

Security Concepts Overview

Security Maintenance Concept is defined as the management of a user's ability to access data on the system. This means you can restrict access by role, meaning by the job function of your user, or by the terminal, meaning by the workstation being used. Your system's security features offer some simple tools to protect your data.

Objectives

- Security Concepts Workflow

Security Concepts Workflow

Epicor Eagle's security is divided into two types: role-based and terminal-based. Let's take a look at what *Role-based Security* has to offer.

Role-based security assigns permissions to a specific group based on job function. For example, counter salesclerks and purchasing clerks have different requirements in the system. Assigning a role gives them only permissions required to do their job. These permissions are defined when you create a role.

You can use pre-defined security templates to create roles from this table and add individual security bits to roles to tailor the security to your business needs. For example, you can create a role using the **POSCLERK** template and then add permissions to this role.

If none of the predefined templates suit your needs, you can create a new role completely without using any template.

An important benefit of role-based security is flexibility. As your employees develop their skills and grow into new jobs, you can easily assign a new role that automatically adjusts their permissions.

For instance, an employee might move from *Point of Sale Clerk* to *Point of Sale Lead*. All you have to do is assign the new role to them.

Terminal-based security works regardless of who logs in because that particular terminal is only given certain permissions. Terminal-Based users are set up with specific permissions at specific terminals. This means a given user could have different permissions at different terminals in the store.

When assigning security to users, you can use pre-defined security templates, and you can also assign individual roles. Oftentimes you may use a combination of both methods.

For example, you might copy the template POSCLERK to a POS clerk, but also assign the clerk certain other security bits that they will need. Unlike Role-Based Security, adding or subtracting bits with Terminal-Based Security is done on a user-by-user basis.

For more information on Role-based and Terminal based Security refer to the courses present in *Epicor Learning Center*

Recap

The security features of Eagle offer some simple tools to protect your data.

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