



## **V6.09 Training Manual**



## **Nimbus User Security**



# Find the freedom to focus on what matters with Nimbus

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## Document Information

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# Nimbus Security Settings

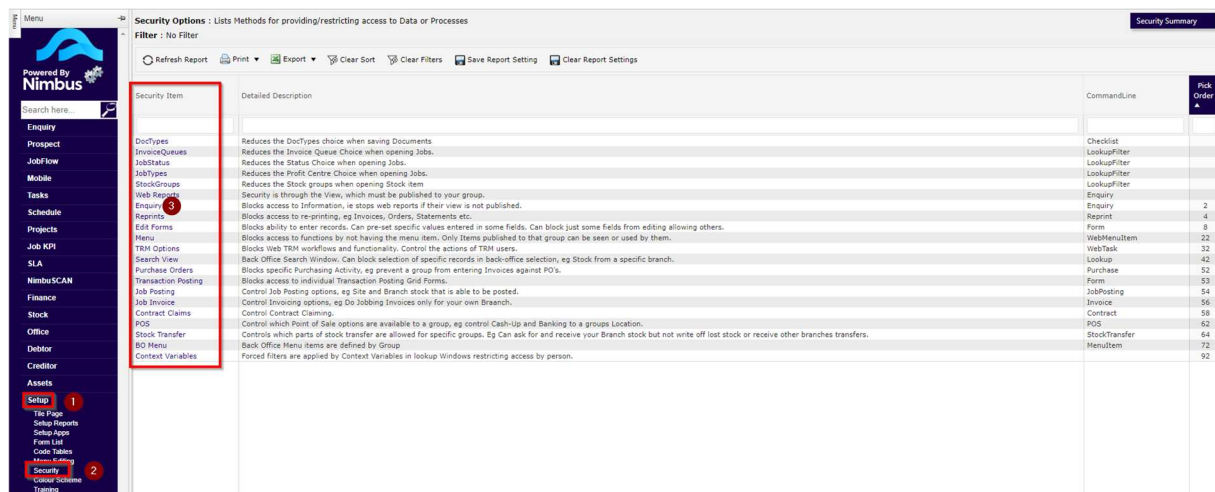
Security controls the Menus, Reports, TRM and Edit-ability for Staff by Groups and Individually.

The main purpose is to simplify the Workflow for each user. They see only the appropriate items for their needs. Restricted access to the wider database prohibits users from seeing commercially sensitive data and ensures they cannot update this data.

## User Groups

The best way to achieve this is via the 'User Group'. Each function is either published or not published to a User Group. Staff can be easily added to an appropriate User Group for their Workflow and subsequently have access to appropriate functions.

Go to Nimbus → Setup → Security → Security Item

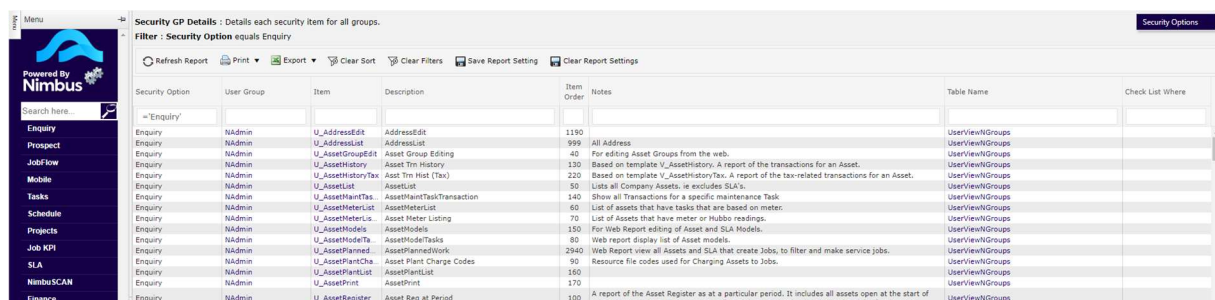


Security Item	Detailed Description	CommandLine	Pick Order
DocTypes	Reduces the DocTypes choice when saving Documents	Checklist	
InvoiceQueues	Reduces the Invoice Queue Choice when opening Jobs.	LookupFilter	
JobStatus	Reduces the Status Choice when opening Jobs.	LookupFilter	
JobTypes	Reduces the Profit Centre Choice when opening Jobs.	LookupFilter	
StockGroups	Reduces the Stock groups when opening Stock Item	LookupFilter	
Web Reports	Security is through the View, which must be published to your group.	Enquiry	2
Enquiry	Blocks access to Information, ie stops web reports if their view is not published.	Report	4
Reprints	Blocks access to re-printing, eg Invoices, Orders, Statements etc.	Form	8
Edits Forms	Blocks ability to enter records. Can pre-set specific values entered in some fields. Can block just some fields from editing allowing others.	WebMenuItem	22
Menu	Blocks access to functions by not having the menu item. Only Items published to that group can be seen or used by them.	WebTask	32
TRM Options	Blocks Web TRM workflows and functionality. Control the actions of TRM users.	Lookup	42
Back Office Search Window	Back Office Search Window. Can block selection of specific records in back-office selection, eg Stock from a specific branch.	Purchase	52
Purchase Orders	Blocks specific Purchasing Activity, eg prevent a group from entering Invoices against PO's.	Form	53
Transaction Posting	Blocks access to individual Transaction Posting Grid Forms.	JobPosting	54
Job Posting	Control Job Posting options, eg Site and Branch stock that is able to be posted.	Invoice	56
Job Invoice	Control Invoicing options, eg Do Jobbing Invoices only for your own Branch.	Contract	58
Contract Claims	Control Contract Claiming.	POS	62
POS	Control which Point of Sale options are available to a group, eg control Cash-Up and Banking to a groups Location.	StockTransfer	64
Stock Transfer	Controls which parts of stock transfer are allowed for specific groups. Eg Can ask for and receive your Branch stock but not write off lost stock or receive other branches transfers.	MenuItem	92
Back Office Menu Items	Back Office Menu Items are defined by Group.		
Context Variables	Forced filters are applied by Context Variables in lookup Windows restricting access by person.		

The Security Options report:-

- Lists all of the Options that can be Set by User Groups
- Provides Command Line links to setup for that group
- Allows you to click any Security Option to view and manage the settings

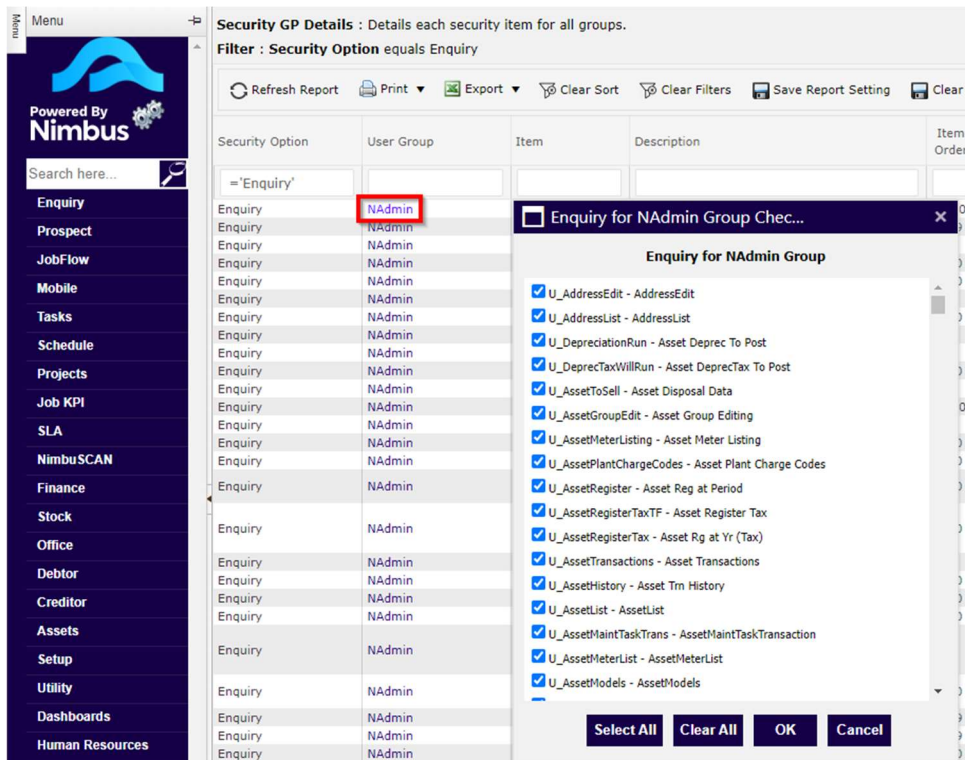
Security Group Details:-



Security Option	User Group	Item	Description	Item Order	Notes	Table Name	Check List Where
'=Enquiry'							
Enquiry	NAdmin	U_AddressEdit	AddressEdit	1190		UserViewGroups	
Enquiry	NAdmin	U_AddressList	AddressList	999	All Address	UserViewGroups	
Enquiry	NAdmin	U_AssetGroupEdit	Asset Group Editing	40	For editing Asset Groups from the web.	UserViewGroups	
Enquiry	NAdmin	U_AssetHistory	Asset Trn History	130	Based on template U_AssetHistory. A report of the transactions for an Asset.	UserViewGroups	
Enquiry	NAdmin	U_AssetHistoryTax	Asset Trn Hist (Tax)	220	Based on template U_AssetHistoryTax. A report of the tax-related transactions for an Asset.	UserViewGroups	
Enquiry	NAdmin	U_AssetList	AssetList	50	Lists all Company Assets, ie excludes SLA's.	UserViewGroups	
Enquiry	NAdmin	U_AssetMaintTask	AssetMaintTaskTransaction	140	Show all Transactions for a specific maintenance Task	UserViewGroups	
Enquiry	NAdmin	U_AssetMeterList	AssetMeterList	50	List of assets that have tasks that are based on meter.	UserViewGroups	
Enquiry	NAdmin	U_AssetMeterList	Asset Meter Listing	70	List of Assets that have meter or Hubbo readings.	UserViewGroups	
Enquiry	NAdmin	U_AssetModels	AssetModels	150	For Web Report editing of Asset and SLA Models.	UserViewGroups	
Enquiry	NAdmin	U_AssetModelTasks	AssetModelTasks	80	Web report display list of Asset models.	UserViewGroups	
Enquiry	NAdmin	U_AssetPlanned	AssetPlannedWork	2940	Web Report view all Assets and SLA that create Jobs, to filter and make service jobs.	UserViewGroups	
Enquiry	NAdmin	U_AssetPlantCha	Asset Plant Charge Codes	90	Resource file codes used for Charging Assets to Jobs.	UserViewGroups	
Enquiry	NAdmin	U_AssetPlantList	AssetPlantList	160		UserViewGroups	
Enquiry	NAdmin	U_AssetPrint	AssetPrint	170		UserViewGroups	
Enquiry	NAdmin	U_AssetRegister	Asset Reg at Period	100	A report of the Asset Register as at a particular period. It includes all assets open at the start of year. It summarizes to one asset per line giving opening book value and activity for the year.	UserViewGroups	

This report is particularly useful as you can filter and sort to see who can do what

You can click to edit any specific function for that group, e.g. clicking on NAdmin:



The screenshot shows the 'Security GP Details' interface. The main table lists security options for the 'NAdmin' group. A modal dialog titled 'Enquiry for NAdmin Group Ch...' is open, showing a list of items with checkboxes for selection.

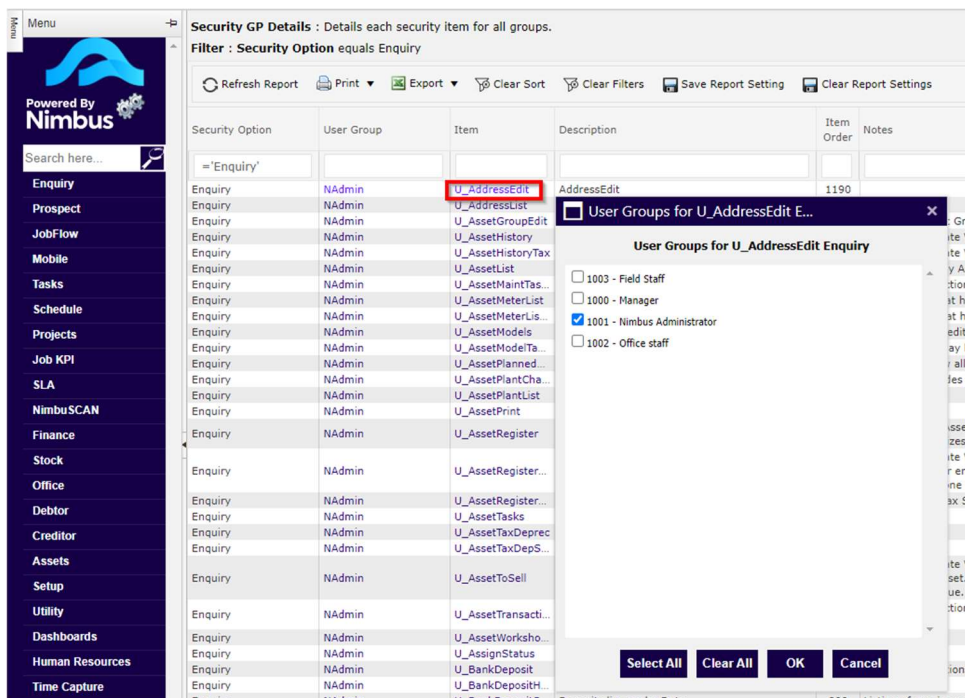
Security Option	User Group	Item	Description	Item Order
Enquiry	NAdmin			
Enquiry	NAdmin			
Enquiry	NAdmin			
Enquiry	NAdmin			
Enquiry	NAdmin			
Enquiry	NAdmin			
Enquiry	NAdmin			
Enquiry	NAdmin			
Enquiry	NAdmin			
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Enquiry	NAdmin			
Enquiry	NAdmin			
Enquiry	NAdmin			
Enquiry	NAdmin			

The modal dialog 'Enquiry for NAdmin Group Ch...' contains the following items:

- U\_AddressEdit - AddressEdit
- U\_AddressList - AddressList
- U\_DepreciationRun - Asset Deprec To Post
- U\_DeprecTaxWillRun - Asset DeprecTax To Post
- U\_AssetToSell - Asset Disposal Data
- U\_AssetGroupEdit - Asset Group Editing
- U\_AssetMeterListing - Asset Meter Listing
- U\_AssetPlantChargeCodes - Asset Plant Charge Codes
- U\_AssetRegister - Asset Reg at Period
- U\_AssetRegisterTaxTF - Asset Register Tax
- U\_AssetRegisterTax - Asset Rg at Yr (Tax)
- U\_AssetTransactions - Asset Transactions
- U\_AssetHistory - Asset Tm History
- U\_AssetList - AssetList
- U\_AssetMaintTaskTrans - AssetMaintTaskTransaction
- U\_AssetMeterList - AssetMeterList
- U\_AssetModels - AssetModels

Allows you to tick/untick the Items for that group

Clicking on the Item column allows you to allow access for that group:



The screenshot shows the 'Security GP Details' interface. The main table lists security options for the 'NAdmin' group. A modal dialog titled 'User Groups for U\_AddressEdit Enquiry' is open, showing a list of user groups with checkboxes for selection.

Security Option	User Group	Item	Description	Item Order	Notes
Enquiry	NAdmin	U_AddressEdit	AddressEdit	1190	
Enquiry	NAdmin	U_AddressList			
Enquiry	NAdmin	U_AssetGroupEdit			
Enquiry	NAdmin	U_AssetHistory			
Enquiry	NAdmin	U_AssetHistoryTax			
Enquiry	NAdmin	U_AssetList			
Enquiry	NAdmin	U_AssetMaintTas...			
Enquiry	NAdmin	U_AssetMeterList			
Enquiry	NAdmin	U_AssetMeterLis...			
Enquiry	NAdmin	U_AssetModels			
Enquiry	NAdmin	U_AssetModelTa...			
Enquiry	NAdmin	U_AssetPlanned...			
Enquiry	NAdmin	U_AssetPlantCha...			
Enquiry	NAdmin	U_AssetPlantList			
Enquiry	NAdmin	U_AssetPrint			
Enquiry	NAdmin	U_AssetRegister			
Enquiry	NAdmin	U_AssetRegister...			
Enquiry	NAdmin	U_AssetRegister...			
Enquiry	NAdmin	U_AssetTasks			
Enquiry	NAdmin	U_AssetTaxDeprec			
Enquiry	NAdmin	U_AssetTaxDepS...			
Enquiry	NAdmin	U_AssetToSell			
Enquiry	NAdmin	U_AssetTransacti...			
Enquiry	NAdmin	U_AssetWorksho...			
Enquiry	NAdmin	U_AssignStatus			
Enquiry	NAdmin	U_BankDeposit			
Enquiry	NAdmin	U_BankDepositH...			
Enquiry	NAdmin	U_BankDepositS...			

The modal dialog 'User Groups for U\_AddressEdit Enquiry' contains the following user groups:

- 1003 - Field Staff
- 1000 - Manager
- 1001 - Nimbus Administrator
- 1002 - Office staff

Clicking on the Table Name will Allow you to copy a group's access to another group

Security GP Details : Details each security item for all groups.  
 Filter : Security Option equals Enquiry

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

Security Option	User Group	Item	Description	Item Order	Notes	Table Name
= 'Enquiry'						
Enquiry	NAdmin	U_AddressEdit	AddressEdit	1190		UserViewNGroups
Enquiry	NAdmin	U_AddressList	AddressList	999	All Address	UserViewNGroups
Enquiry	NAdmin	U_AssetGroupEdit	Asset Group Editing	40	For editing Asset Groups from the web.	UserViewNGroups
Enquiry	NAdmin	U_AssetHistory	Asset Trn History			UserViewNGroups
Enquiry	NAdmin	U_AssetHistoryTax	Asst Trn Hist (Tax)			UserViewNGroups
Enquiry	NAdmin	U_AssetList	AssetList			UserViewNGroups
Enquiry	NAdmin	U_AssetMaintTas...	AssetMaintTaskTransaction			UserViewNGroups
Enquiry	NAdmin	U_AssetMeterList	AssetMeterList			UserViewNGroups
Enquiry	NAdmin	U_AssetMeterList	Asset Meter Listing			UserViewNGroups
Enquiry	NAdmin	U_AssetModels	AssetModels			UserViewNGroups
Enquiry	NAdmin	U_AssetModelTa...	AssetModelTasks			UserViewNGroups
Enquiry	NAdmin	U_AssetPlanned	AssetPlannedWork			UserViewNGroups
Enquiry	NAdmin	U_AssetPlantCha...	Asset Plant Charge Codes			UserViewNGroups
Enquiry	NAdmin	U_AssetPlantList	AssetPlantList			UserViewNGroups
Enquiry	NAdmin	U_AssetPrint	AssetPrint			UserViewNGroups
Enquiry	NAdmin	U_AssetRegister	Asset Reg at Period			UserViewNGroups

Based on template V\_AssetRegisterTax (Asst Rg at Yr (Tax) Templ). A report of the Asset Register

## How to add an Item to a User Group

When a user clicks on a menu link they may get a the message below if the report has not been assigned to their User Group.

Menu

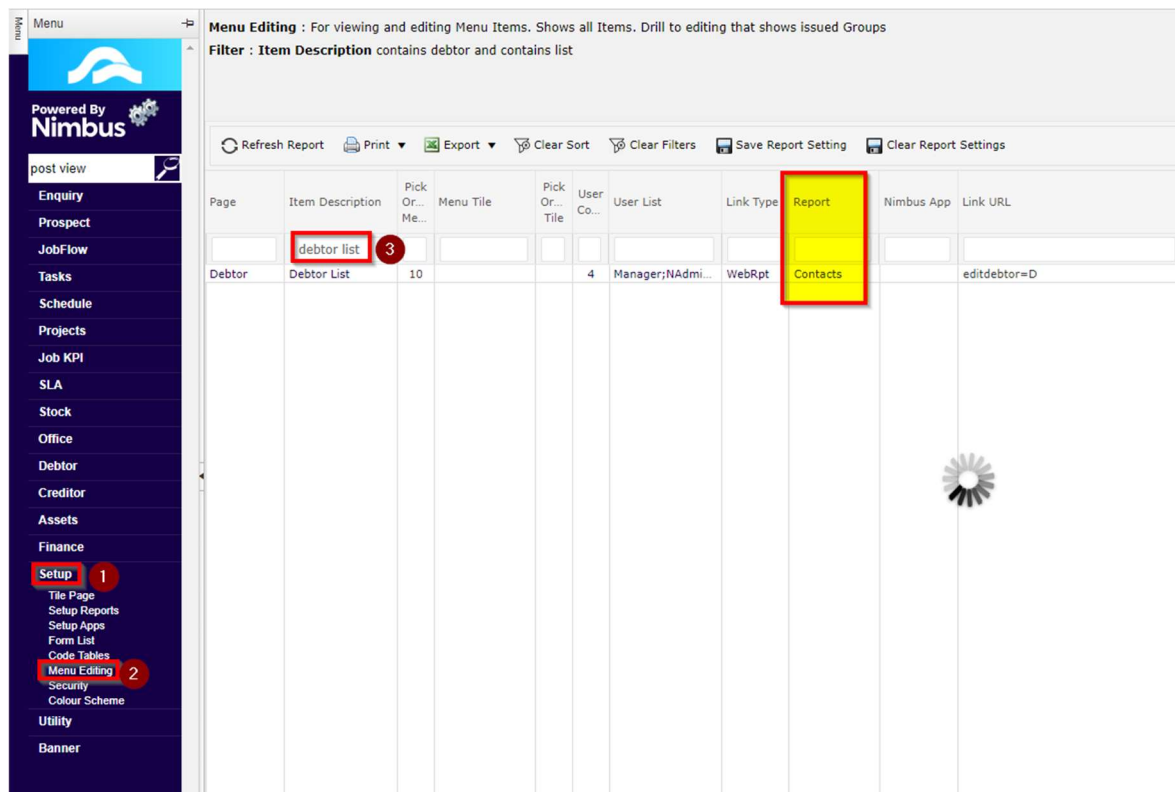
Sorry, you don't have permission to view this report. [Go back to the previous page](#) or see your administrator for the permission.

Powered By Nimbus

client

- Enquiry
- Prospect
- JobFlow
- Tasks
- Schedule
- Projects
- Job KPI
- SLA
- Stock
- Office
- Debtor
  - Debtor List
  - Overdues
  - Account History
  - Trans Posting

Firstly, find out the name of the report that opens when the Menu Item 'Debtor List' is clicked. Go to Nimbus→Set Up→ Menu Editing and search for the report name as per the image below. The report in this case is called 'Contacts'



**Menu Editing** : For viewing and editing Menu Items. Shows all Items. Drill to editing that shows issued Groups

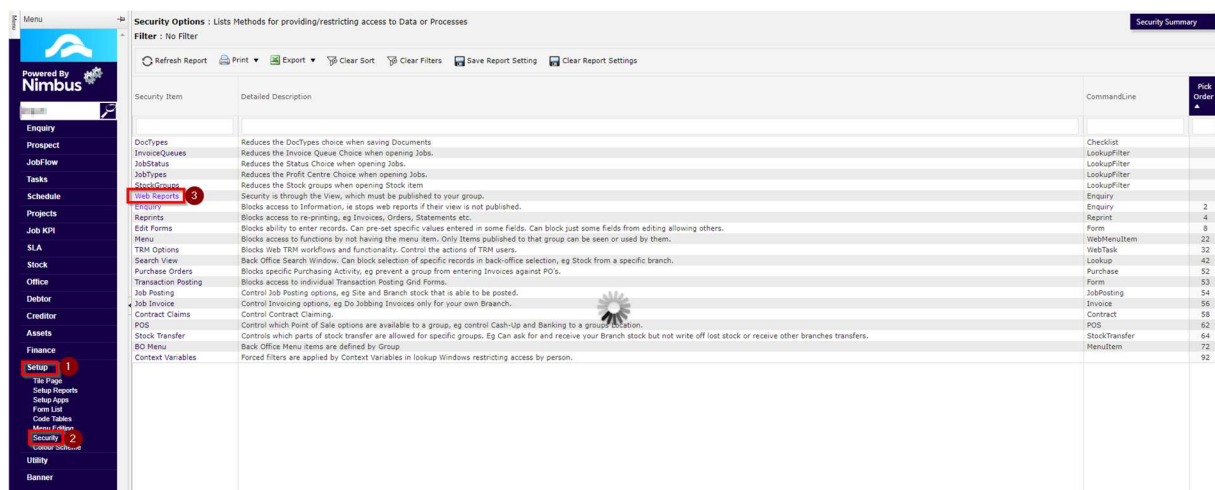
**Filter** : Item Description contains debtor and contains list

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

Page	Item Description	Pick Or... Me...	Menu Tile	Pick Or... Tile	User Co...	User List	Link Type	Report	Nimbus App	Link URL
	debtor list	3						Contacts		
Debtor	Debtor List	10			4	Manager;NAdmi...	WebRpt			editdebtor=D

To add the Contacts Report which is activated when the Menu Item 'Debtor List' is clicked do the following:-

Go to Nimbus→ Setup→Security and click on the 'Web Reports Security Item



**Security Options** : Lists Methods for providing/restricting access to Data or Processes

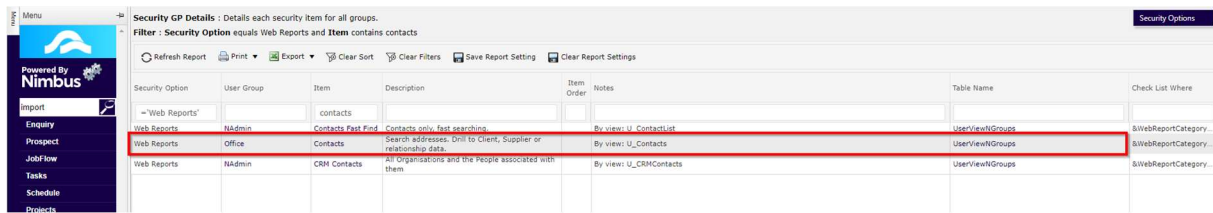
**Filter** : No Filter

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

Security Item	Detailed Description	CommandLine	Pick Order
DocTypes	Reduces the DocTypes choice when saving Documents	Checklist	
InvoiceQueues	Reduces the Invoice Queue Choice when opening Jobs.	LookupFilter	
JobStatus	Reduces the Status Choice when opening Jobs.	LookupFilter	
JobTypes	Reduces the Profit Centre Choice when opening Jobs.	LookupFilter	
StockGroups	Reduces the Stock groups when opening Stock Item	LookupFilter	
Web Reports	Security is through the View, which must be published to your group.	Enquiry	
Enquiry	Blocks access to Information, ie stops web reports if their view is not published.	Enquiry	2
Receipts	Blocks access to re-printing, eg Invoices, Orders, Statements etc.	Receipt	4
Edt Forms	Blocks ability to enter records. Can pre-set specific values entered in some fields. Can block just some fields from editing allowing others.	Form	8
Menu	Blocks access to functions by not having the menu item. Only items published to that group can be seen or used by them.	WebMenuItem	22
TSM Options	Blocks Web TSM workflows and functionality. Control the actions of TSM users.	WebTask	32
Search View	Back Office Search Window. Can block selection of specific records in back-office selection, eg Stock from a specific branch.	Lookup	42
Purchase Orders	Blocks specific Purchasing Activity, eg prevent a group from entering Invoices against PO's.	Purchase	52
Transaction Posting	Blocks access to individual Transaction Posting Grid Forms.	Form	53
Job Posting	Control Job Posting options, eg Site and Branch stock that is able to be posted.	JobPosting	54
Job Invoice	Control Invoicing options, eg Do Jobbing Invoices only for your own Branch.	Invoice	56
Contract Claims	Control Contract Claiming	Contract	58
POS	Control which Point of Sale options are available to a group, eg control Cash-Up and Banking to a group location.	POS	62
Stock Transfer	Controls which parts of stock transfer are allowed for specific groups. Eg Can ask for and receive your Branch stock but not write off lost stock or receive other branches transfers.	StockTransfer	64
BO Menu	Back Office Menu Items are defined by Group	MenuItem	72
Context Variables	Forced filters are applied by Context Variables in lookup Windows restricting access by person.		92

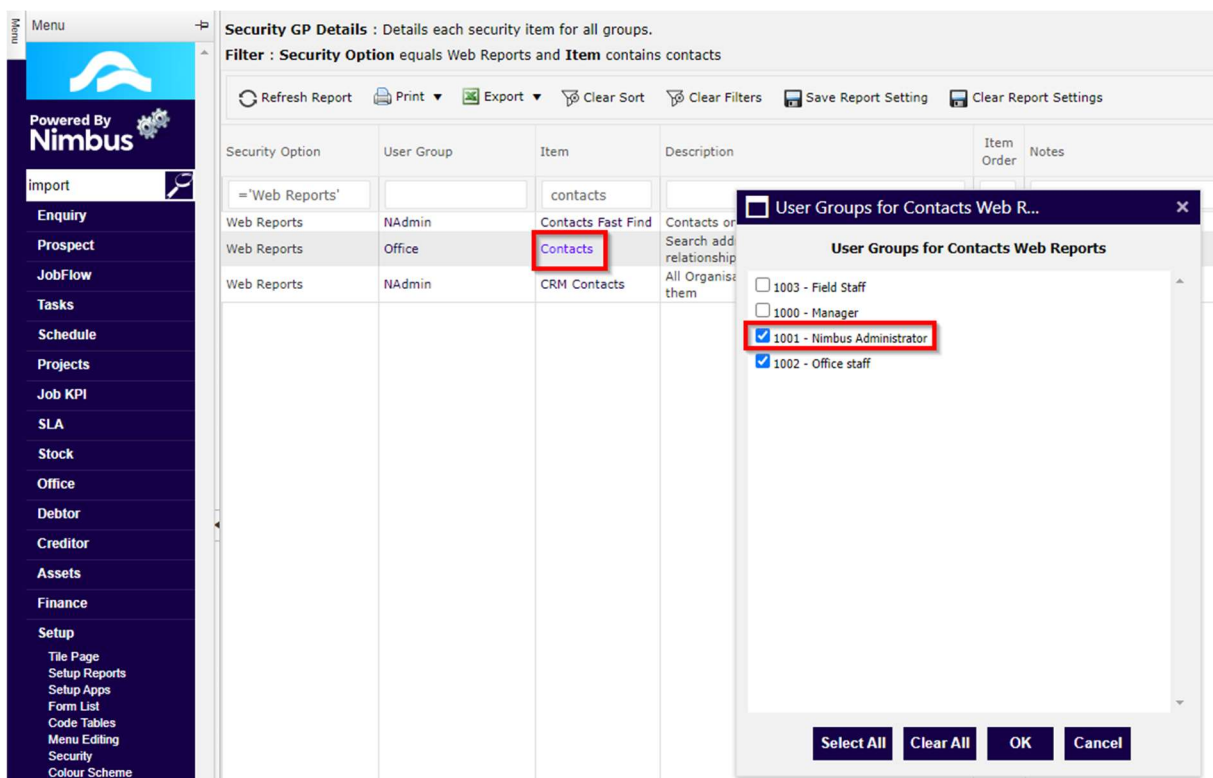


You can see 'Contacts' web Report is only allocated to the 'Office' Group



Security Option	User Group	Item	Description	Item Order	Notes	Table Name	Check List Where
= 'Web Reports'		contacts					
Web Reports	NAdmin	Contacts Fast Find	Contacts only, fast searching		By view: U_ContactList	UserViewGroups	sWebReportCategory...
Web Reports	Office	Contacts	Search addresses. Drill to Client, Supplier or relationship data.		By view: U_Contacts	UserViewGroups	sWebReportCategory...
Web Reports	NAdmin	CRM Contacts	All Organisations and the People associated with them		By view: U_CRMContacts	UserViewGroups	sWebReportCategory...

To add it to the NAdmin Group click on the 'Item' Column and tick 'Nimbus Administrator' then 'OK'



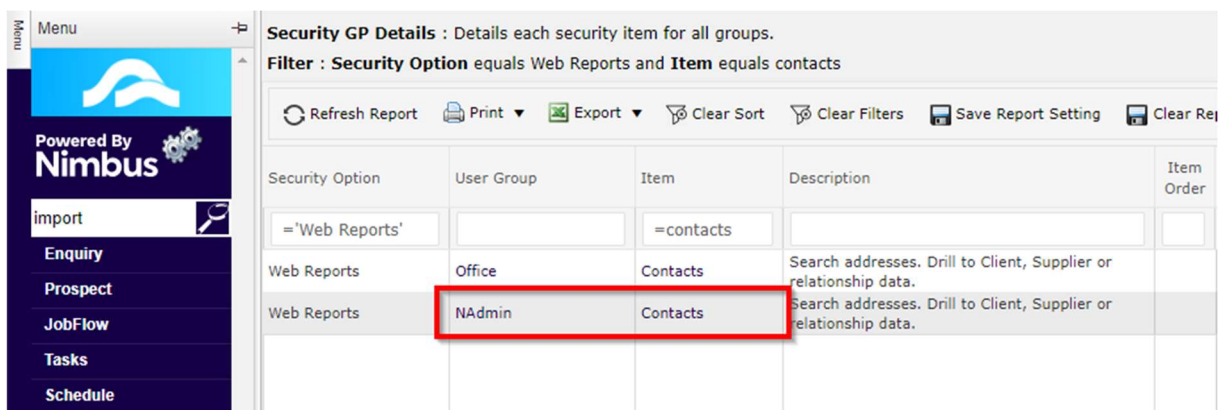
Security Option	User Group	Item	Description	Item Order	Notes
= 'Web Reports'		contacts			
Web Reports	NAdmin	Contacts Fast Find	Contacts or Search add relationship		
Web Reports	Office	Contacts	Search addresses. Drill to Client, Supplier or relationship data.		
Web Reports	NAdmin	CRM Contacts	All Organisations and the People associated with them		

**User Groups for Contacts Web Reports**

- 1003 - Field Staff
- 1000 - Manager
- 1001 - Nimbus Administrator
- 1002 - Office staff

Select All Clear All OK Cancel

The report is now set up for this user group



Security Option	User Group	Item	Description	Item Order
= 'Web Reports'		=contacts		
Web Reports	Office	Contacts	Search addresses. Drill to Client, Supplier or relationship data.	
Web Reports	NAdmin	Contacts	Search addresses. Drill to Client, Supplier or relationship data.	

## Individual Security Settings

Nimbus has a very powerful mechanism to aid Individual Workflow. Each User's Login Name directly retrieves specific information Values for your site's user-defined Context Fields.

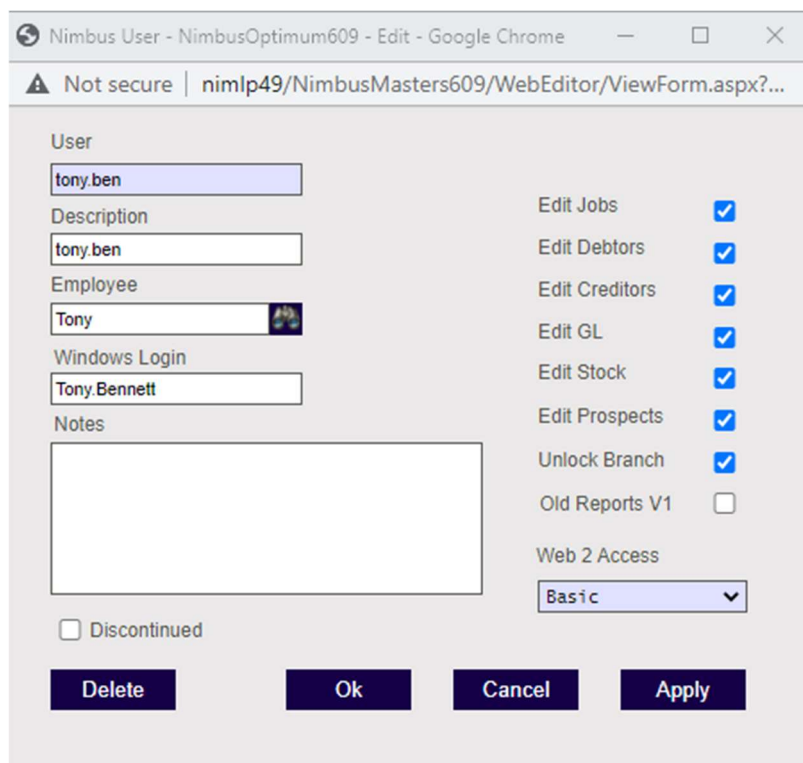
Context Variables (Utility menu→Admin Reports→Context variables)

Context Variables M : Users {Context values}. System [dset] [apath] [ipath] [ngroup] [nuser] [version] combined views  
Filter : No Filter

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

Branch	NUser	Machine	Division	Staff	User Group	Van	Old	Web User	New Job	New Prospect	Edit Debtors	Edit Creditors	Edit GL	Edit Stock	TRM Time	Time StockID	TRM Stock	TRM Returns	TRM Edit	TRM Invoice
*	Amy.Lang			Amy.Lang	NAdmin		*0	1	1	1	1	1	1	1	1		1	1	1	1
*	Amy.Lang	Web		Amy.Lang	NAdmin		*0	1	1	1	1	1	1	1	1		1	1	1	1
*	christia						*0	1	1	1	1	1	1	1						
	Dan.Brot						*0	1	0	0	0	0	0	0						
	danadmin				NAdmin		*0	0	0	0	0	0	0	0	1		1	1	1	1
	danadmin	Web			NAdmin		*0	0	0	0	0	0	0	0	1		1	1	1	1
	daniel.k				NAdmin		*0	0	0	0	0	0	0	0	1		1	1	1	1
	daniel.k	Web			NAdmin		*0	0	0	0	0	0	0	0	1		1	1	1	1

- This web report shows the Context Variables defined on your site, and the values of those variables for each of your staff.
- These Variables are site-dependant, giving the company flexibility to add their own.
- Mostly these Context Values are on the various Tabs of the Edit User Form. To open the form click on the Nuser column



The screenshot shows the 'Edit User' form for a user named 'tony.ben'. The form includes the following fields and options:

- User:** tony.ben
- Description:** tony.ben
- Employee:** Tony
- Windows Login:** Tony.Bennett
- Notes:** (Empty text area)
- Discontinued
- Edit Jobs:**
- Edit Debtors:**
- Edit Creditors:**
- Edit GL:**
- Edit Stock:**
- Edit Prospects:**
- Unlock Branch:**
- Old Reports V1:**
- Web 2 Access:** Basic

Buttons at the bottom: Delete, Ok, Cancel, Apply.

The application of these Context Variables to Work-Flow is also very user-configurable. This means that there is no easy and definitely no complete list of where they are applied. It is best to consult your Nimbus Consultant regarding any changes and extensions to the places affected by these Context Variables.

Workflow areas that can be controlled by Context Variables include:



## Report Filters

**Jobs Allocated** : Jobs allocated to staff, and still underway. Status- JA, JP, JPM, JS, JMW, JMWNew, JL  
**Filter** : Supervisor equals Wayne

Profit Centre  Supervisor  Up to Period

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

Supervisor	Current Owner	Job No	Job Description	Status	Error	Client	Site Address	Order Goods	Cur... Ord...	F...	D... T...	Hours ToDate
=Wayne												
Wayne		WKE-5	Plumbing	JP	ok	Jarrett Developments	120 Mt Albert Rd	Q	0			20.5
Wayne		WKE-4	Electrical	JP	ok	Jarrett Developments	120 Mt Albert Rd	Q	0			
Wayne		WKE-3	Portals	JP	ok	Jarrett Developments	120 Mt Albert Rd	Q	1			33.5
Wayne		WKE-2	Slab	JP	ok	Jarrett Developments	120 Mt Albert Rd	Q	0			81
Wayne		WKE-1	Prelim & General	JP	ok	Jarrett Developments	120 Mt Albert Rd	Q	0			45

The Supervisor Filter is automatically applied when running this report

These Filters can be set Locked or editable.

## Report Columns

**Log Jobs** : Search addresses and current jobs. Drill to Client, Supplier or Job data.  
**Filter** : No Filter

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

Shortname	Name	Street	Suburb	City	Client	New Job	SLA	Job
A1 Con	A1 Concrete Pumping Ltd	128 Main Rd	Stoke	Nelson	A1 Con	NewJob		
Adam	Adam Langbridge	56 Mount St		Nelson				
ADCInt	ADC International	1327 Broadway		New York	ADCInt	NewJob		
Andria	Andria	No Street Address						
APrakash	Amit Prakash	No Street Address						
AutoElec	Automotive Electrical	25 Tay Street	SunnySide	Nelson	AutoElec	NewJob		
Baily	Baily & Sons Ltd	56 Long St	Stoke	Gore	Baily	NewJob		
Baldrick	Baldrick Plumbers	29 Manners Street	Browns Bay	Auckland	Baldrick	NewJob		

The 'New Job' column will disappear if a user is not ticked to 'New Jobs'

## Lookup Filters

Lookup - U\_Job

JobNumber	DebtorIndex	SiteAddress	Description	Status	Supervisor	Project	Customer	Old	Branch
WKE-Z	JarrettD	120 Mt Albert Rd	Retentions	JP	Wayne	WKE	Jarrett Developments	False	
WKE-5	JarrettD	120 Mt Albert Rd	Plumbing	JP	Wayne	WKE	Jarrett Developments	False	
WKE-4	JarrettD	120 Mt Albert Rd	Electrical	JP	Wayne	WKE	Jarrett Developments	False	
WKE-3	JarrettD	120 Mt Albert Rd	Portals	JP	Wayne	WKE	Jarrett Developments	False	
WKE-2	JarrettD	120 Mt Albert Rd	Slab	JP	Wayne	WKE	Jarrett Developments	False	
WKE-1	JarrettD	120 Mt Albert Rd	Prelim & General	JP	Wayne	WKE	Jarrett Developments	False	
SPA-Z	Irish Green	22 Dublin Street	Retentions	JP	Julie	SPA	Irish Green Backs	False	
SPA-V01	ADCInt	1327 Broadway	Variation-Garage	JP	Adam	SPA	ADC International	False	

This Job Selection is not restricted to a particular Branch because the Branch Context variable has not been applied to this user