



Texas Skyward User Group Conference

Web Security: Financial Management and HR/PR

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Web Security: Financial Management



This session focuses on the new Web Security options for users of the Business Suite modules.

- Security Groups: Demonstrate how to assign security to allow or limit user access to certain areas of the software.
- Security Users: Learn how to clone or replace a security user.
- Custom Forms: Demonstrate how to restrict access to Custom Forms.
- Confidential Fields: Show how to adjust user access to confidential fields.
- Employee Profile: Show how to give building administrators access to specific information for the employees in their buildings.

Setting up Security Groups

Security Level Maintenance - PS\CA\SE\SG\WF - 27260 - 05.16.02.00.10 - Internet Explorer

Security Level Maintenance (4287)

System: FW - Web Financial Management
 Entity: 000 - Entity (000)
 Group: 101 - Vendor Request

WF - Web Financial Management

VE - Vendors Sort: Menu Display Order Alphabetical Order
 Show: All Items Items With Assigned Security

WFVE - Menu Items	Menu Path	Assigned vs Available	Minimum Security Level	Security Access Level	Security Lookup Level
<input type="checkbox"/> VE - Vendors	WFVE	0/51			
<input type="checkbox"/> PS - Product Setup	WFVE\PS	0/16			
<input type="checkbox"/> VP - Vendor Profile	WFVE\VP				
<input type="checkbox"/> VB - Vendor Browse	WFVE\VB				
<input type="checkbox"/> TB - Vendor Browse/Profile Tabs	WFVE\TB	0/20			
<input type="checkbox"/> VU - Used in Payroll	WFVE\VU				
<input type="checkbox"/> DV - Duplicate Records	WFVE\DV				
<input type="checkbox"/> RC - Report Card	WFVE\RC				
<input type="checkbox"/> MI - Mass Inactivate	WFVE\MI		5		
<input type="checkbox"/> RE - Reports	WFVE\RE	0/7			
<input type="checkbox"/> CF - Custom Forms	WFVE\CF				
<input type="checkbox"/> DM - Data Mining	WFVE\DM				

Buttons: Assign Selected, Expand All, Collapse All, Check All, Uncheck All, History Log, Export Security, Print Security

Assign Security To Selected Menu Paths

WFVE\VP

You are about to assign access and lookup security levels to all menu paths listed. Group entries and all sub-groups will be processed if they are part of the selection range. If the chosen access level does not meet the minimum security access level for the menu path(s) in the selected range, then that menu path will be skipped.

Security Access Level: **5-COMplete Access With Mass Updates**

Security Lookup Level: **1-INQUIRE ONLY**

Buttons: Cancel, Apply

Setting up Security User Access

Security Information - PS\CA\SE\US\SU - 9733 - 05.16.02.00.10 - Internet Explorer

Security Information (109)

Security Information

Name:

SSN:

Account Information

* Login:

* Password: (network password must be used)

Aaronson (In House) hide

Force password change at next login

Secured User Settings

Active Secured User:

System Wide Access:

Allow Use of Skyward Password:

Allow User to Access Skycoder:

Customer Access

Submit Service Calls:

Submit User Group RFEs:

Submit Billable RFEs:

Customer Access ID:

Send Email Notification:

System Wide Access by Area

Financial Management

Human Resources

PEIMS

Product Setup

Student Management

Asterisk (*) denotes a required field

Save

Save and Email Account Reset Link

Set Password

Back

Setting up Custom Form Security.

Secured Custom Forms and Screens - P5\CA\SE\SG\WF - 27260 - 05.16.02.00.10 - Internet Explorer

Secured Custom Forms and Screens (283)

Name	Access	Lookup	
Custom Student Tabs - Custom Student Tabs			
Family - Family			
Profile Master - Profile Master			
- Field trip (screen) - 12			
- Eye (screen) - 16			
- Parking Spot 2015 (screen) - 20			
- Employee Only (advanced form) - 51			
- Hair (advanced form) - 66			
Special Ed - Special Ed			
Student - Student			
Student Entity - Student Entity			

< 11 records displayed >

Buttons: Back, Assign Selected



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THANK YOU FOR ATTENDING!

