Security Administration: access levels by user

Overview

Security Administration lets you view and change the security levels of IRIS users for your county. Only users with General Access Level 5 - County Admin or higher can open the editor. Users below level 5 see the message 'You do not have the required security level to access Security Administration.' and a **Home** button that returns to the Utilities portal.

The editor has three tabs: **Set Security by User**, **Set Security by Screen** and **Set Report Access**. This page covers the **Set Security by User** tab. For the other tabs, copying user security and resetting security, see Security Administration: screens, reports, copying and resetting.

IRIS decides the level that applies to a user in this order, highest priority first:

1. A page override, when the user has one on that page.
2. A portal override, when there is no page override and the user has an override on the portal.
3. The General Access Level, when there is no page or portal override.

Before you begin

- Sign in to IRIS10 for your county. See Logging in.
- Make sure your General Access Level is 5 - County Admin or higher.
- Know how to move between portals and pages. See Navigating portals and pages.

Procedure

Open Security Administration

1. In the Utilities portal, open **Security Administration**.

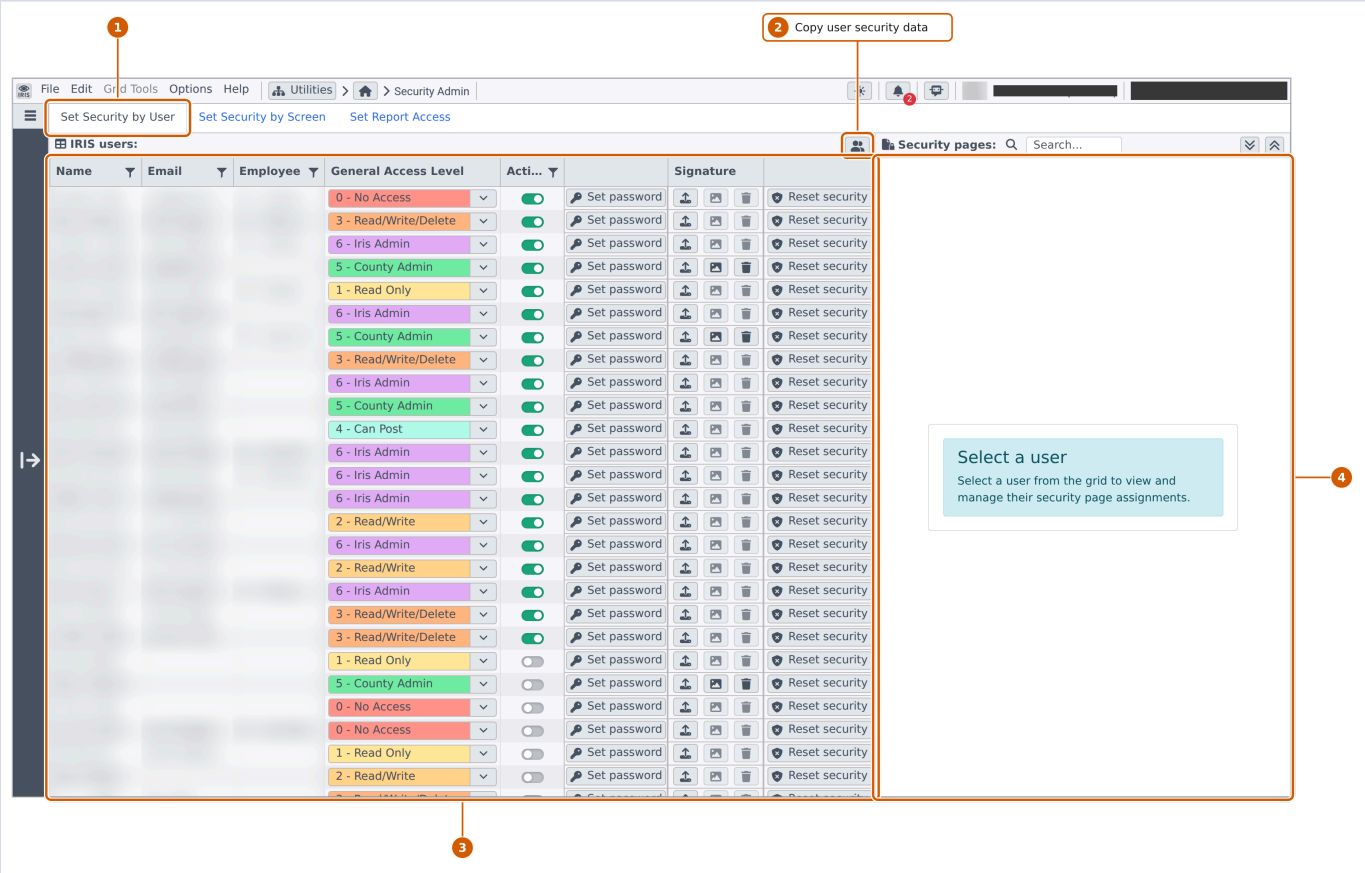
   The browser path is `/utilities/securityadmin`.

   > **Note:** Only users with General Access Level 5 - County Admin or higher see the editor.

2. Check what opens.

   The editor opens with three tabs: **Set Security by User**, **Set Security by Screen** and **Set Report Access**. The **Set Security by User** tab shows the IRIS users grid and a **Select a user** card.

> **Note:** Users below level 5 see 'You do not have the required security level to access Security Administration.' and a **Home** button that returns to the Utilities portal.



Security Administration opens on the Set Security by User tab, with the IRIS users grid on the left and the 'Select a user' card on the right.

1. Set Security by User tab
2. Copy user security data — covered on the companion page
3. IRIS users grid
4. Select a user

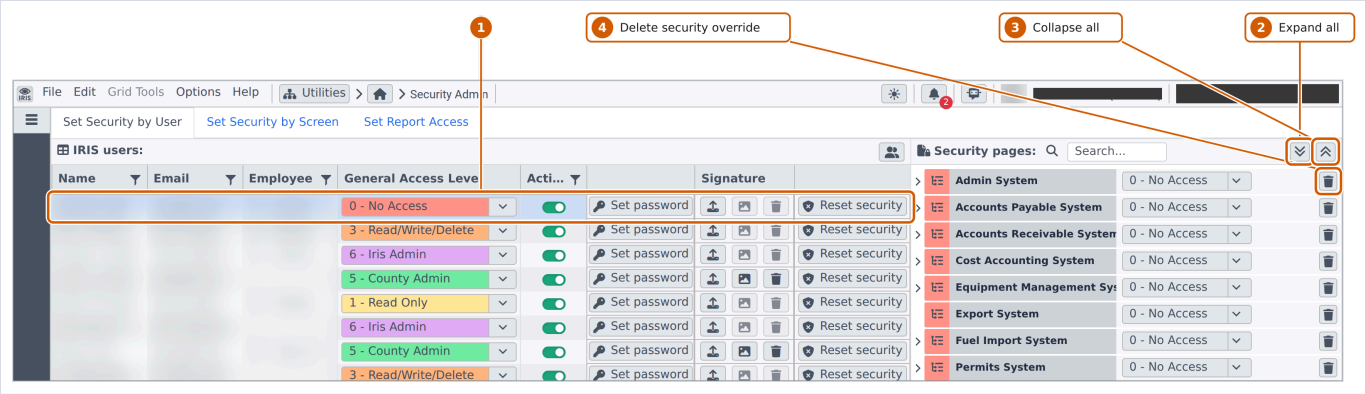
Select a user

1. On the **Set Security by User** tab, find the user in the IRIS users grid.

   To narrow the list, use the column filters. See Grid filters.
2. Click the user's row.

   The **Security pages** panel on the right shows that user's portals and pages, each with a level dropdown. The panel also has a search box and the **Expand all** and **Collapse all** buttons.
3. To see every page, click **Expand all**.

   All portals open to show their pages.



After you click a user's row, Security pages lists that user's portals and pages, each with a level dropdown and a Delete security override button.

1. Selected user
2. Expand all
3. Collapse all
4. Delete security override — available only when the item has its own override

Change a user's General Access Level

1. In the IRIS users grid, find the user's **General Access Level** dropdown and choose the new level.

   IRIS shows 'Warning! This will change the general access level to <level> for the user: <name>.' with **Accept** and **Cancel** buttons.

   > **Important:** Do not choose 6 - Iris Admin. That level is for the IRIS development and support team only.

2. Click **Accept**.

   IRIS saves the new level.

   > **Note:** To keep the current level, click **Cancel** instead. IRIS puts the previous level back and saves nothing.

3. Review the user's Security pages.

   The Security pages tree refreshes. Portals and pages without their own override now show the new General Access Level.

Set a portal or page level for a user

1. Click the user's row in the IRIS users grid.

   The user's Security pages appear.

2. In **Security pages**, find the portal or page.

   If needed, click **Expand all** or use the search box.

3. Choose a level in the dropdown next to the portal or page.

IRIS asks 'Change security level to <level> for <item>?' with **Accept** and **Cancel** buttons.

4. Click **Accept**.

   IRIS saves the level as an override for that portal or page, and the item's **Delete security override** button becomes available.

   > **Note:** To leave the level as it was, click **Cancel** instead.

Remove a portal or page override

1. Click the user's row and find the portal or page in **Security pages**.
2. Click the **Delete security override** button next to the item.

   For a portal, IRIS asks 'Are you sure you want to remove the security override for <item>? The effective level will revert to the general access level.' For a page, the message ends 'will revert to the portal level.' **Yes** and **No** buttons are shown.

   > **Note:** The button is available only when the item has its own override. Items that take their level from the portal or the General Access Level have it disabled.

3. Click **Yes**.

   IRIS removes the override. A portal goes back to the user's General Access Level, and a page goes back to the portal level.

   > **Note:** To keep the override, click **No** instead.

Make a user active or inactive

1. In the IRIS users grid, switch the user's **Active** switch on or off.

   The change saves right away, with no prompt.

Reference

Security levels

LEVEL (AS SHOWN)	WHAT IT ALLOWS
0 - No Access	No access to the portal or page. Access to a page needs level 1 or higher.
1 - Read Only	Open and view the portal or page.
2 - Read/Write	Adds editing records in grids. Whether **Add** appears depends on each screen's own add level.
3 - Read/Write/Delete	Adds deleting records in grids.
4 - Can Post	Adds posting menu items such as **Post**, **Approve** and **Void**.
5 - County Admin	County administrator. Can open Security Administration.

LEVEL (AS SHOWN)	WHAT IT ALLOWS
6 - Iris Admin	System Administrator level, held only by the IRIS development and support team. County administrators should not choose it.

Where a user's level comes from (highest priority first)

SOURCE	APPLIES TO	WHEN IT IS USED
Page override	One page	When the user has an override set on that page
Portal override	A portal and its pages without their own override	When there is no page override and the user has an override on the portal
General Access Level	Everything without an override	When there is no page or portal override

The General Access Level is a user's base security level for the county (0 to 6).

IRIS users grid (Set Security by User)

COLUMN OR CONTROL	WHAT IT SHOWS OR DOES
Name	User's name. Active users are listed first, then inactive users, each sorted by name.
Email	User's email address
Employee	Linked employee
General Access Level	Dropdown with the user's General Access Level. Changing it shows a warning with **Accept** and **Cancel**.
Active	On/off switch that saves right away
Set password	Opens the Set password window
Signature	Upload, view and delete buttons for the user's signature
Reset security	Removes the user's overrides after a warning. See Security Administration: screens, reports, copying and resetting.
Copy user security data (button above the grid)	Opens the Copy User Security window. See Security Administration: screens, reports, copying and resetting.

How the level affects buttons and menus

Toolbar buttons and menu items above the user's level are hidden. For what **Add**, **Edit** and **Delete** do in grids, see Grid viewing and editing. For the grid toolbar, see Data grid overview and basics.

ITEM	SHOWN WHEN
Toolbar buttons	The user's level for the screen is at least the level the button needs. Buttons above the user's level are not shown.
Add	Level 2 or higher, and the screen's own add level

ITEM	SHOWN WHEN
Edit records in grids	Level 2 - Read/Write or higher
Delete	Level 3 - Read/Write/Delete or higher
Post, Approve and Void menu items	Level 4 - Can Post or higher. Menu items above the user's level are hidden, not disabled.

Tips and notes

Important: 6 - Iris Admin is the System Administrator level, held only by the IRIS development and support team. Do not choose it for county users.

Note: Report pages never give more than 1 - Read Only, however high the user's page, portal or General Access Level is.

Tip: If **Delete security override** is greyed out, the item has no override of its own. It takes its level from the portal or from the General Access Level. To change the level, change the portal or the General Access Level, or set a new override on the item.

Note: Clicking **Cancel** on the General Access Level warning puts the previous level back. Nothing is saved.

Note: Security changes apply only to the county you are signed in to.

Tip: Release all approved payments needs only level 1. Do not treat it as a posting item.

Related topics

- Security Administration: screens, reports, copying and resetting
- Navigating portals and pages
- Logging in
- Data grid overview and basics
- Grid filters
- Grid viewing and editing