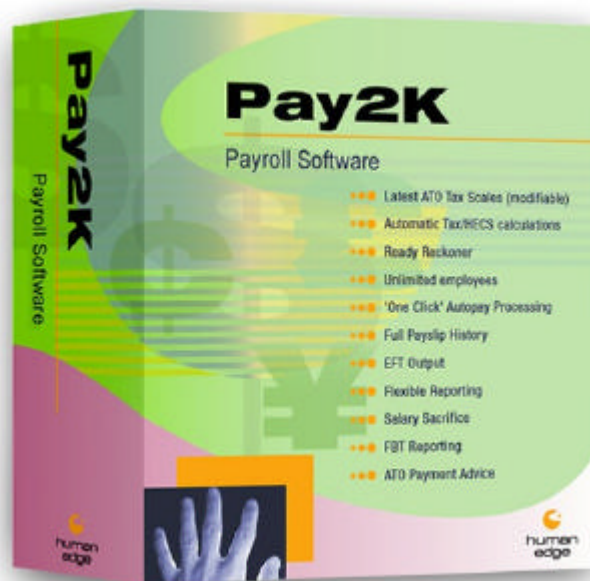


# Pay2K



The Payroll Package with  
Attitude and Aptitude

## Security User Guide



Human Edge Software Corporation Pty Ltd  
417 City Road  
South Melbourne Vic 3205

Support Centre: 1300 301 931

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# Pay2k Security

## Overview

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### Introduction

Security is needed to restrict access to the confidential information that is contained in Pay2k.

This document looks at

- The different sections of the security form and explains their use.
  - How to set the password that will restrict access to the security form so only authorised individuals can change the security settings in Pay2k.
  - How to set up user logins and apply security to restrict the logins access to the different areas of Pay2k.
- 

### Contents

This chapter contains the following topics:

| Topic               | See Page |
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| Security Password.  | 8        |
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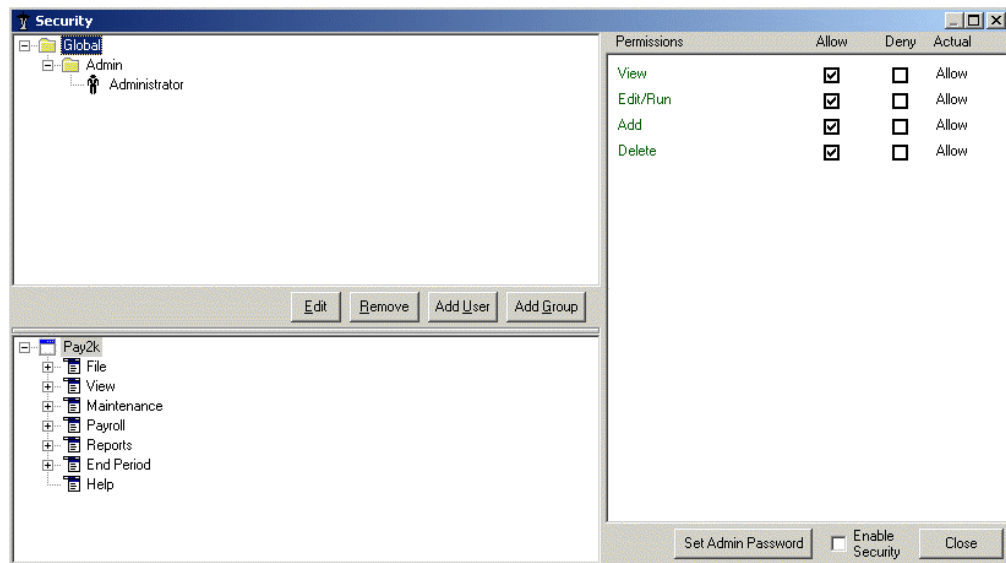
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# Pay2k Security Form

**Introduction** The Security module lets you specify the amount of access that individuals have to Pay2K.

The Pay2k Security form has 3 sections:

- Groups and Logins, top left.
- Menu Selection, bottom left.
- Permissions, right side.

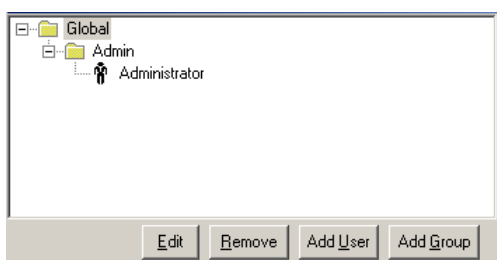


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## Pay2k Security Form, Continued

### Groups and Logins

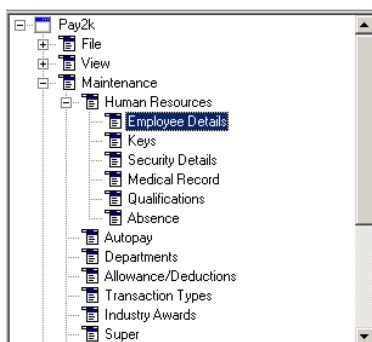
Is on the top left side of the form. This is where you add your security groups and the login names for individuals.



| Button    | Function  |
|-----------|---|
| Edit      | Lets you edit the details for the selected Group or Login   |
| Remove    | Removes the selected Group or Login.<br><b>Note:</b> A group can only be removed when it is empty; while it contains user logins it can not be removed.   |
| Add User  | Adds a new user login to security.  |
| Add Group | Adds a security group. Security groups are used to contain user logins that require the same level of access to Pay2k. Groups are used to make setting up security quicker. By setting up the security on the group that level of access is given to all the logins that are part of the group.<br><b>Example:</b> Five staff members require the same level of access to Pay2k. By setting up a group and assigning the five staff members to it you will only need to set up the security once for the group rather than setting up security on each login. |

### Menu Selection

Is on the bottom left side of the form. This is where you select the menus and forms that will have security applied.



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## Pay2k Security Form, Continued

**Permissions** Is on the right side of the form. This is where you set the access that will be given to the selected user or group for the selected menu or form.

| Permissions | Allow                    | Deny                     | Actual |
|-------------|--------------------------|--------------------------|--------|
| View        | <input type="checkbox"/> | <input type="checkbox"/> | Allow  |
| Edit/Run    | <input type="checkbox"/> | <input type="checkbox"/> | Allow  |
| Add         | <input type="checkbox"/> | <input type="checkbox"/> | Allow  |
| Delete      | <input type="checkbox"/> | <input type="checkbox"/> | Allow  |

Enable Security

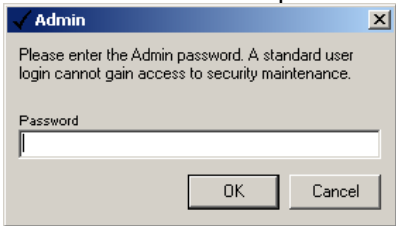
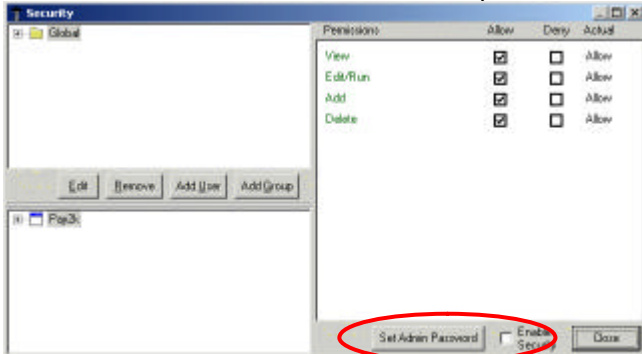

The areas of the permissions section are:

| Area               | Function  |
|--------------------|---|
| Permissions        | The permissions column lists the different permission levels that are available for the selected menu or form.  |
| Allow              | Place a tick in the allow column to give access to the selected permission level.   |
| Deny               | Place a tick in the deny column to deny access to the selected permissions level.   |
| Actual             | This states the permission level that will be assigned to the item if a selection is not made. The actual permission level is inherited from: <ul style="list-style-type: none"> <li>• the Group the item is part of, and</li> <li>• the Menu the item is part of.</li> </ul> |
| Set Admin Password | This button is used to set the admin password to access the security module.  |
| Enable Security    | Needs to be ticked for the security settings to be applied. If unticked all logins will have full access to all areas of Pay2k.   |

# Security Password

**Introduction** The security area has a password to restrict access to this form and prevent unauthorised changes to the security levels assigned to the user logins in Pay2k. When you start using Pay2k you need to set this password.

**Set By Step** Follow the steps below to set the admin password for the security form.

| Step | Action  |
|------|---|
| 1.   | Login to <b>PAY2K</b>   |
| 2.   | Select <b>FILE ► SECURITY</b> , from the menu.<br><br><b>Result:</b> An <b>ADMIN</b> password form will be displayed.<br>   |
| 3.   | Click on <b>OK</b> . No password will be set at this stage.<br><br><b>Result:</b> The <b>SECURITY</b> form will open.<br> |
| 4.   | Click on <b>SET ADMIN PASSWORD</b> .<br><br><b>Result:</b> The <b>SET ADMIN PASSWORD</b> form will open.<br>               |
| 5.   | Enter and confirm the password  |
| 6.   | Click on <b>OK</b> .<br><br><b>Result:</b> You will need to enter this password to access the Security form from now on.  |
| 7.   | Click on the <b>CLOSE</b> button to close the Security form.  |

# Setting up Security

## Overview

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**Introduction** This section looks at how you set up user logins and assign security to them in Pay2k.

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**Contents** This section contains the following topics:

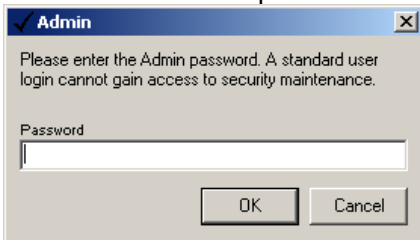
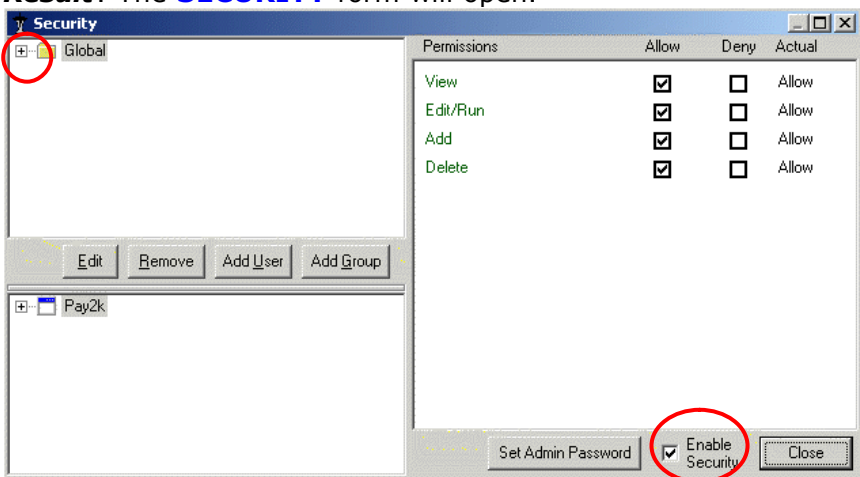
| Topic                          | See Page |
|--------------------------------|----------|
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| Assign Security                | 14       |

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## Add Security Groups and Logins

**Introduction** Security groups and logins need to be added to Pay2k. The groups and logins are used to allocate the security settings to. This enables you to determine who has access to the different areas in Pay2k.

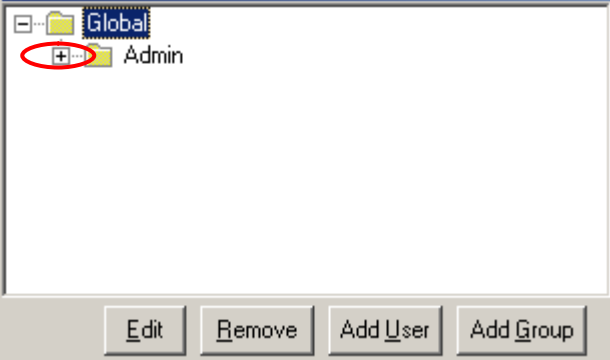
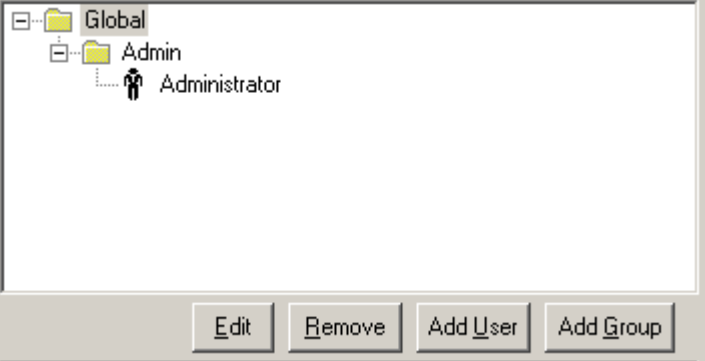
**Step By Step** Follow the steps in the table below to add a group or login.

| Step | Action  |
|------|---|
| 1.   | Login to <b>PAY2K</b>   |
| 2.   | Select <b>FILE</b> ▶ <b>SECURITY</b> .<br><br><b>Result:</b> An Admin password form will be displayed.<br> |
| 3.   | Enter the Admin Password and click on OK.<br><br><b>Result:</b> The <b>SECURITY</b> form will open.<br> |
| 4.   | Ensure <b>ENABLE SECURITY</b> is ticked.<br><b>Note:</b> The security settings you enter will only be applied if this option is ticked.   |

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## Add Security Groups and Logins, Continued

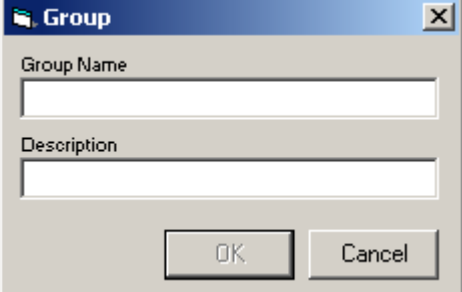
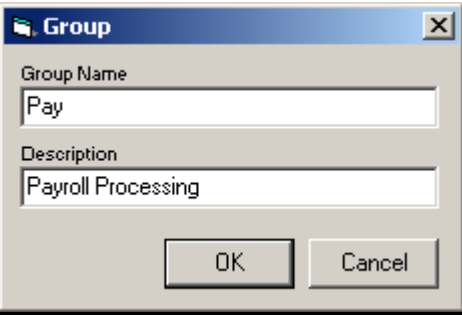
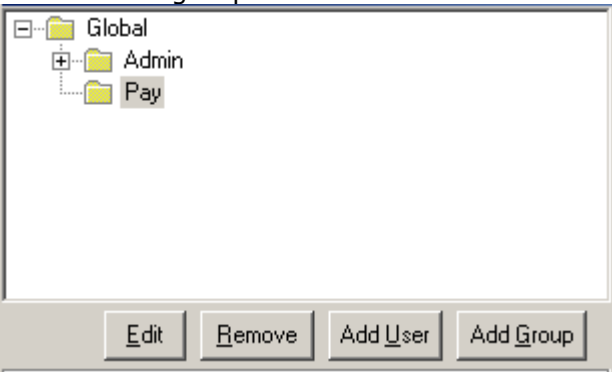
### Step By Step (continued)

| Step | Action  |
|------|---|
| 5.   | <p>On the top left section click on the plus to the left of Global.</p> <p><b>Result:</b> The Global folder will expand and display your existing security groups.</p>  |
| 6.   | <p>Click on the plus to the left of a group name.</p> <p><b>Result:</b> The members of the group will be displayed.</p>   |
| 7.   | <p>Refer to:<br/> <b>Add a Group</b> for instructions on adding a new security group.<br/> <b>Add a User</b> for instructions on adding a user login to a group.<br/>           This could be an existing group or a group you have just created.</p>     |

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## Add Security Groups and Logins, Continued

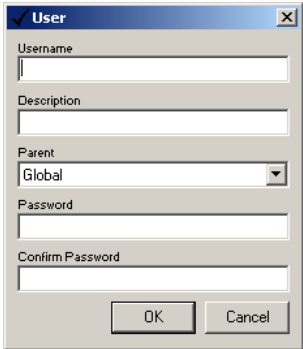
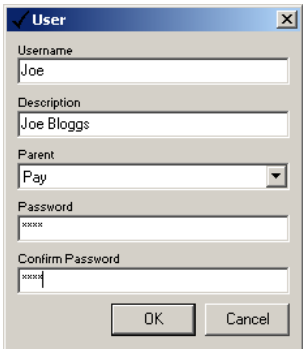
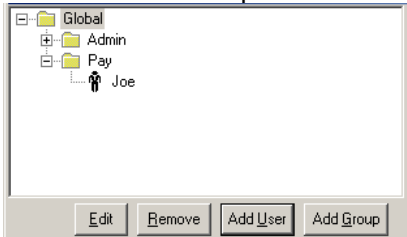
**Add a Group** Follow the steps in the table below to add a security group.

| Step | Action  |
|------|---|
| 1.   | <p>Click on the <b>ADD GROUP</b> button to add the details for a new security grouping.</p> <p><b>Result:</b> The <b>GROUP</b> form will open.</p>  |
| 2.   | <p>Enter the <b>GROUP NAME</b> and <b>DESCRIPTION</b>.</p>   |
| 3.   | <p>Click on <b>OK</b>.</p> <p><b>Result:</b> The group will be added to the list.</p>   |
| 4.   | Repeat steps 1 to 3 to add more groups.   |
| 5.   | Refer to <b>Add a User</b> for instruction on adding a user login to the group.   |

*Continued on next page*

## Add Security Groups and Logins, Continued

**Add a User** Follow the steps in the table below to add a user login.

| Step | Action   |
|------|--|
| 1.   | <p>Click on the <b>ADD USER</b> button to add a new login.</p> <p><b>Result:</b> The <b>USER</b> form will open.</p>    |
| 2.   | <p>Enter the</p> <ul style="list-style-type: none"> <li>• Username</li> <li>• Description</li> <li>• Parent, the Group that the user login is part of. Select the group from the drop down list.</li> <li>• Password</li> <li>• Confirm Password.</li> </ul>  |
| 3.   | <p>Click on <b>OK</b>.</p> <p><b>Result:</b> The new person will be added to the selected group.</p>    |
| 4.   | Repeat steps 1 to 3 to add more user logins.   |
| 5.   | Refer to <b>Assign Security</b> for details on how to set the security.  |

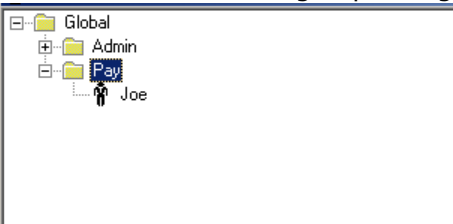
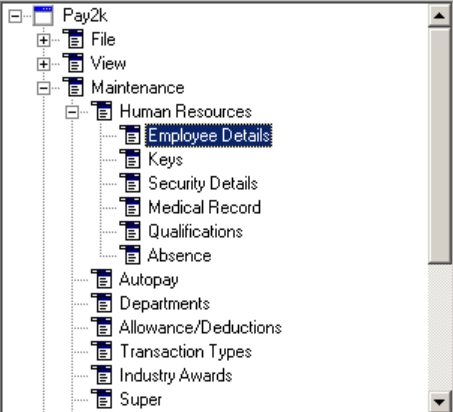
# Assign Security

**Introduction** A security level can be assigned to the security group and to the individual's login.

The login will automatically receive the security level set for the group it is a part of. This is useful were several people are to have the same level of access to Pay2k, as the security can be setup once at the group level.

The individual's login can then have specific items removed or added to it if one member of the group requires access to a function that the other group members do not.

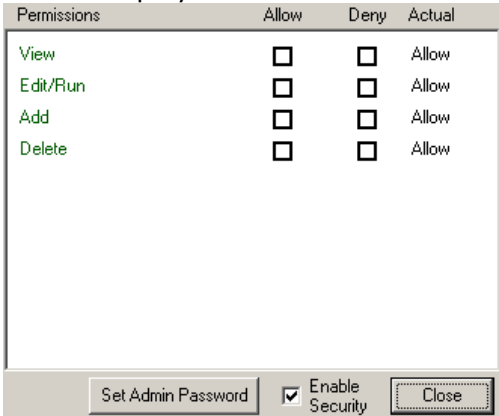
**Step By Step** Follow the steps in the table below to assign security to a group or login.

| Step | Action  |
|------|---|
| 1.   | <p>Click on the group or login you want to assign security to, located on the top left of the form.</p> <p><b>Result:</b> The selected group or login will be highlighted.</p>    |
| 2.   | <p>Select the menu item or form to assign security to, on the bottom left of the form.</p> <p><b>Note:</b> Click on the plus symbol to the left of a menu item to expand it and see the options below it.</p> <p><b>Result:</b> The menu option will be highlighted.</p>  |

*Continued on next page*

## Assign Security, Continued

### Step By Step (continued)

| Step | Action   |
|------|--|
| 3.   | <p>On the right side of the form the current security permissions for the selected group or login and the selected menu or form will be displayed.</p>   |
| 4.   | <p>Select to <b>ALLOW</b> or <b>DENY</b> access to the different levels of permission available on the selected menu or form.</p> <p><b>Note:</b> The <b>ACTUAL</b> column displays the access level that will be assigned if no selection is made.</p>  |
| 5.   | <p>Repeat steps 2 to 5 for each menu and form in Pay2k.</p> <p><b>Note:</b> If you deny access to a menu you do not need to deny access to all the items under that menu. If you give access to a menu then you will need to specify for each of the items under that menu the required level of access.</p> |
| 6.   | Click on <b>SAVE</b> on the tool bar.  |
| 7.   | Repeat steps 1 to 6 for each group or user login you are assigning security to.  |
| 8.   | <p>Ensure <b>ENABLE SECURITY</b> is ticked.</p> <p><b>Note:</b> The security settings will only be applied if this option is ticked.</p>   |
| 9.   | Click on <b>CLOSE</b> , when you have finished adding security.  |

### Test Login

To test the security on the user login exit out of Pay2k and login using the new user login. Check the areas of Pay2k that this login gives you access to. If the login is incorrect adjust the security for the user login using the 'Assign Security' instructions.

When the security on the user login is correct the login name and password can be given to the individual.