Veco Administration Guides –

Security Access

Introduction

The “Veco” system contains a comprehensive facility for defining what functionality is available to individual users of the software. This is done by the use of “Tree Access” and “Form Access” for specific departments and individual users.

When discussing security, we first need to define some important concepts within “Veco”:

Departments

“Departments” are defined as the various areas of the business into which all users need to be categorised. The standard departments used by “Veco” are:

- Accounts
- Auctions
- General
- Lettings
- Management
- Sales
- Weekend Staff

Every user needs to be assigned to one of the above departments. This will then determine the levels of security access given to each user.

Forms

“Forms” are defined as the individual details screens used to display information. Every record of information held within “Veco” is displayed on a “Form”. Examples are:

- Contact
- Property
- Owner Group
- Tenancy
- Works Order
- Accounts Transaction

Tree Menu and Nodes

The “Tree Menu” and “Nodes” are the gateways into the “Veco” database. Clicking on a tree option will display a list of records in a “Grid” format. Double-clicking any individual item from the grid will then display a form containing details about the item from the grid.

Security Access

"Veco" has two types of security:

- Tree Access

"Tree Access" determines which departments, and therefore which members of those departments, are allows to see the tree menu options.

- Form Access

Assuming a user can see grid items, the "Form Access" is used to limit what actions a user can take when they open an item from the grid. Form Access can be controlled by entire department, or by individual user.

Defining Tree Access

Tree Access can be configured as follows:

1. Click "Admin : Tree Access" from the main menu
2. A window will appear showing the full tree menu on the left, and the existing departments on the right
3. Click on a tree node and the departments will indicate who can see the tree option and thus the grid items associated with that tree option.
4. To change which departments are allows to see the tree option click "Edit"
5. Tick the allowed departments
6. Click "Save"
7. Repeat for each node and sub-node on the tree
8. Click "Close"

Defining Form Access

Form Access can be controlled by department and also by individual user.

There are varying form access "rights":

Access Right	Means the department or user…
No Access	can see items on a grid but cannot open the full details
Open	can open items on a grid
Create	can create new items by clicking "Add New" in the grid toolbar
Update	can make changes to details and save the changes
Delete	can delete the items

Department Form Access

To set the form access levels for all users in a particular department:

1. Click “Admin : Parameters” from the main menu
2. Next to the button “Form Access By Department” select a department (eg Accounts)
3. Click the button “Form Access By Department”
4. On the form headed “User Security” a list of the various “Forms” are displayed
5. For each form, select any combination of security access rights you wish to assign to the chosen department
6. Click “Save” and then “Close”

User Form Access

To set the form access levels for an individual user:

1. Click “Admin : Users” from the main menu to display the “Users” grid
2. Double-click a user to open the details form
3. Click the button “From Access” on the toolbar
4. On the form headed “User Security” a list of the various “Forms” are displayed
5. For each form, select any combination of security access rights you wish to assign to the chosen user
6. Click “Save” and “Close”

Setting/Resetting a User’s Department

Each user needs to belong to one of the designated departments when the user details are first entered. Selecting a department will initially set the User Form Access to that department. The individual user’s security rights can then be changed as detailed above. However, if the Department Form Access is changed after a new user has been created the user details need to be reset.

To do this:

1. Call up the User Details from the User Grid
2. Select a department that is different from the one shown
3. Click “Save”
4. You will be prompted to set the User Form Security to that of the chosen department – answer “No”
5. Now change the department to the <u>correct</u> department for the User
6. Click “Save”
7. Answer “Yes” to the question if you wish to now set the user’s security to that of the selected department
8. Click “Close”