Role Based Security Transcript

Andrew: Hmm. Hey Robert can you come help me?

Robert: Sure Andrew. What's up?

Andrew: These customers want to pay with a different Tender type and I'm not quite sure how to process them all.

Robert:

Topics-

- Add, Change and Delete Eagle Users

- Manage Security Bits

- Assign Roles to Users

Add Change, and Delete Eagle Users

Add-

When an employee has a change to their contact information or forgets their password, you can easily update their user record. Open System Management, then Security Maintenance, and click Role Based Security Maintenance. Click the Miscellaneous button at the top of the page and then choose Add/Delete/Change User.

Click number 3 to Change a User. Select the correct store from the dropdown list and click OK. Choose the User you want to change from the dropdown list and click OK. Update any of the information including the Password if needed, and click OK. The window closes and saves your changes. If you updated the password, be sure to ask your employee to test it.

Change-

When an employee has a change to their contact information or forgets their password, you can easily update their user record. Open System Management, then Security Maintenance and click Role Based Security Maintenance. Click the

Miscellaneous button at the top of the page and then choose Add/Delete/Change User.

Press number 3 to Change a User. Select the correct store from the dropdown list and click OK. Choose the User you want to change from the dropdown list and click OK. Update any of the information including the Password if needed and click OK. The window closes and your changes are saved. If you updated the password be sure to ask your employee to test it.

Delete-

When you hire new employees, they will need to be added as a User so that they can log in and function with the proper security settings. Open System Management, then Security Maintenance and click Role Based Security Maintenance. Click the Miscellaneous button at the top of the page and then choose Add/Delete/Change User.

Click number 1, Add a User. Fill out as much information as you can. A Best Practice is to use High Security passwords. Click OK. The new User is now available and ready for you to assign a security role or roles.

Manage Security Bits

To manage the security bits associated with each Role, start in the Eagle Browser. From the System Managements folder, select Security Maintenance. Then choose Role-Based Security Maintenance. You can also type RBS in the Eagle Launch Bar. Once there, select the miscellaneous button and choose Maintain Roles.

From the Role dropdown list, select the one you wish to manage. Then press Enter, or Display. Now you can see all of the security bits and their status within this Role.

If there is a YES in the Authorized column, it means this bit has been assigned to this Role. To change the setting from Yes to No and vice versa, select the text in the Authorized column. When you have made all of the necessary edits, select Change from the Ribbon Menu.

Assign Roles to Users

After developing a Role, you need to assign it to specific Users. Begin in Role-Based Security Maintenance. This screen Defaults to display "By User"

Select a User from the User Dropdown menu. Then press Enter. Here you can see all of the Roles currently assigned to this user.

If a field is blank, it means the Role has not been assigned. If you have multiple stores, you can see what Roles have been assigned in each store. To add a Role, select the blank box in the store field on the correct line.

When you want to remove a Role, simply select the word Yes and the Role will be removed. When you have finished assigning Roles, press Change in the Ribbon menu.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

EPICOR.

Corporate Office	Latin America and Caribbean	Europe, Middle East and Africa	Asia	Australia and New Zealand
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int. 104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298