Deltek University



Document Security Security Course Exercises for PIM powered by Union Square

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1. Document Pool Access – System Role

For a demonstration of this exercise, watch these videos:

Security Providers, Security Access Rights, System Role Security

1. Use the **Document Pools Tab** to define **Read** access to the following **Document Pools** for the **F02 All Internal Users** System Role:

Document Pool Structure
03 Knowledge Area
03.01 Workspace
03.02 Building Regulations
03.03 Academic Papers
03.04 Standards
03.05 Health and Safety
03.06 Environmental
03.07 Forms of Contract
03.08 News
03.09 Contract Administration Guides
03.10 Policies and Procedures

- 2. Now define **Read/Write** access to all of the **"03 Knowledge Area" Document Pools** for the **D06 Senior Managers** System Role.
- 3. Save and apply your changes.



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2a. Document Pool Creation

For a demonstration of this exercise, watch these videos:

Creating Document Pools

An additional **Document Pool** needs to be added to the **03 Knowledge Area** Document Pool structure.

- 1. From the Web Administrator tab, add the following Document Pool as a sub level (child) of O3 Knowledge Area:
 - 03.11 Published Articles
- 2. Save the new pool
- 3. Use the **Document Pools Tab** to add **security access** this new pool. The required **security access** is listed below:
 - The D06 Senior Managers System Role needs to have Read/Write access
 - The F01 Workspace Security System Role needs to have Read/Write access
 - The F02 All Internal Users System Role needs to have Read access
- 4. Save and Apply your changes



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2b. Document Pool Creation & Pool Requirements

For a demonstration of this exercise, watch these videos:

Creating Document Pools, Document Pool Requirements

Another new Document Pool set for Quality Control is required under 05 Project Administration.

- 1. From the Web Administrator tab Select the **05 Project Administration** Pool
- 2. Create a new Document Pool named 05.13 Quality Control, and add the following sub pools under it:
 - 05.13.01 Procedures
 - 05.13.02 Reports
- 3. Save the new pools
- 4. From the **Security Console > Document: Pool Requirements** drop down, check and set the pool

requirements to:

- Contact Optional
- Organisation Optional
- Project Mandatory

Note

These **requirements** will ensure **users** are **forced** to link their **documents** to a **Project** and have the **option** of linking it to a **Contact** and **Organisation** when publishing to this pool.

- 5. Save your changes
- 6. From the **Document Pools** tab, give the following security access to **05.13 Quality Control**:
 - F02 All Internal Users System Role Read access
 - F01 Workspace Security System Role Read/Write access
 - D06 Senior Managers System Role Read/Write access
- 7. Save Security and Apply Security



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3a. Document Pool Access – Entity System Role

For a demonstration of this exercise, watch these videos:

Entity System Role Security

 Use the Document Pools Tab to define Read/Write access to the following Document Pools for the D06 Senior Managers System Role who are linked to Projects.

Document Pool Structure
05.05 Financials
05.05.01 Orders
05.05.02 Invoices
05.05.03 Quotations

Note

Use the Entity System Role option as a Security Provider with Read/Write Access Rights, and then Project as the Entity Class to define the Document Security Access.

- 2. Add the **D10 Accounts** System Role with **Read/Write** access to these document pools as well. This removes the need for people within the Accounts department to be linked to every project.
- 3. Save and Apply your changes.



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3b. Document Pool Access – Entity Contact Role

For a demonstration of this exercise, watch these videos:

Entity Contact Role Security

The business **Associates** and **Principles** will need to **access** to the following **Document Pools**. However, they only need to be able to edit the documents on **Projects** they have been assigned to in one of these two **Contact Roles**.

Document Pool Structure
05 Project Administration
05.10 Contract Documents
05.11 Insurances
05.12 Subcontractor Enquiries

Note

Use the Entity Contact option as the Security Provider, Read/Write as Access Rights and Project as the Entity Class, and then select the Associate and Principle checkboxes for the Contact Role.



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3c. Document Pool Access – Employee

For a demonstration of this exercise, watch these videos:

Employee Role Security

Hammond Inc has **multiple** global offices. Maria Jones is a UK based employee working in Nottingham. She needs to have access to the **UK handbook only**, even though it is published to the same **Policies and Procedures** Document pool as the other handbooks.

Set up security so that all **F02 Internal users** have **Read** access to the following Document Pool, for their branch only:

Document Pool Structure	
09 Human Resources	
09.05 Policies and Procedures	

Note

All Contacts are tagged to the Organisation they work for when you first add them into the system.

!! Caution !!

When you check in the UK handbook, ensure that you tag to the correct Organisation record, in this case Hammond Inc (Nottingham).



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Useful Facts about Document Pools

Important facts that all Union Square Security Managers should know:

- Document Pools are not storage locations
- Document Pools are also known as categories
- Documents can be tagged against multiple Document Pools
- A Document Pool structure should aim to be no more than three levels deep
- Document Pool names should easily identify to the user the types of documents they will expect to find
- Document Pools cannot be seen unless they have a document tagged to them this is regardless of Security Access Rights
- You can only publish documents to the lowest level of the structure, e.g. You cannot tag a document against 05 Project Administration, but can publish and tag a document against 05.11 Insurances (assuming you have the required access)
- Documents can be assigned Attributes when they are published. The Document Attributes are driven by the Document Pool Requirements. Any mandatory requirements will force the user to add the attribute to the document before they can complete the Check In Wizard
- Document Pool Requirements are also used to show or hide a Document Pool on a record's Document Tab (assuming a valid document has been published)



Security Manager Checklist

Now that you have completed this section of the course it is time to start defining your document security access in your own system. You can use this handy check list to ensure you have completed everything:

- □ Create any additional Document Pools required
- □ Apply the relevant security to your Documents Pools
- Apply the relevant Requirements to your Document Pools
- **D** Test your Document Security by publishing a test document and logging in as your test user

Support



During Implementation

Send a detailed email, including screenshots, and/or a Windows Problem Steps Recorder (PSR) zip file to your Union Square Project Manager or Implementation Consultant.

After Implementation

Go to the Deltek Support site <u>http://support.deltek.com</u>. You will need to request a password using the Account Assistance section:

Deltek Customer Care Connect				
Į	Client Login Username: Password: Login			
Account Information				
2	New Users To register, contact your Support Contact Manager (SCM). If you are unsure who your SCM is, please contact Customer Care at 1.877.HLP.PROJ.			
0	Account Assistance Retrieve your Contact ID, username or create a new password.			

Enter your email address and click the button below to be emailed your Contact ID:

Account Assistance
Retrieve Your Contact ID and Username We'll send your Contact ID and username to your registered email address.
Email Address
Email My Contact ID and Username

Once you have received your Contact ID, you will be able to login to the Deltek support site to log a call.