

Security Overview

AQUA 6.70.00+

Security in Advantage

This document covers the Security modules in Advantage (User, Group and Module) and related modules such as Change Password and the Security Report.

The Security module is used to establish module rights, client/division/product limits, employee limits, and individual user settings. Modules are defined as the various programs that reside in each application. Modules are located in various applications such as Advantage, Webvantage, Advantage Update, or Adassist. When security rights are established for a module that exists in multiple areas, the rights automatically apply to all, and do not have to be established separately. The Security module allows for two levels of control.

- Group
- User

Group Setup

Groups may be created to represent a set of security rights and users may be assigned to those groups accordingly. Users can belong to more than one group. If a user belongs to multiple groups and rights are granted to modules differently in those groups (one blocked and one allowed) the system will always 'allow' access in this case. Groups override the user level security in most cases, so it will be important to make sure all users are part of a group. From this module:

- Add users to groups.
- Establish module rights for the group. Module rights include menu access, print, update, add, and custom options where applicable.
- Establish Group Settings (items that can only be set at this level):
 - Allow Task Edit.
 - Calendar Settings (Add Holidays and View Other Employees).
 - Alert Inbox Settings (Show All, Show Unassigned).
 - Document Manager Settings (Can Upload, Can View Private).
 - Webvantage Workspace Templates (Create Workspace Template).
- Apply Workspace Template (by Group). Overwrites existing, with warning!
- Multi-select groups and apply rights to all selected groups at once.

Advantage Aqua - [Group Setup]

Home File Options

Add Save Delete Copy Terminated Employees

Group Setup

5 Group(s)

Enter text to search... Clear

Name	Description
All Rights	All Rights
Executive Team	Executive Team
Account Service - Creative	Account Service - Creative
RCS	Advantage Group 'RCS'
Limited	Limited Rights

Name: Executive Team

Description: Executive Team

Users | Module Access | Group Settings | Workspaces

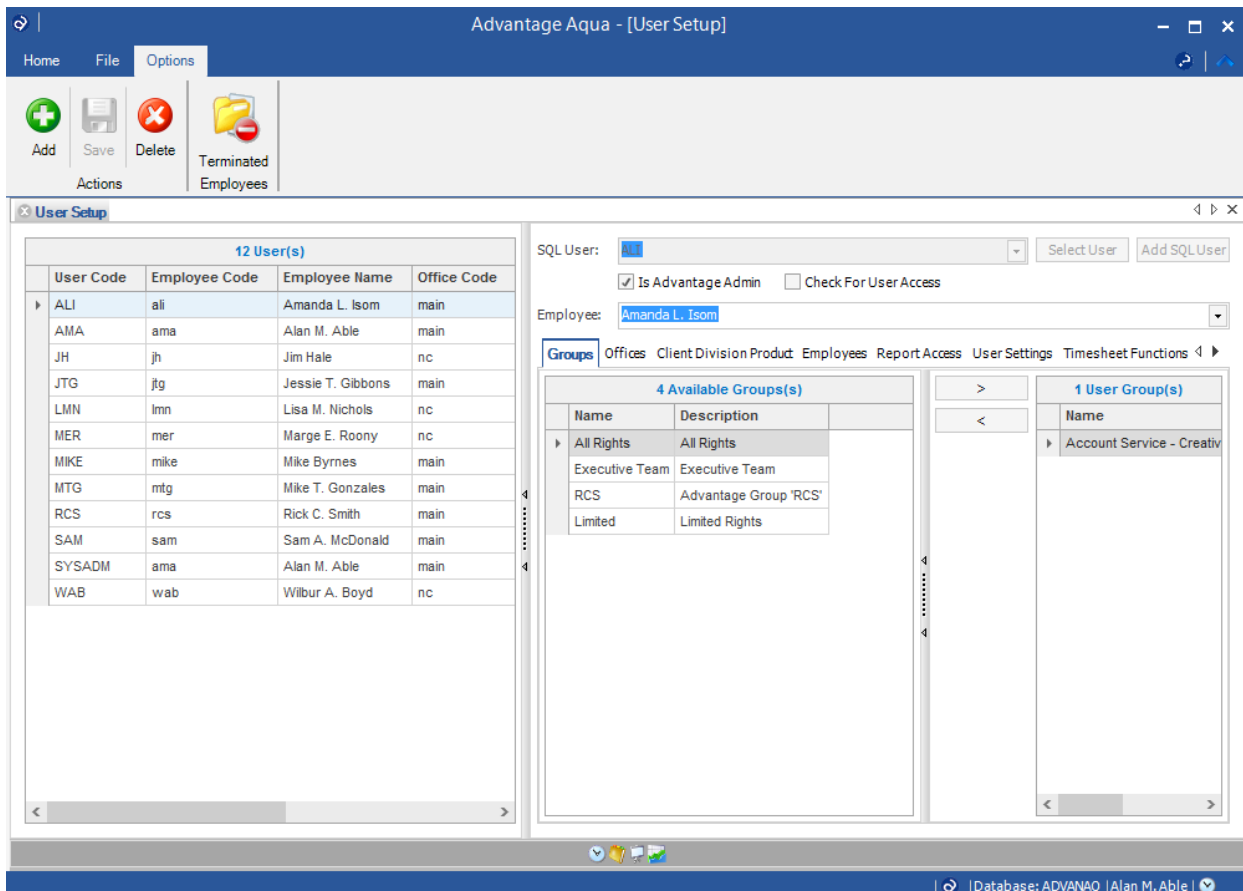
8 Available User(s)		
User Code	Employee Code	Emp
ALI	ali	Alan
AMA	ama	Alan
JH	jh	Jim H
JTG	jtg	Jessi
LMN	lmn	Lisa I
MIKE	mike	Mike
MTG	mtg	Mike
SYSADM	ama	Alan

4 Group User(s)		
User Code	Employee Code	Employee Name
RCS	rcs	Rick C. Smith
SAM	sam	Sam A. McDonald
WAB	wab	Wilbur A. Boyd
MER	mer	Marge E. Rooney

User Setup

User Setup is used to override group setup in terms of access to modules (as an option) and to establish certain rights that only exist at the individual level. From this module:

- Add, Update or Delete users. This includes the ability to add new users to SQL Server and associate them with Employee users. This is also available in Employee Maintenance 'Security & Password' tab.
- See which group(s) users belong to.
- Add users to groups.
- Establish office, client/division/product and employee limits. This is also available in Employee Maintenance 'Security & Password' tab.
- Establish module rights for the user (if overriding the group to grant additional access). Module rights include menu access, print, update, add, and custom options where applicable.
- Establish Report Access (within a report module, can only be set at this level).
- Establish User Settings (items that can only be set at this level):
 - Show Markup, Limit Time Entry to Employee Code Attached, Limit Timesheet Functions, Limit PO to Employee Code Attached.
 - Webvantage User Only (replaces old "Time Entry" only option).
 - Allow Profile Update (controls Webvantage Profile tab availability in My Settings).
- Apply Workspace Template (by User).
- Multi-select users and apply rights to all selected users at once.
- Group rights override this level unless the check box to "Check for User Access" is activated for the individual user. In this case, if the user level allows access to a module, rights will be granted. It allows special access to individual users. If the user is part of a group, User level rights can only be 'granted' at this level, not blocked. Granted rights (at any level) always override blocked.
- Is Advantage Admin indicates the user is an administrator. Note: When this option is selected, the user cannot be setup as a 'Webvantage User Only' (in the User Settings tab) or be deleted.



Module Setup allows you to establish rights for any/all modules for groups and users at the same time. It's an alternative view, from the 'module' perspective. This module includes special options such as:

- Block/Unblock all (for selected groups and users).
- Set **User Detail Rights** such as print, update, add and custom 1/custom 2 settings for modules (for selected groups and users).
- Narrow modules by type such as Modules, Reports, Dashboards/Queries and Desktop Objects.

The screenshot shows the 'Advantage Aqua - [Module Access]' window. The top menu bar includes 'Home', 'File', 'Options', 'User', and 'Group'. Below the menu is a 'Group Actions' section with buttons for 'Block All', 'All Can Print', 'All Can Update', 'All Can Add', 'All Rights Custom 1', 'All Rights Custom 2', 'Unblock All', 'All Can't Print', 'All Can't Update', 'All Can't Add', 'All No Rights Custom 1', and 'All No Rights Custom 2'. The main area is titled 'Module Access' and shows the 'Application' set to 'Advantage'. On the left is a tree view of modules, with 'Job Jacket' selected. On the right, there are two tables: '5 Group Access' and '13 User Access'.

Group	Is Blocked	Can Print	Can Update	Can Add	Custom1	Custom2
All Rights	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Executive Team	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Service - Creative	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advantage Group 'RCS'	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited Rights	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

User Code	Employee Code	Employee Name	Office Code	Office Name	Department Code
ALI	ali	Amanda L. Isom	main	Main Office	prod
AMA	ama	Alan M. Able	main	Main Office	as
JH	jh	Jim Hale	nc	North Carolina	dev
JTG	jtg	Jessie T. Gibbons	main	Main Office	dev
LMN	lmn	Lisa M. Nichols	nc	North Carolina	as

Modules are broken down into types which can be filtered - Modules, Reports, Dashboard/Queries, and Desktop Objects.

The screenshot shows the 'Advantage Aqua - [Module Access]' window with the 'Options' menu open. The 'Options' menu has sub-items: 'Modules', 'Reports', 'Dashboard / Queries', and 'Desktop Objects'. Below these are icons for 'Terminated Employees', 'All', 'All Blocked', 'All Unblocked', 'Show By', 'Expand All', and 'Collapse All'. The 'Show By' dropdown is currently set to 'All'.

Module Access

Under the Module Access tab from any level (User, Group or Module), you will find the available “Applications” listed. Security rights may be granted or blocked for entire Applications using this feature by Group or User. Applications available are:

- Advantage – Block to disallow access (login).
- Webvantage – Block to disallow access (login).
- Advantage Update – Block to disallow access (login).
- Outlook Add In – Block to disallow access (login).
- Advantage Database Update – Block to disallow access (login).
- Adassist – Block to disallow entering an Adassist Password. Does not block access to login, blocks the ability for the user to enter or change their password (without existence of a password, user cannot login).

General tools available in the Security Modules

- Each module contains a tab on the ribbon called Options. Module Setup contains two additional tabs on the ribbon for Users and Groups. Depending on the module you are using (Group, User or Module), different ribbon tabs and options may appear. The options include ways to expand and collapse levels, filter module types, or set flags.
- Rows may be multi-selected using the **shift or control key**. This allows updating of multiple rows at once where applicable. When selecting multiple rows, the Is Blocked indicator will display as unblocked. To set the rights for all selected items, check and uncheck or re-check the Is Blocked checkbox. This establishes the rights for all selected items regardless of their original state.
- Columns with a 'filter' indicator (funnel icon on top right of column) can be used to narrow data displayed, or sorted (click to sort).
- User Detail Rights may be set to control detail rights (add, update, print) where supported.

The screenshot displays the 'Group Setup' window in Advantage Aqua. The ribbon at the top has 'Options' selected, showing 'Add', 'Save', 'Delete', and 'Copy' actions, along with 'Expand All' and 'Collapse All' view options. The main content area is divided into a left pane showing a list of 5 groups, including 'Executive Team', and a right pane for configuring the 'Executive Team'. The right pane has tabs for 'Users', 'Module Access', 'Group Settings', and 'Workspaces', with 'Module Access' active. It shows a tree of application modules, with 'Campaigns' selected under 'Project Management'. To the right of the tree is an 'Options' panel with checkboxes for 'Is Blocked', 'Can Print', 'Can Update', 'Can Add', 'Custom 1', and 'Custom 2'. A red arrow points to the 'Options' panel.

Examples of possible uses of tools:

Group Setup: Add users to groups by department.

- Filter employees by department. Multi-select employees. Use arrow to move selected employees to selected group.

User Setup: Setup Office Limits by employee so limit access to all data by the assigned office.

User Setup: Setup CDP Limits by department and set time entry only option.

- Filter employees by department. Multi-select employees. Filter or multi-select CDPs and use arrow to move to the limit window. Multi-select CDP's and set Allow Time Entry option as desired.

Module Setup: Block a set of modules for groups or users.

- Select the module or multi-select modules for which to establish rights. Use special options to set 'all' or individually select groups and users and change rights.

How Advantage and Webvantage Read Rights

Module Access:

Modules (menu level) check the security settings to determine access. If users belong to groups, the group access is used by default. If a user belongs to one or more groups that allow access to the module, they will be able to enter the module.

For example, if you previously established a security group in Webvantage that permitted access to the Job Jacket, and another group in Advantage denied access to the Job Jacket, users that are part of those two groups would be permitted access to the Job Jacket in both applications (Webvantage and Advantage). The Job Jacket is an example of a module that exists in both applications and therefore the security is shared.

User-level rights may be established and will be used if the "Check for User Access" option is selected at the user level, or if the user does not belong to a group. It allows special access to individual users. If the user is part of a group, User level rights can only be 'granted' at this level, not blocked. Granted rights (at any level) always override blocked.

Office, Client/Division/Product Limits, Employee Limits, and User Rights:

These rights are established by User. Limits and User Settings may be applied to other users within the User Setup module.

Change Password (User Password Maintenance)

Users control their own SQL Server, Adassist, Billing Approval and Quote Approval and other passwords using the Change Password module under the Security menu. If a user does not have a row in the Billing Approval or Quote Approval modules, the password options for those modules are not available. To establish a password for Billing Approval or Quote Approval (which is required in order for users to change this password), use the appropriate module under the Security menu.

Security Report

The Security Report lists each user and their rights based on how the system translates rights based on the assigned group(s) or user access. This includes a listing of groups that each user belongs to.

Employee Maintenance / Security & Password Tab

The employee maintenance 'Security & Password' tab also contains the ability, along with User Level Security to:

- Add a SQL Server User/New Employee
- Establish office, client/division/product and employee limits.

New Modules and the Message Board:

All new modules will be added to the security as 'blocked' by default. This ensures that when you upgrade either Advantage or Webvantage, access to any new modules is not permitted until security rights are granted. A message board is available to display new modules added with the current release. From the Advantage/File Menu (lower menu bar) and from the Webvantage (top menu bar) – click on the "A" icon to see a list of modules or options that have been added (and will be blocked) with this version. Within the Advantage message board, click on Options to navigate to Security.