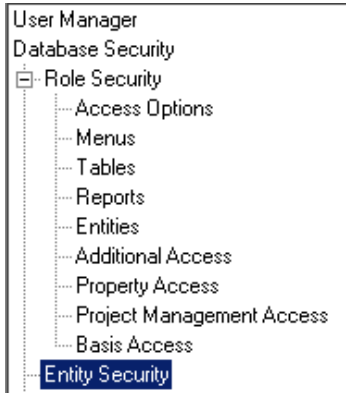
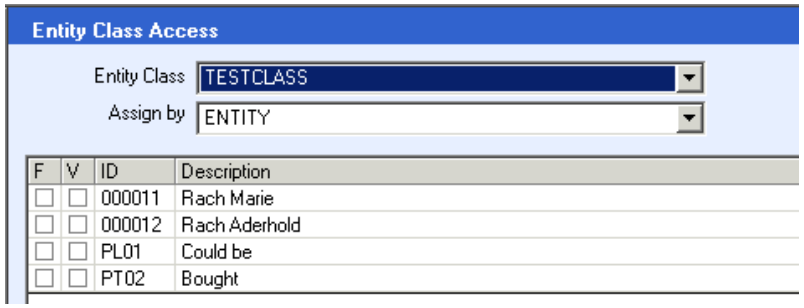
Managing Entity Classes

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:





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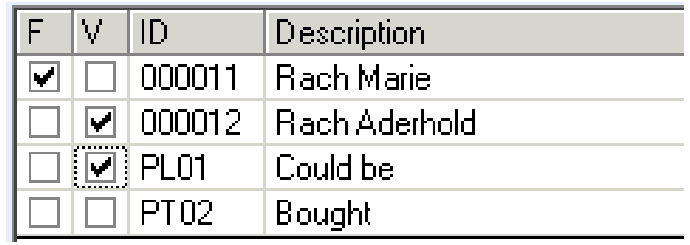
Managing Entity Classes

- 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
☑	☐	000011	Rach Marie
☐	☑	000012	Rach Aderhold
☐	☑	PL01	Could be
☐	☐	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.

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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.

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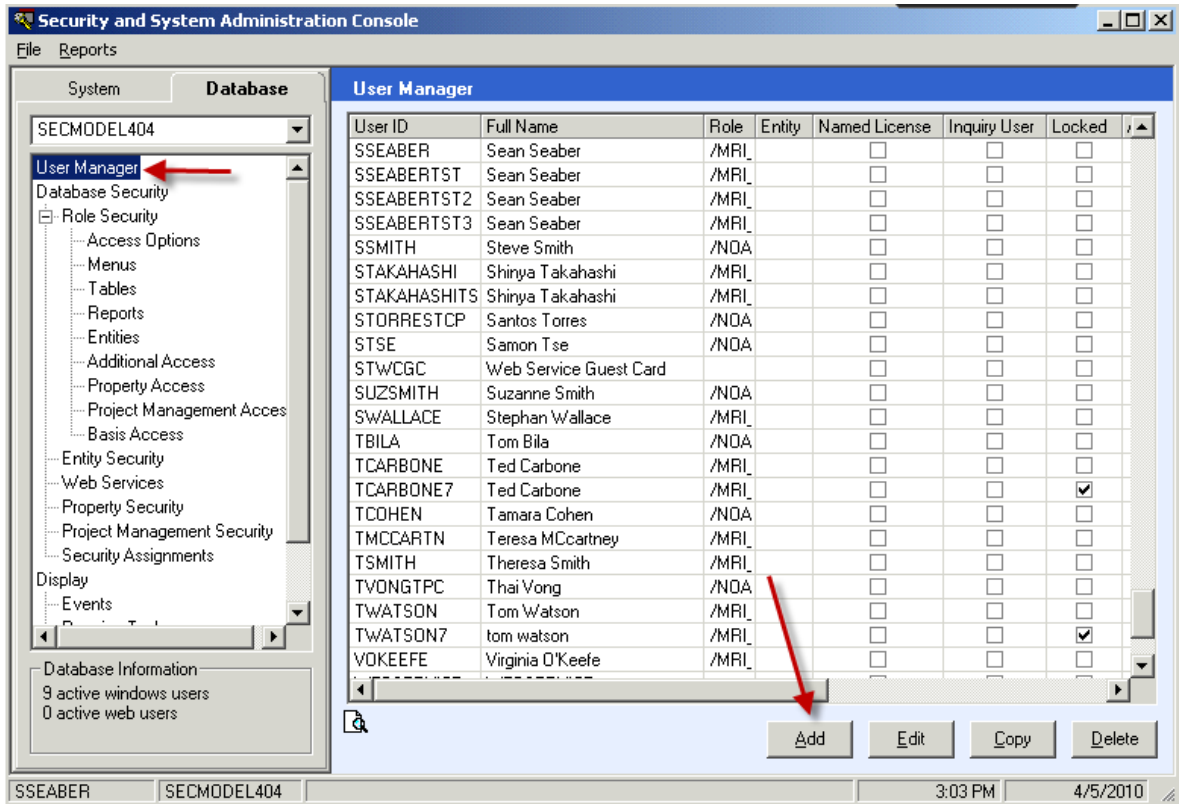
Adding a User

Let's add a user.

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



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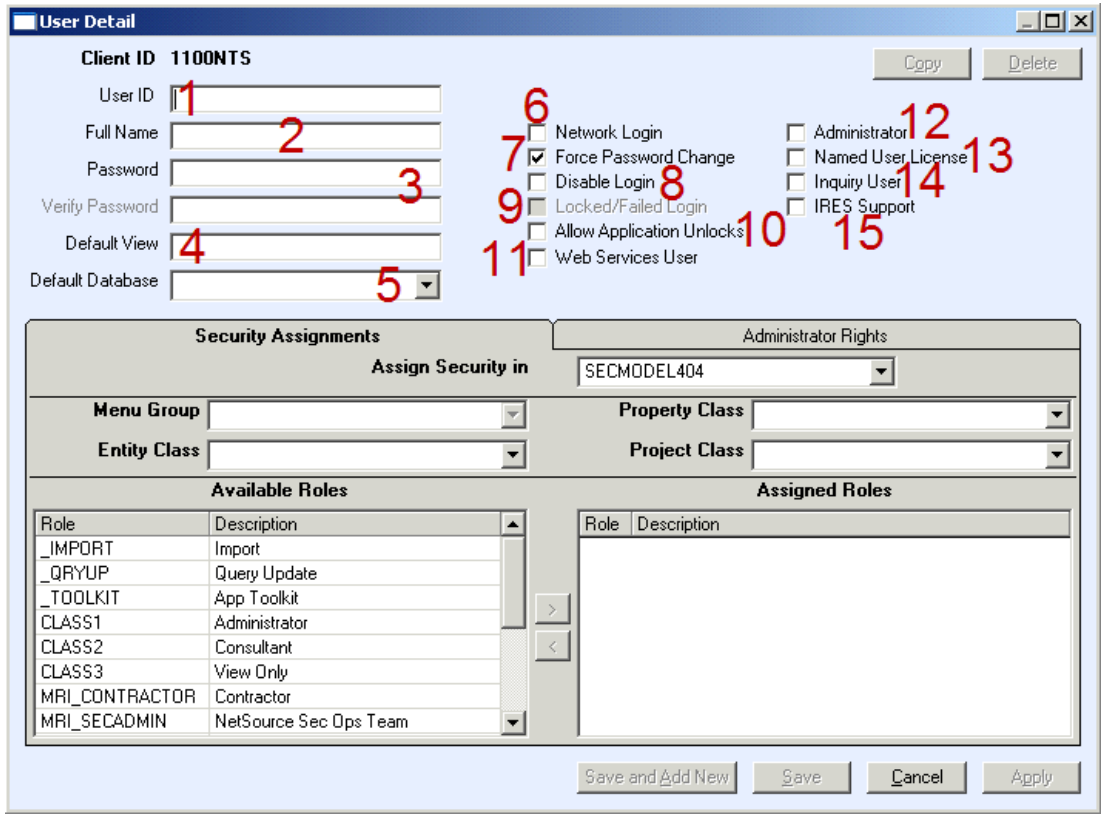
Adding a User

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



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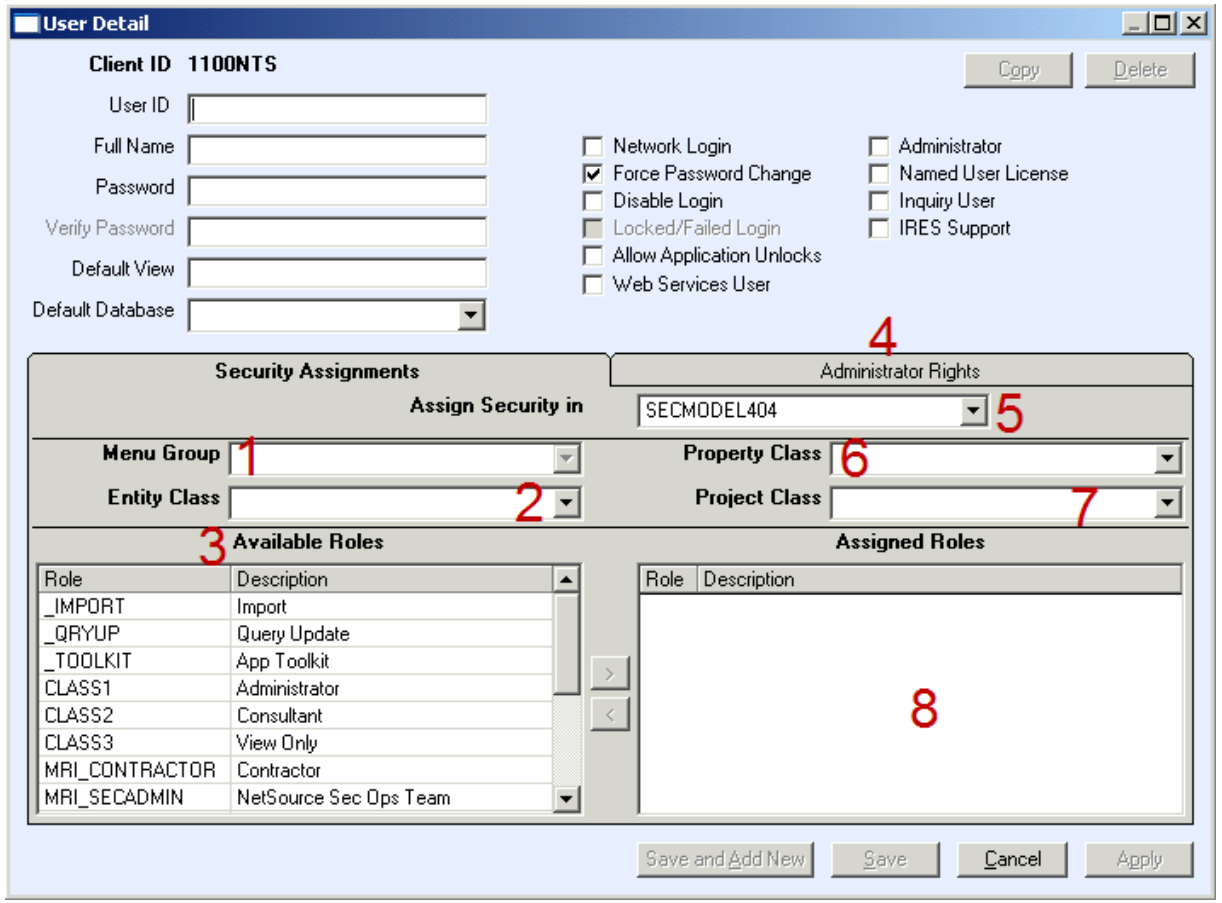
Adding a User

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



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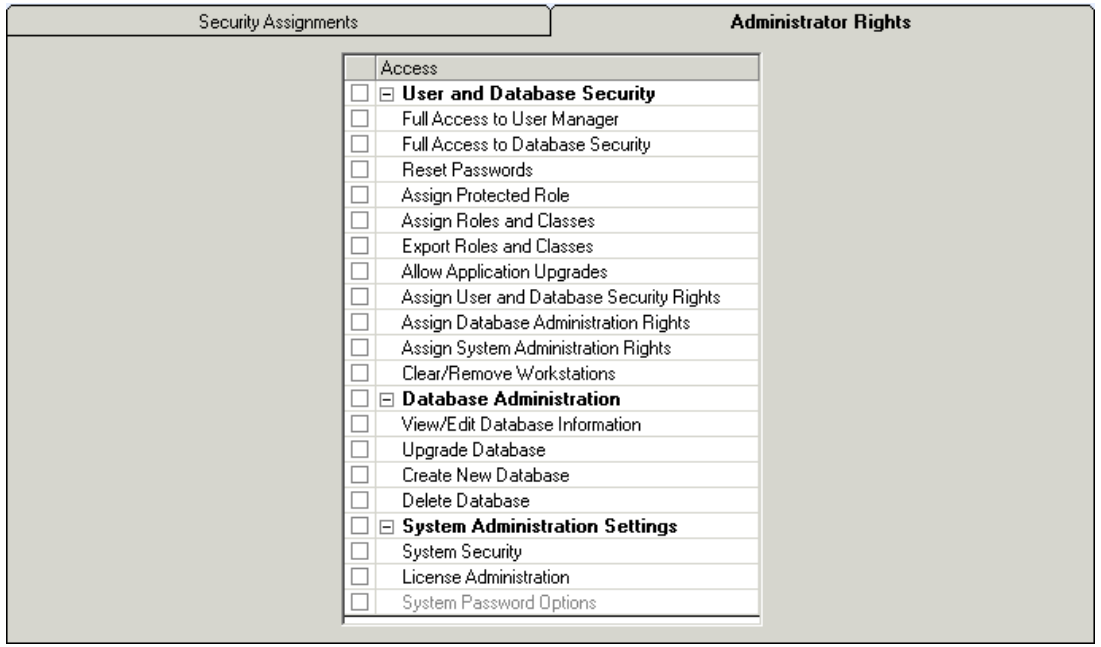
Adding a User

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



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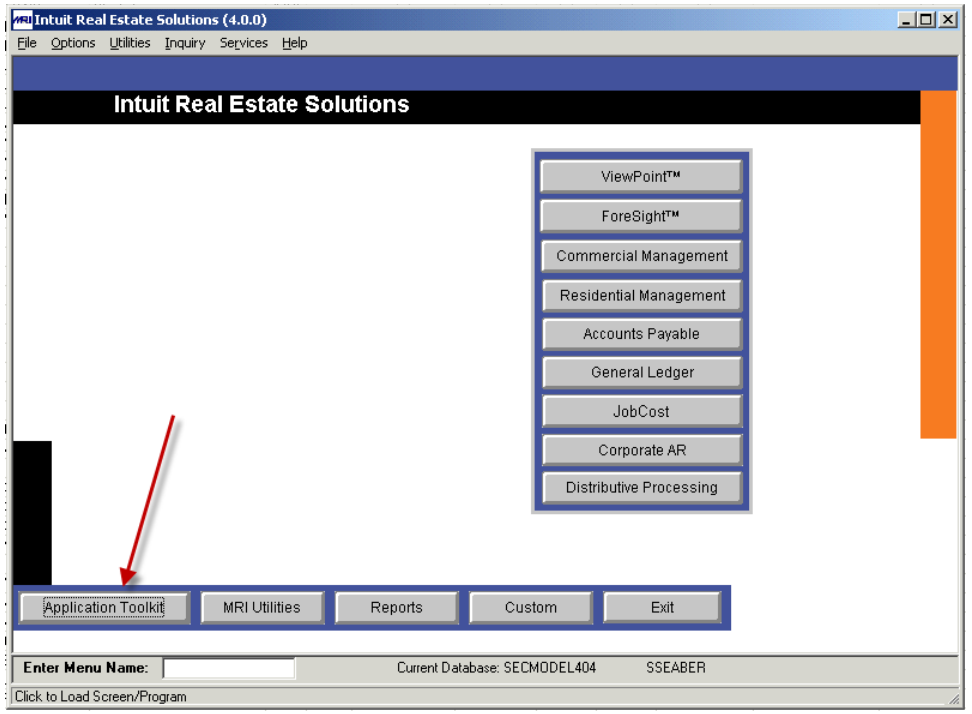
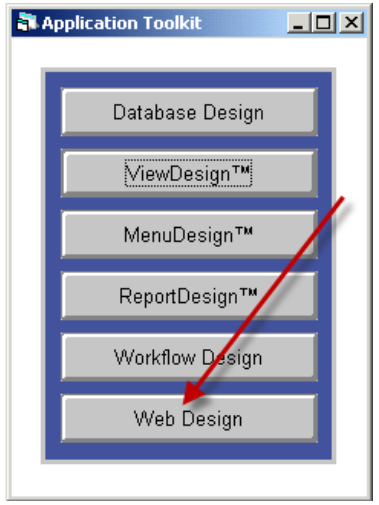
Web Menu Security



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

This will open the Web Design interface



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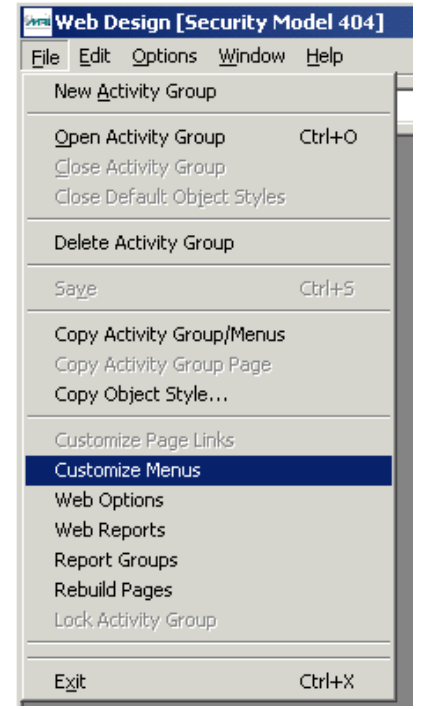
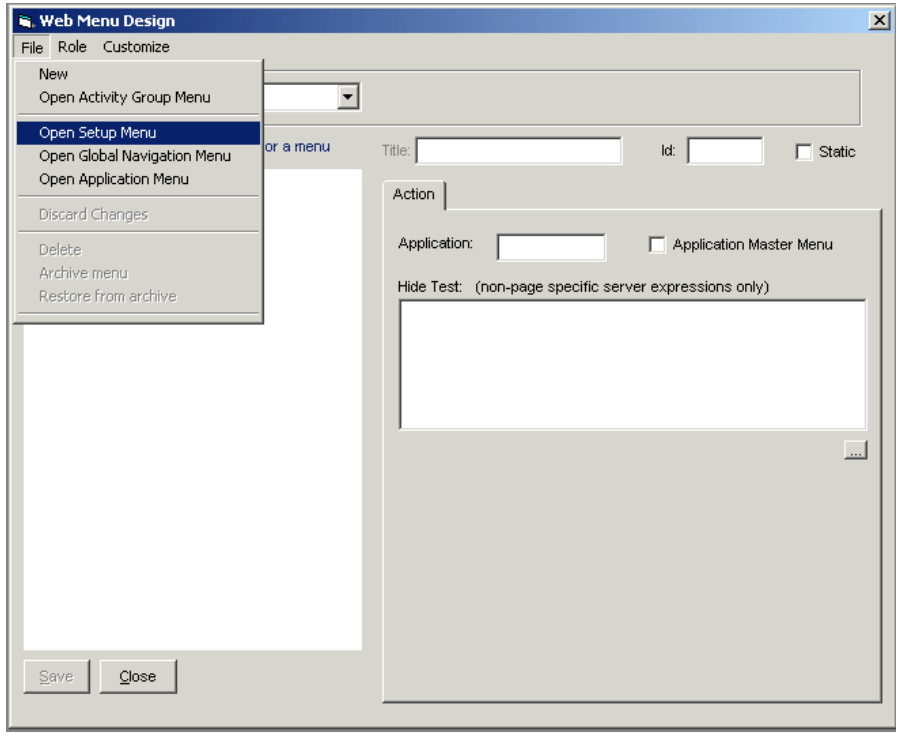
Web Menu Security

- 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

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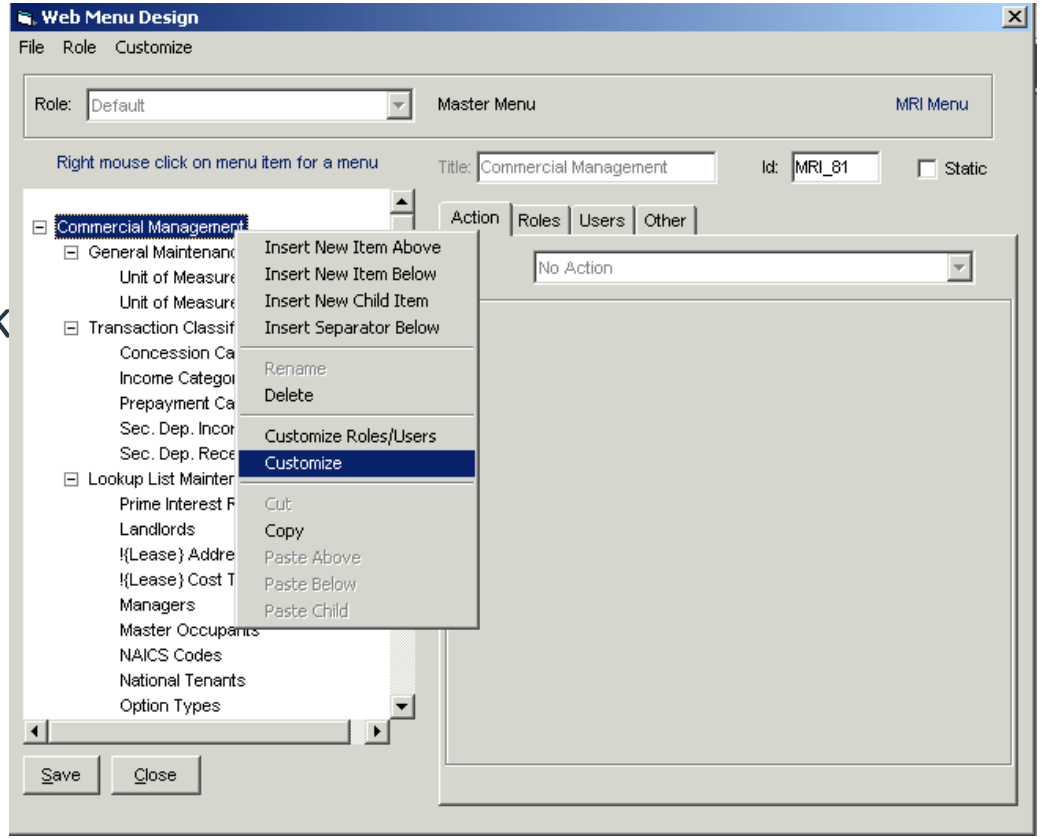
Web Menu Security

- 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.



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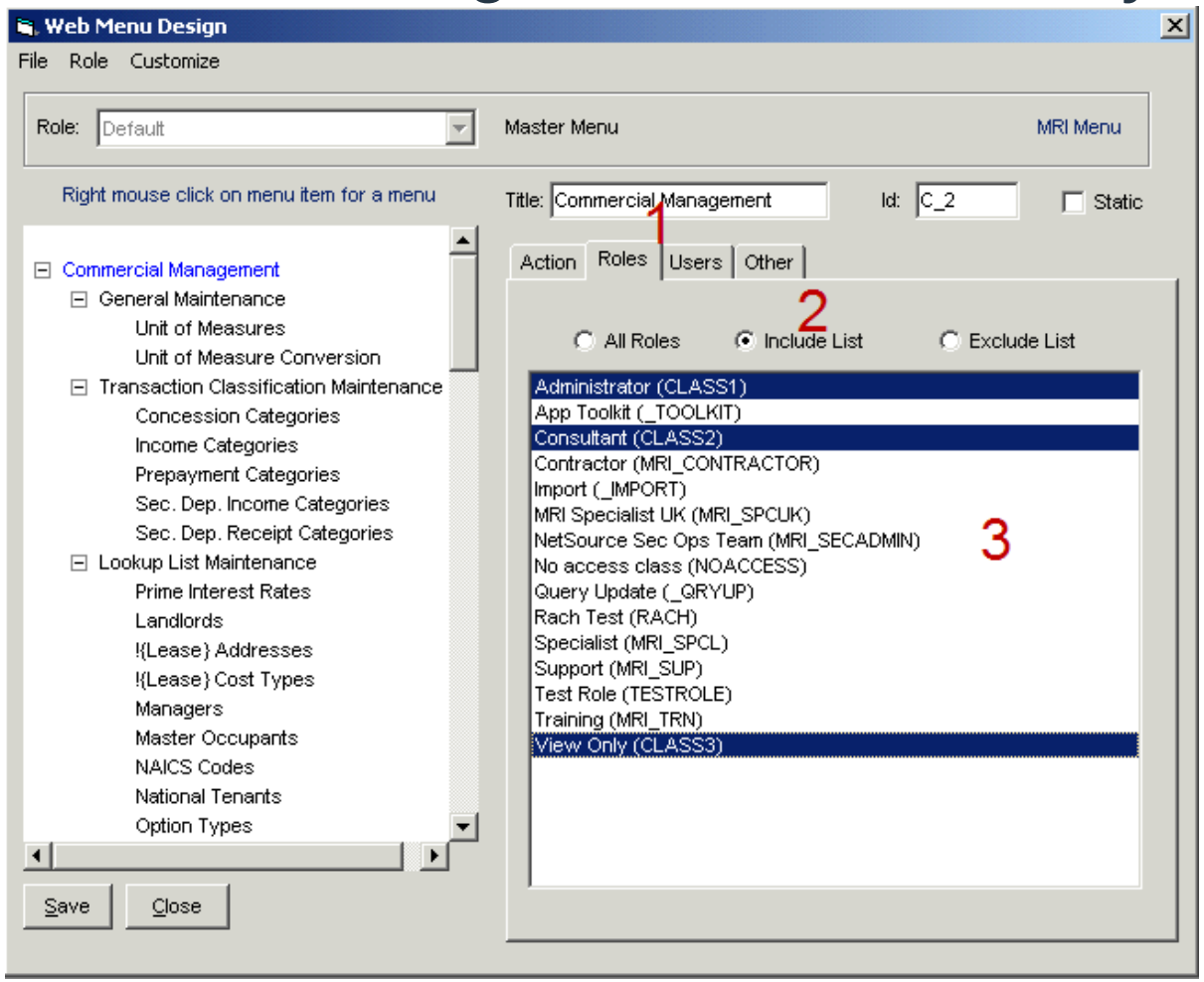
Web Menu Security

How do I change the menu security?



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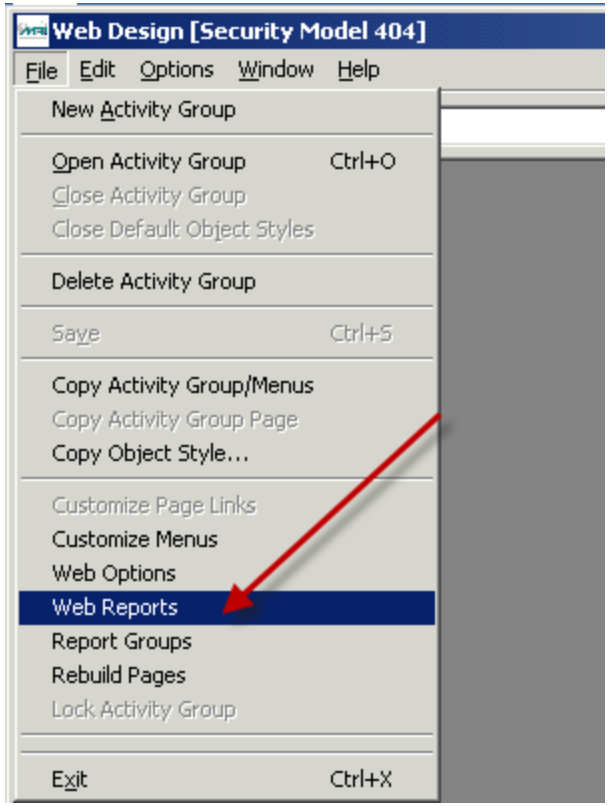
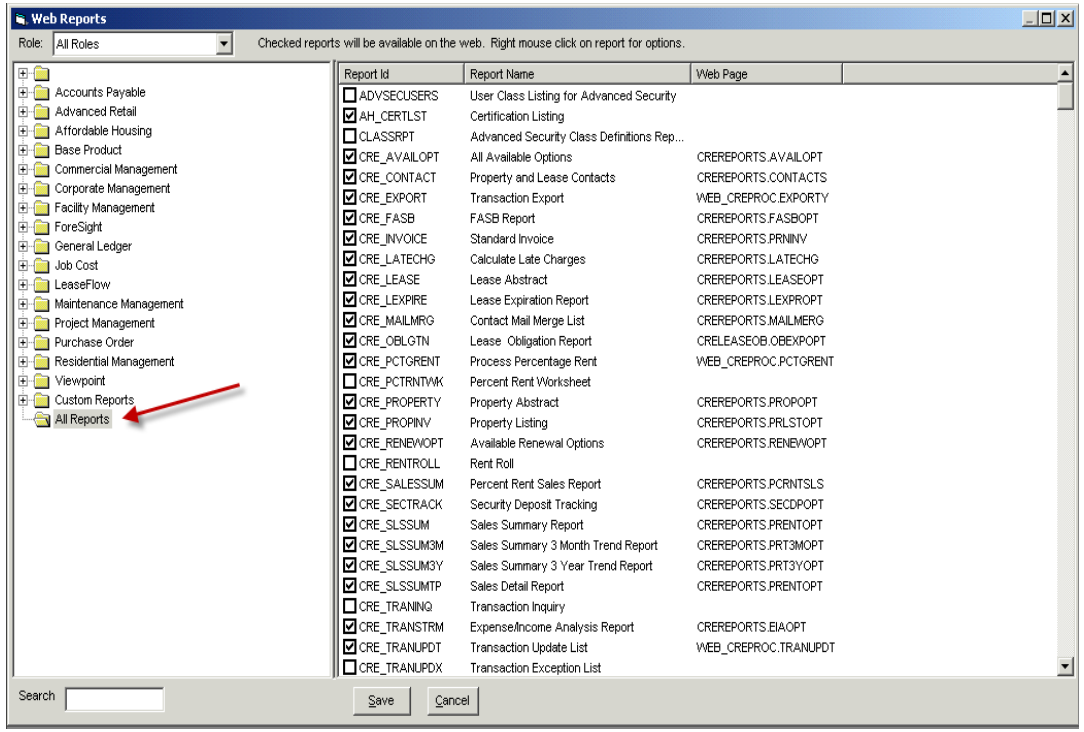
Web Enable Reports

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.

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Web Enable Reports

We have 3 columns to look at:

- Report ID
- Report Name
- Web Page

Report Id	Report Name	Web Page
☐ ADVSECUSERS	User Class Listing for Advanced Security	
☑ AH_CERTLST	Certification Listing	
☐ CLASSRPT	Advanced Security Class Definitions Rep...	
☑ CRE_AVAILOPT	All Available Options	CREREPORTS.AVAILOPT
☑ CRE_CONTACT	Property and Lease Contacts	CREREPORTS.CONTACTS
☑ CRE_EXPORT	Transaction Export	WEB_CREPROC.EXPORTY
☑ CRE_FASB	FASB Report	CREREPORTS.FASBOPT
☑ CRE_INVOICE	Standard Invoice	CREREPORTS.PRNINV
☑ CRE_LATECHG	Calculate Late Charges	CREREPORTS.LATECHG
☑ CRE_LEASE	Lease Abstract	CREREPORTS.LEASEOPT
☑ CRE_LEXPIRE	Lease Expiration Report	CREREPORTS.LEXPROPT
☑ CRE_MAILMRG	Contact Mail Merge List	CREREPORTS.MAILMERG

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.

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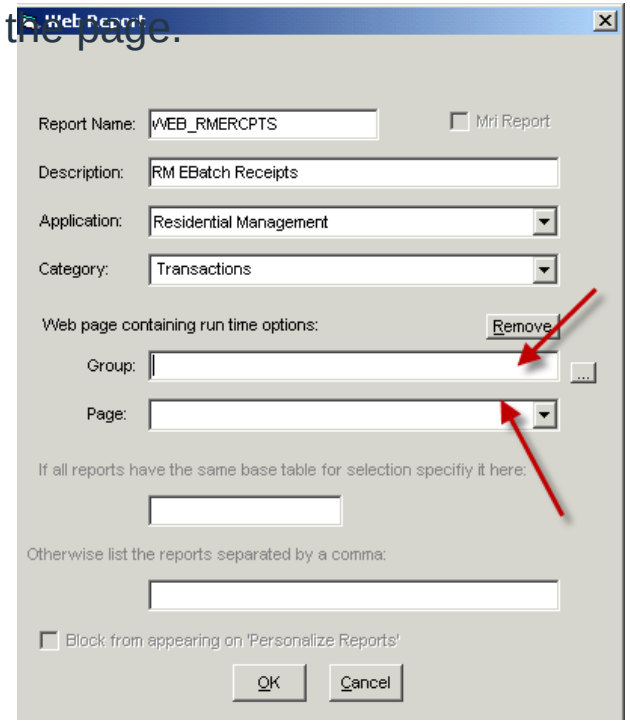
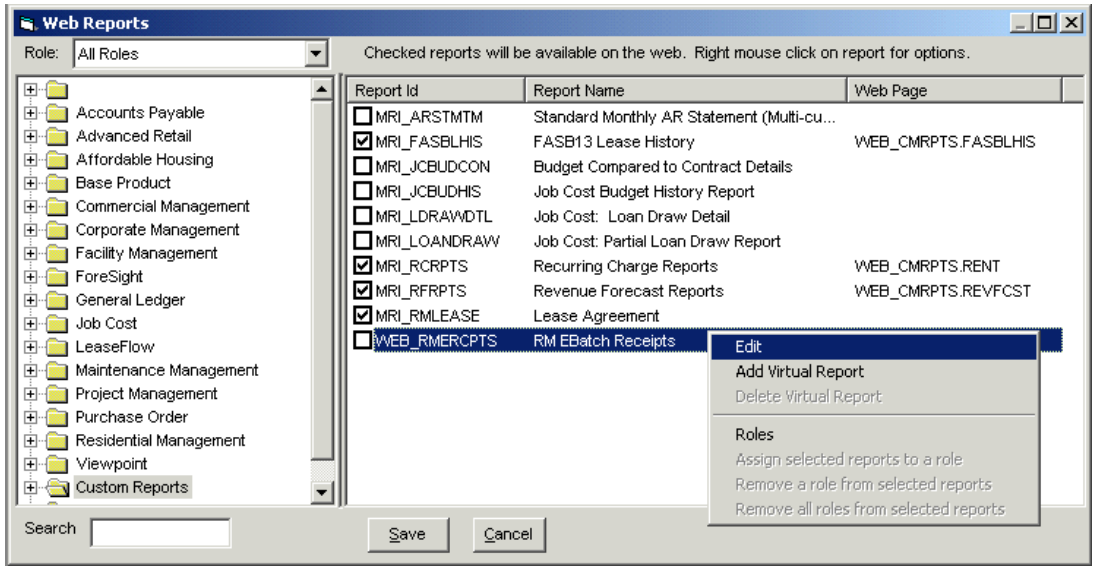
Web Enable Reports

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.





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

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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

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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.

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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.

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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.

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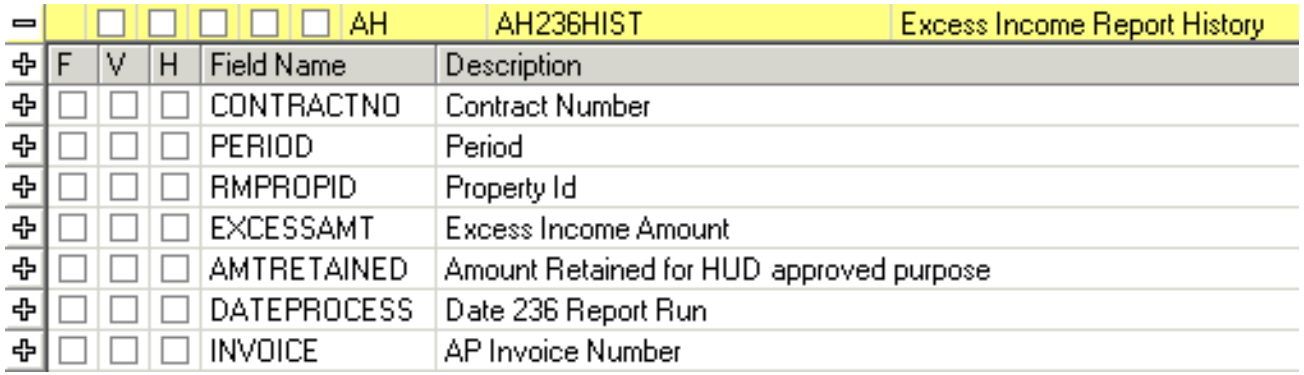
Tables

- 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.



	AH	AH236HIST	Excess Income Report History
F	V	H	Field Name	Description
☐	☐	☐	CONTRACTNO	Contract Number
☐	☐	☐	PERIOD	Period
☐	☐	☐	RMPROPID	Property Id
☐	☐	☐	EXCESSAMT	Excess Income Amount
☐	☐	☐	AMTRETAINED	Amount Retained for HUD approved purpose
☐	☐	☐	DATEPROCESS	Date 236 Report Run
☐	☐	☐	INVOICE	AP Invoice Number

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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.

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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

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