# Role Based Security

Your system collects and stores data that is vital to the success of the business.

Protecting that data by ensuring only authorized staff can access it is one of your first considerations when allowing access to the system.

In this course, we show how to create, change, and delete user records, how to manage security settings, and how to assign security-based roles to staff.

## Objectives

- Add, Change, Delete Users
- Manage Security Bits
- Assign Roles

## Add, Change, Delete Users

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.

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.

When an employee leaves, you can easily delete 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 2 to Delete a User.

Select the correct store from the dropdown list and click OK.

Choose the User you need to delete and click OK.

Confirm your action by pressing Yes.

The window closes and deletes the user.

You will no longer see it in the User dropdown list.

## 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

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.

## Recap

Role based security may seem complex but breaking it down into its component parts makes it easy to understand.

The true advantage of using role-based security is the ease in updating or modifying security roles and then applying the changes to each employee assigned that role.

In this course, we showed how to create, change, and delete user records, how to manage security settings, and how to assign security-based roles to staff.

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, the Epicor logo, and are trademarks of Epicor Software Corporation, registered in the United States and other countries. All other marks are owned by their respective owners. Copyright © 2021 Epicor Software Corporation. All rights reserved.

## 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**
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

**Latin America and Caribbean**
Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

**Europe, Middle East and Africa**
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

**Asia**
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

**Australia and New Zealand**
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298