Security Overview *v6.70.07*

dvantage

Security - Advantage

General Overview

This user guide provides an overview of the Security modules in Advantage (User, Group and Module) and related modules such as Change Password, Password Policy, Report Writer Security Datasets and the Security Report.

Security Modules
The Security modules including the main Security module, User Security, Group Security and Module Access are used to:
- Add, edit and delete users.
- Set security limits for client/division/product limits, employee limits, and individual user settings.
- Manager user licenses
- Set password policies and manage expiration periods.
- Establish module rights.

Password Management Tools
In addition to the main security modules, users can change and/or reset their passwords when forgotten or lost directly from the Advantage and Webvantage login screens using the 'Change Password' and 'Forgotten Password' button.

Administrator Tools
The Admin tool in Webvantage provides administrators with a back-door utility that can easily be used to set or clear passwords.

Modules are defined as the various programs that reside in Advantage or Webvantage. When security rights are established for a module that exists in multiple areas, the rights automatically apply to all, and do not have to be established separately. The Security module allows for two levels of control.

- Group
- User

Setup

User Security

User Security is used to add, edit and delete users. From this module:

- Add - Add new users by assigning a user code and associating them with an employee.
- Delete - Delete single or multiple users – this action deletes the user from Security. The user will be removed and will no longer be able to access any modules.
- Change Password – Select the specific user and change the password on the fly by entering the New Password twice to confirm.
- Terminated Employees – Toggles between showing and hiding the terminated employees in the left panel list.
- Deactivate single or multiple users and remove them from security groups.
- Establish office, client/division/product and employee limits. Only available at this level.
- Establish module rights for the user (if overriding the group to grant additional access). Module rights include menu access, print, update, add, and custom options where applicable.
- Establish Report Access (within a report module, can only be set at this level).
- Establish User Settings (items that can only be set at this level):
    - Limit Time Entry to Employee Code Attached
    - Limit Timesheet Function
    - Limit PO to Employee Code Attached.
    - Webvantage User Only (Standard User)
    - Allow Profile Update (controls Webvantage Profile tab availability in My Settings).
    - Is a CRM User
    - Is a Media Tools User
- Multi-select users and apply rights to all selected users at once.

User License Info

The User License Info section of the toolbar displays the Total and Available Licenses for Power Users, Standard Users and Media Tools Users. On the left panel, the specific license type for each user is checked in the Power User, Standard User or Media Tools user columns.   The available licenses are updated in real-time.

Group Setup

Groups may be created to represent a set of security rights and users may be assigned to those groups accordingly. Users can belong to more than one group. If a user belongs to multiple groups and rights are granted to modules differently in those groups (one blocked and one allowed) the system will always 'allow' access in this case. Groups override the user level security in most cases, so it will be important to make sure all users are part of a group. From this module:

- Add users to groups.
- Establish module rights for the group. Module rights include menu access, print, update, add, and custom options where applicable.
- Establish Group Settings (items that can only be set at this level):
  - Allow Task Edit.
  - Calendar Settings (Add Holidays and View Other Employees).
  - Alert Inbox Settings (Show All, Show Unassigned).
  - Document Manager Settings (Can Upload, Can View Private).
- Multi-select groups and apply rights to all selected groups at once.

- Group rights override the User security unless the check box to "Check for User Access" is activated for the individual user. In this case, if the user level allows access to a module, rights will be granted. It allows special access to individual users. If the user is part of a group, User level rights can only be 'granted' at this level, not blocked. Granted rights (at any level) always override blocked.

Module Setup allows you to establish rights for any/all modules for groups and users at the same time. It's an alternative view, from the 'module' perspective. This module includes special options such as:
- Block/Unblock all (for selected groups and users).
- Set **User Detail Rights** such as print, update, add and custom 1/custom 2 settings for modules (for selected groups and users).
- Narrow modules by type such as Modules, Reports, Dashboards/Queries and Desktop Objects.

Modules are broken down into types which can be filtered - Modules, Reports, Dashboard/Queries, and Desktop Objects.
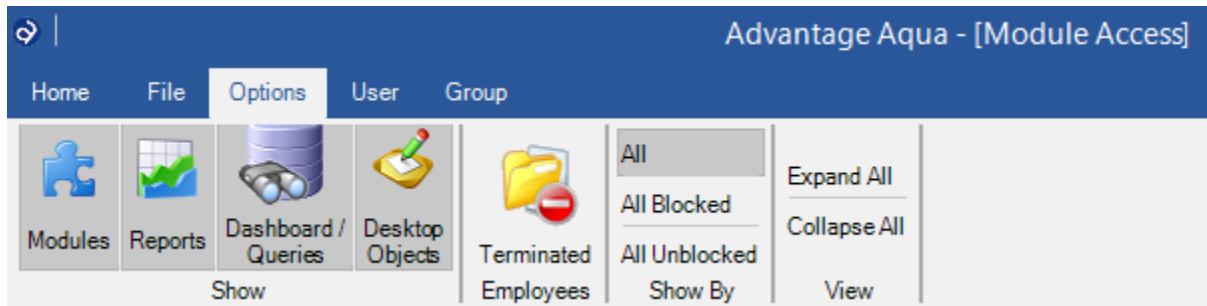
Module Access

Under the Module Access tab from any level (User, Group or Module), you will find the available "Applications" listed. Security rights may be granted or blocked for entire Applications using this feature by Group or User. Applications available are:

- Advantage – Block to disallow access (login).
- Webvantage – Block to disallow access (login).
- Outlook Add In – Block to disallow access (login).
- Advantage Database Update – Block to disallow access (login).
- Adassist – Block to disallow entering an Adassist Password. Does not block access to login, blocks the ability for the user to enter or change their password (without existence of a password, user cannot login).

General tools available in the Security Modules

- Each module contains a tab on the ribbon called Options. Module Setup contains two additional tabs on the ribbon for Users and Groups. Depending on the module you are using (Group, User or Module), different ribbon tabs and options may appear. The options include ways to expand and collapse levels, filter module types, or set flags.
- Rows may be multi-selected using the **shift or control key**. This allows updating of multiple rows at once where applicable. When selecting multiple rows, the Is Blocked indicator will display as unblocked. To set the rights for all selected items, check and uncheck or re-check the Is Blocked checkbox. This establishes the rights for all selected items regardless of their original state.
- Columns with a 'filter' indicator (funnel icon on top right of column) can be used to narrow data displayed, or sorted (click to sort).
- User Detail Rights may be set to control detail rights (add, update, print) where supported.
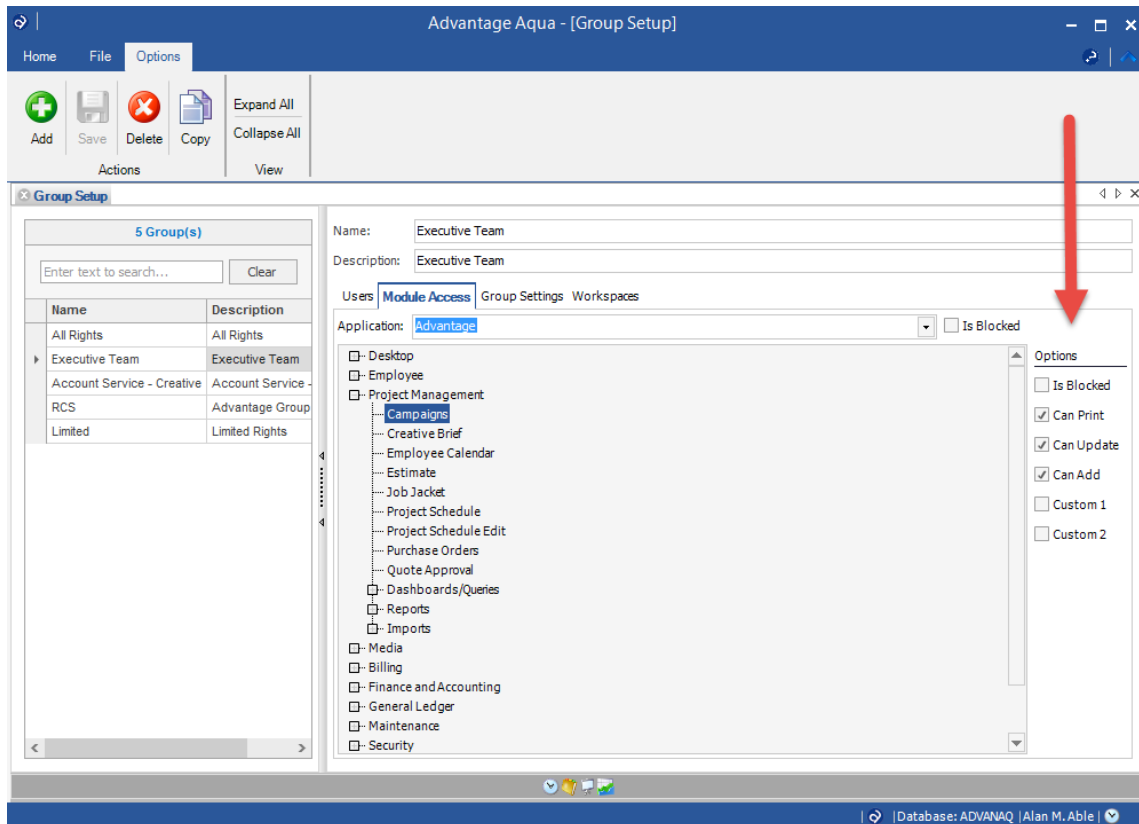
Examples of possible uses of tools:

Group Setup: Add users to groups by department.

- Filter employees by department. Multi-select employees. Use arrow to move selected employees to selected group.

User Setup: Setup Office Limits by employee so limit access to all data by the assigned office.

User Setup: Setup CDP Limits by department and set time entry only option.

- Filter employees by department. Multi-select employees. Filter or multi-select CDPs and use arrow to move to the limit window. Multi-select CDP's and set Allow Time Entry option as desired.

Module Setup: Block a set of modules for groups or users.

- Select the module or multi-select modules for which to establish rights. Use special options to set 'all' or individually select groups and users and change rights.

How Advantage and Webvantage Read Rights

Module Access:

Modules (menu level) check the security settings to determine access. If users belong to groups, the group access is used by default. If a user belongs to one or more groups that allow access to the module, they will be able to enter the module.

For example, if you previously established a security group in Webvantage that permitted access to the Job Jacket, and another group in Advantage denied access to the Job Jacket, users that are part of those two groups would be permitted access to the Job Jacket in both applications (Webvantage and Advantage). The Job Jacket is an example of a module that exists in both applications and therefore the security is shared.

User-level rights may be established and will be used if the "Check for User Access" option is selected at the user level, or if the user does not belong to a group. It allows special access to individual users. If the user is part of a group, User level rights can only be 'granted' at this level, not blocked. Granted rights (at any level) always override blocked.

Office, Client/Division/Product Limits, Employee Limits, and User Rights:

These rights are established by User. Limits and User Settings may be applied to other users within the User Setup module.

Password Management -User
Password Utilities for Users
The main log in page for both Advantage and Webvantage provides users with two utilities to manage their own passwords.

- Change Password – Allows the employees who know their old password to change their login password.   Password changes required the entry of the Old Password, New Password and a second entry of the new password for confirmation.
- Forgot Password –Allows the employee to reset their login password when forgotten or lost. A message prompting the user to check their email for instructions is generated. Once the email is opened, a five-letter code can be copied and pasted into the Change Password pop-up. Enter the new password twice and click Save
- Admin Tool – When no email addresses are set up for employees in the database, the Admin Tool provides IT Administrators with a utility in Webvantage to update employee passwords. See more details in the IT Password Management section.

Change Password (User Password Maintenance)

Users control their own Adassist, Billing Approval and Quote Approval and other passwords using the Change Password module under the Security menu. If a user does not have a row in the Billing Approval or Quote Approval modules, the password options for those modules are not available. To establish a password for Billing Approval or Quote Approval (which is required in order for users to change this password), use the appropriate module under the Security menu.

Password Management -Admin

IT Password Management

IT Admins can use the IT Password Management utility from the Webvantage login screen by using the key combo : CTRL+ALT+p. The normal sign in will be removed and the Admin Sign in will be displayed. The user code should have the same permissions/roles as the user used for the DB Update application. Passwords for each employee can be changed or cleared.

Password Policy.
The Password Policy module in both Advantage and Webvantage is used by Administrators to define and enforce the specific rules required for passwords when logging info Advantage or Webvantage. The initial default settings are included in the list below and can be modified for each agency using the Advantage Update Wizard. On the login screen, a warning will be displayed when any of the rules have not been met for the set password.   The policy settings are optional and include all of the following:

- Minimum password length = 2 (Default)
- Password complexity required = Y (Default)
- Uppercase = Y (Default)
- Lowercase = Y (Default)
- Number = Y (Default)
- Special Character = Y (Default)
- Password History
- Password expiration (age) days
- Attempts before Lockout
- Lockout Reset (in minutes)

Desktop/Report Writer – Security Datasets
The following datasets are available to be used to build customized reports to help manage and maintain user security.

- Security Group Module Access
- Group Settings Only
- Group User Settings
- Security User Module Access
- Security User Settings

Security Report
The Security Report offers the following four report formats to display user rights based on the assigned group (s) or user access.   Each of the reports can be run for all or selected employees.
- Security Permission
- Employee Summary
- Group Security Permission
- Group Summary

New Modules and the Message Board:
All new modules will be added to the security as 'blocked' by default.   This ensures that when you upgrade either Advantage or Webvantage, access to any new modules is not permitted until security rights are granted. A message board is available to display new modules added with the current release. From the Advantage/File Menu (lower menu bar) and from the Webvantage (top menu

bar) – click on the "A" icon to see a list of modules or options that have been added (and will be blocked) with this version. Within the Advantage message board, click on Options to navigate to Security.