Setting up security groups

Goal: Define the access specific groups of employees have to information in Ajera.

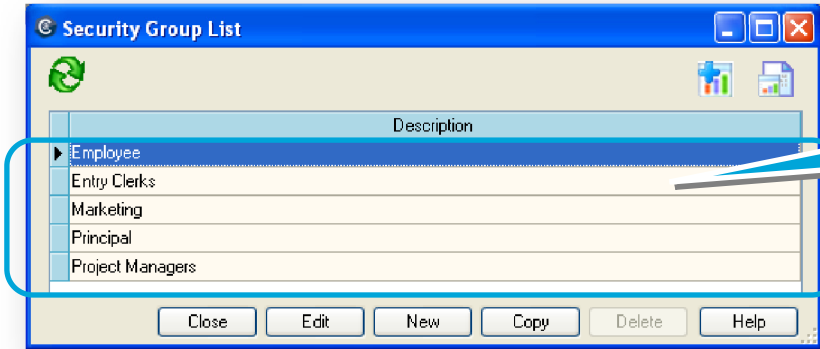
In this quick lesson

When you set up security groups in the Security Group List window, you define each group's access to information in Ajera. This information includes items on the Company, Setup, Manage, Reports, and Inquiry menus and areas in the Project Command Center.

While setting up employees, you designate their security group. As a result, when an employee logs into Ajera, the Ajera menu is customized to display that employee's tasks and reports based on the security group.

Step 1: View the Security Group List

1. Click **Company** > **Security**.
2. The Security Group List window displays the predefined security groups in Ajera.



Ajera contains these predefined security groups.

Ajera sets up the Administrator security group but does not display it because it must not be changed.

The Administrator security group has access to all options, tasks, and reports and to all employee user IDs and passwords.

As an added control, only employees assigned to the Administrator security group can add or change security settings.

Step 2: Select general settings

As an example, set up the project manager security group.

1. In the Security Group List window, select **Project Managers** and click the **Edit** button.
2. The General tab contains options that allow you to limit the general information that members of this security group can view. Make the appropriate selections.

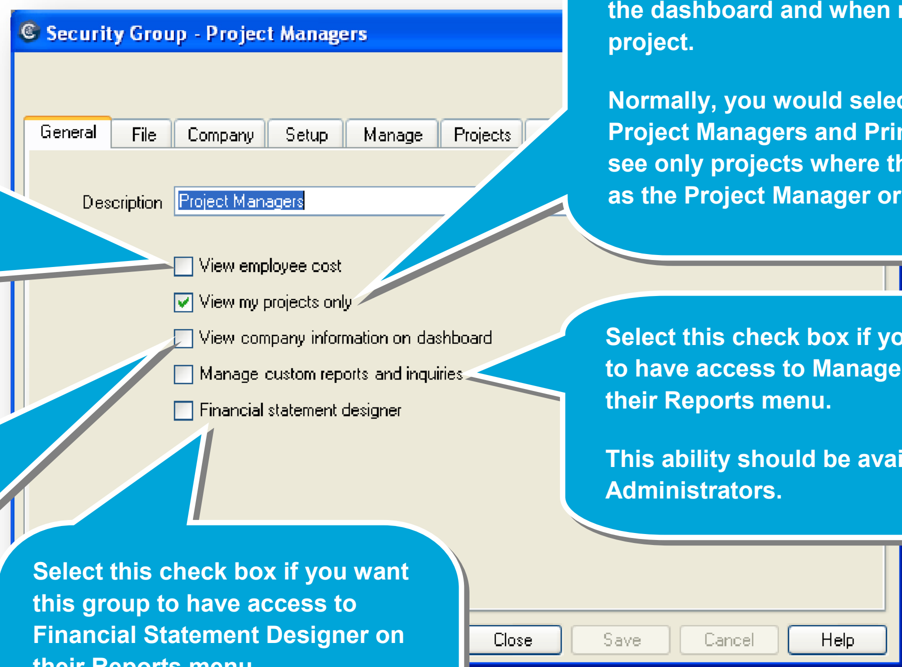
Select this check box if you want this group to see cost amounts on reports and client invoices.

Cost is the amount an employee is paid plus optional overhead markups. It is not necessarily the rate being billed.

This information typically is confidential.

Select this check box for if you want this group to view a customized list of projects on the dashboard and when managing time by project.

Normally, you would select this option for Project Managers and Principals so that they see only projects where they are designated as the Project Manager or Principal in charge.



Select this check box if you want this group to view companywide aging for cash, receivables and payables, key account balances, and trends.

This information typically should be available only to Principals and Accounting.

Select this check box if you want this group to have access to Manage Custom Reports on their Reports menu.

This ability should be available only to Administrators.

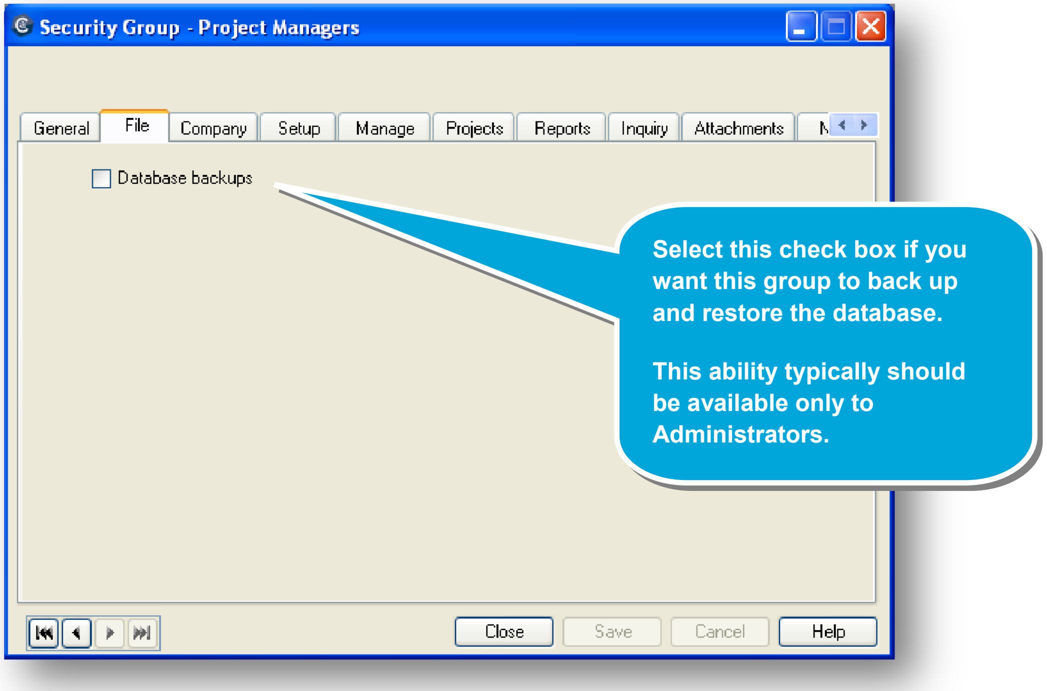
Select this check box if you want this group to have access to Financial Statement Designer on their Reports menu.

Use the designer to create your own financial statement designs.

This ability typically should be available only to Accounting.

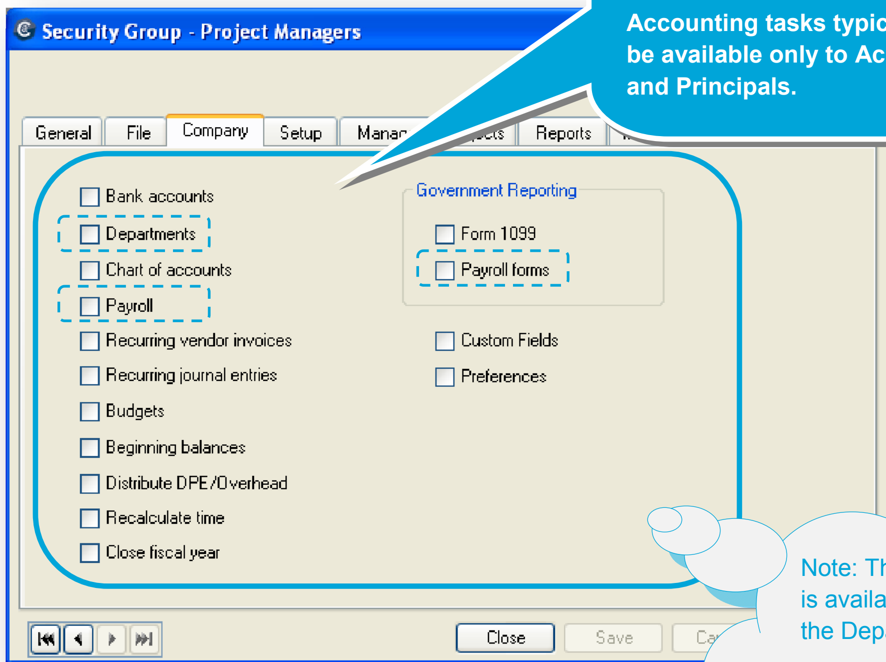
Step 3: Select File menu settings

1. Click the **File** tab.
2. This tab contains only the **Database backups** check box. Make the appropriate selection.



Step 4: Select Company menu settings

1. Click the **Company** tab.
2. This tab displays tasks related to the firm's accounting operations. Make the appropriate selections.



Select a check box if you want this group to have access to that specific accounting task on the Company menu in Ajera.

Accounting tasks typically should be available only to Accounting and Principals.

Note: The Departments check box is available for ajeraComplete or the Departments add-on only.

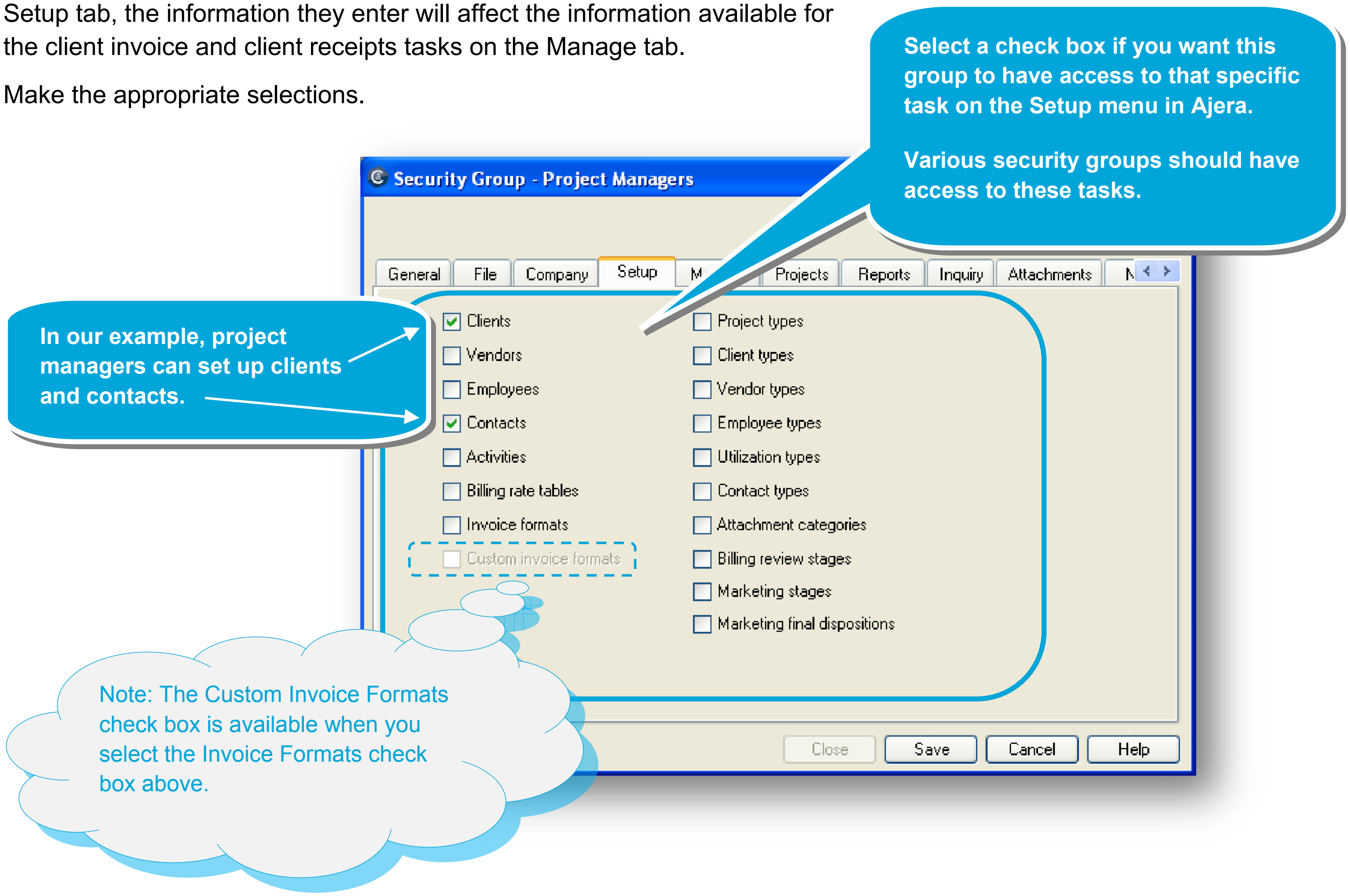
The Payroll and Payroll Forms check boxes are available for ajeraComplete or the Payroll add-on only.

Step 5: Select Setup menu settings

1. Click the **Setup** tab.
2. This tab displays setup tasks that are typical for an architectural or engineering firm. These tasks are available on the Setup menu in Ajera.

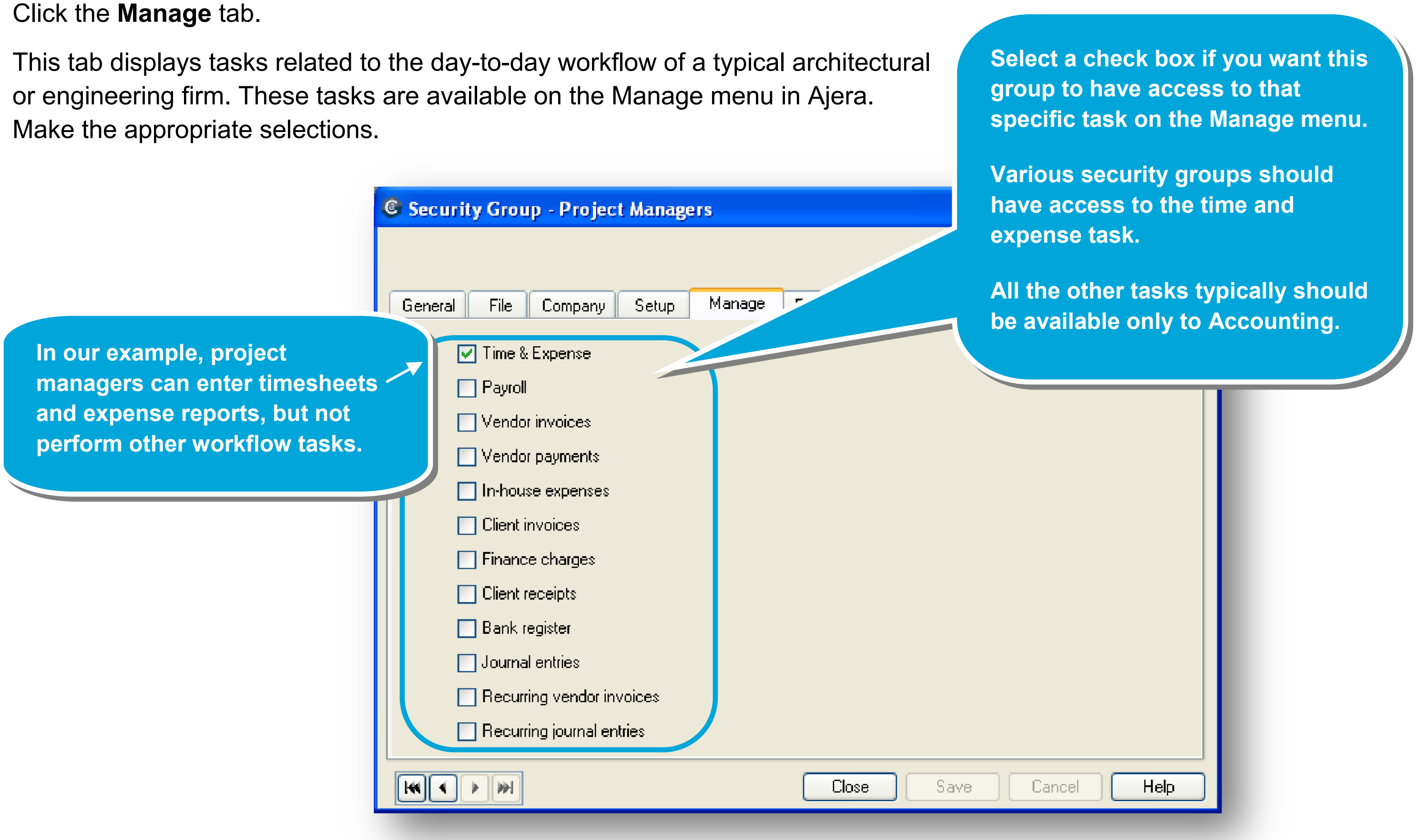
   The setup tasks affect the information that is available for the manage tasks. For example, if members of this group are allowed to set up clients on the Setup tab, the information they enter will affect the information available for the client invoice and client receipts tasks on the Manage tab.

   Make the appropriate selections.



Step 6: Select Manage menu settings

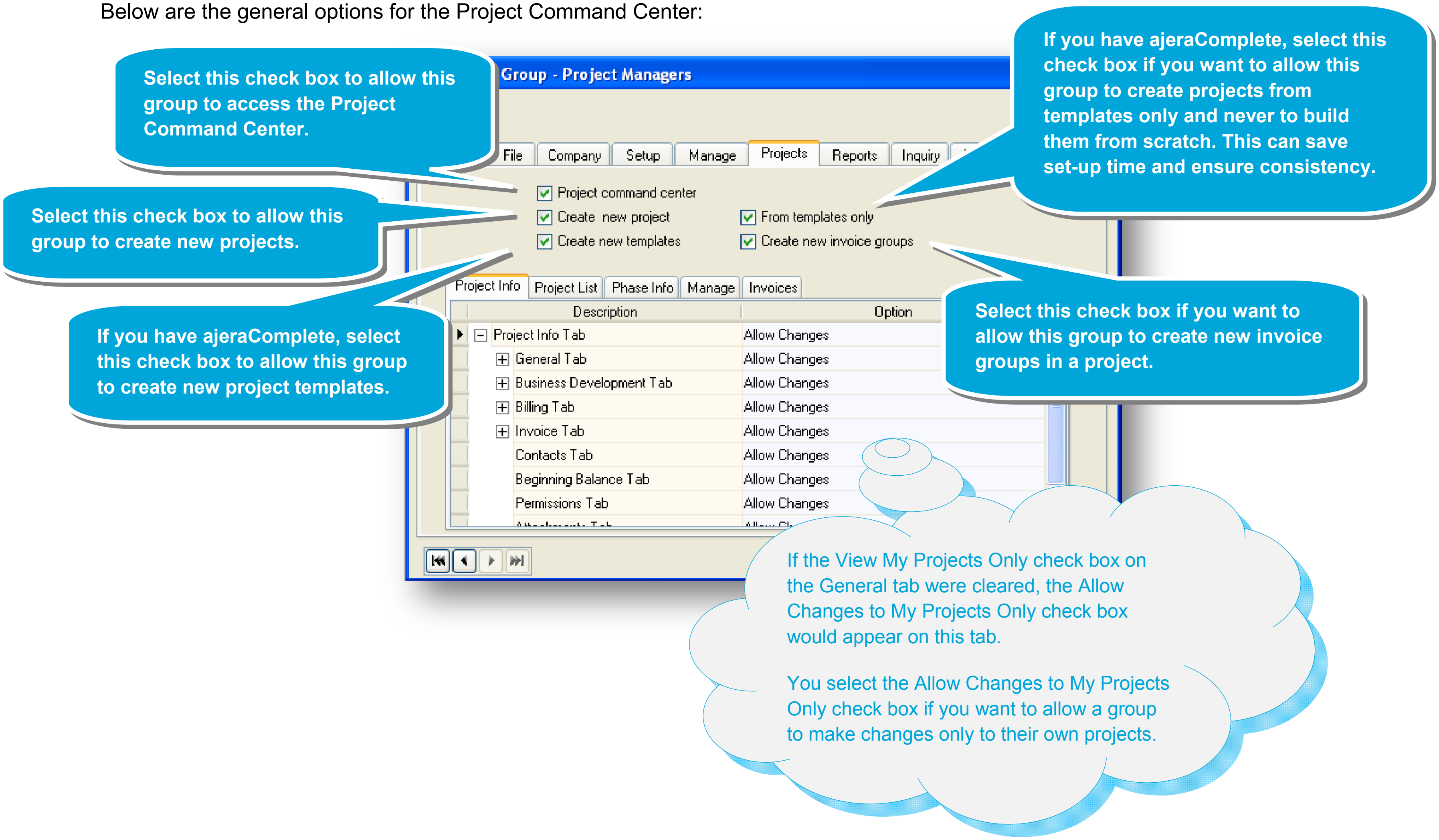
1. Click the **Manage** tab.
2. This tab displays tasks related to the day-to-day workflow of a typical architectural or engineering firm. These tasks are available on the Manage menu in Ajera. Make the appropriate selections.



Step 7: Select Project Command Center settings

1. Click the **Projects** tab.
2. This tab displays tasks that appear in the Project Command Center.
   The tab contains general options and specific options.

   Below are the general options for the Project Command Center:



Step 7: Select Project Command Center settings (continued)

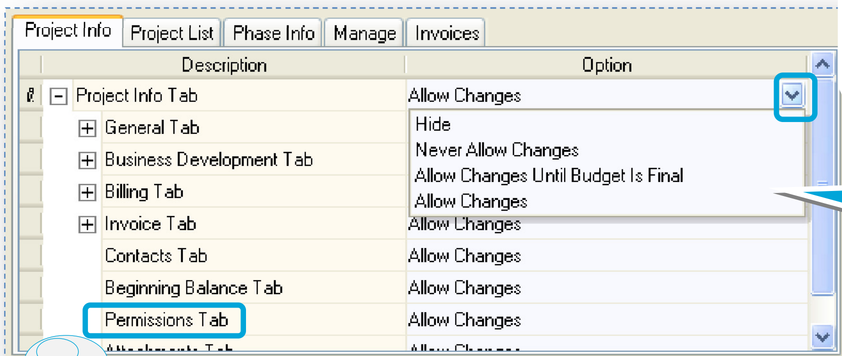
3. Now select the level of access the security group has for specific tabs, subtabs, and fields in the Project Command Center.

   The options you select also determine which columns and fields are available in the Customize window, which appears when you click the Customize button in the Project Command Center.

   To help you visualize what these options affect, this quick lesson shows the security options and their related areas in the Project Command Center.

4. Begin with the options specific to the Project Info tab of the Project Command Center:

Security for the Project Info tab



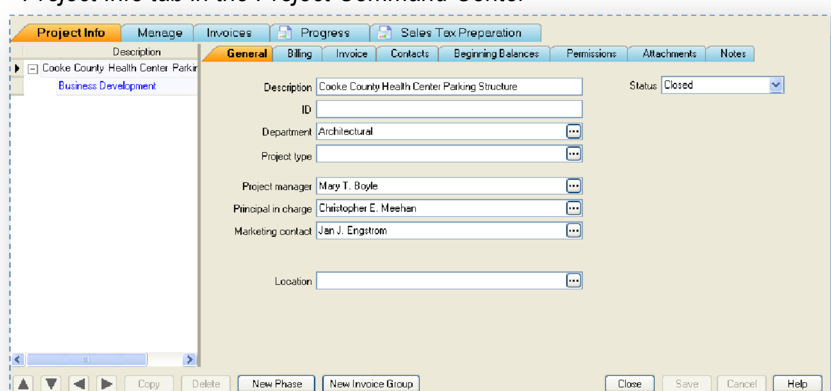
Here, select which subtabs and fields this group can view on the Project Info tab of the Project Command Center.

For each subtab and field, you can select any of these access settings.

In particular, note Permissions.

When you allow a group to make changes on the Permissions subtab of the Project Command Center, group members can then decide to allow changes to a specific project's work breakdown structure, resources, or tasks, or decide when a budget is final.

Project Info tab in the Project Command Center

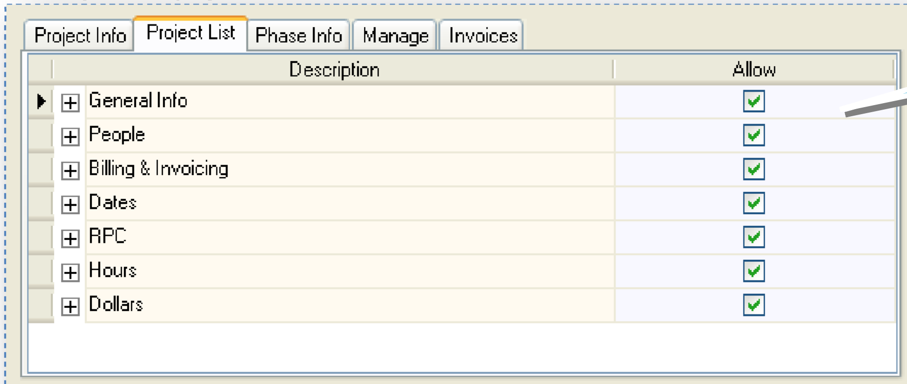


Step 7: Select Project Command Center settings (continued)

5. Below are the options specific to the project list in the Project Command Center:

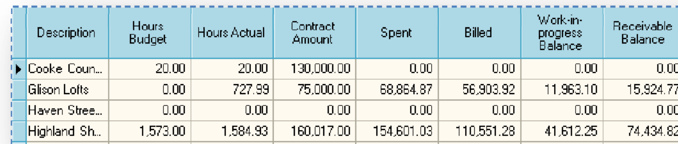
Here, select which columns this group can view in the project list at the top of the Project Command Center.

Security for the project list



Description	Allow
General Info	☑
People	☑
Billing & Invoicing	☑
Dates	☑
RPC	☑
Hours	☑
Dollars	☑

project list in the Project Command Center

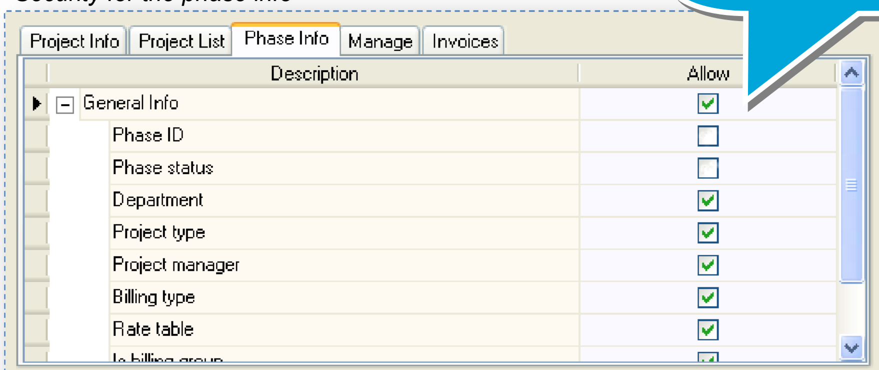


Description	Hours Budget	Hours Actual	Contract Amount	Spent	Billed	Work-in-progress Balance	Receivable Balance
Cooke Coun...	20.00	20.00	130,000.00	0.00	0.00	0.00	0.00
Glison Lofts	0.00	727.99	75,000.00	68,864.87	56,903.92	11,963.10	15,924.77
Haven Stree...	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Highland Sh...	1,573.00	1,584.93	160,017.00	154,601.03	110,551.28	41,612.25	74,434.82

6. Below are the options specific to the phase info in the Project Command Center:

Here, select which columns this group can view to the right of the project tree in the Project Command Center.

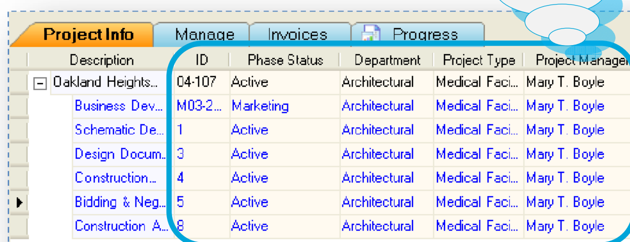
Security for the phase info



Description	Allow
General Info	☑
Phase ID	☐
Phase status	☐
Department	☑
Project type	☑
Project manager	☑
Billing type	☑
Rate table	☑
Is billing group	☑

Phase info displays to the **right** of the phase description and can include ID, status, department, project type, project manager, and so on. You select to display this information in the Customize window.

phase info in the Project Command Center



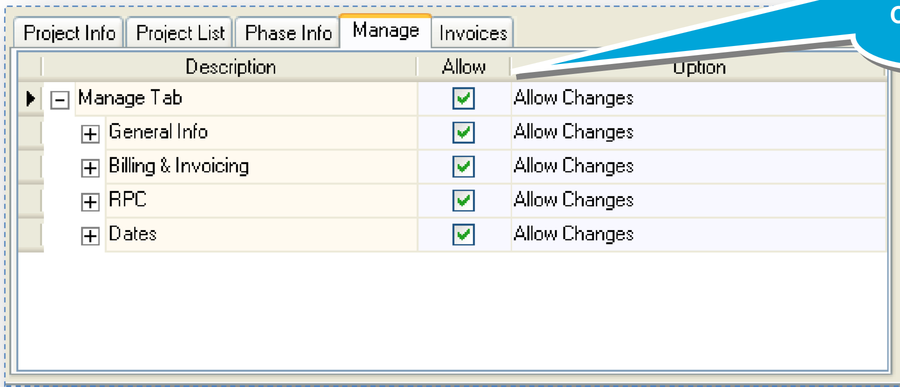
Description	ID	Phase Status	Department	Project Type	Project Manager
Oakland Heights...	04-107	Active	Architectural	Medical Faci...	Mary T. Boyle
Business Dev...	M03-2...	Marketing	Architectural	Medical Faci...	Mary T. Boyle
Schematic De...	1	Active	Architectural	Medical Faci...	Mary T. Boyle
Design Docum...	3	Active	Architectural	Medical Faci...	Mary T. Boyle
Construction...	4	Active	Architectural	Medical Faci...	Mary T. Boyle
Bidding & Neg...	5	Active	Architectural	Medical Faci...	Mary T. Boyle
Construction A...	8	Active	Architectural	Medical Faci...	Mary T. Boyle

Step 7: Select Project Command Center settings (continued)

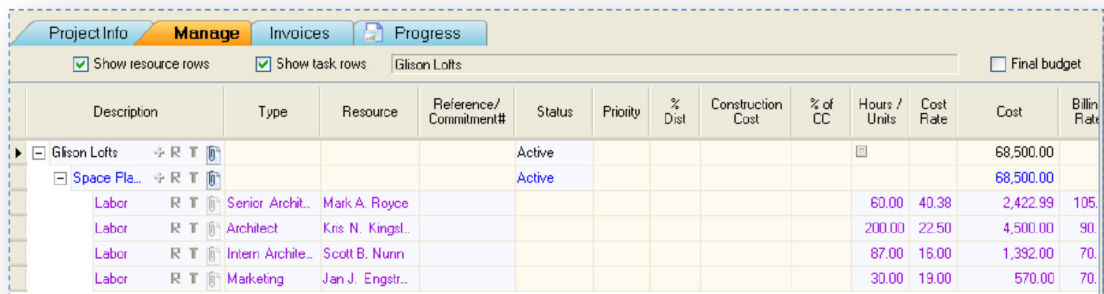
7. Below are the options specific to the Manage tab of the Project Command Center:

Here, select which columns this group can view on the Manage tab of the Project Command Center.

Security for the Manage tab



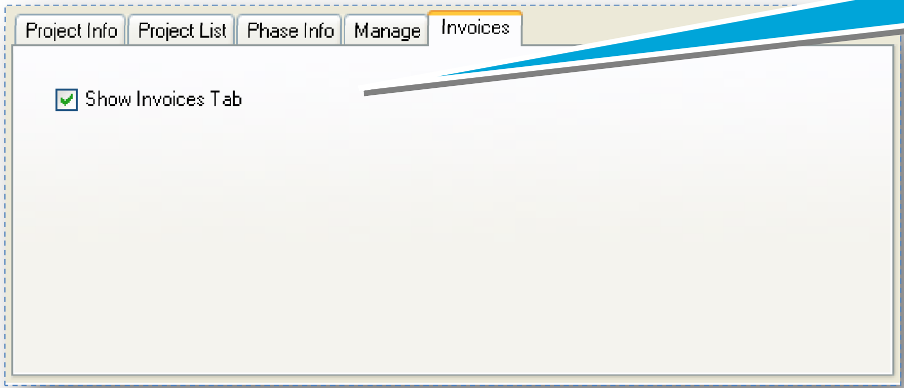
Manage tab in the Project Command Center



Step 7: Select Project Command Center settings (continued)

8. Below are the options specific to the Invoices tab of the Project Command Center:

Security for the Invoices tab

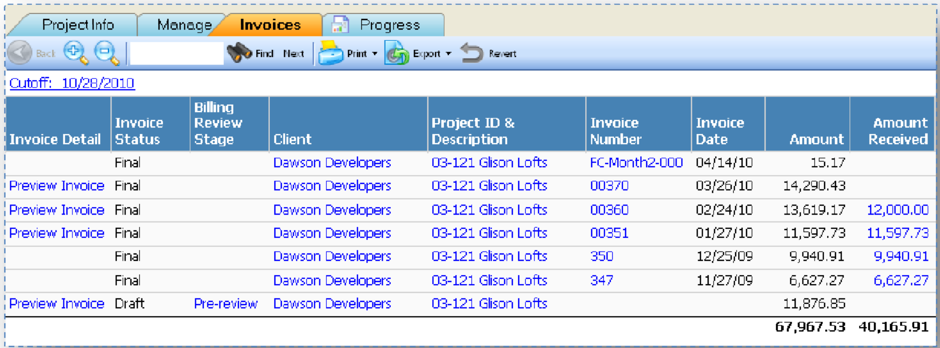


Here, select whether this group can view the Invoices tab in the Project Command Center.

The Invoices tab of this window displays the PCC Invoices inquiry. Use this inquiry to review client invoice details and to preview client invoices.

Note: Unlike other inquiries, this inquiry is available only from the Project Command Center.

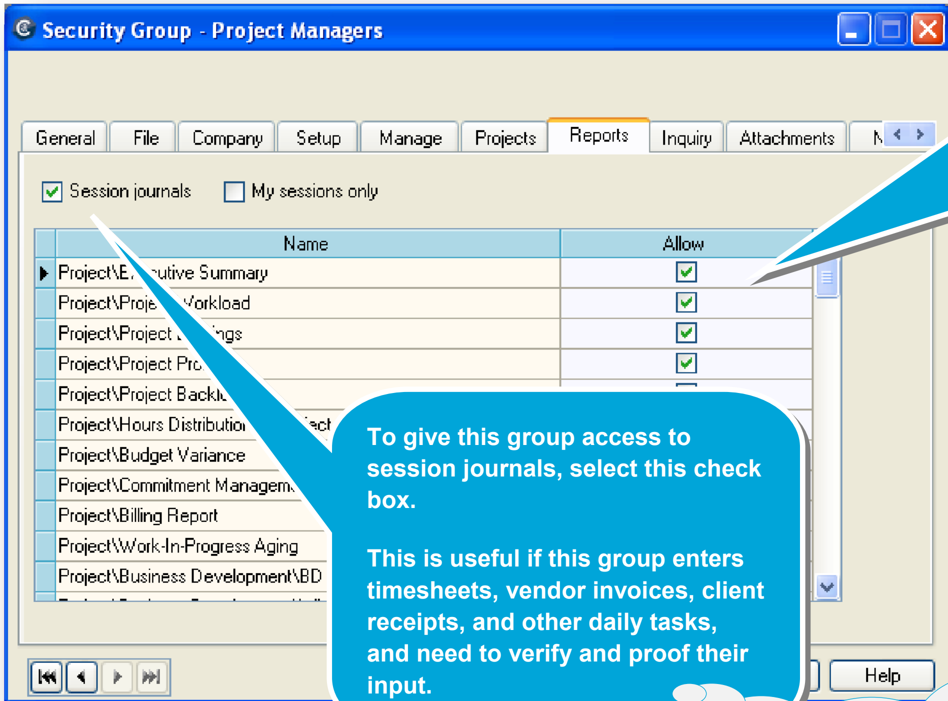
Invoices tab in the Project Command Center



Invoice Detail	Invoice Status	Billing Review Stage	Client	Project ID & Description	Invoice Number	Invoice Date	Amount	Amount Received
	Final		Dawson Developers	03-121 Glison Lofts	FC-Month2-000	04/14/10	15.17	
Preview Invoice	Final		Dawson Developers	03-121 Glison Lofts	00370	03/26/10	14,290.43	
Preview Invoice	Final		Dawson Developers	03-121 Glison Lofts	00360	02/24/10	13,619.17	12,000.00
Preview Invoice	Final		Dawson Developers	03-121 Glison Lofts	00351	01/27/10	11,597.73	11,597.73
	Final		Dawson Developers	03-121 Glison Lofts	350	12/25/09	9,940.91	9,940.91
	Final		Dawson Developers	03-121 Glison Lofts	347	11/27/09	6,627.27	6,627.27
Preview Invoice	Draft	Pre-review	Dawson Developers	03-121 Glison Lofts			11,876.85	
							67,967.53	40,165.91

Step 8: Select Reports menu settings

1. Click the **Reports** tab.
2. This tab displays reports that can be viewed and printed in Ajera. Make the appropriate selections.



Select a check box if you want this group to have access to a specific report on the Reports menu.

Security groups should have access only to reports that are relevant to them.

In our example, project managers have access to the project reports.

To give this group access to session journals, select this check box.

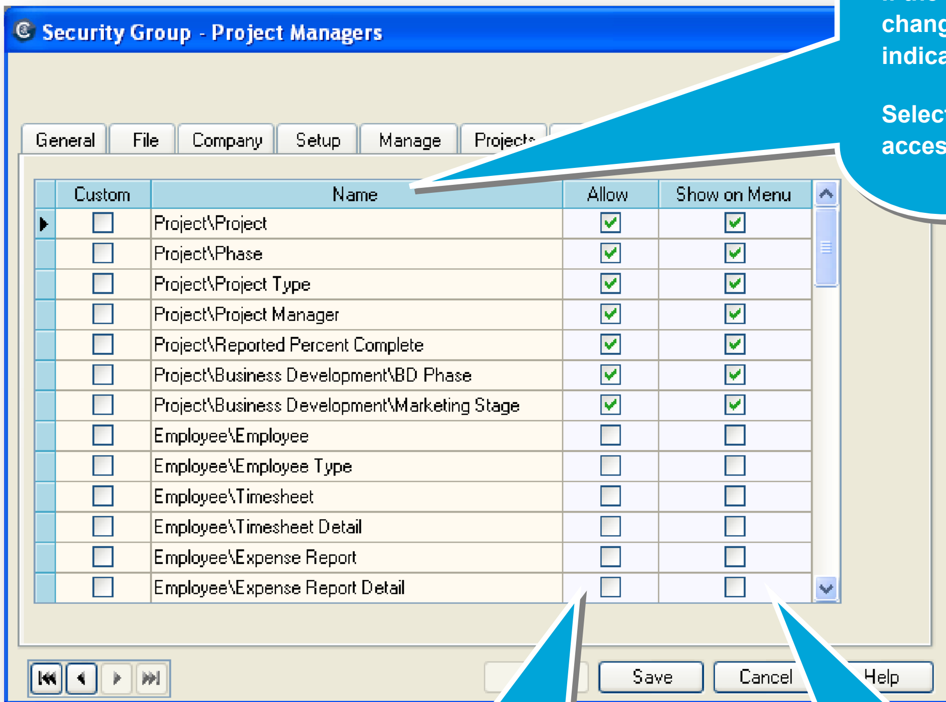
This is useful if this group enters timesheets, vendor invoices, client receipts, and other daily tasks, and need to verify and proof their input.

When the Session Journals check box is selected, the My Sessions Only check box is available.

Select this check box if you want this group to view only its own work.

Step 9: Select Inquiry menu settings

1. Click the **Inquiry** tab.
2. This tab displays inquiries that can be viewed and printed in Ajera. Make the appropriate selections.



When you select the Manage Custom Reports and Inquiries check box on the General tab, Ajera allows this group to access and change all inquiries.

If the check box is cleared, this group cannot change inquiries but can access them as indicated on this tab.

Select a check box if you want this group to have access to a specific inquiry on the Inquiry menu.

Select the Allow check box to allow this group to see links from another inquiry to this inquiry.

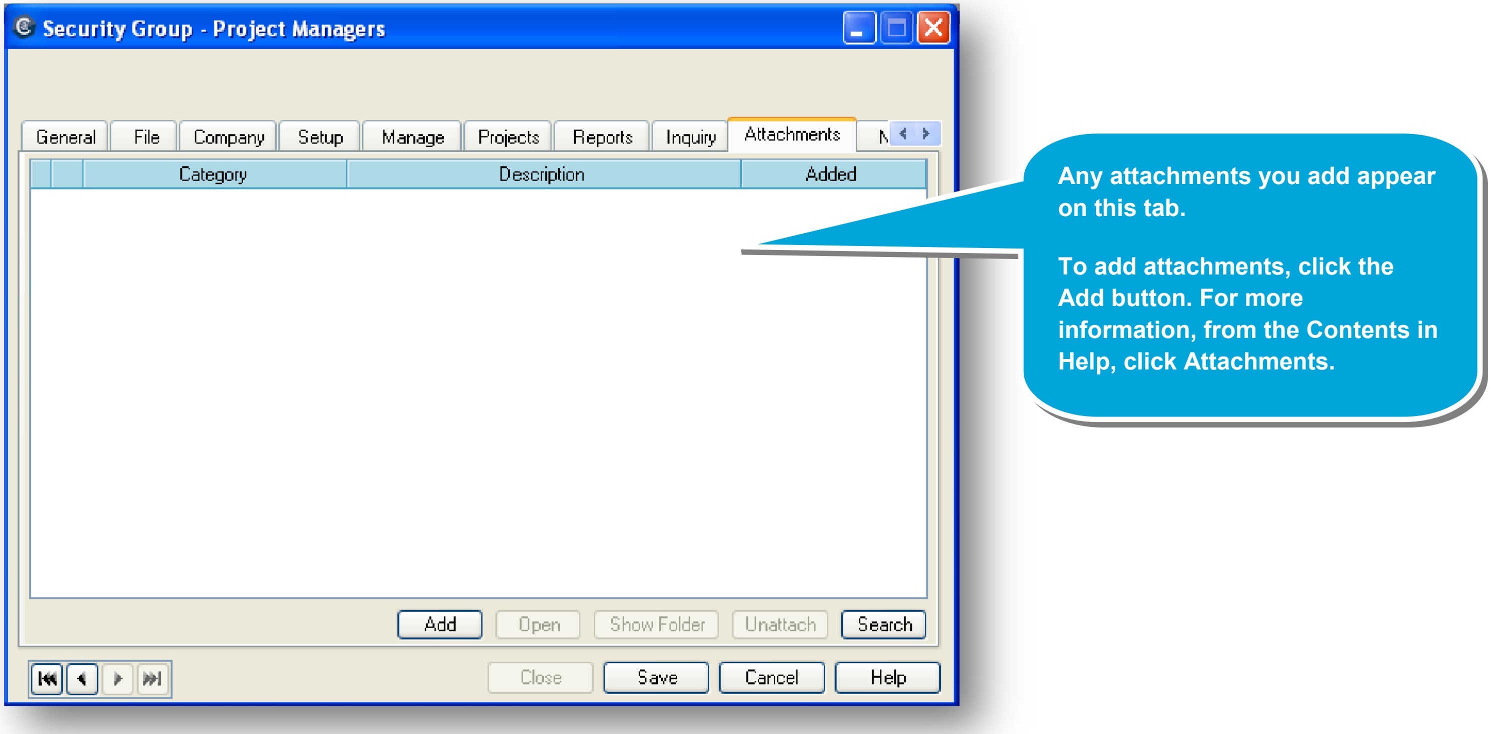
However, this group cannot see the inquiry on the Inquiry menu unless you also select the Show on Menu check box.

Select the Show on Menu check box to allow this group to see this inquiry on the Inquiry menu.

When you select this check box, Ajera automatically selects the Allow check box.

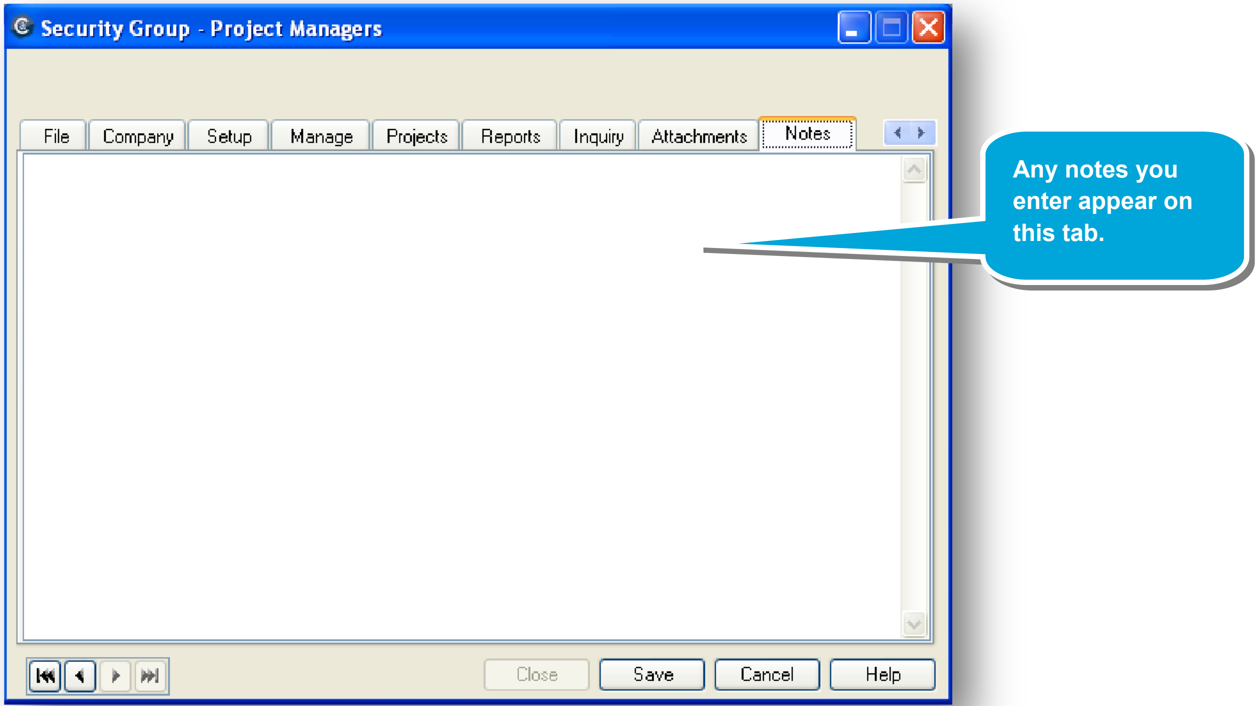
Step 10: Select Attachments

1. Click the **Attachments** tab.
2. This tab allows you to attach files related to the security group.



Step 11: Enter notes

1. Click the **Notes** tab.
2. This tab allows you to enter notes about the security group.



Summary
Now that you have set up your security groups, you can set up employees and assign them to a security group.

See the *Setting up employees* quick lesson for an overview of that process.