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.

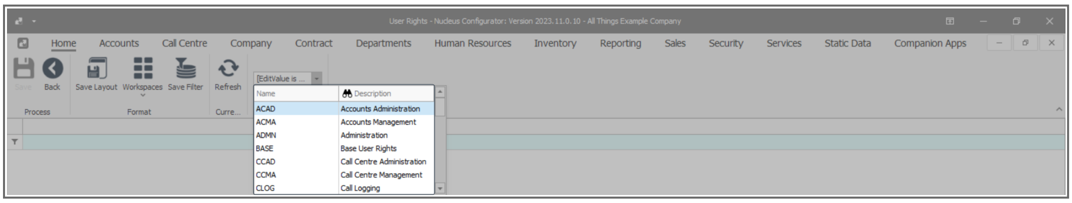
Ribbon Access: Configurator > Security > User and Group Security

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

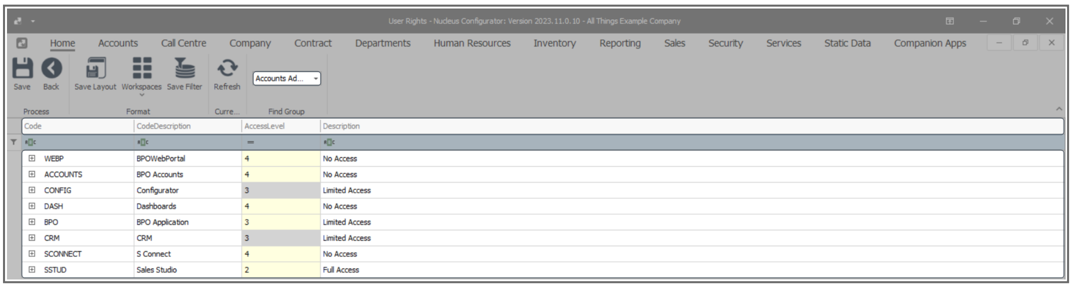
SELECT USER GROUP

- 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.



ACCESS TYPES

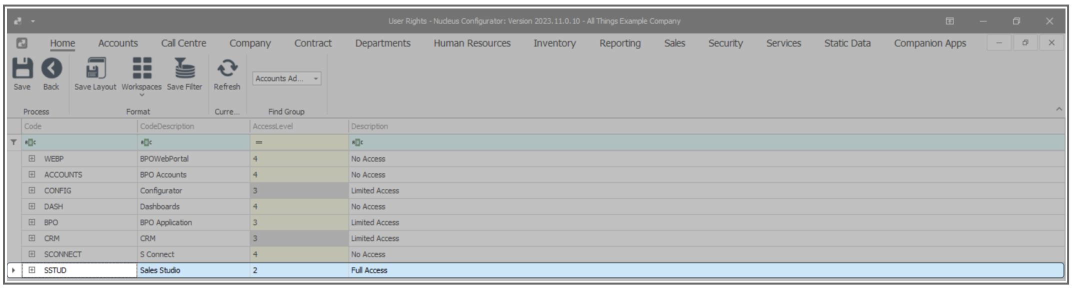
- **System**: This sets the system functionality security (whether the user can perform the function).
- **Menu Access**: This access type sets the security for the ability to select the item in the Nucleus Service menu.
- **All Other Access Types**: This sets the security for each individual screen,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

ACCESS LEVELS

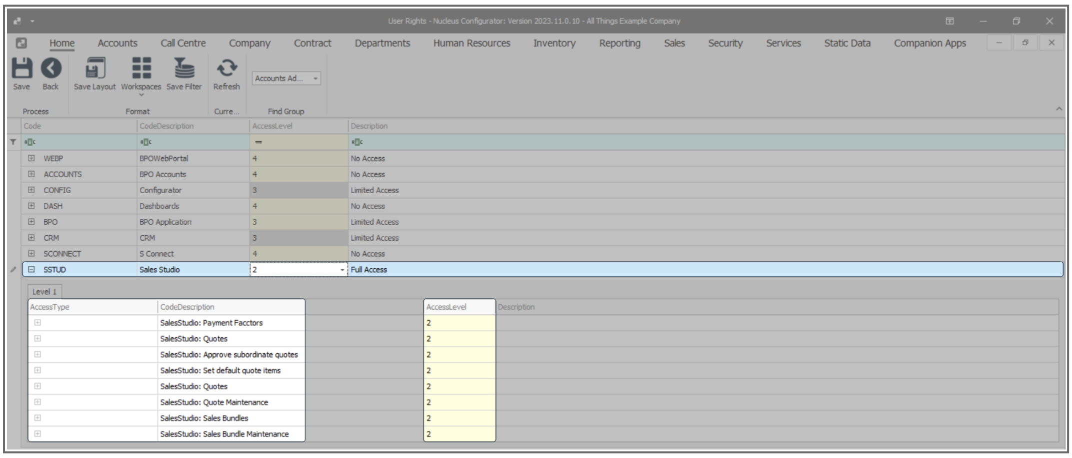
- **1 - Unlimited Access**: Access to all parts of the system.
- **2 - Full Access**: Access to all parts of the system.
- **3 - Limited Access**: Read Only.
- **4 - No Access**: Not accessible in Nucleus Service.

SET ACCESS LEVEL

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

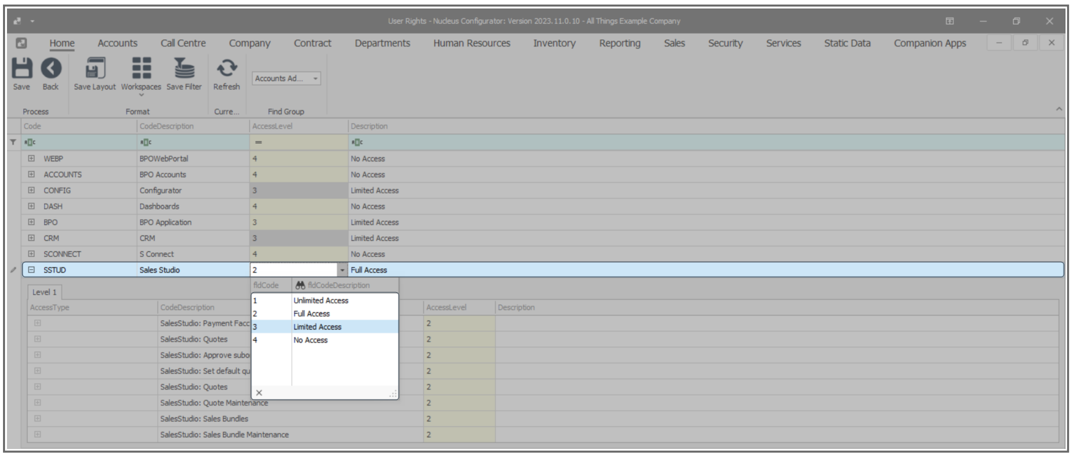


- Click on the **expand** button of the selected row.
- A drop-down **data grid** will appear showing the **Access Level** for each **Access Type**.
  - This image shows **Access Levels** for Sales Studio are set at **2 - Full Access**.



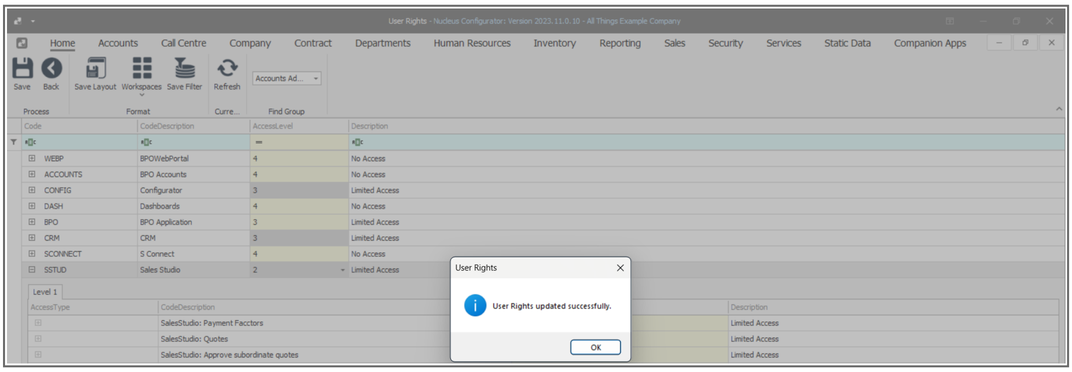
- Click on the **Access Level** field in the selected row.
- A drop-down **menu** will appear and you will select the relevant **Access Level**.

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



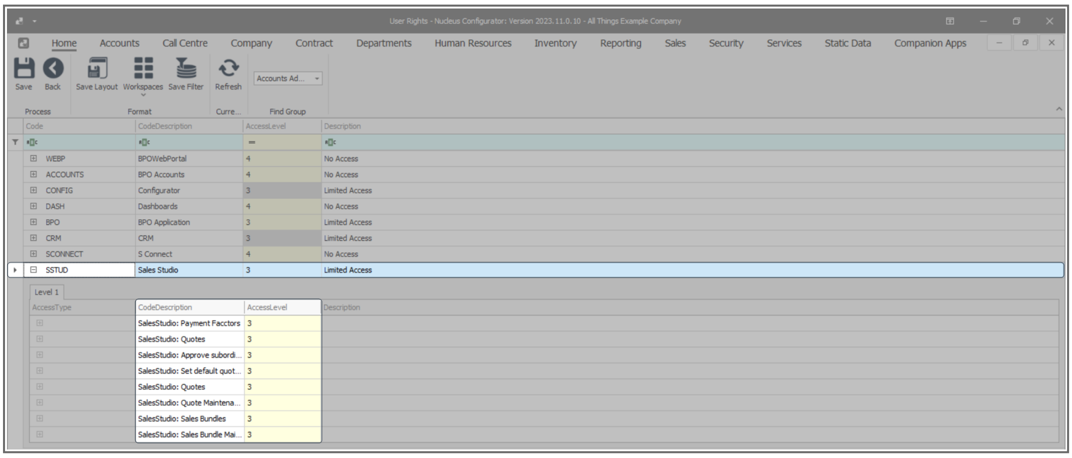
- Click on **Save**.

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



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

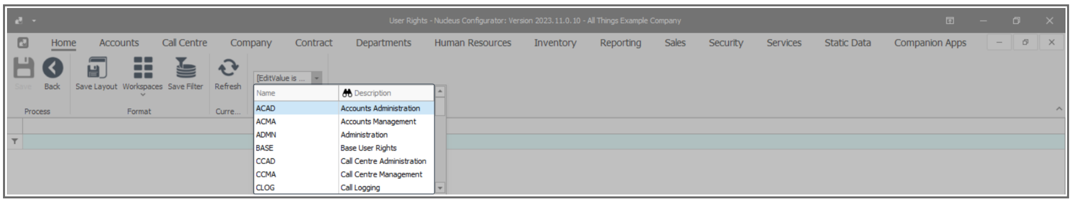
- You will return to the User Rights screen showing the updated **Access Level**.
    - This image shows Sales Studio **Access Level** updated from **2 - Full Access** to **3 - Limited Access**.



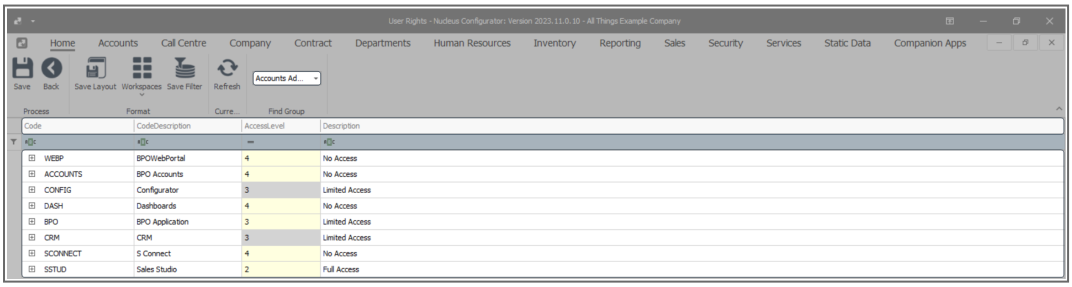
SET ACCESS LEVELS ON SUB CODES

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

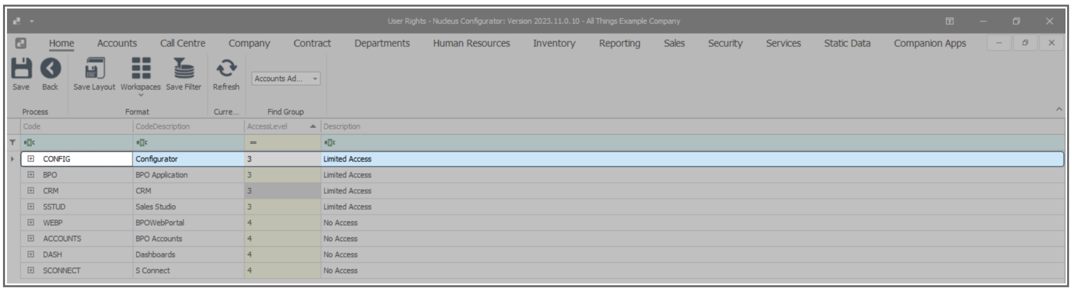
- A **Group Name** and **Description** drop-down list will be displayed.
- Select the **Group Name** that you wish to set the **Access Level** for.
    - In this image, **Accounts Administration** is selected.



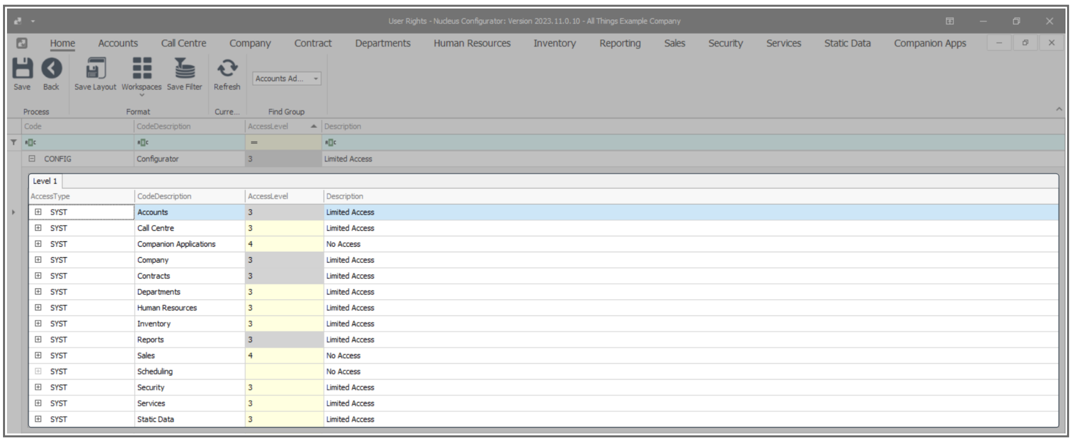
- The **Code and Access Level** data grid will be displayed.



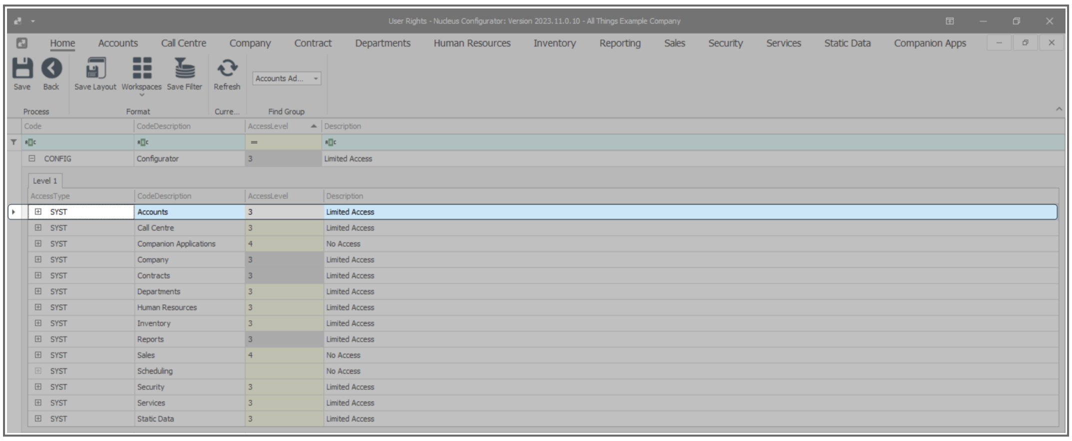
- Select the **Code** you wish to set the **Access Level** for.
  - In this image, **Configurator** is selected.



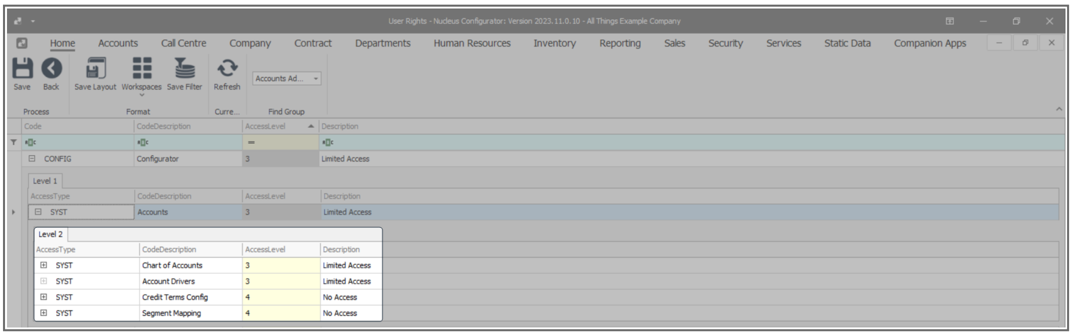
- Click on the **expand** button of the selected row.
- A drop-down **data grid** will appear showing **Level 1**.



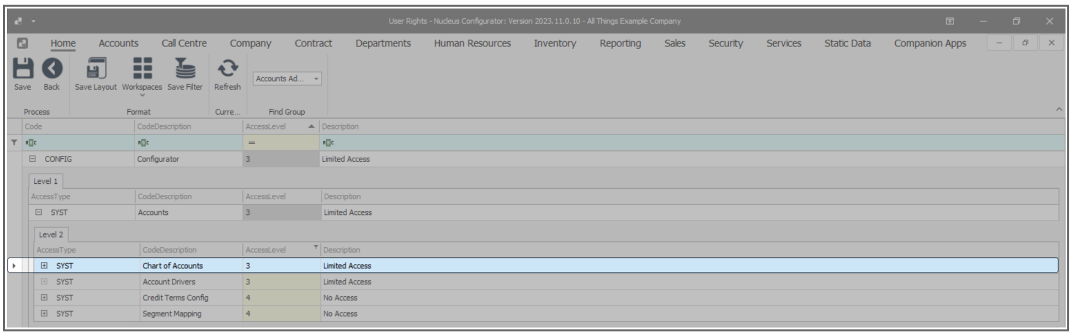
- Select the **Code** you wish to set the **Access Level** for.
  - In this image, **SYST - Accounts** is selected.



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

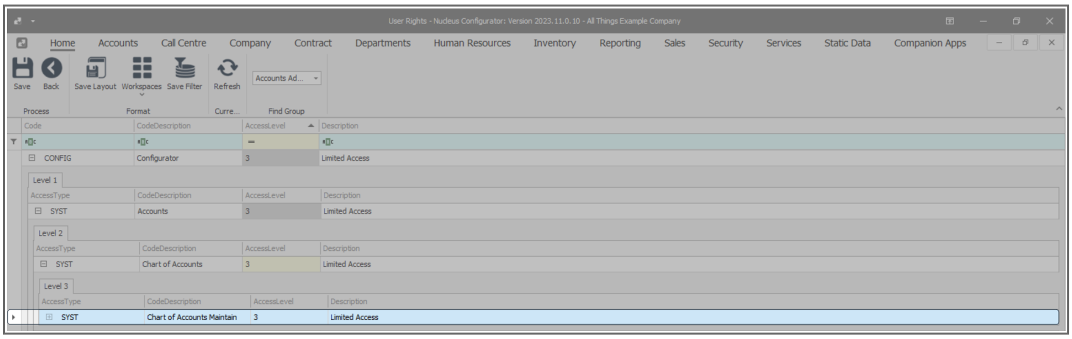


- Select the **Code** you wish to set the **Access Level** for.
    - In this image, **SYST - Chart of Accounts** is selected.

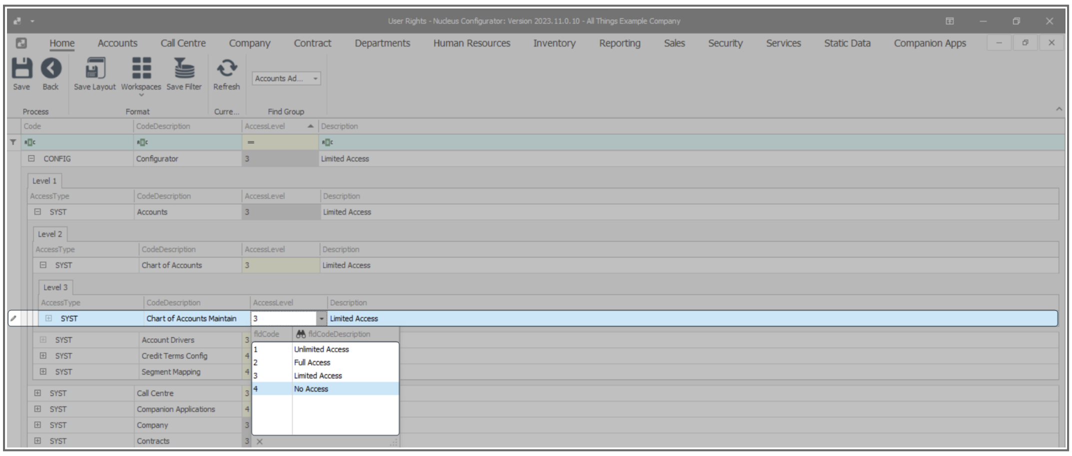


- Click on the **expand** button of the selected row.

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



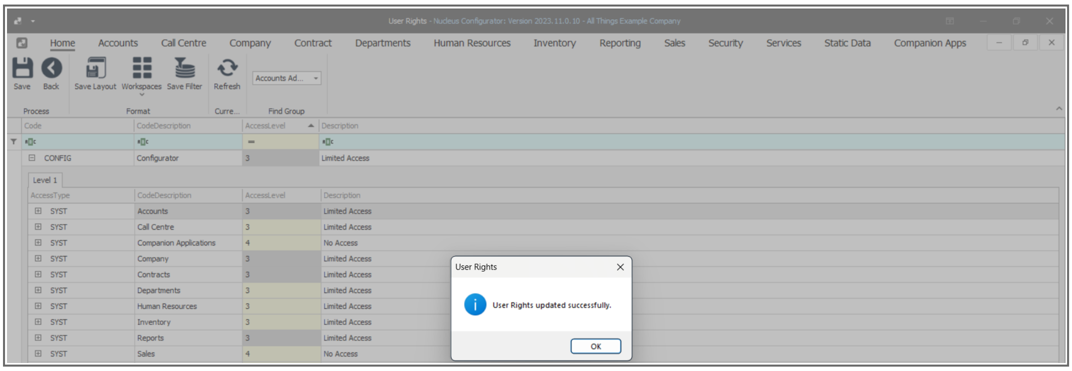
- Click on the **Access Level** field in the selected row.
- A drop-down **menu** will appear and you will select the relevant **Access Level**.
    - In this image, **4 - No Access** is selected.



- Click on **Save**.

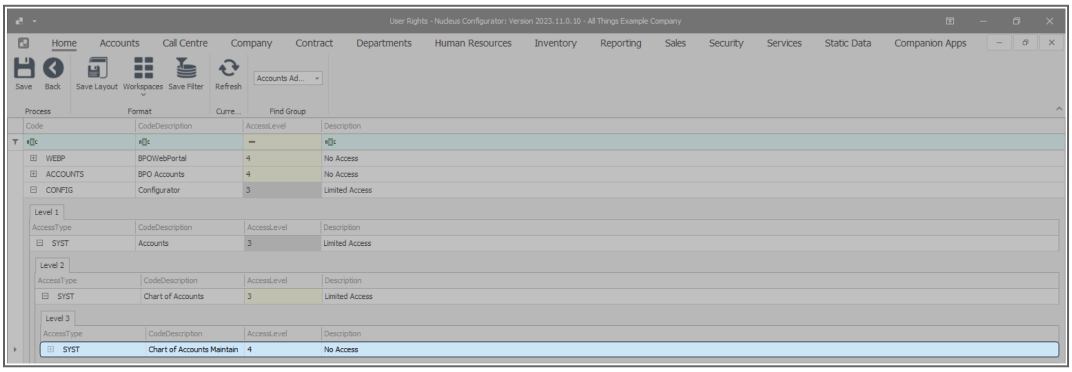
- A User Rights message will pop up saying -
    - **User Rights updated successfully**.

- 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.

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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