

# Setting up security groups

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

## In this quick lesson

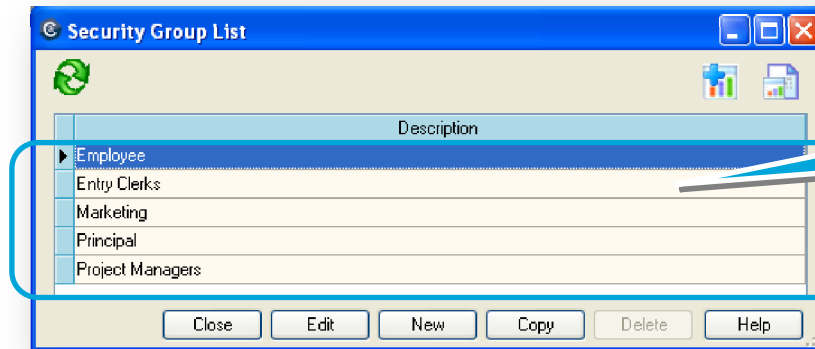
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When you set up security groups in the Security Group List window, you define each group's access to information in Ajera. This information includes items on the Company, Setup, Manage, Reports, and Inquiry menus and areas in the Project Command Center.

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 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 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.

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 have access to Manage Custom Reports on their Reports menu.

This ability should be available only to Administrators.

Security Group - Project Managers

General File Company Setup Manage Projects

Description: Project Managers

View employee cost

View my projects only

View company information on dashboard

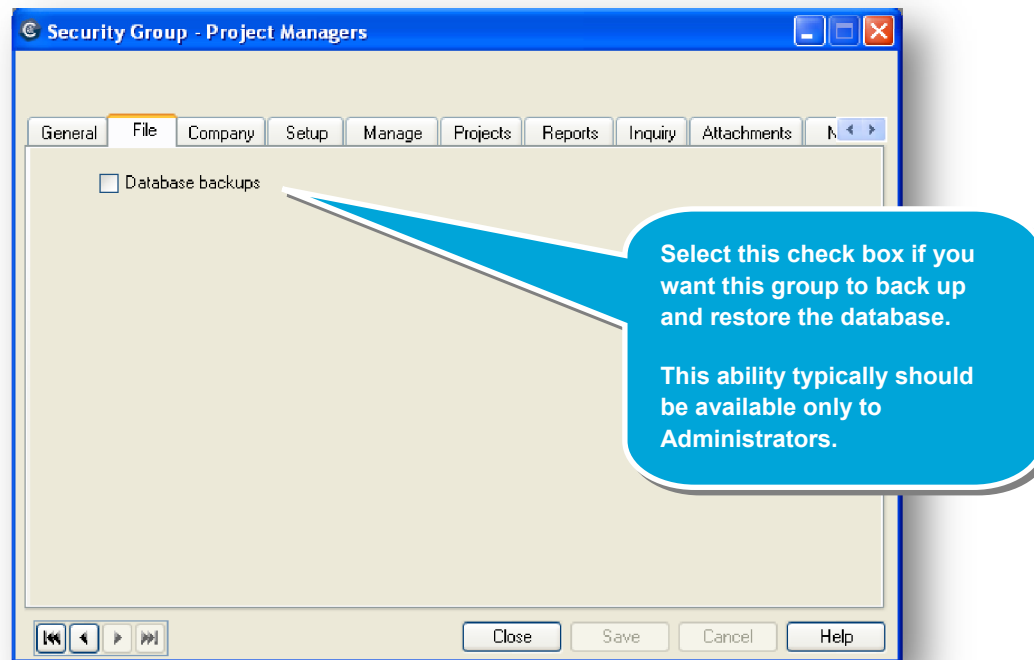
Manage custom reports and inquiries

Financial statement designer

Close Save Cancel Help

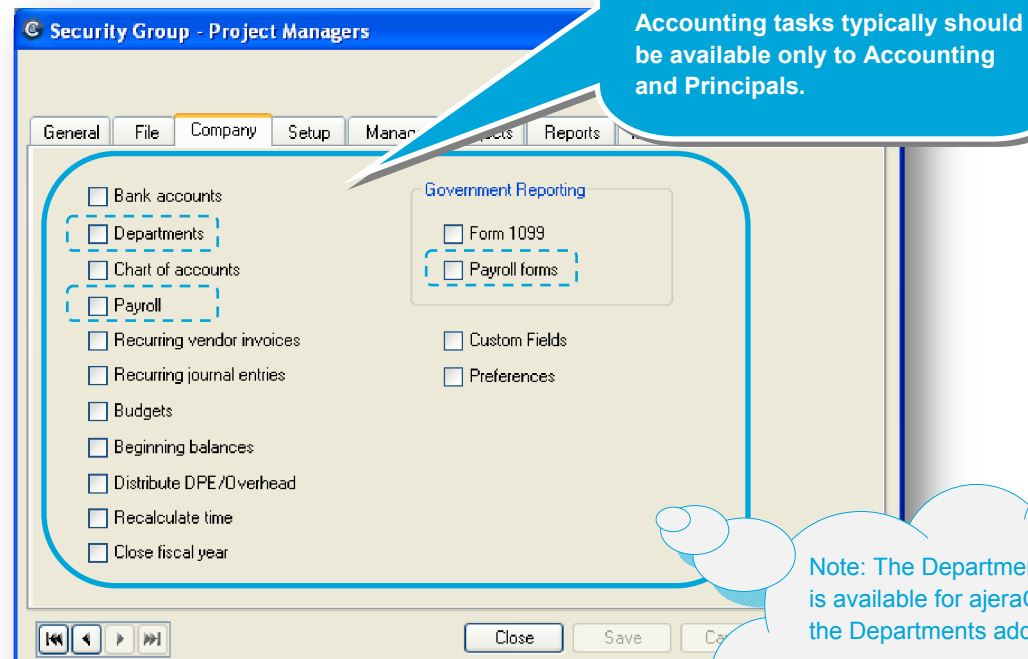
## Step 3: Select File menu settings

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.

**In our example, project managers can set up clients and contacts.**

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

**Various security groups should have access to these tasks.**

**Note: The Custom Invoice Formats check box is available when you select the Invoice Formats check box above.**

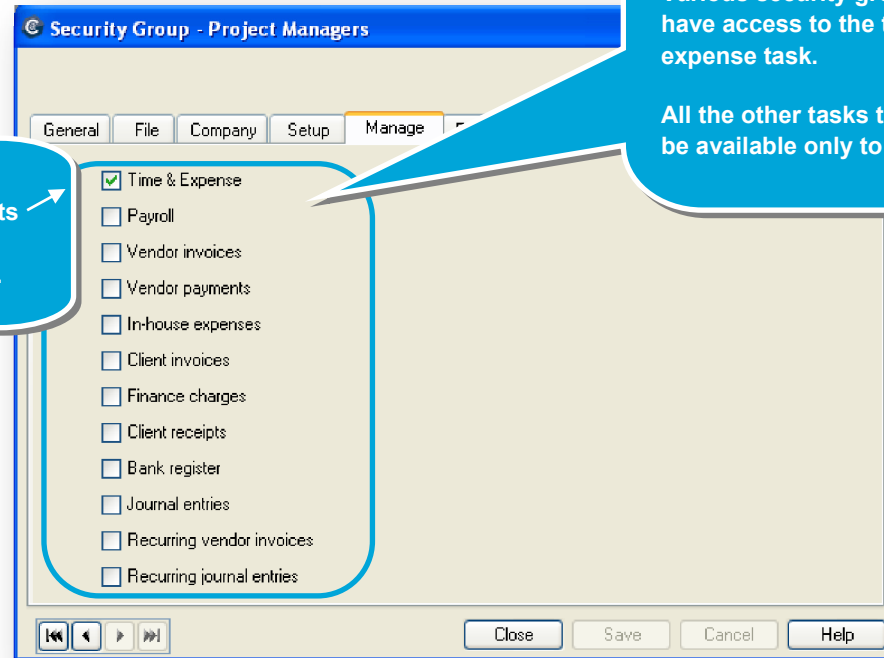
Task	Selected
Clients	<input checked="" type="checkbox"/>
Vendors	<input type="checkbox"/>
Employees	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>
Activities	<input type="checkbox"/>
Billing rate tables	<input type="checkbox"/>
Invoice formats	<input type="checkbox"/>
Custom invoice formats	<input type="checkbox"/>
Project types	<input type="checkbox"/>
Client types	<input type="checkbox"/>
Vendor types	<input type="checkbox"/>
Employee types	<input type="checkbox"/>
Utilization types	<input type="checkbox"/>
Contact types	<input type="checkbox"/>
Attachment categories	<input type="checkbox"/>
Billing review stages	<input type="checkbox"/>
Marketing stages	<input type="checkbox"/>
Marketing final dispositions	<input type="checkbox"/>

Buttons: Close, Save, Cancel, Help

## 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.

In our example, project managers can enter timesheets and expense reports, but not perform other workflow tasks.



Select a check box if you want this group to have access to that specific task on the Manage menu.

Various security groups should have access to the time and expense task.

All the other tasks typically should be available only to Accounting.

## 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:

The screenshot shows the 'Group - Project Managers' window with the 'Projects' tab selected. The interface includes a menu bar (File, Company, Setup, Manage, Projects, Reports, Inquiry) and a main area with several checked options: 'Project command center', 'Create new project', 'Create new templates', 'From templates only', and 'Create new invoice groups'. Below these is a 'Project Info' section with a tree view of tabs and a table of options.

**Callout 1:** Select this check box to allow this group to access the Project Command Center.

**Callout 2:** Select this check box to allow this group to create new projects.

**Callout 3:** If you have ajeraComplete, select this check box to allow this group to create new project templates.

**Callout 4:** If you have ajeraComplete, select this check box if you want to allow this group to create projects from templates only and never to build them from scratch. This can save set-up time and ensure consistency.

**Callout 5:** Select this check box if you want to allow this group to create new invoice groups in a project.

**Callout 6:** If the View My Projects Only check box on the General tab were cleared, the Allow Changes to My Projects Only check box would appear on this tab.

**Callout 7:** You select the Allow Changes to My Projects Only check box if you want to allow a group to make changes only to their own projects.

Description	Option
Project Info Tab	Allow Changes
General Tab	Allow Changes
Business Development Tab	Allow Changes
Billing Tab	Allow Changes
Invoice Tab	Allow Changes
Contacts Tab	Allow Changes
Beginning Balance Tab	Allow Changes
Permissions Tab	Allow Changes
Attachments Tab	Allow Changes



## Step 7: Select Project Command Center settings (continued)

- 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.

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

Security for the Project Info tab

Description	Option
Project Info Tab	Allow Changes
+ General Tab	Hide
+ Business Development Tab	Never Allow Changes
+ Billing Tab	Allow Changes Until Budget Is Final
+ Invoice Tab	Allow Changes
Contacts Tab	Allow Changes
Beginning Balance Tab	Allow Changes
Permissions Tab	Allow Changes
Attachments Tab	Allow Changes

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

The screenshot shows the 'Project Info' tab in the Project Command Center. The 'General' subtab is selected, displaying the following fields:

- Description: Cooke County Health Center Parking Structure
- ID: [Empty]
- Department: Architectural
- Project type: [Empty]
- Project manager: Mary T. Boyle
- Principal in charge: Christopher E. Meethan
- Marketing contact: Jan J. Engstrom
- Location: [Empty]
- Status: Closed

Buttons at the bottom include Copy, Delete, New Phase, New Invoice Group, Close, Save, Cancel, and Help.

### Step 7: Select Project Command Center settings (continued)

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

#### Security for the project list

Description	Allow
General Info	<input checked="" type="checkbox"/>
People	<input checked="" type="checkbox"/>
Billing & Invoicing	<input checked="" type="checkbox"/>
Dates	<input checked="" type="checkbox"/>
RPC	<input checked="" type="checkbox"/>
Hours	<input checked="" type="checkbox"/>
Dollars	<input checked="" type="checkbox"/>

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

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
Gilson Lotts	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

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

#### Security for the phase info

Description	Allow
General Info	<input checked="" type="checkbox"/>
Phase ID	<input type="checkbox"/>
Phase status	<input type="checkbox"/>
Department	<input checked="" type="checkbox"/>
Project type	<input checked="" type="checkbox"/>
Project manager	<input checked="" type="checkbox"/>
Billing type	<input checked="" type="checkbox"/>
Rate table	<input checked="" type="checkbox"/>
Invoicing group	<input checked="" type="checkbox"/>

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

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)

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

Security for the Manage tab

Description	Allow	Option
[-] Manage Tab	<input checked="" type="checkbox"/>	Allow Changes
[+] General Info	<input checked="" type="checkbox"/>	Allow Changes
[+] Billing & Invoicing	<input checked="" type="checkbox"/>	Allow Changes
[+] RPC	<input checked="" type="checkbox"/>	Allow Changes
[+] Dates	<input checked="" type="checkbox"/>	Allow Changes

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

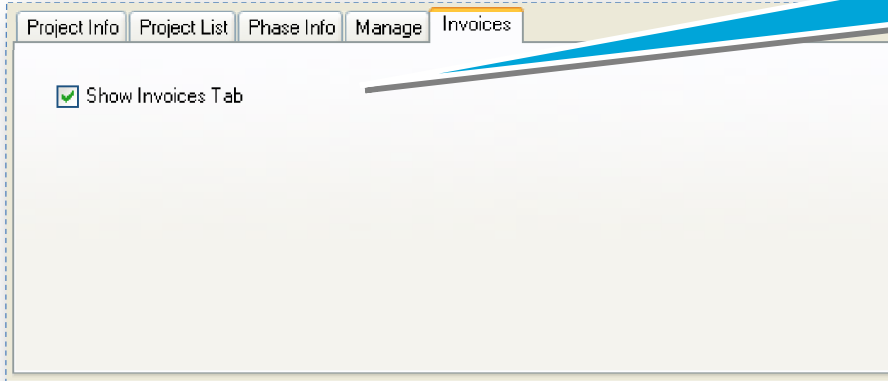
Manage tab in the Project Command Center

Project Info <b>Manage</b> Invoices Progress												
<input checked="" type="checkbox"/> Show resource rows <input checked="" type="checkbox"/> Show task rows                    Gilson Lofts <input type="checkbox"/> Final budget												
Description	Type	Resource	Reference/ Commitment#	Status	Priority	% Dist	Construction Cost	% of CC	Hours / Units	Cost Rate	Cost	Billin Rate
[-] Gilson Lofts				Active							68,500.00	
[-] Space Fla...				Active							68,500.00	
Labor	R T	Senior Archit... Mark A. Royce							60.00	40.38	2,422.99	105
Labor	R T	Architect Kris N. Kingsl...							200.00	22.50	4,500.00	90
Labor	R T	Intern Archile... Scott B. Nunn							87.00	16.00	1,392.00	70
Labor	R T	Marketing Jan J. Engstr...							30.00	19.00	570.00	70

### Step 7: Select Project Command Center settings (continued)

- 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.

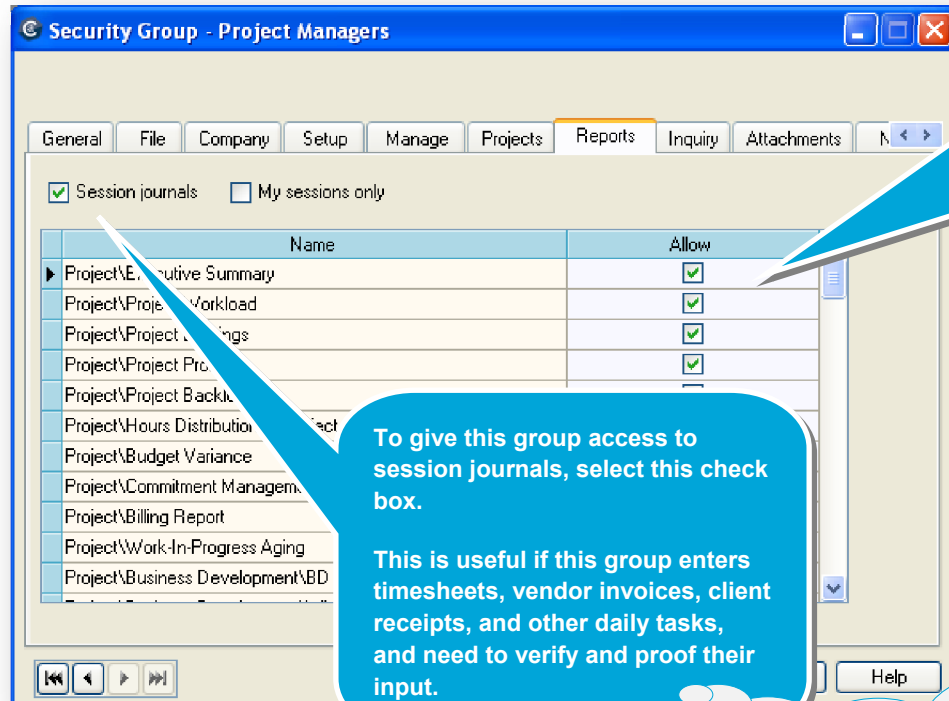
Note: Unlike other inquiries, this inquiry is available only from the Project Command Center.

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 Glson Lofts	FC-Month2-000	04/14/10	15.17	
Preview Invoice	Final		Dawson Developers	03-121 Glson Lofts	00370	03/26/10	14,290.43	
Preview Invoice	Final		Dawson Developers	03-121 Glson Lofts	00360	02/24/10	13,619.17	12,000.00
Preview Invoice	Final		Dawson Developers	03-121 Glson Lofts	00351	01/27/10	11,597.73	11,597.73
	Final		Dawson Developers	03-121 Glson Lofts	350	12/25/09	9,940.91	9,940.91
	Final		Dawson Developers	03-121 Glson Lofts	347	11/27/09	6,627.27	6,627.27
Preview Invoice	Draft	Pre-review	Dawson Developers	03-121 Glson Lofts			11,876.85	
							<b>67,967.53</b>	<b>40,165.91</b>

## 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.



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.

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.

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.

Custom	Name	Allow	Show on Menu
<input type="checkbox"/>	Project\Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Project\Phase	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Project\Project Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Project\Project Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Project\Reported Percent Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Project\Business Development\BD Phase	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Project\Business Development\Marketing Stage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Employee\Employee	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Employee\Employee Type	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Employee\Timesheet	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Employee\Timesheet Detail	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Employee\Expense Report	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Employee\Expense Report Detail	<input type="checkbox"/>	<input type="checkbox"/>

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.

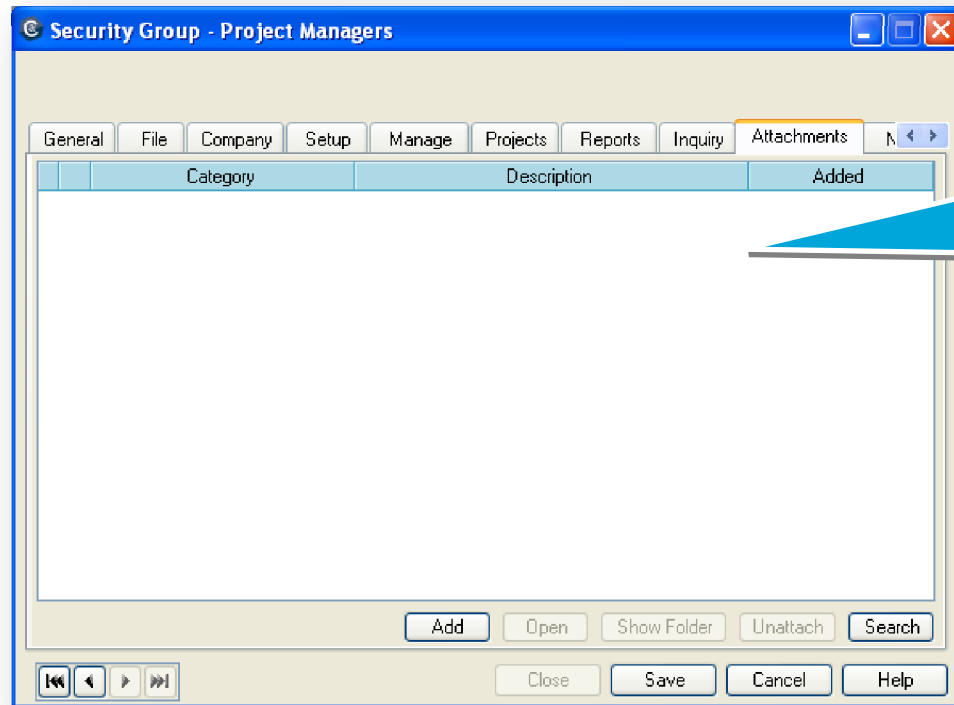
However, this group cannot see the inquiry on the Inquiry menu unless you also select the Show on Menu check box.

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.

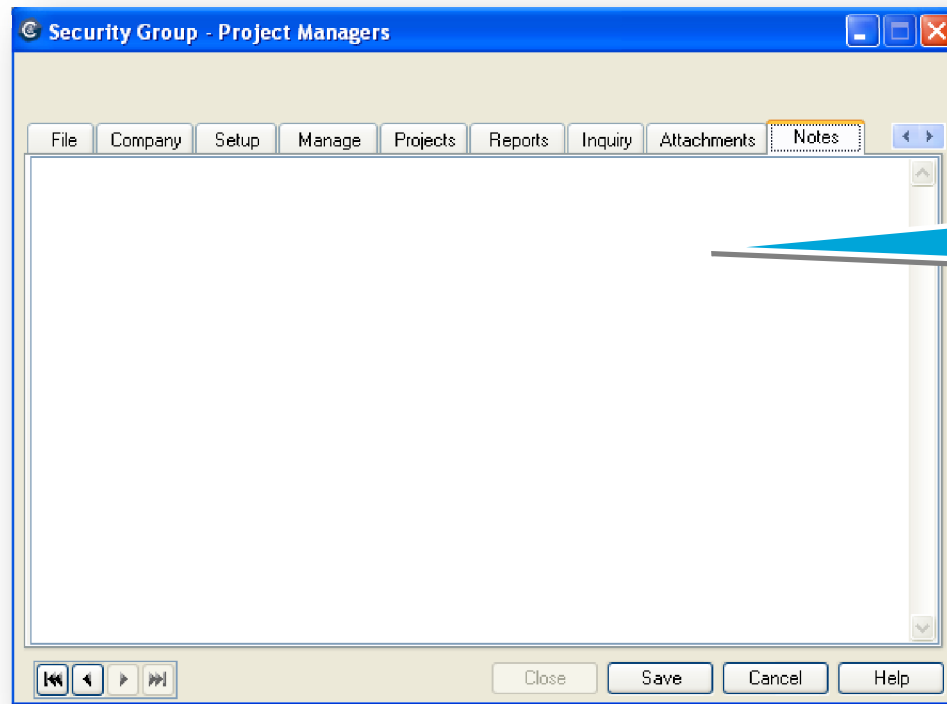


Any attachments you add appear on this tab.

To add attachments, click the Add button. For more information, from the Contents in Help, click Attachments.

## Step 11: Enter notes

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



Any notes you enter appear on this tab.

### 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.