Security Administration: screens, reports, copying and resetting

Overview

Security Administration lets you work with the security of the users in your county. On it you can:

- Select a user and see their security.
- See and change which users have their own level on a portal or screen.
- Turn report access on or off for a user.
- Remove a security override.
- Copy one user's security to another user.
- Reset a user's security overrides.
- Make a user active or inactive.
- Set a user's password.
- Manage a user's signature.

The screen has three tabs: **Set Security by User**, **Set Security by Screen** and **Set Report Access**.

Before you begin

- Sign in with a General Access Level of **5 - County Admin** or higher. With a lower level, IRIS shows "You do not have the required security level to access Security Administration." and a **Home** button that takes you back to the Utilities portal.
- Know how to move between portals. See Navigating portals and pages.
- Know how security levels and overrides work for a single user. See Security Administration: access levels by user.

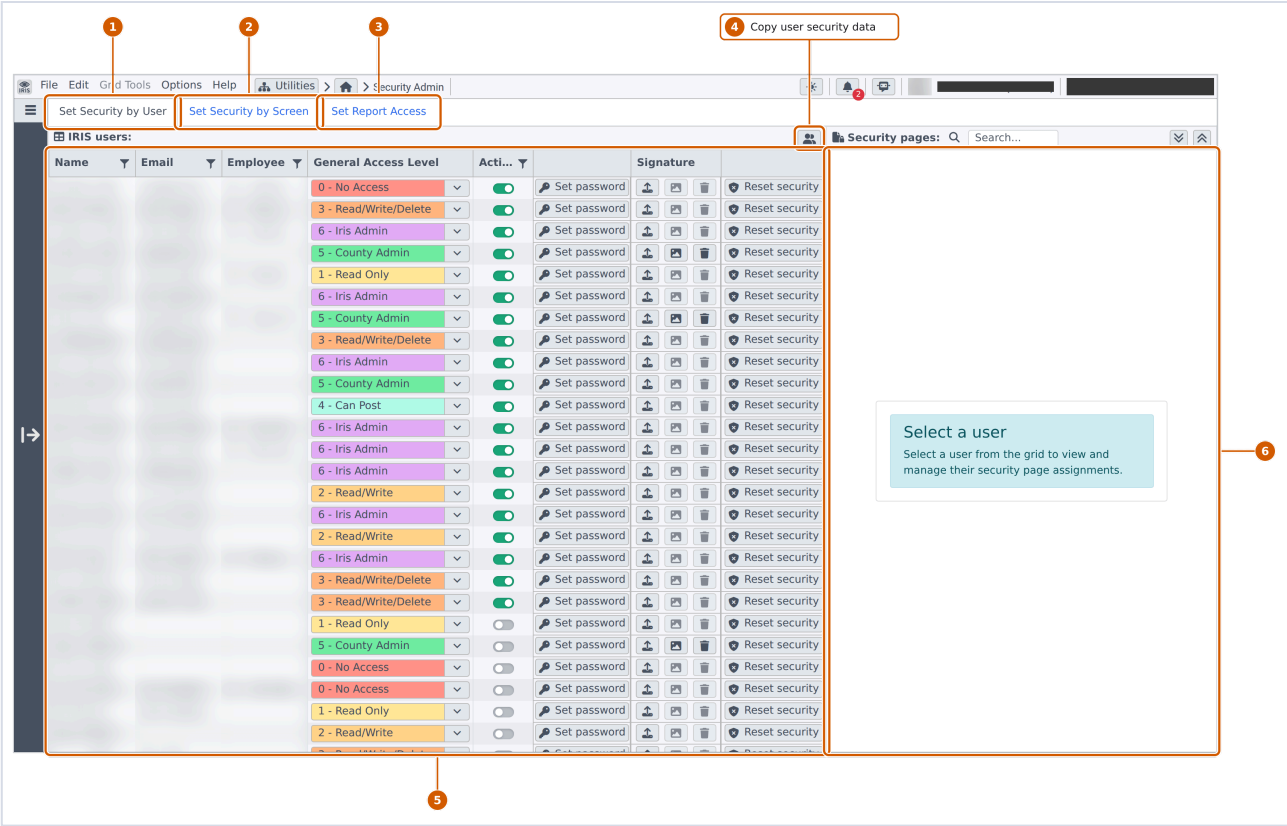
Procedure

Open Security Administration and select a user

1. Open the Utilities portal and choose **Security Administration**.

   The Security Administration screen opens with three tabs: **Set Security by User**, **Set Security by Screen** and **Set Report Access**.
2. On the **Set Security by User** tab, look at the IRIS users grid.

   The grid lists users with the columns **Name**, **Email**, **Employee**, **General Access Level**, **Active** and **Signature**. Active users are listed first, then inactive users, each sorted by name. The right-hand side shows "Select a user".

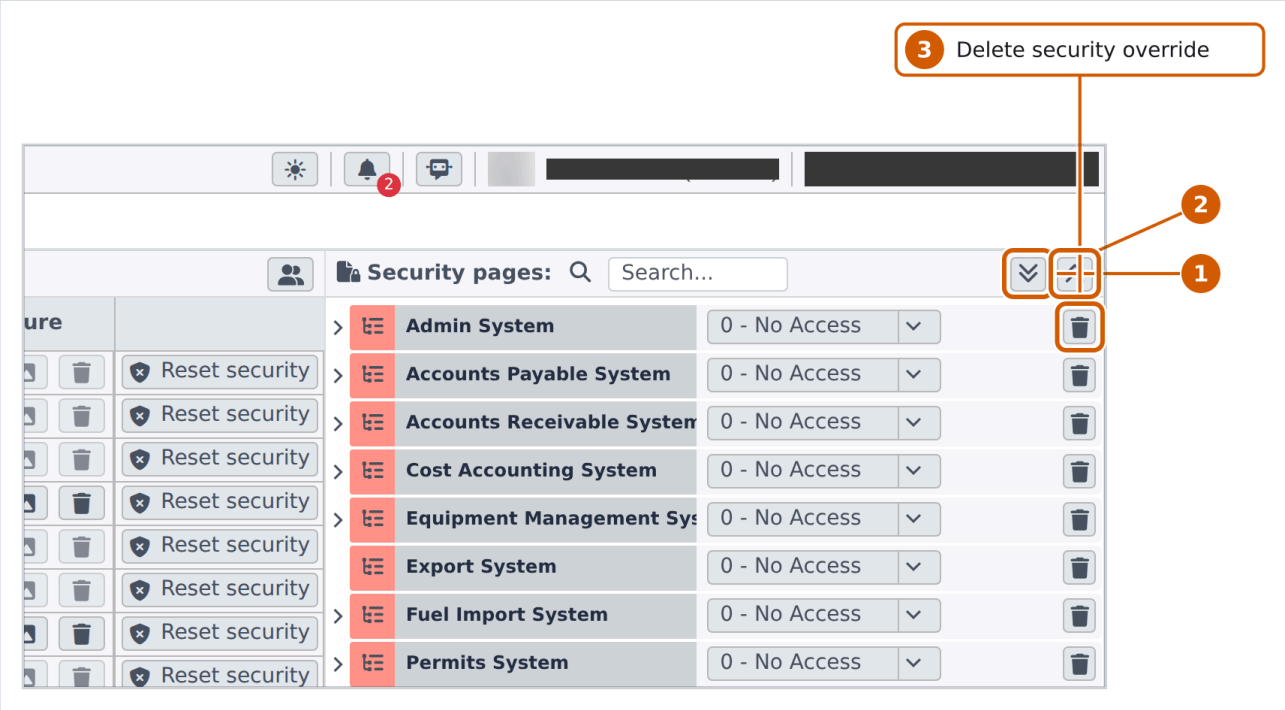


Security Administration opens on the Set Security by User tab, with the IRIS users grid on the left.

1. Set Security by User
2. Set Security by Screen
3. Set Report Access
4. Copy user security data
5. IRIS users grid
6. Select a user

3. Click anywhere in a user's row.

   The row is selected. The right-hand side shows **Security pages:** for that user, with a search box and the **Expand all** and **Collapse all** buttons.



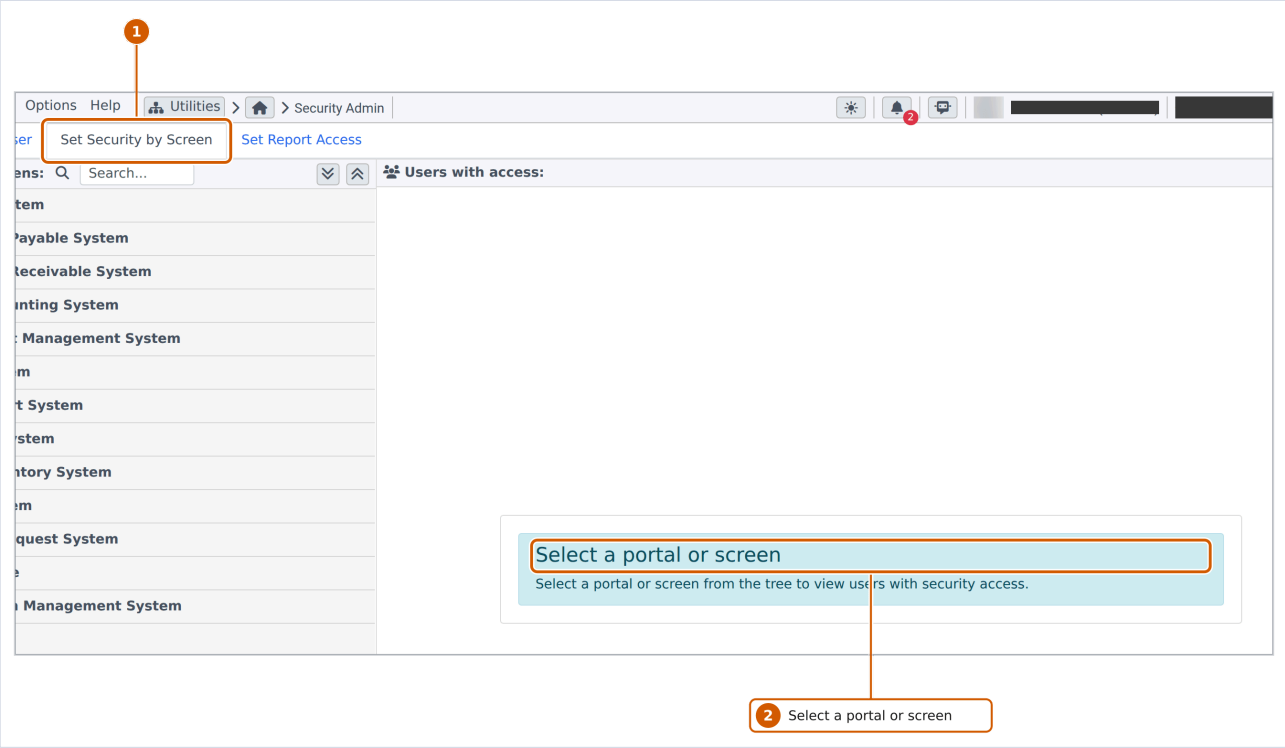
After you select a user, Security pages shows that user's portals with a level and a Delete security override button for each.

1. Expand all
2. Collapse all
3. Delete security override

See and change who has their own level on a portal or screen

1. Click the **Set Security by Screen** tab.

   The tab shows **Portals & screens:** on the left and **Users with access:** on the right, with the prompt "Select a portal or screen".



The Set Security by Screen tab. Choose a portal or screen to see the users who have their own level on it.

1. Set Security by Screen
2. Select a portal or screen

2. Choose a portal or screen in the **Portals & screens:** list.

   Users with access: lists the users who have their own override on that portal or screen, sorted by name. Users who only inherit their level are not listed.

3. To change a listed user's level, choose a new level in that user's **Level** dropdown.

   IRIS asks "Change security level to \<level\> for user: \<name\>?" with **Accept** and **Cancel**.

4. Click **Accept**.

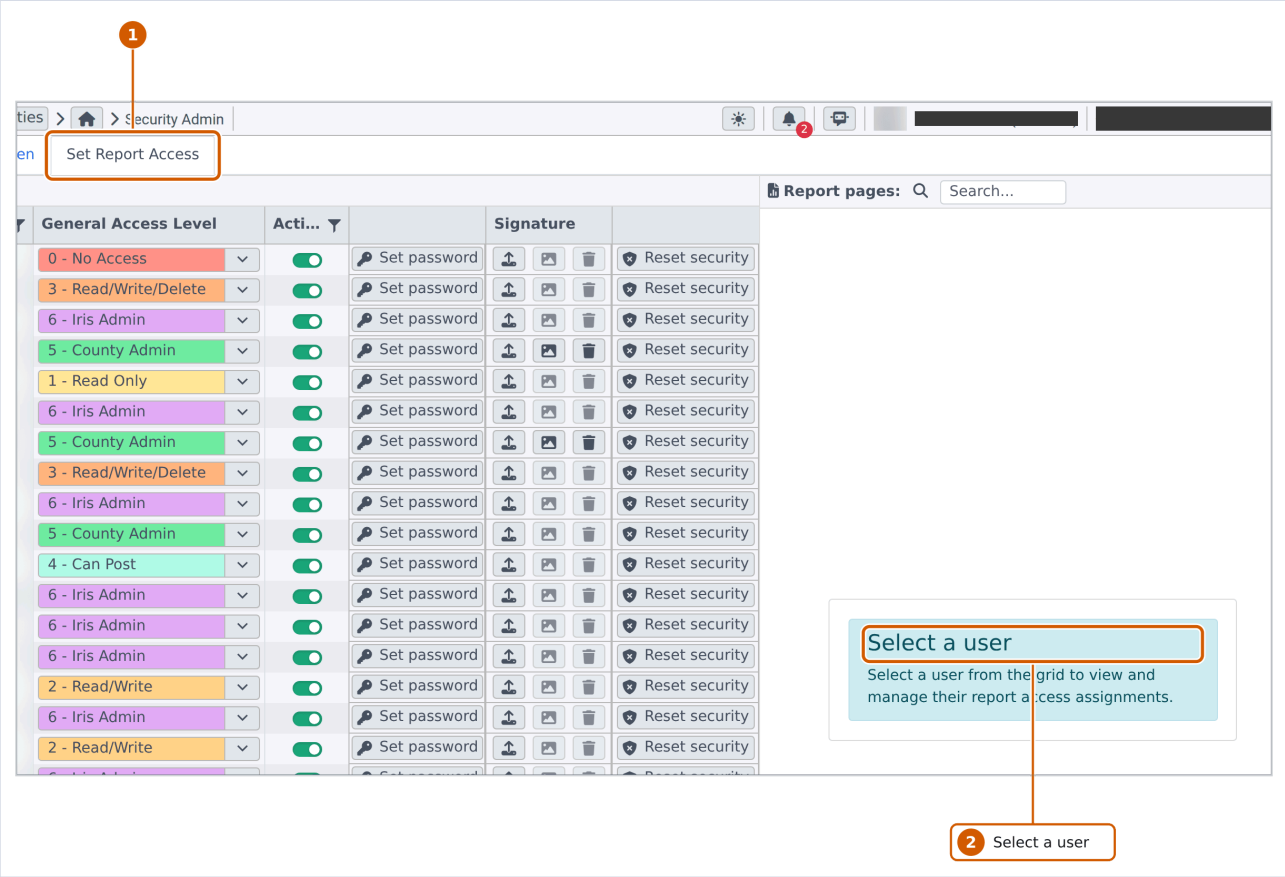
   The user's override on that portal or screen is saved at the new level.

> **Note:** To keep the current level, click **Cancel** instead.

Give or remove a user's access to a report

1. Click the **Set Report Access** tab.

   The tab shows the IRIS users grid and the prompt "Select a user".



The Set Report Access tab uses the same IRIS users grid. Select a user to see their report pages.

1. Set Report Access
2. Select a user

2. Click the user's row.

   Report pages: lists the reports, each with an on/off switch and a **Delete report access override** button. A switch is on when the user has access to that report.

3. Switch a report on to give access, or off to remove access.

   The change is saved at once, with no prompt. Switching on gives read-only access (**1 - Read Only**). Switching off sets the report to **0 - No Access** for that user.

4. To remove the user's own setting for a report so it goes back to the inherited level, click **Delete report access override** next to the report.

   IRIS asks "Are you sure you want to remove the security override for \<item\>? The effective level will revert to the portal level." with **Yes** and **No**.

5. Click **Yes**.

   The override is removed and the user's access to that report follows the portal level.

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

Remove a security override for a user

1. On the **Set Security by User** tab, click the user's row.

Security pages: shows the user's portals and pages, each with a level dropdown and a **Delete security override** button.

2. Find the portal or page. Use **Expand all** to show every page.

   All portals open to show their pages.

3. Click **Delete security override** next to the portal or page.

   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 portal, or "... will revert to the portal level." for a page, with **Yes** and **No**.

   > **Note:** You can click the button only when the item has its own override.

4. Click **Yes**.

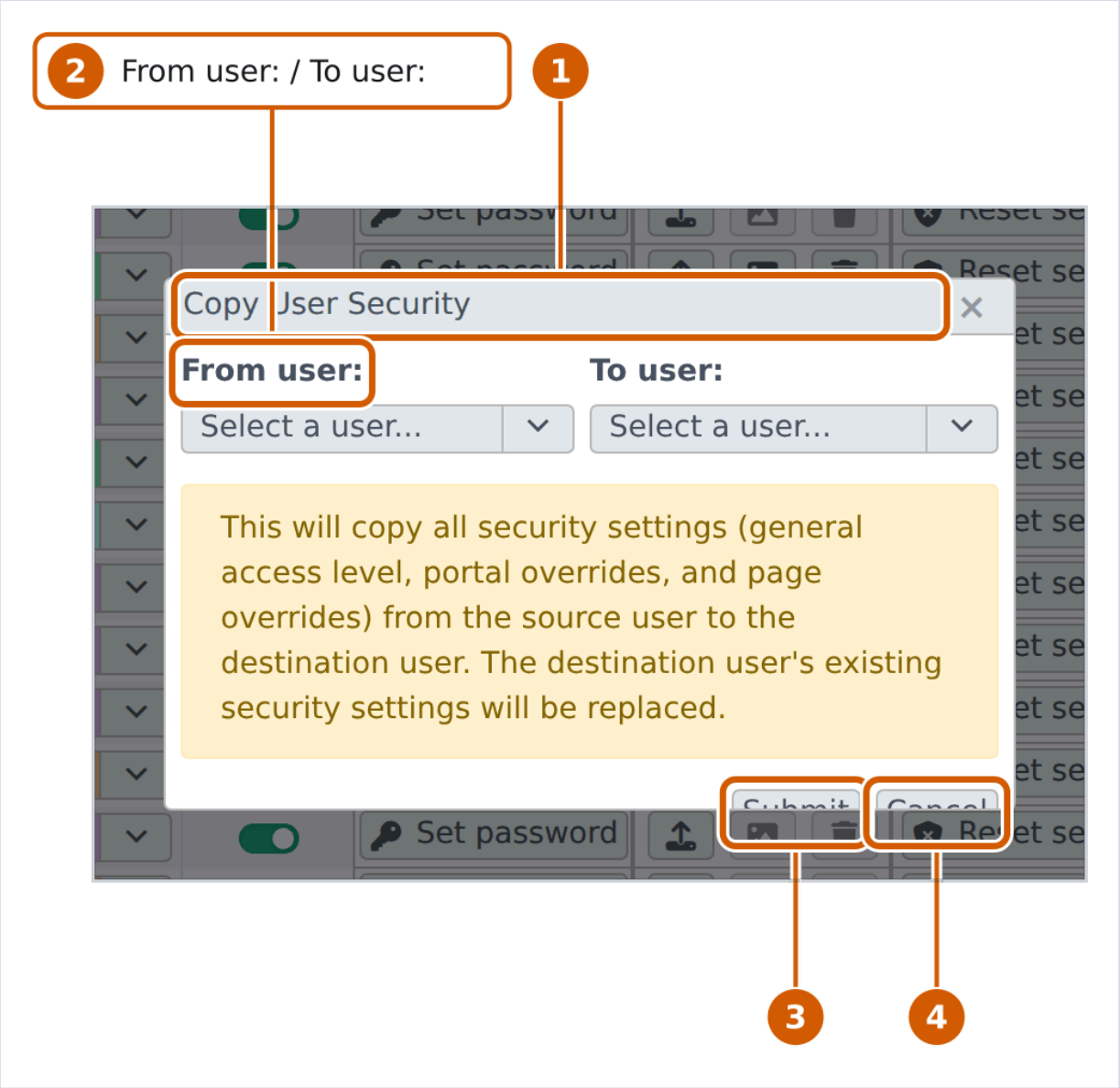
   The override is removed. A portal goes back to the user's General Access Level. A page goes back to the portal level.

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

Copy security from one user to another

1. On the **Set Security by User** tab, click the **Copy user security data** button above the IRIS users grid.

   The **Copy User Security** window opens with **From user:** and **To user:** lists and **Submit** and **Cancel** buttons.



The Copy User Security window. The To user's existing security settings are replaced, and the copy cannot be undone.

1. Copy User Security
2. From user: / To user:
3. Submit
4. Cancel

2. Read the warning in the window.

   The window states that all security settings (general access level, portal overrides and page overrides) are copied from the source user and that the destination user's existing settings are replaced.

3. In **From user:**, choose the user whose security you want to copy. You can type to filter the list.
4. In **To user:**, choose the user who should receive that security.

> **Note:** The two users must be different. If either list is empty, IRIS shows "Please select both a source and destination user."

5. Click **Submit**.

   The window closes. IRIS shows "\<From\>'s security settings have been copied to \<To\>." The To user now has the From user's General Access Level and all of the From user's portal, page and report-access overrides. All of the To user's previous overrides are gone. This cannot be undone.

> **Note:** To close the window without copying, click **Cancel** instead.

Reset a user's security

1. On the **Set Security by User** tab, find the user in the IRIS users grid and click the **Reset security** button in that user's row.

   IRIS asks "Warning! Are you sure you want to reset the users security settings? This action cannot be undone." with **Yes** and **No**.
2. Click **Yes**.

   All of the user's portal, page and report-access overrides are deleted and the trees reload. The user's General Access Level stays, so the user's access now follows it everywhere. This cannot be undone.

> **Note:** To cancel the reset, click **No** instead.

Make a user active or inactive

1. In the IRIS users grid, click the **Active** switch in the user's row.

   The change is saved at once. If it cannot be saved, the switch goes back to its previous position and, in most cases, an error message appears.

Set a user's password

1. In the IRIS users grid, click the **Set password** button in the user's row.

   The **Set password** window opens. If the user has an email address, it shows **Create New Password** and **Confirm Password**. If the user has no email address, only an email form shows, with the message "The selected user does not have an email address assigned. Please assign an email address to this user before setting a password."

> **Note:** If the email form shows, complete steps 2 to 4 first. Otherwise, go to step 5.

2. Type the user's email address in the **Email Address** box.
3. Click **Submit**.

   IRIS shows "Email updated successfully." If the email cannot be saved, IRIS shows an error message.
4. Click **Ok** on the success message.

The **Create New Password** and **Confirm Password** boxes appear.

5. Type the new password in **Create New Password**.

   The checks below the box update as you type: 8 to 30 characters; **Contains uppercase character**; **Contains a digit**; **Contains special character**; and that the password does not contain `.` `;` `'` or `@`.
6. Type the same password in **Confirm Password**.
7. Click **Submit**.

   IRIS shows "Password updated successfully." If the password cannot be saved, IRIS shows an error message.

Manage a user's signature

1. In the IRIS users grid, use the upload button in the **Signature** column of the user's row to add a signature.
2. To see the signature, click the view button in the **Signature** column.

   > **Note:** View and delete are unavailable when the user has no signature.
3. To remove the signature, click the delete button in the **Signature** column.

   IRIS asks "Are you sure you want to delete the signature for user: \<name\>?"

Reference

Security levels

LEVEL SHOWN IN IRIS	WHAT IT MEANS FOR THE USER
0 - No Access	No access to the portal, page or report.
1 - Read Only	Can open the page and view it. This is also the highest level any report can have.
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 menu items such as Post, Approve and Void.
5 - County Admin	Can open Security Administration and manage the county's users.
6 - Iris Admin	System Administrator level, held only by the IRIS development and support team. County administrators should not choose it.

Which level applies to a page

ORDER	LEVEL USED	SHOWN AS SOURCE
1	The user's own override on the page	`page`

ORDER	LEVEL USED	SHOWN AS SOURCE
2	Otherwise, the user's own override on the portal	`portal`
3	Otherwise, the user's General Access Level	`generalaccess`

IRIS users grid

COLUMN OR CONTROL	WHAT IT DOES
Name, **Email**, **Employee**	Identify the user. You can filter these columns.
General Access Level	The user's base level for this county. It applies wherever there is no override.
Active	On/off switch. It saves as soon as you click it.
Set password	Opens the **Set password** window.
Signature	Upload, view and delete buttons for the user's signature.
Reset security	Removes all of the user's overrides after a warning.
Copy user security data (above the grid)	Opens the **Copy User Security** window.

Messages you may see

MESSAGE	WHEN IT APPEARS
You do not have the required security level to access Security Administration.	You open Security Administration with a General Access Level below 5.
Change security level to \<level\> for user: \<name\>?	You change a **Level** on the **Set Security by Screen** tab (**Accept** or **Cancel**).
Are you sure you want to remove the security override for \<item\>? The effective level will revert to the general access level.	You delete a portal override (**Yes** or **No**).
Are you sure you want to remove the security override for \<item\>? The effective level will revert to the portal level.	You delete a page or report override (**Yes** or **No**).
Please select both a source and destination user.	You click **Submit** in **Copy User Security** without both users.
Source and destination users must be different.	You choose the same user in **From user:** and **To user:**.
\<From\>'s security settings have been copied to \<To\>.	A copy succeeded.
Warning! Are you sure you want to reset the users security settings? This action cannot be undone.	You click **Reset security** (**Yes** or **No**).
Email updated successfully.	You saved an email address in the **Set password** window.
Password updated successfully.	You saved a new password.

MESSAGE	WHEN IT APPEARS
Are you sure you want to delete the signature for user: \ <name\>?	You click the signature delete button.

Tips and notes

Important: Copy User Security replaces the To user's General Access Level and all of their portal, page and report-access overrides with the From user's. The copy cannot be undone, so check both names before you click **Submit**.

Important: Reset security cannot be undone. It removes every override for the user but keeps the General Access Level, so the user's access everywhere then follows that level.

Note: Set Security by Screen lists only users who have their own override on the chosen portal or screen. Users who inherit their level from a portal or their General Access Level are not listed. Use **Set Security by User** to see their level.

Note: Report access is always read only. Turning a report on gives **1 - Read Only**, however high the user's other levels are.

Note: Report access switches and the **Active** switch save as soon as you click them. There is no confirmation prompt.

Tip: Delete security override is available only on items where the user has their own override. If the button is greyed out, the item is inheriting its level.

Note: Security changes, including copies, apply to the county you are signed in to.

Note: Menu and toolbar items that need a higher level than the user has are hidden, not greyed out. For example, Post, Approve and Void need **4 - Can Post**.

Note: 6 - Iris Admin is the System Administrator level for the IRIS development and support team. Do not choose it for county users.

Related topics

- Security Administration: access levels by user
- Navigating portals and pages
- Data grid overview and basics
- Grid filters
- Logging in