Security Overview

Proper security prevents unauthorized access to transaction and customer data.

Let's discuss the importance of users and an assigned password or PIN.

Users have one or more role associated with them and that determines their permission settings.

There are also some system wide settings that affect access along with the enabled licenses.

Objectives

- Users, Passwords, and PINs

- Roles and Permissions

- Settings and Licenses

Users, Passwords, and PINs

When you log into just about any software you have a username and most likely, a password.

Managing users lets you control who can access your software and what they can do once they have logged in.

Basic contact information is gathered and easily updated.

Strong passwords are not only smart, but a requirement when adding new users.

PIN numbers can be created for Point-of-Sale log in.

Each user has a status and is identified as someone that can update other user records or has access to all administrative functions.

These toggles represent some important decisions so be sure you identify who in your business will have this functionality.

Finally, the user record contains the list of assigned licenses and assigned roles.

We will explore those concepts next.

Roles and Permissions

You can think of a role kind of like a job description.

For example, a clerk could be a role and that role performs certain functions at point of sale.

The permissions enabled for that role determine what the cashier can and cannot do.

Permissions are either allowed or not allowed.

When assigning a role to the user – the user inherits all the rules associated with that role.

So, the user is then allowed or not allowed to perform certain functions.

Settings and Licenses

In addition to users and roles, settings and licenses determine your software behavior.

Settings are associated with applications.

The value field can affect process workflows, costing methods or even naming conventions.

Licenses are enabled based on your sales agreement.

There are a defined number available and assigned.

Those licenses are assigned to the user and again, determine what that person can and cannot do.

Recap

Users, permissions, roles, settings, and license all play a part in developing a solid security structure.

Passwords and PIN numbers help secure your data.

Defined roles make sure everyone has access to the applications they need.

And settings and licenses determine how you do business.

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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