

We are currently updating our site; thank you for your patience.

## SECURITY

### USER AND GROUP SECURITY – GROUP SECURITY SETTINGS

In **User and Group Security**, you can create new users, assign users to groups, and set user group security, i.e. what a **user** may or may not have access to in Nucleus Service.

A **user** must be created for each employee who is required to log on to Nucleus Service.

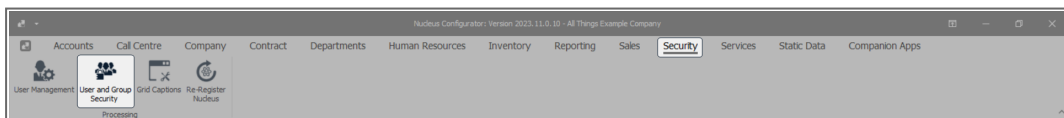
Each **user** is placed in a security group and security rights are set for that group.

Here we will outline how to set those group rights.

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#### Ribbon Access: Configurator > Security > User and Group Security

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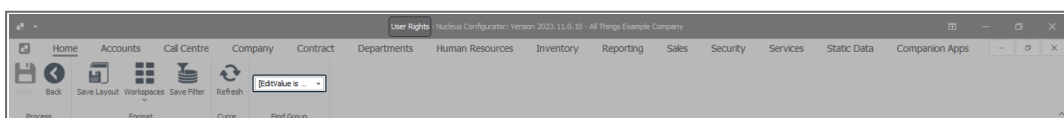


The **User Rights** screen will be displayed.

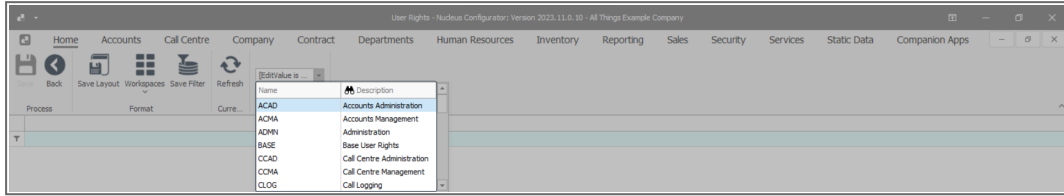
## SELECT USER GROUP

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- Click on the **drop-down arrow** in the **Find Group** ribbon frame.



- A **Group Name** and **Description** drop-down list will be displayed.
- Select the **Group Name** that you wish to set the **Access Level** for.
  - In this image, **Accounts Administration** is selected.



- The **Code and Access Level** data grid will be displayed.

The screenshot shows the 'User Rights - Nucleus Configurator' window with the 'Accounts Administration' group selected. A data grid is displayed below the group name, showing a list of codes and their corresponding access levels and descriptions.

Code	CodeDescription	AccessLevel	Description
WEBP	BPOWebPortal	4	No Access
ACCOUNTS	BPO Accounts	4	No Access
CONFIG	Configurator	3	Limited Access
DASH	Dashboards	4	No Access
BPO	BPO Application	3	Limited Access
CRM	CRM	3	Limited Access
SCONNECT	S Connect	4	No Access
SSTUD	Sales Studio	2	Full Access

## ACCESS TYPES

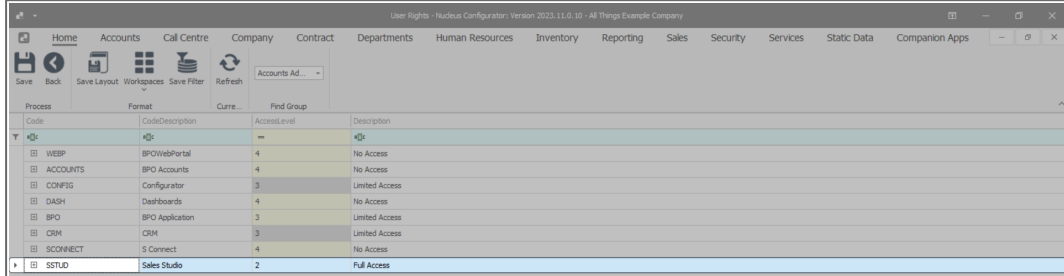
- **System:** This sets the system functionality security (whether the user can perform the function).
- **Menu Access:** This access type sets the security for the ability to select the item in the Nucleus Service menu.
- **All Other Access Types:** This sets the security for each individual screen, and items within that screen.

## ACCESS LEVELS

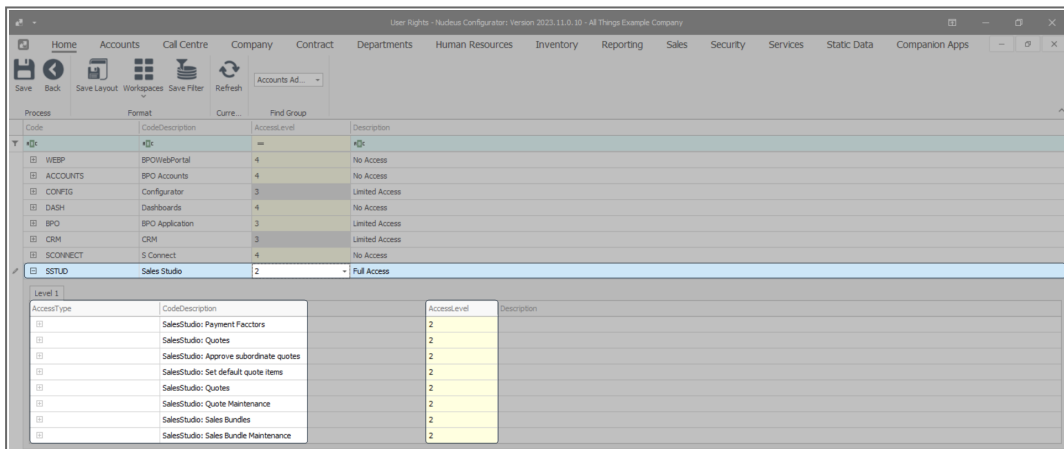
- **1 - Unlimited Access:** Access to all parts of the system.
- **2 - Full Access:** Access to all parts of the system.
- **3 - Limited Access:** Read Only.
- **4 - No Access:** Not accessible in Nucleus Service.

## SET ACCESS LEVEL

- Select the **Code** you wish to set the **Access Level** for.
  - In this image, **Sales Studio** is selected.



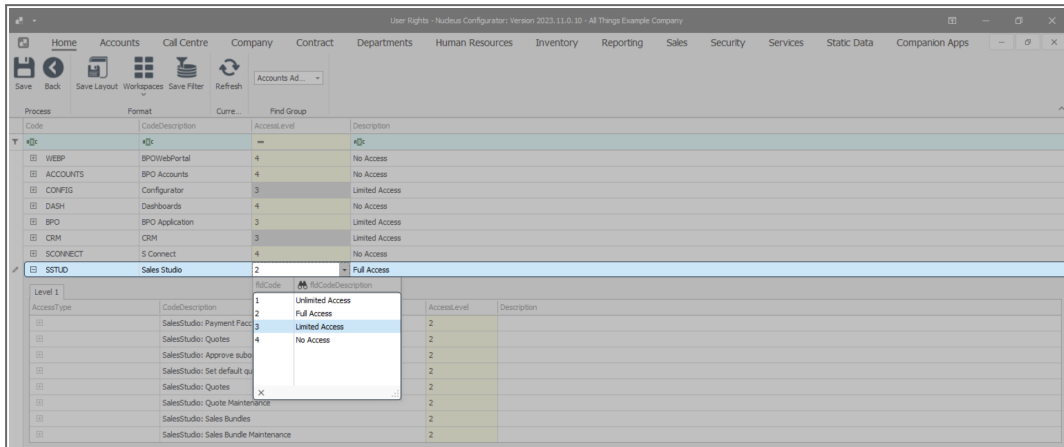
- Click on the **expand** button of the selected row.
- A drop-down **data grid** will appear showing the **Access Level** for each **Access Type**.
  - This image shows **Access Levels** for Sales Studio are set at **2 - Full Access**.



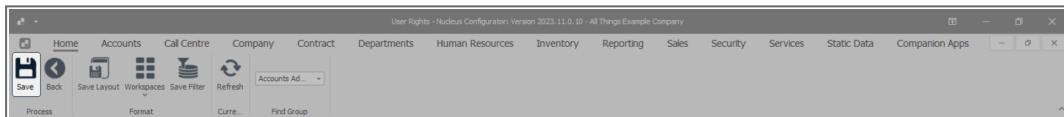
- Click on the **Access Level** field in the selected row.
- A drop-down **menu** will appear and you will select the relevant **Access Level**.

## Group Security Settings

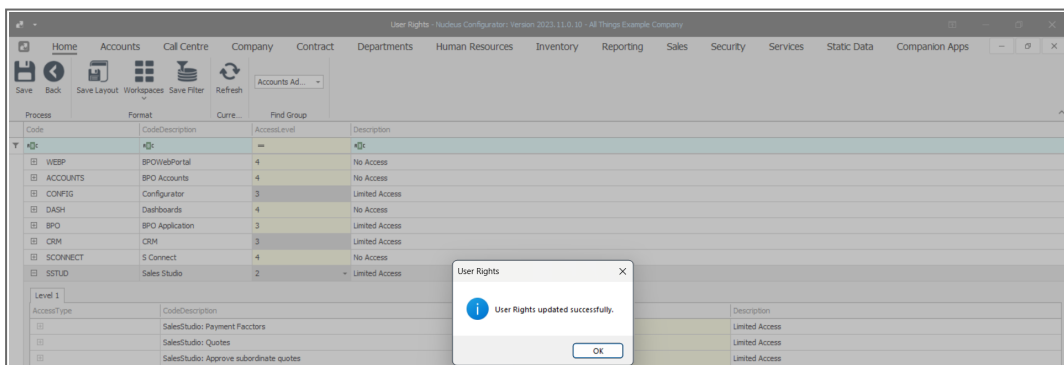
- In this image, the security access for the entire Sales Studio will be set to **3 - Limited Access**.



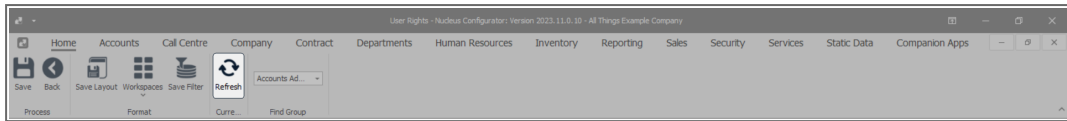
- Click on **Save**.



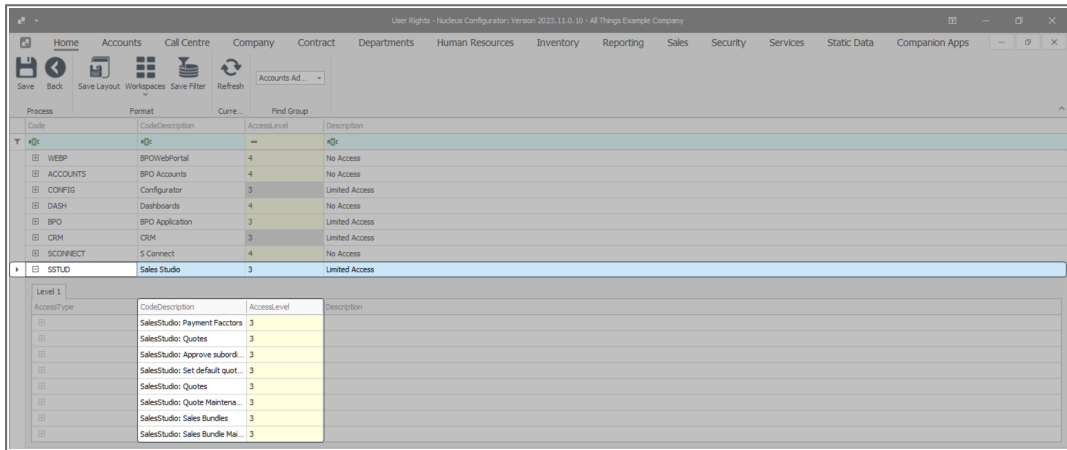
- A User Rights message will pop up saying -
  - User Rights updated successfully.**
- Click on **OK**.



- Click **Refresh** to update the saved changes.



- You will return to the User Rights screen showing the updated **Access Level**.
  - This image shows Sales Studio **Access Level** updated from **2 - Full Access** to **3 - Limited Access**.

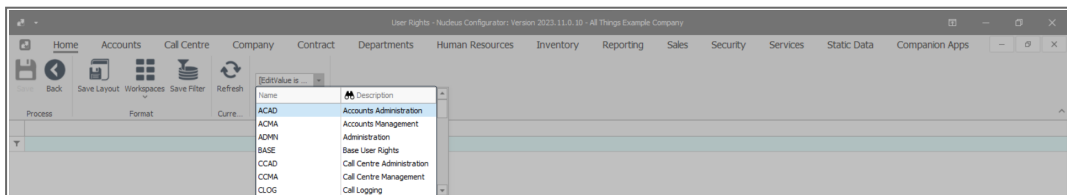


## SET ACCESS LEVELS ON SUB CODES

- Click on the **drop-down arrow** in the **Find Group** ribbon frame.



- A **Group Name** and **Description** drop-down list will be displayed.
- Select the **Group Name** that you wish to set the **Access Level** for.
  - In this image, **Accounts Administration** is selected.



- The **Code and Access Level** data grid will be displayed.

Code	CodeDescription	AccessLevel	Description
WEBP	BPOWebPortal	4	No Access
ACCOUNTS	BPO Accounts	4	No Access
CONFIG	Configurator	3	Limited Access
DASH	Dashboards	4	No Access
BPO	BPO Application	3	Limited Access
CRM	CRM	3	Limited Access
SCONNECT	S Connect	4	No Access
SSTUD	Sales Studio	2	Full Access

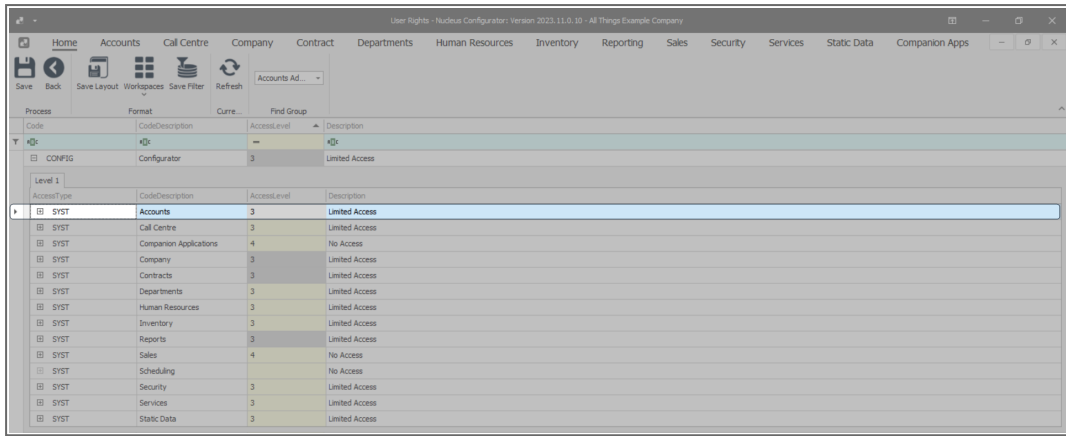
- Select the **Code** you wish to set the **Access Level** for.
  - In this image, **Configurator** is selected.

Code	CodeDescription	AccessLevel	Description
WEBP	BPOWebPortal	4	No Access
ACCOUNTS	BPO Accounts	4	No Access
CONFIG	Configurator	3	Limited Access
BPO	BPO Application	3	Limited Access
CRM	CRM	3	Limited Access
SSTUD	Sales Studio	3	Limited Access
WEBP	BPOWebPortal	4	No Access
ACCOUNTS	BPO Accounts	4	No Access
DASH	Dashboards	4	No Access
SCONNECT	S Connect	4	No Access

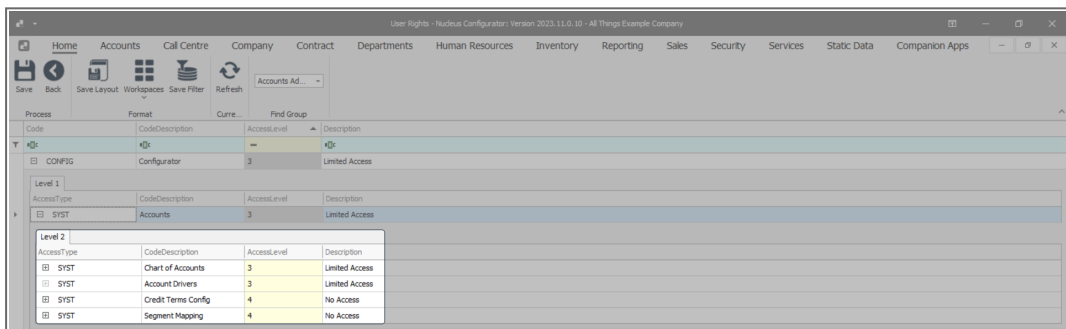
- Click on the **expand** button of the selected row.
- A drop-down **data grid** will appear showing **Level 1**.

AccessType	CodeDescription	AccessLevel	Description
SYST	Accounts	3	Limited Access
SYST	Call Centre	3	Limited Access
SYST	Companion Applications	4	No Access
SYST	Company	3	Limited Access
SYST	Contracts	3	Limited Access
SYST	Departments	3	Limited Access
SYST	Human Resources	3	Limited Access
SYST	Inventory	3	Limited Access
SYST	Reports	3	Limited Access
SYST	Sales	4	No Access
SYST	Scheduling	4	No Access
SYST	Security	3	Limited Access
SYST	Services	3	Limited Access
SYST	Static Data	3	Limited Access

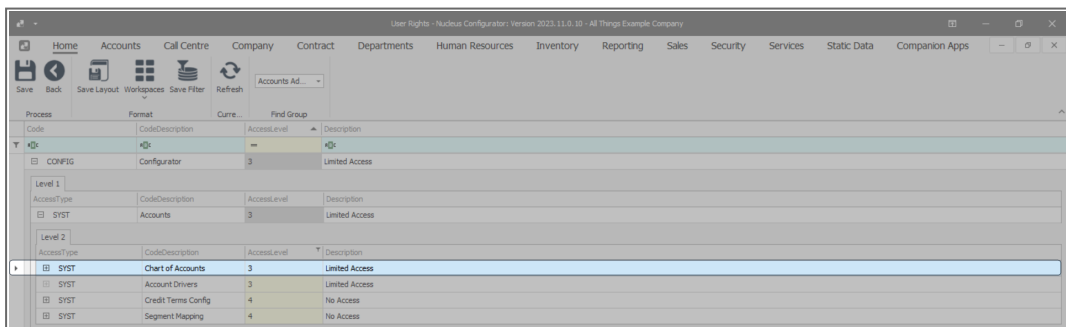
- Select the **Code** you wish to set the **Access Level** for.
  - In this image, **SYST - Accounts** is selected.



- Click on the **expand** button of the selected row.
- A drop-down **data grid** will appear showing **Level 2**

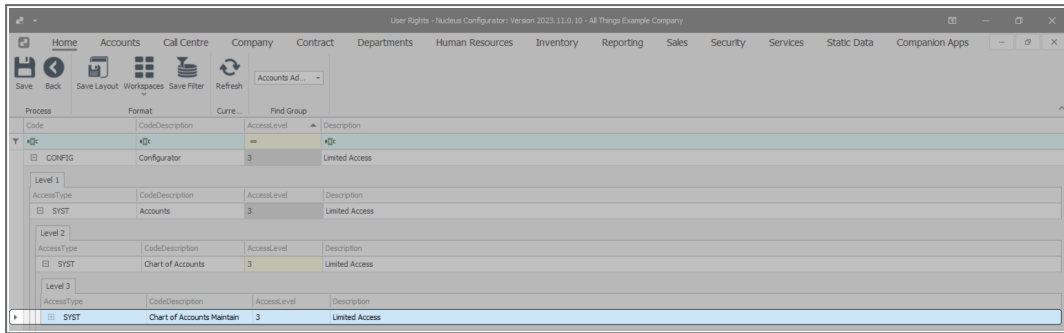


- Select the **Code** you wish to set the **Access Level** for.
- In this image, **SYST - Chart of Accounts** is selected.



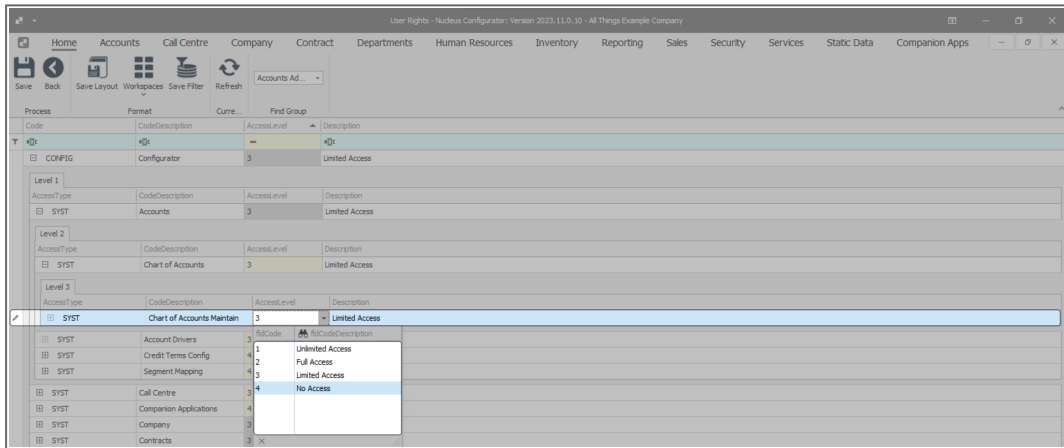
- Click on the **expand** button of the selected row.

- A drop-down **data grid** will appear showing **Level 3**

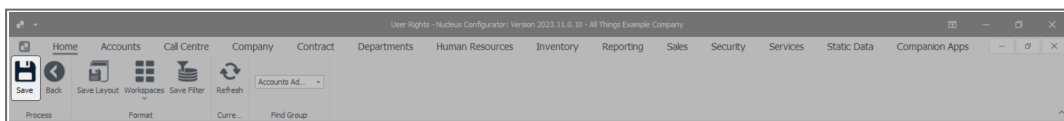


- Click on the **Access Level** field in the selected row.
- A drop-down **menu** will appear and you will select the relevant **Access Level**.

- In this image, **4 - No Access** is selected.



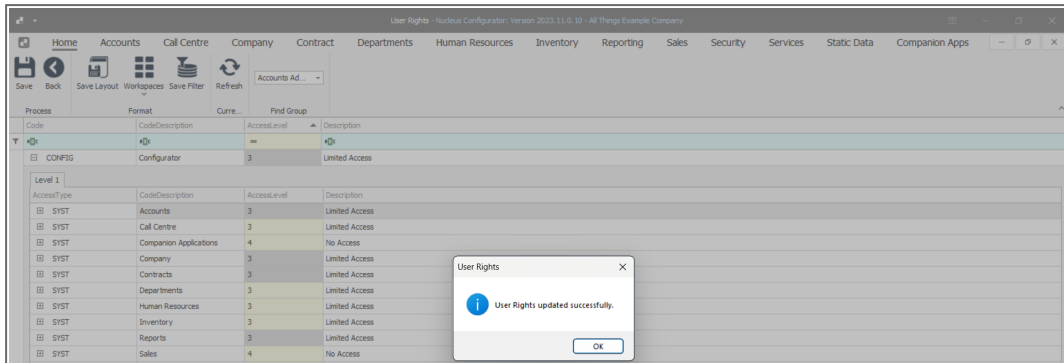
- Click on **Save**.



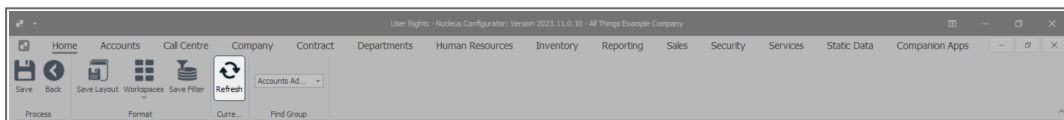
- A User Rights message will pop up saying -
  - **User Rights updated successfully.**



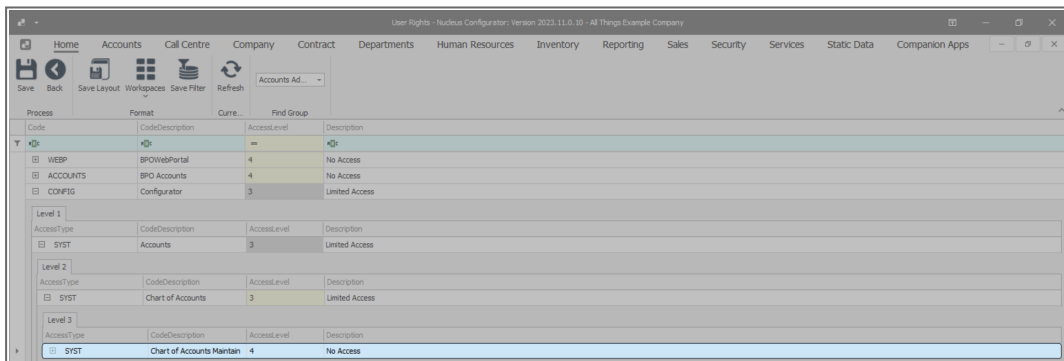
- Click on **OK**.



- Click **Refresh** to update the saved changes.



- You will return to the User Rights screen.
  - This image shows the updated **Access Level** of **SYST - Chart of Accounts Maintain** from **3 - Limited Access** to **4 - No Access**.



## IMPORTANT NOTES

- If you are setting up a **new group** from **scratch**, it is a good idea to set the **'Company Modules: Site' Access** first, otherwise you **cannot** assign a user to this group you have created, and the user will

not be able to log into **Nucleus Service**.

- Set the **Site** (Branch) security dependant on which Sites the user may have access to.

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### Related Topics

- [Security - User Group and Security](#)
- [User and Group Security - Create a New User](#)
- [User Group and Security - Edit a User](#)
- [Delete a User](#)
- [User Group and Security - Create New Group](#)
- [User Group and Security - Edit a Group](#)
- [User Group and Security - Procurement Authorisation](#)
- [User Group and Security - Purchase Requisition Release for Approval Override](#)

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