Deltek University

Users & Access

Security Course Exercises for PIM powered by Union Square

January 2017

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1a. Creating Users

For a demonstration of this exercise, watch these videos:
Users & Licences, System Roles

A new manager has started at our organisation; follow the instructions below to give them access:

1. From the **Activity Zone,** select the **Add Internal Contact** link, and populate the **form** with the following data:

   - **Forename** Maria
   - **Surname** Jones
   - **Email** maria.jones@hammond.local
   - **Organisation** Hammond Inc (Nottingham)

2. Click **Next>** and then click **Finish**

3. Populate the **mandatory fields** (fields marked with an *)

   - **Title** Mrs
   - **Job Category** Manager
   - **Department** Contracts

4. Save the form and close the new **Contact Record**

5. To make this new contact a **user**, go to **Admin > Users**

6. Search for **Maria Jones** and click on the **Go** button

7. To give Maria a **Trusted User Licence** populate the fields with the following data:

   - **Domain** HAMMOND
   - **Logon** maria.jones

8. Select the **F02 All Internal Users** check box to assign Maria Jones to the default role for employees

9. Click on **Update User's Details** to save your changes

1b. Creating Users

A new **Business Administrator** is also about to start at Hammond Inc (Nottingham). They will need access as well.

1. Create an internal contact record for **Mike Barber**. His role is in **Admin** working in the **Contracts** department. His email address will be mike.barber@hammond.local

2. Set Mike up as a user with a **Trusted User Licence**

   - **Domain** HAMMOND
   - **Logon** mike.barber

3. Ensure he is given the **F02 All Internal Users** Role

2a. Creating a Test User

For a demonstration of this exercise, watch these videos:
Security Console, Reclaim Licence, Create a Test User.

You can test your security by creating a dummy internal contact and logging in as this person.

1. From the **Activity Zone,** select the **Add Internal Contact** Link, and populate the **form** with the following data:
    - **Forename** Security Testing
    - **Surname** Test
    - **Organisation** Hammond Inc (Nottingham)
2. Click **Next>** and then **c**lick **Finish**
3. Populate the **mandatory fields**
    - **Title** -
    - **Job Category** Admin
    - **Department** IT

!! Caution !!
You must use the surname 'Test' and omit all contact methods, e.g. email phone no.

4. Save the form and close the new **Contact Record**
5. To make this new contact a **user**, go to **Admin > Users**
6. Search for **Security Testing Test**, click on the **Go** button, and give them the following login credentials:
    - **Username** security.testing
    - **Password** test123
7. Select the **F02 All Internal Users** check box
8. Click on **Update User's Details**

Note
Notice when you save this, the number of licences used is unaffected.

2b. Using the Test User

You can have two Union Square sessions open as long as one of them is using the Private Browsing feature of Internet Explorer.

1. To start a private browsing session press **Ctrl + Shift + P** simultaneously
2. Press the Internet Explorer Home icon to  go to the Union Square login
3. User the following credentials to log in as the test user:
   - **Username** security.testing
   - **Password** test123

Notice the top right hand corner showing **Security Testing** (the forename used on the test account). You can use this to easily identify the test user screen.

4. Go to the **Activity Zone**, you can see that the Test User can access the functionality for the role **F02 All Internal Users.**

Once you have a test user on your organisation's Union Square system, you will need to change your Internet Explorer settings to allow you to login with a username and password. ***You do not need to do this during the training course as Internet Explorer has already been configured.***

1. Go to **Internet Options** and select the **Security** tab
2. Click the **Custom Level** button
3. Scroll to the very bottom of the **Settings** window to the **User Authentication** option
4. Change the radio button from **Automatic logon only in Intranet zone** to **Prompt for user name and password** (You can change this back when you have finished testing your new security roles)
5. Click OK to close this window and click OK to close the Internet options window
6. Close all browser windows and reopen your Union Square system which will now display and user name and password logon screen.

3a. Defining Zone Access for Roles

For a demonstration of this exercise, watch these videos:
Access Zones, Access Zones for Multiple Roles.

1. Using the Security Console and **Access - Zones** Drop down option, define access to the following items for the **D06 Senior Manager** role:

   Organisations

   - Search Organisations

   Contacts

   - Search Contacts
   - Add Internal Contacts
   - Edit Superseded Contact

   Enquiries

   - Add Enquiry

   Project

   - Add Project

   Leave

   - Search Leave Matrix

2. **Save** your changes and select **Access – User Role Membership** from the drop down.

3. Put **Maria Jones** in the **D06 Senior Managers** Role and **save** your changes

Note
The points above give the Senior Manager Role access to additional areas of Union Square that the All Internal Users Role does not provide. Therefore we only need to define the differences as giving the user access to both roles will fulfil their requirements.

!! Caution !!
Ensure that the role not only has access to the menu item but also the menu group if this is not provided by the **F02 All Internal Users** role.

3b. Defining Zone Access for Roles

Mike also needs to be put in an additional role however it is not yet configured.

The **D09 Business Administrators** Security Role will allow Mike access to the **Zones and Menu Items** of Union Square he needs to do his job, which are not covered by the **F02 All Internal Users Role**.

1. Configure the **D09 Business Administrators** System Role as follows:
    - Search Organisations
    - Search Contacts
    - Search Enquiries
    - Search Projects

2. Put **Mike Barber** in the **D09 Business Administrators** System Role

4. Dashpart Security

For a demonstration of this exercise, watch these videos:
Access Dashparts

1. Use the Security Console to define **access** to the following **Dashparts** for the **D06 Senior Managers** role:
   - **My Approvals**
   - **My Projects**

2. The **D09 Business Administrators Role** will need access to these **Dashparts**:
   - **My Projects**
   - **Intray** (Tool to publish scanned documents to Union Square)

3. Amend the **F02 All Internal** Users role to make the **Working Files** dashpart **Mandatory**.
4. Save the changes

5a. Band Security

For a demonstration of this exercise, watch these videos:
Access Bands

1. Select the Security Console tab and the **Access - Bands** drop down option
2. Define access to the following **Bands** for the **D06 Senior Managers** Role:

Entity – Bandset – Band	Level
Contact - General - Contact Details - External	2
Contact - General - Contact Methods	2
Contact - General - Notes	2
Contact - Leave - Leave - Current Year	3
Contact - Leave - Associated Internal Contacts	2
Contact - Leave - Emergency Contacts	1
Enquiry - General – Enquiry General	3
Organisation - General - Organisation Details - External	2
Organisation - General - Organisation Details - Internal	2
Organisation - General – Insurances	1
Project - General - Project Detail	2
Project - General - Internal Contacts	2
Project - General - Organisations and Contacts	2
Project - Implied Contacts – Implied Contacts	1

3. Save your changes

Note
If the user is in multiple roles that have differing access rights, the role with highest access rights will take precedence.

5b. Band Security

Mike will also need some **additional access** over the **F02 Internal Users Role**.

1. Configure the **D09 Business Administrators** role so that Mike can do the following:

   Contact Records

   - Edit External Contact Details
   - Edit Notes

   Enquiry Records

   - Edit Organisations and Contacts band
   - Edit Notes

   Organisation Record

   - Edit External Organisation Details
   - Edit Notes

   Project Record

   - Edit Organisation and Contacts band
   - View Issue History
   - View Document Issues

2. Save the changes

Security Manager Checklist

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

- ❑ Setup your own access / licence by filling in the Domain and Windows Logon Details
- ❑ Assign a licence for your users and add them to the **F02 – All Internal Users** role
- ❑ Configure your **F02 – All Internal Users** role for zones, dash parts, and bands
- ❑ Define and Configure any other roles you will require
- ❑ Add the relevant users to your additional Roles
- ❑ Test your security using your Security Testing account

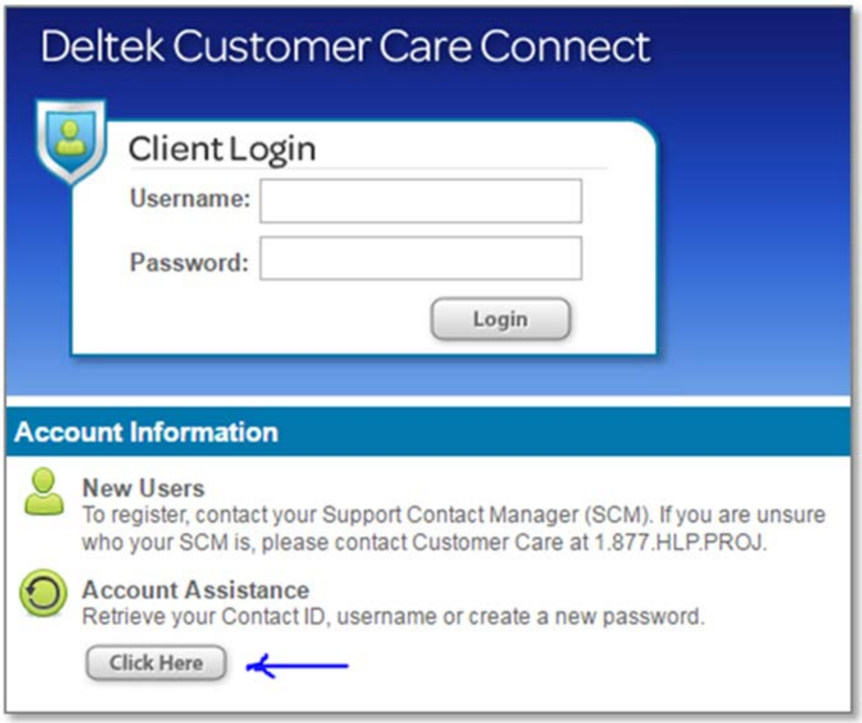
Support

During Implementation

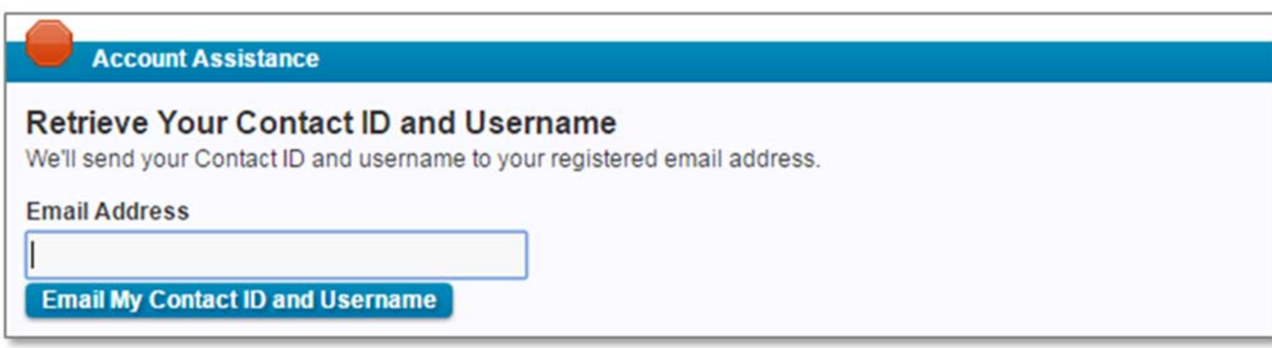
Send a detailed email, including screenshots, and/or a Windows Problem Steps Recorder (PSR) zip file to your Union Square Project Manager or Implementation Consultant.

After Implementation

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



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



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