# **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*