Introduction

The simplest and highest level of security is to restrict access to menu options on the main menu. Whether you do this using groups or individual users, the method is nearly identical. They key is to understand how menu options are mapped to security "actions" or "tokens".
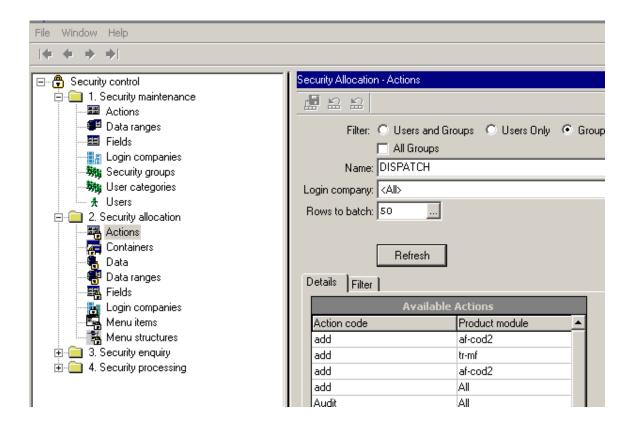
Defining groups and allocating users to groups

Add the group, and allocate users to it through this option. There is sufficient docuemntstion in the sevurity system help menus.
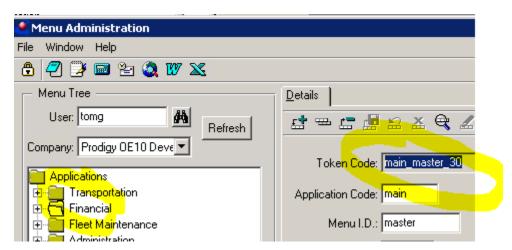
Security Allocation of Menu Options

Select security allocation -> Actions, and in the window provided select the user or group for whom you want to add restrictions. The example will restrict a sample group "dispatch" from anything but "Files", "Order Booking" and "Dispatch" in the main menu:
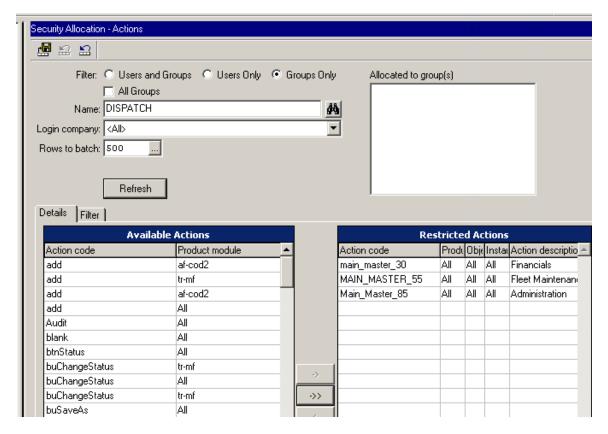
Press the refresh button to see the allocations (restrictions currently in place for this group. You could alos select for a specific user. Groups are highly recommended.

In "Administration-> Menu maintenance", take a look at the token code names of the menus you want to restrict by highlighting the menu option, and reading the associated data in the viewer:

Scroll through the "Available Actions" until you find the action. (If you can't find it you can add it through security maintenance, but these are added automatically when options are added to the menu. If there are more than one, you can delete all - leave one that either has "all" as a product module, or a product module that matches the menu option.)

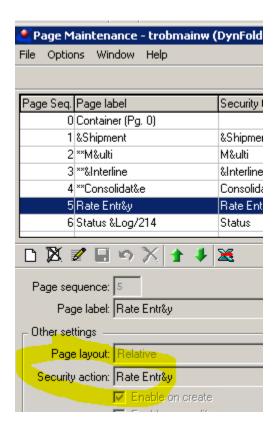Add the action to the "restricted actions" for the group:

Repeat for each menu option. Press the Save button when you're done.

The group (or user) will now be restricted from accessing the menu options associated with the action (token) code allocated to it. Any user who is a member of that group will inherit the restirction.
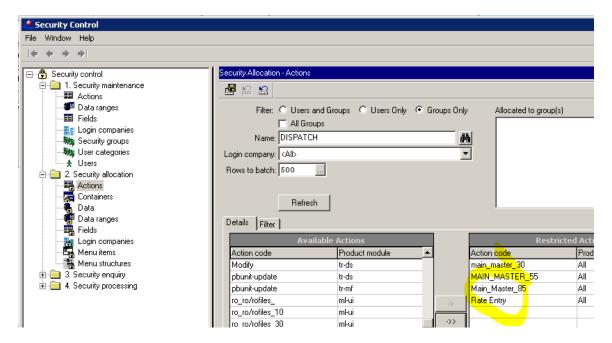
About Actions

Actions can be very general, like "delete", and exist for specific product modules, or specific objects within a product module.

Actions can also be associated with a tab folder page heading - for example in order booking, the tab folder "Rate Entry" has a security token code assigned to it called... "Rate Entry"

... so if you add this action code and allocate it to a group, the memebers of the group wont be able to access the rate entry tab of trobmainw. This can be further defined for specific modules and/or objects if needed.

Field Security

Field security works the same way except you use field names and not toekns to define what it is you are securing. You set them up the same way. When you 'allocate' field security to a user or group, you can specify whether the access is full, read-only, or hidden: