# Epicor ECM (DocStar) – Security Classes

In this course, we’ll look at what Security Classes are, how to set them up, what objects are affected by security classes, and how to apply security classes to these objects. Then, we’ll look at how to provide Ad Hoc permissions.

Objectives

* Security Classes
* Applying Security Classes to Objects
* Ad Hoc Security

Security Classes

Security Classes define security rights to objects such as content files, content types, inboxes, folders, and workflows. They allow you to define who can view, modify, or delete objects, and various other things.

When you create a security class, you add users or user groups to the class, and specify the security permissions each group or user will have in that security class.

To create security classes, navigate to the Admin page and, in the Manage column, select Security Classes. The Security Classes screen displays.

By default, this screen is set up to create a new security class, but you can access existing classes via the Select a Security Class drop-down.

To create a new class, make sure New displays in this field, and enter a Name and optional Description for the security class.

Selecting the Report Folder check box will create a folder specifically for this security class. Reports in this folder will only be visible to users who have permission to access it.

You can add both users and/or groups to the security class. Just select Add User or Add Group, then search and select. Hold down CTRL to select multiple users or groups.

Now that we’ve selected some groups, we can set their security permissions. It’s important to note that you can select different security permissions for each user or group. In this example, several groups are in the Accounting security class, but each has different permissions, set according to what activities each group carries out.

For details of what each permission is for, view the Online Help.

When you’ve set everything up, select Save. In the next topic, we’ll look at security in a bit more detail.

Select the right arrow to move on.

Applying Security Classes to Objects

The last step to completing setup for Security Classes is to apply those Security Classes to objects throughout the Epicor ECM (DocStar) site.

In Epicor ECM (DocStar), objects that users can interact with are referred to as “securable objects”. We can apply security classes to these objects. Security Classes act like keys that open the doors which Epicor ECM (DocStar) uses to protect these objects.

The idea is to only give users access to the information they need, so users and groups need to have explicit permissions granted to see - or interact with - securable objects.

All such objects must have a Security Class assigned to them; most will be assigned to the Public class unless specified otherwise.

So, which objects are securable? Major examples are: Content Types, Content Items – such as documents, Folders, Inboxes, Record Categories, Workflows, Package Types and Packages, Form Templates and Forms Content, and Reports.

Regarding Content Types and Content Items, the recommended best practice is to set the Security Class in the Content Type and then not modify it. Setting these up correctly at the beginning will avoid headaches further down the road.

Some objects are not securable, meaning they are not subject to security classes. For example: Fields, Field Groups, Lists, and Stamps. These items are more like labels which are applied to the securable objects.

So, once you have permission to see an object, you can also see the fields and stamps and so on. You may or may not be allowed to modify these labels, but so long as you have permission to the object, you can see all these labels as well.

So, you can secure your content, and dictate the security levels of the users that need to access or edit it. And remember, you can only create security permission rules for securable objects.

Select the right arrow to move on.

Ad Hoc Security

There may be special cases where you want to give users access to an object even though they don’t have access to its security class.

For example, the HR department generally only allows HR employees to see its documents. But it’s time for employees’ performance review. The HR team can see the review documents, which come under the HR security class. But they also want to enable employees to view their own review document, even though they don’t have access to the HR security class.

They need to provide Ad Hoc permission. Here’s how to do it. Open the item in the Document Viewer, go to the Actions menu, and select Modify Security.

Here, you can grant access to a specific user – or user group. Also, you can specify exactly what security permissions they will have. In our example, we only want to allow the employee to view the document. We certainly won’t let them make changes, or delete the document!

Just hit Save, and the user now has special, Ad Hoc permissions for this single document.

Select the right arrow to move onto a quick recap.

Recap

In this course, we looked at security classes – what they are and how to create them, and we looked at securable objects, and how to apply a security class to them. Then, we looked at how to provide Ad Hoc permissions.

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