## Overview

The 2019 spring release of atrieveERP includes changes to the way that you define the menu items that display for a signed in user. The View Builder functionality, previously accessed through Security Builder, has been replaced with the new Menu Builder. All other functions of Security Builder remain unchanged, you will continue to use Security Builder to manage your user and location overrides as well as GL security.

The following is an overview of the User Authentication Process in the Web Portal and the Menu Retrieval Process.

User Authentication Process
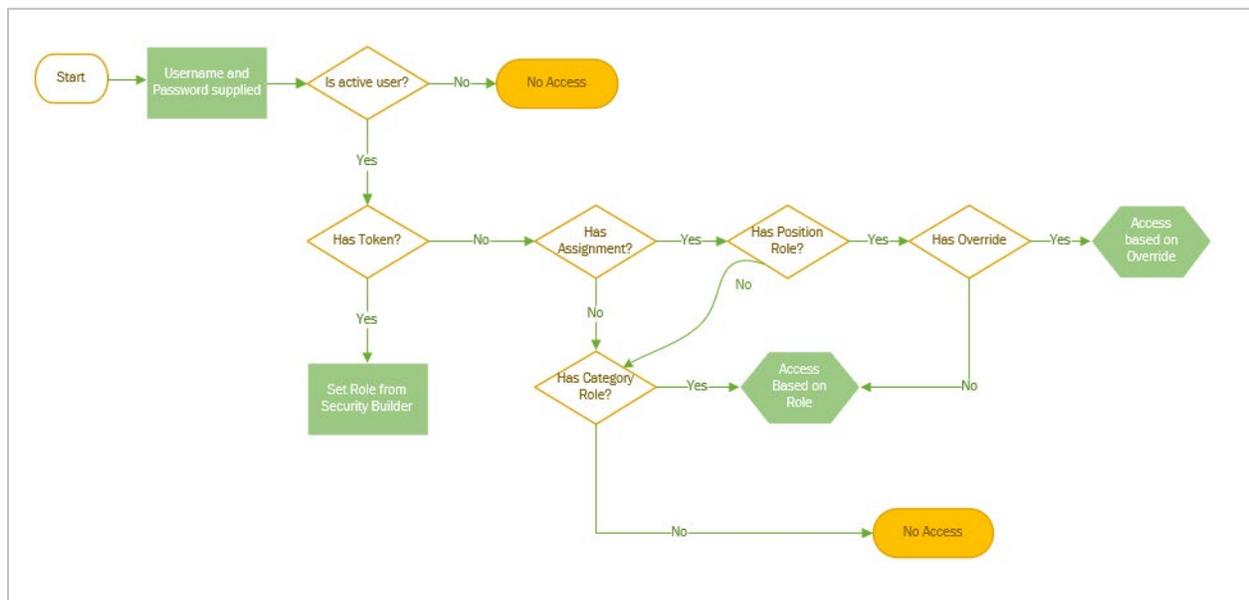
The process of authentication into the Web Portal starts with one of the following scenarios:

1. By entering a username and password combination into the login page, or
2. By supplying a valid token using the Token Authentication System

The system checks if a regular user or token-based user has signed in and is accessing the portal (an example of a token-based user is a new employee being onboarded receiving a token to access the onboarding package). If a token ID is present, the token is verified using the Token Authentication System and an employee number and role code are returned from the valid token. From here, the employee number and role code are used for the security module as if a regular user has been authenticated and signed in.

The system performs additional checks to determine if the user has an assignment with role based on the category or position code or has a role override in Security Builder and based on

the information returned determines whether the user will access the system based on a role or an override.

There are areas where the role could be applied based on the employee's assignment, but for some reason might need to be overridden for certain individuals. Currently, a Menu Builder Override would not accomplish this, so the Security Builder Role Override would be required.

Examples of security provisions based on role that might require a Security Builder Role Override to still be in place:

- eDocs is the SMS Document Security Code is based on Role
- Dashboards assigned by Role
- GL Security applied to a Role
- RW Reports for all products, secured by Role

In the case of provisioning based on the employee's Role, Security Builder overrides the Assigned Role, as it always has.

Important: The calculation of a Role and its priority is the same as in previous releases and remains unchanged. The main thing to note is that the Menu Builder process gets called AFTER the login process has completed. If a user has a Menu Override (meaning, the user has a record in Menu Builder and is assigned a role or roles in Menu Builder) the menu items for these roles will be seen instead of those from the Security Role determined at login. If the user does NOT have a Menu Override present in Menu Builder, the Role code calculated during the login process is used to generate the menu.

Menu Retrieval Process

A Menu Builder Role overrides a Security Builder Role, which overrides an Assigned Role in terms of the menu items that will be displayed to the signed in user.
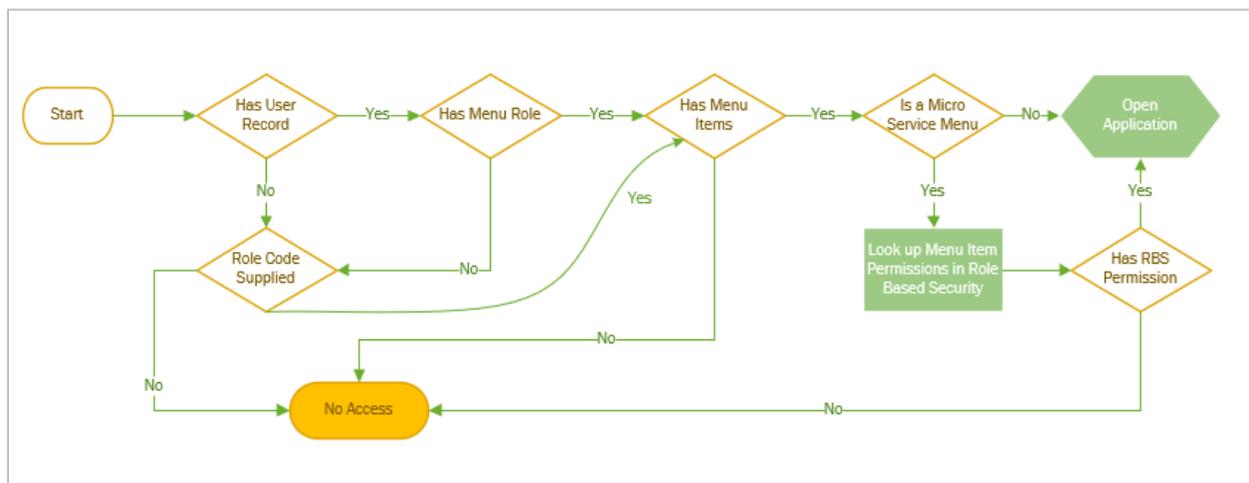
1. The Menu Builder system will check if there is record in the Menu Builder Users Table matching the supplied security ID (i.e. the employee number). If there is such a record, it then checks to see if there are roles associated with that User, and if so, displays the menu items from the consolidation of those Roles. If there are not Roles assigned to this User in Menu Builder, the system will then make a request to retrieve the menu using the Security Role code assigned to the User during login. If a Role is found, the system will display the menu items based on that Role.

2. If we are requesting a menu within a Micro Service (i.e. Journal Entry, Purchasing Card, External Job Posting, Role Based Security and Menu Builder), the system will verify in Role Based Security, if the menu items presented in that micro service menu have permissions, and if yes, verify the Security ID of the user requesting the menu is a member of an applicable RBS role, and that the role contains the required permissions to access those functions within the Micro Service. If so, the menu items are added to the returned menu, otherwise they are bypassed.

Login Information

Clicking on the signed in User's name at the bottom of the left navigation menu will display Role and security information for that user.

< Jana Adam

User Information

Username:	adamja
Employee Number:	11942
Employee Name:	Jana Adam
Role:	ALL ACCESS - All Access
User has Override in Security Builder:	Yes via Employee # 11942

Location Information

Location(s):
General Locations: 1500
BMW Locations: 0021
TEW Locations: 0021
RQW Locations: 0021
Non Authorizer Locations: 1500

GL Security Information

GL Security Template:	fullaccess
Statement(s):	select gl if level 1 between '00' and 'zz'

Menu Service Information

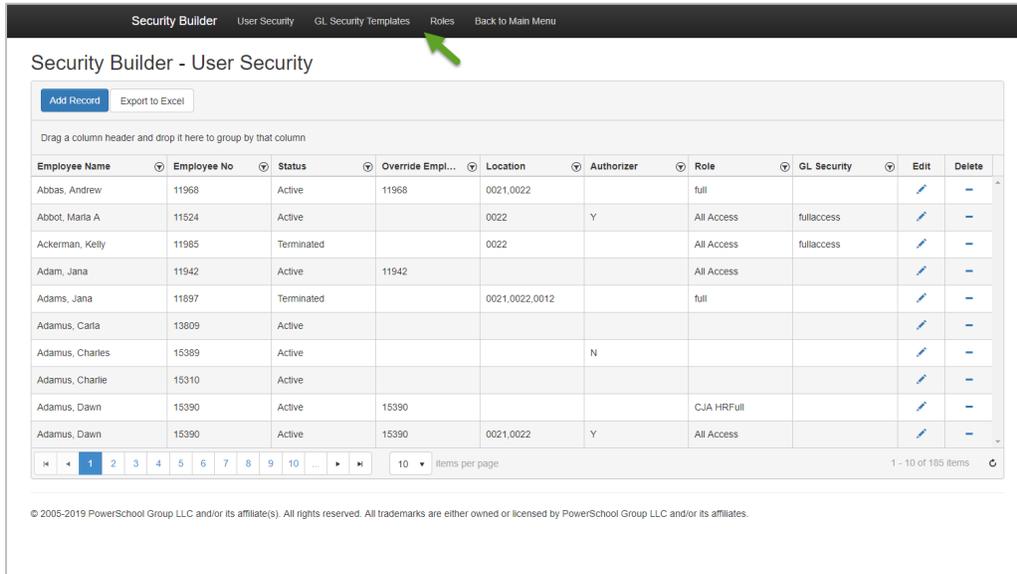|	
Role Code (ALL ACCESS) Exists in Menu Service:	Yes
User Override in Menu Service:	Yes
Menu Service Role(s):	All Access (all access)

Role Based Security Information

Role Based Security Role(s):	Secretary Import Role

From this page, you have access to important information, such as:

- Security Builder User Override
- Location Information
- GL Security Information
- Menu Service Information
- Role Based Security (if assigned)

Security Builder Changes

On the Security Builder home page, the View Builder menu option has been removed from the menu header bar.
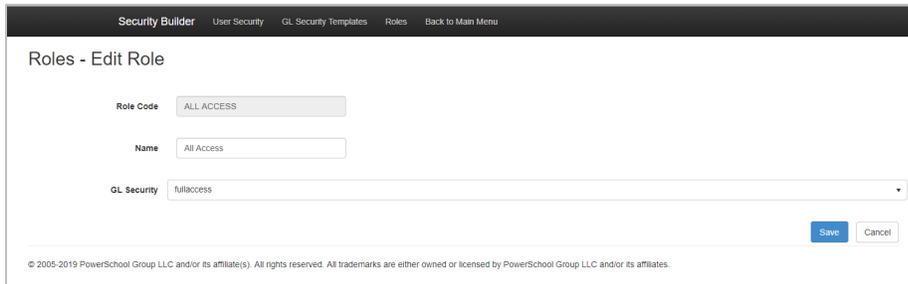

In addition, when you edit a Role you will no longer see a list of menu views associated to that Role.

Note: As part of the upgrade to the spring 2019 release all existing Roles and Views will be automatically imported from Security Builder into Menu Builder. Post upgrade, if you create a new Role in atrieve or if you create a new override Role in Security Builder then you would also need to create that Role in Menu Builder to define the menu items that are available for the new Role. This secondary step will be removed in the future as the functionality of Role Based Security is enhanced.

Menu Builder

The new Menu Builder is located under the Tools menu and Security and Setup. On the Roles page, you will see a listing of the Roles defined by your district. From this page you may view, add, edit and remove Roles.
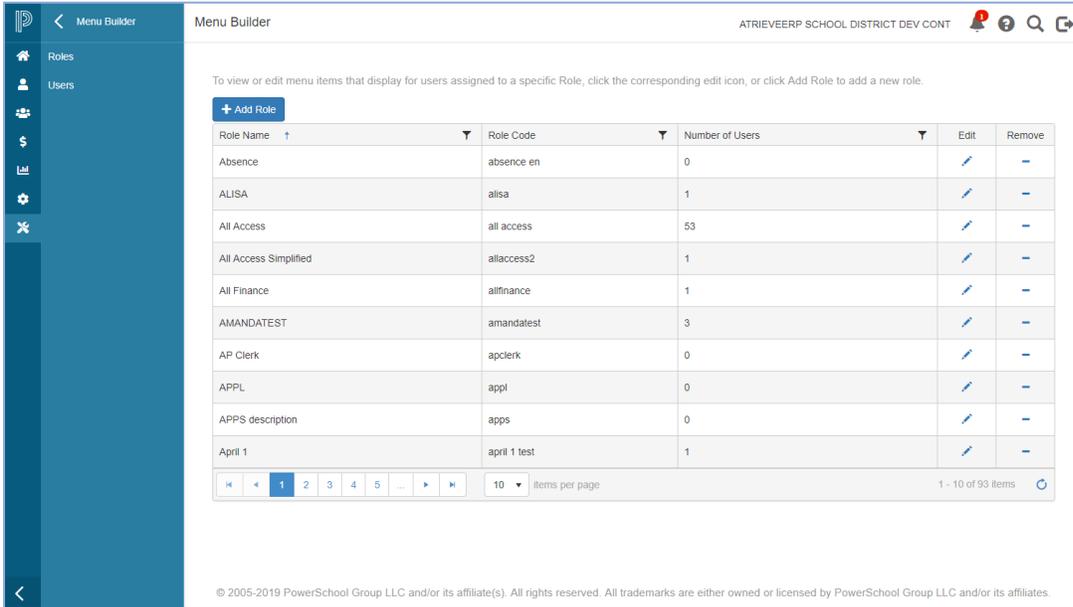
The Roles in Menu Builder define the menu items that will display for users assigned to that role when they sign into the system. For consistency, you would use the same Role name across applications.

Note that the signed in User will still require the appropriate permissions to be able to access the programs associated to the menu items. If the User clicks on a menu item where they do not have permission to access the application, a warning message will display.

To add a new role click Add Role and enter the Role and Role Code. For the Role code you may enter a new code, by typing a value into the text field, or select an existing code from the list.

*Note that existing codes are pulled from the Role Code database in atrieveHR.   Best practice would be that you add the Role to the Role Code database in atrieveHR first which populates the Role Code in Menu Builder which saves you from having to add it to both places manually. If you add a Role Code in Menu Builder first, it does not automatically update the Role Code database.*

To remove a Role from Menu Builder, click on the corresponding Remove icon. If there are Users assigned to the Role that you are attempting to remove you will be prevented from removing it. To remove the Role, you will need to reassign any Users assigned to that role to another role first. Or, if those users do not require a Menu Override you would simply remove the users from the role, and the menu for those Users will be built based on their logged in security Role.

To edit an existing Role, click on the Edit pencil. On the Edit Role page, you will see a listing of the menus and menu items associated to that Role, as well as the Users assigned to the Role. If required, you may update the Role name and select a different Role Code to associate to the Role (if applicable) on this page. Changing the associated Role Code should only be done with caution.
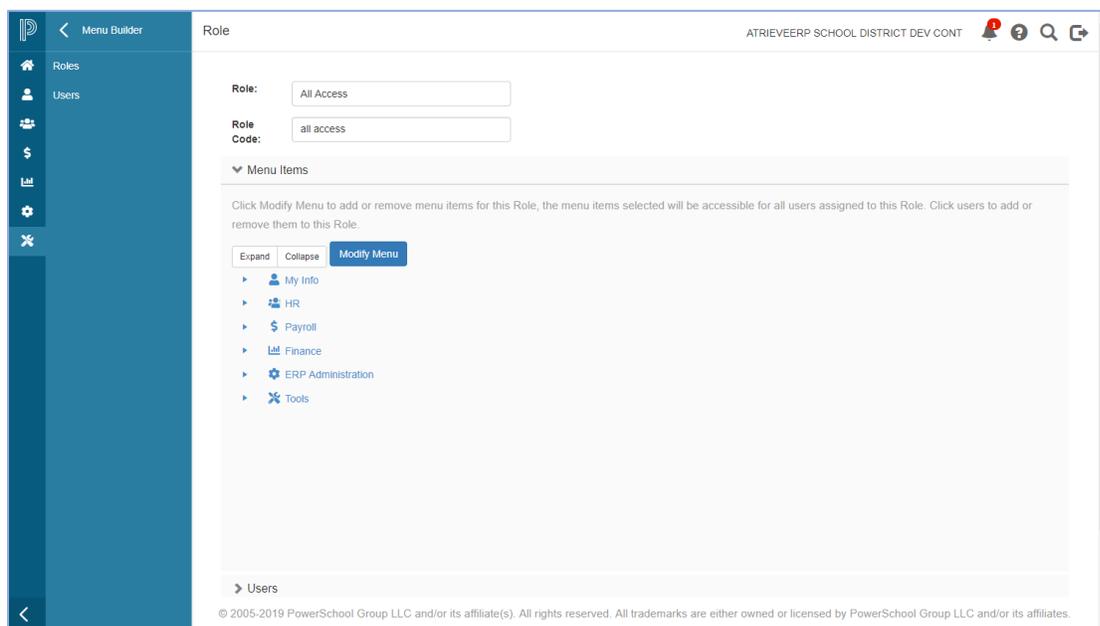

In the Menu Items section of the page you will see a menu tree which is dynamically built based on the menu items selected for the Role.

By default, when a Role is first created the menu tree will not display. To add menu items, click Modify Menu and the menu item popup window will display.
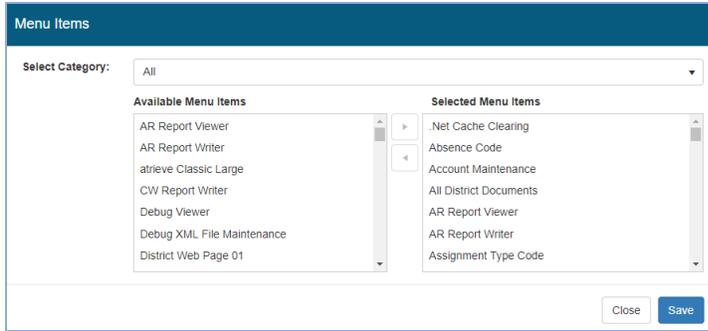
If you are not sure under which menu the menu item resides then you may search All Available Menu Items. But if you know the menu where the menu item resides then you can select it from the menu dropdown to refine your search.
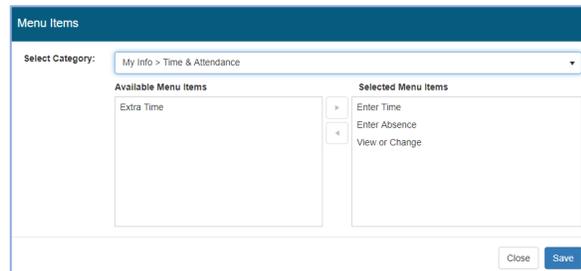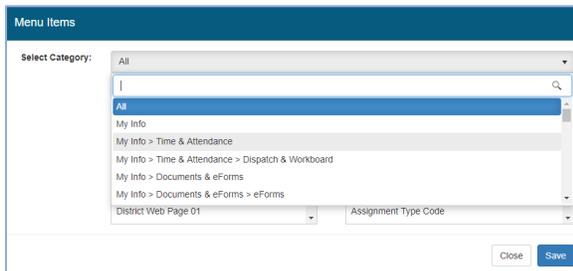
Once you have located the menu item, click on it and then click the right arrow button to move to the selected list. To deselect an item, click to highlight it and then click the left arrow button to move it back to the Available list.

Click save, and the menu item tree is updated.   By default, the menu tree is collapsed; you can expand each menu by clicking the arrow head next to the menu, or to expand all, click the Expand button. To collapse the entire tree, click the Collapse button.
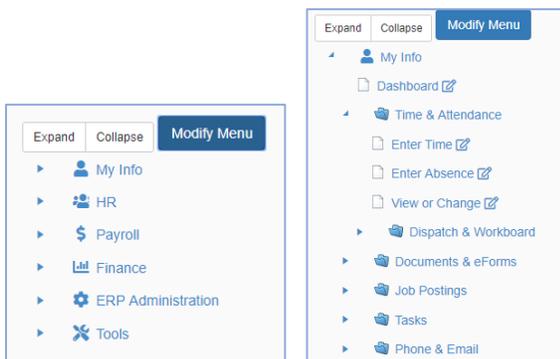
Next to each menu item there is an Edit icon that allows you to view the associated environment. DO NOT make changes to the environment for a menu item without consulting an atrieveERP specialist.

AtrieveERP has 7 core system environments, including:

- Finance
- Human Resources
- Payroll
- Employee Self Serve
- Global
- Miscellaneous Account Receivable
- Automated Dispatch

Generally, these are the only environments that your district will need, and our menu items are configured for those environments. In some cases, your district may require additional environments, for example to support different payroll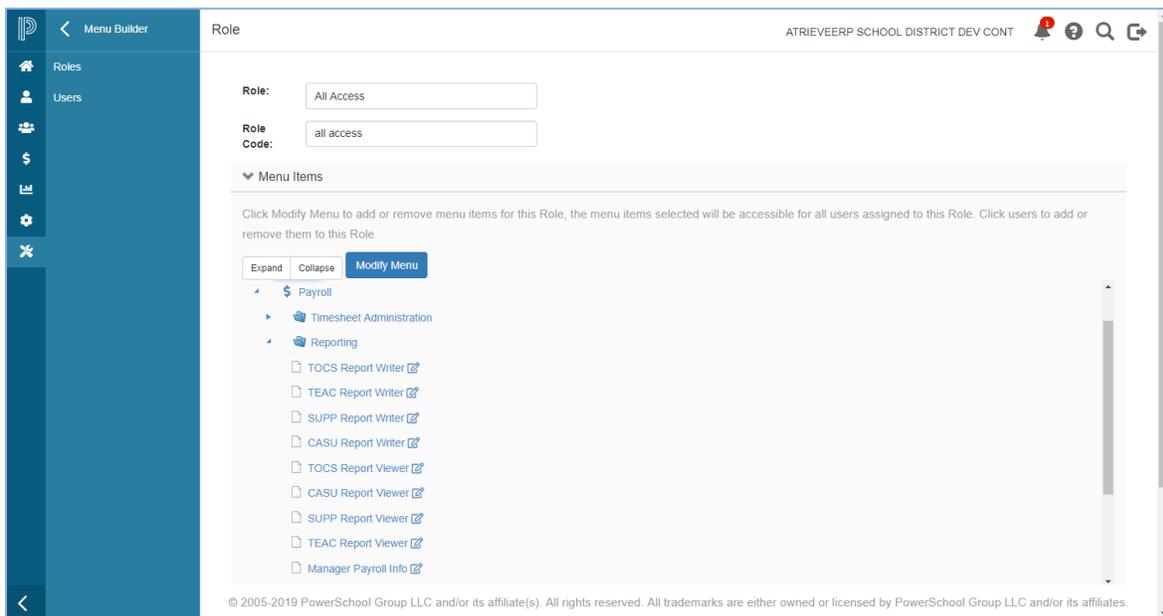 configurations for reporting (Teacher Pay reporting, Support Pay reporting, etc.). Additional environments can be configured by your atrieveERP specialists; for more information please enter a request through support.

Menu item names are standardized and cannot in general be modified, but there are some menu items that do allow for customization of the menu item name, including but not limited to custom eForms, Report Writers and Viewers, where additional environments are used and some menu items under Job Postings. For a detailed listing of all menu items that are customizable refer to the Appendix in this document.

To add or remove Users associated to a Role click on the Users section below the Menu Item tree. From here you can type the name of the user to add to the Role. Or to remove a user from a menu override Role click the remove icon.

Note that the employee search list contains ONLY those users with Menu Overrides. Users without overrides will have their menu built by the system, based on the Role Code assigned to that user during the login process to the web portal.
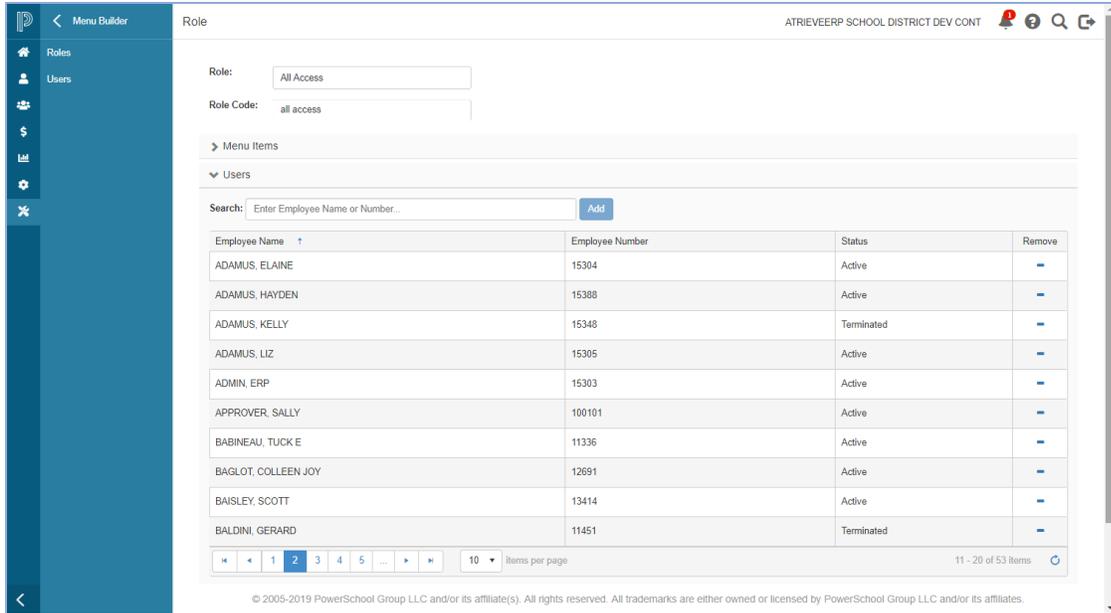
Selecting the Users menu item from the left navigation menu provides you with a quick way to view the roles and menu items associated to a particular User.
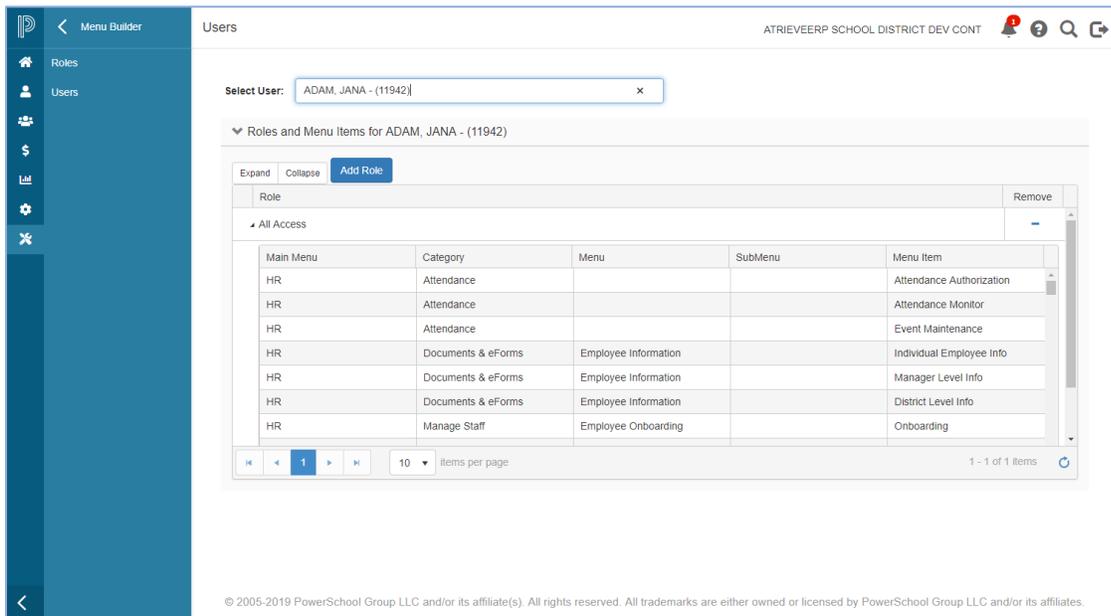
A user may be assigned more than one Role if applicable in Menu Builder. When the user signs into the system the menu will display a consolidated listing of the menu items that they have access to, based on their Role or Roles.

You may remove menu override roles associated to a user, and all associated menu items will no longer be accessible to that user when they sign in.

Appendix

The following table is a listing of menu items where the menu item display name may be customized.

Important: If you have customized the display name for any of the menu items listed below, when the migration from Security Builder to Menu Builder completes, your custom display names <u>WILL</u> be preserved.

But, if you have created <u>menu groups</u> in Security Builder rather than customizing the menu item display name directly, these groupings will NOT be mapped into the new standardized menu. You will need to update the display name for those menu items to ensure that they are intuitive for your end users.

Example 1: In Security Builder you have customized the display name for a Report Writer to 'Warehouse Reports'. When the migration completes the menu item in the new Menu Builder and standardized menu will be 'Warehouse Reports'

Example 2: In Security Builder you have added a Menu group labelled 'Warehouse' and in that group you have the menu item 'Report Writer' (which is the standard unedited name). When the migration completes the menu item in the new Menu Builder and standardized menu will be 'Report Writer'.

To update this menu item, you will do the following:

1. Navigate to Menu Builder
2. Edit a Role that includes the menu item to be updated
3. Locate the menu item in the menu item tree and click the edit icon next to the name
4. On the Customize Menu Item popup enter the new name and click save and the menu item name will be saved for the selected Role only. Or, to have the change apply to all Roles that currently include the menu item, click the option to update all.
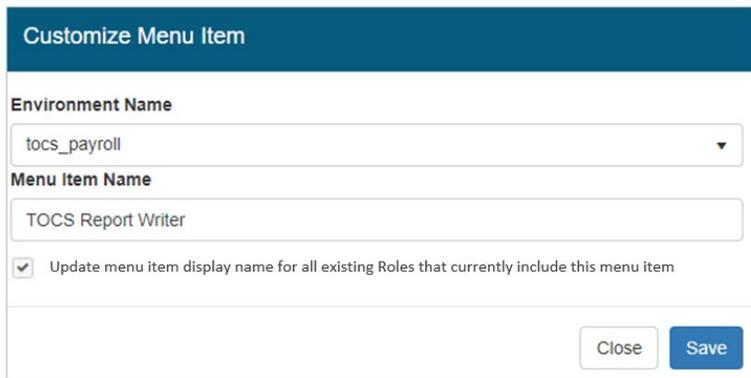
List of Customizable Menu Item Display Names

Menu Path	Menu Item Name
My Info > Documents & eForms > eForms	Employee Web Page 01
My Info > Documents & eForms > eForms	Employee Web Page 02
My Info > Documents & eForms > eForms	Employee Web Page 03
My Info > Documents & eForms > eForms	Employee Web Page 04

My Info > Documents & eForms > eForms	Employee Web Page 05
My Info > Documents & eForms > eForms	Employee Web Page 06
My Info > Documents & eForms > eForms	Employee Web Page 07
My Info > Documents & eForms > eForms	Employee Web Page 08
My Info > Documents & eForms > eForms	Employee Web Page 09
My Info > Documents & eForms > eForms	Employee Web Page 10
My Info > Job Postings	Support Staff Postings
My Info > Job Postings	Support Staff Confirmation
My Info > Job Postings	Support Staff Posting 2
My Info > Job Postings	Support Staff Confirmation 2
HR > Manage Staff > Employee Onboarding	Employee Additions 01
HR > Manage Staff > Employee Onboarding	Employee Additions 02
HR > Manage Staff > Employee Onboarding	Employee Additions 03
HR > Manage Staff > Employee Onboarding	Employee Additions 04
HR > Manage Staff > Employee Onboarding	Employee Additions 05
HR > Manage Staff > Employee Onboarding	Employee Additions 06
HR > Manage Staff > Employee Onboarding	Employee Additions 07
HR > Manage Staff > Employee Onboarding	Employee Additions 08
HR > Manage Staff > Employee Onboarding	Employee Additions 09
HR > Manage Staff > Employee Onboarding	Employee Additions 10
HR > Manage Staff > Employee Onboarding	Employee Changes 01
HR > Manage Staff > Employee Onboarding	Employee Changes 02
HR > Manage Staff > Employee Onboarding	Employee Changes 03
HR > Manage Staff > Employee Onboarding	Employee Changes 04
HR > Manage Staff > Employee Onboarding	Employee Changes 05
HR > Manage Staff > Employee Onboarding	Employee Changes 06
HR > Manage Staff > Employee Onboarding	Employee Changes 07
HR > Manage Staff > Employee Onboarding	Employee Changes 08
HR > Manage Staff > Employee Onboarding	Employee Changes 09
HR > Manage Staff > Employee Onboarding	Employee Changes 10
HR > Manage Staff > Internal Job Posting	Support Staff Applications
HR > Manage Staff > Internal Job Posting	Support Staff Applications 2
HR > Documents & eForms > Location eForms	Location Web Page 01
HR > Documents & eForms > Location eForms	Location Web Page 02
HR > Documents & eForms > Location eForms	Location Web Page 03
HR > Documents & eForms > Location eForms	Location Web Page 04
HR > Documents & eForms > Location eForms	Location Web Page 05
HR > Documents & eForms > Location eForms	Location Web Page 06
HR > Documents & eForms > Location eForms	Location Web Page 07
HR > Documents & eForms > Location eForms	Location Web Page 08
HR > Documents & eForms > Location eForms	Location Web Page 09

HR > Documents & eForms > Location eForms	Location Web Page 10
HR > Documents & eForms > District eForms	District Web Page 01
HR > Documents & eForms > District eForms	District Web Page 02
HR > Documents & eForms > District eForms	District Web Page 03
HR > Documents & eForms > District eForms	District Web Page 04
HR > Documents & eForms > District eForms	District Web Page 05
HR > Documents & eForms > District eForms	District Web Page 06
HR > Documents & eForms > District eForms	District Web Page 07
HR > Documents & eForms > District eForms	District Web Page 08
HR > Documents & eForms > District eForms	District Web Page 09
HR > Documents & eForms > District eForms	District Web Page 10
HR > Documents & eForms > eForm DB Maintenance	Final Form 01 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 02 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 03 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 04 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 05 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 06 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 07 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 08 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 09 Maintenance
HR > Documents & eForms > eForm DB Maintenance	Final Form 10 Maintenance
HR > Reporting	HR Report Writer
HR > Reporting	HR Report Viewer
Payroll > Reporting	Report Writer
Payroll > Reporting	Report Viewer
Payroll > Reporting	Manager Payroll Info
Finance > Reporting	Report Writer
Finance > Reporting	Report Viewer
Finance > Reporting	AR Report Writer
Finance > Reporting	AR Report Viewer