

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 <u>each</u> 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.





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.

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• The Code and Access Level data grid will be displayed.

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	E BPO	BPO Application	3	Limited Access										
	E CRM	CRM	3	Limited Access										
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#### **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.

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•	⊞ SSTUD		Sales Studio		2		Full Access											

- 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.

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- 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**.

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• Click on Save.



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

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		SalesStudio: Approve sub	ordinate quotes						Limited	Access				

• 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.

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### **SET ACCESS LEVELS ON SUB CODES**

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

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- 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.

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• The Code and Access Level data grid will be displayed.

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

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

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



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- Click on the **expand** button of the selected row.
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   Image: Second Configuration Version 2020.11.0.90 41 Things Exercise Company

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   Image: Second Configuration Version Configuration Version Configuration Version Version
- 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.

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



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

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- 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.

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• Click on Save.



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



• Click on OK.

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• 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.

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#### **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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