# **Security Groups Setup for Connect**

*Overall Instruction: When setting up security groups in Clarity, check the Access Granted box for the module and then remove security from the items listed below the module header. A few modules may need other items added and those are noted in the module as appropriate.*

# **Administration**

*– Add ALL and remove the following:*

## System Management

* Modify Data – Just the Tasks
* System Tools
	+ Attach Databases
	+ Detach Databases
	+ Load Databases
	+ Maintain Databases
	+ Modify Configuration File
	+ Validate Encryption

# **Backups & Checklists**

 System Management – Note: Grant Access to these menu items only.

***ADD:***

* *System Tools*
	+ *Send Databases*
	+ *Export Report Forms/Definitions*
	+ *Import Report Forms/Definitions*
* *Organization*
	+ *Related Reports > Checklists*

# **Asset Management**

* Keep all at this time

# **Asset Management Reports & Inquiry Only**

Note: Grant Access to these menu items only.

***ADD:***

* *Inquiry*
* *Reports – Remove the following*
	+ *Management Tracking Report*

# **Accounts Payable**

*– Add ALL and remove the following:*

* Organization > Miscellaneous > Delete Checks

***ADD:***

* *System Management >Master Records > Setup/Modify Banks*

# **Accounts Payable Reports & Inquiry Only**

Note: Grant Access to these menu items only.

***ADD:***

* *Vendor Inquiry*
* *Reports – Remove*
	+ *Checks*
	+ *Management Tracking Tool*
	+ *Purchase Orders*
	+ *Requisition*

# **Accounts Receivable**

* Keep all at this time

# **Accounts Receivable Reports & Inquiry Only**

Note: Grant Access to these menu items only.

***ADD:***

* *Inquiry*
* *Reports – Remove the following*
	+ *Management Tracking Report*
	+ *Invoices*
	+ *Statements*
	+ *Credit Memos*
	+ *Delinquent Account List/Notices*

# **Business Licenses**

* Keep all at this time

# **Business License Reports & Inquiry Only**

Note: Grant Access to these menu items only.

***ADD:***

* *Inquiry*
* *Reports – Remove the following*
	+ *Management Tracking Report*
	+ *Business License/Form*
	+ *Delinquent Notice*

# **Building Permits (Community Development)**

* Keep all at this time

***ADD:***

* *System Management >Master Records > Setup/Modify Contacts*
* *System Management>Master Records>Setup/Modify Properties*

# **Building Permits (Community Development) Reports & Inquiry Only**

Note: Grant Access to these menu items only.

***ADD:***

* *Inquiry*
* *Reports – Remove the following*
	+ *Management Tracking Report*
	+ *Permits*
	+ *Violation Notices*

# **Cash Receipting**

*– Add ALL and remove the following:*

* Payments > Miscellaneous > Delete Bad Receipts
* ***ADD:***
	+ *Accounts Receivable > Inquiry*
	+ *Animal License > Inquiry*
	+ *Business License > Inquiry*
	+ *Cemetery Management > Inquiry*
	+ *Community Development > Property Inquiry, Permit Inquiry, Violation Inquiry*
	+ *Utility Management > Customer Inquiry*
	+ *Utility Management > Service Order Inquiry*

# **Cash Receipting Reports & Inquiry Only**

Note: Grant Access to these menu items only.

***ADD:***

* *Reports – Remove the following*
	+ *Management Tracking Report*
	+ *Receipts*

# **General Ledger**

*– Add ALL and remove the following:*

* Organization > Tasks > Account Codes
* Organization > Miscellaneous > Setup Outstanding Deposits/Checks
* Organization > Miscellaneous > Setup Period Dates
* Organization > Miscellaneous > Synchronize Caselle 2.x (unless they are still using a Caselle 2.x database)

***ADD:***

* *System Management >Master Records > Setup/Modify Banks*

# **General Ledger Reports & Inquiry Only**

Note: Grant Access to these menu items only.

***ADD:***

* *Account Inquiry*
* *Activity Inquiry*
* *Grant Inquiry*
* *Journal Inquiry*
* *Reports – Remove Management Tracking Report*

# **Human Resources**

* Keep all at this time

# **Human Resources View Only**

Note: Grant Access to these menu items only.

***ADD:***

* *Applicant Inquiry*
* *Employee Inquiry*
* *Job Inquiry*
* *Reports – Remove the following*
	+ *Management Tracking Report*
	+ *Applicant Forms*
	+ *Benefit Enrollment Forms*
	+ *Employee Compensation Forms*
	+ *Employee Performance Review Forms*
	+ *Employee Termination Forms*
	+ *Personnel Action Forms*

# **Maintenance Orders**

* Keep all at this time

# **Maintenance Orders View Only**

Note: Grant Access to these menu items only.

***ADD:***

* *Inquiry*
* *Reports – Remove the following*
	+ *Management Tracking Report*

# **Materials Management**

* Keep all at this time

# **Materials Management View Only**

Note: Grant Access to these menu items only.

***ADD:***

* *Inquiry*
* *Reports – Remove the following*
	+ *Management Tracking Report*
	+ *Bid Request*
	+ *Inventory Reorder*
	+ *Physical Inventory Worksheet*

# **Payroll**

*– Add ALL and remove the following:*

* Organization > Tasks > Approval Processes
* Organization > Tasks > Approval Steps
* Organization > Tasks > Calculations
* Organization > Tasks > Calculation Formulas
* Organization > Tasks > Electronic File Formats
* ***ADD:***

# **Payroll (Cont’d)**

* + *System Management > Modify Data > Payroll*
	+ *System Management >Master Records>Merge Departments*
	+ *System Management >Master Records>Banks*
	+ *System Management >Master Records> Departments*

# **Payroll View Only**

Note: Grant Access to these menu items only.

***ADD:***

* *Employee Inquiry*
* *Reports – Remove the following*
	+ *Management Tracking Report*
	+ *Payroll Checks*
	+ *Transmittal Checks*

# **Project Management**

* Keep all at this time

# **Project Management View Only**

Note: Grant Access to these menu items only.

***ADD:***

* *Inquiry*
* *Reports – Remove the following*
	+ *Management Tracking Report*
	+ *Job Forms*

# **Utility Management**

*– Add ALL and remove the following:*

* Organization > Miscellaneous > Modify Data
* Organization > Miscellaneous > Modify Assistance
* Organization > Miscellaneous > Modify Certifications
* Organization > Miscellaneous > Modify Contract Loan Payment Schedule
* Organization > Miscellaneous > Modify Deposits
* Organization > Miscellaneous > Modify Meter Activity
* Organization > Miscellaneous > Modify Transactions
* Organization > Miscellaneous > Modify Credit History
* Organization > Miscellaneous > Modify Credit Usage
* Organization > Miscellaneous > Modify Pending Deposits

***ADD:***

* *System Management >Master Records > Setup/Modify Banks*
* *System Management >Master Records > Setup/Modify Contacts*
* *System Management>Master Records>Setup/Modify Properties*

# **Utility Management View Only**

Note: Grant Access to these menu items only.

***ADD:***

* *Customer Inquiry*
* *Service Order Inquiry*
* *Reports – Remove the following*
	+ *Delinquent List/Notices*
	+ *Final Bills*
	+ *Service Orders*
	+ *Shut-off List/Notices*
	+ *Utility Bills*
	+ *Management Tracking Report*