

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

Payroll (Cont'd)

ADD:

- *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*