Security

User Guide – V 12.0

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Parklane Systems Security

Introduction

Use Security to indicate each user account system access rights regarding:

- Modules; and in each module:
  - Menu Items
  - Data/screens access
  - Functions that can be used
  - Various rules
- Department restrictions
- Company restrictions (multi-company option only)

For each user account, you will provide:

- Name
  - 25 characters
- Id
  - 10 characters
  - Identify the account using a name abbreviation.
  - Used by the system for identification and auditing purposes
- Password
  - 10 characters
  - Passwords are hashed
  - Criteria for valid passwords can be established under “Sign-In Rules” located on the Main Menu
- Email Address

There are four types of Security records:

- Role profiles where access rights can be identified for a group of user accounts.
- Role based accounts that use the rights identified in particular role.
- Unique user accounts that are not affiliated with a role and the rights are specific to that user.
- Restricted Administrators (Multi-company option only) where a user is given access to Security to manage their own user accounts within one company.

How it Works

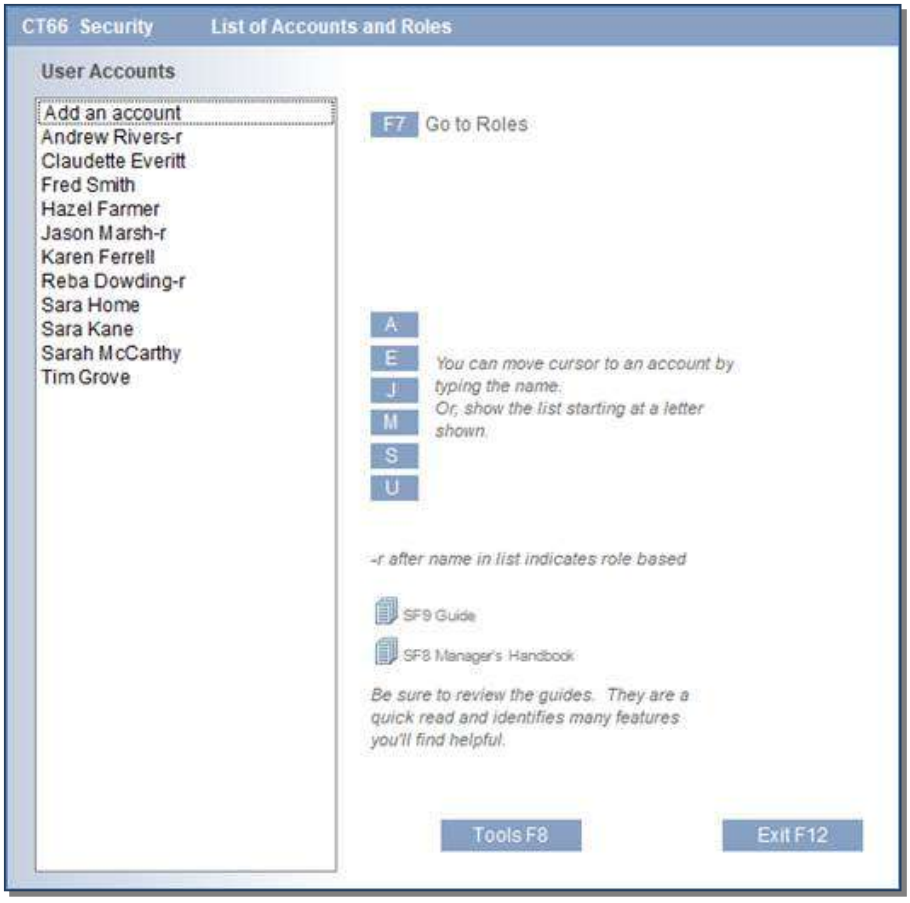
It is important that Managers have access to Security. There are many useful tools and controls that can be used by a Manager, however, one would need to use and appreciate Security to determine what fits their needs.

Parklane Support provides instructions to access Security for the first time.

The first record will be a unique user account that is defined as an Administrator with access to Security. Once this account has been set up, Security is available to that person on the Main Menu.

Below is the Security home screen.

- To add an unique user account, select “Add an Account”
- To access a current account, select the account from the list.
- To manage your role profiles, select F7 Go to Roles.
- To add a Restricted Administrator, select “Add an account”.

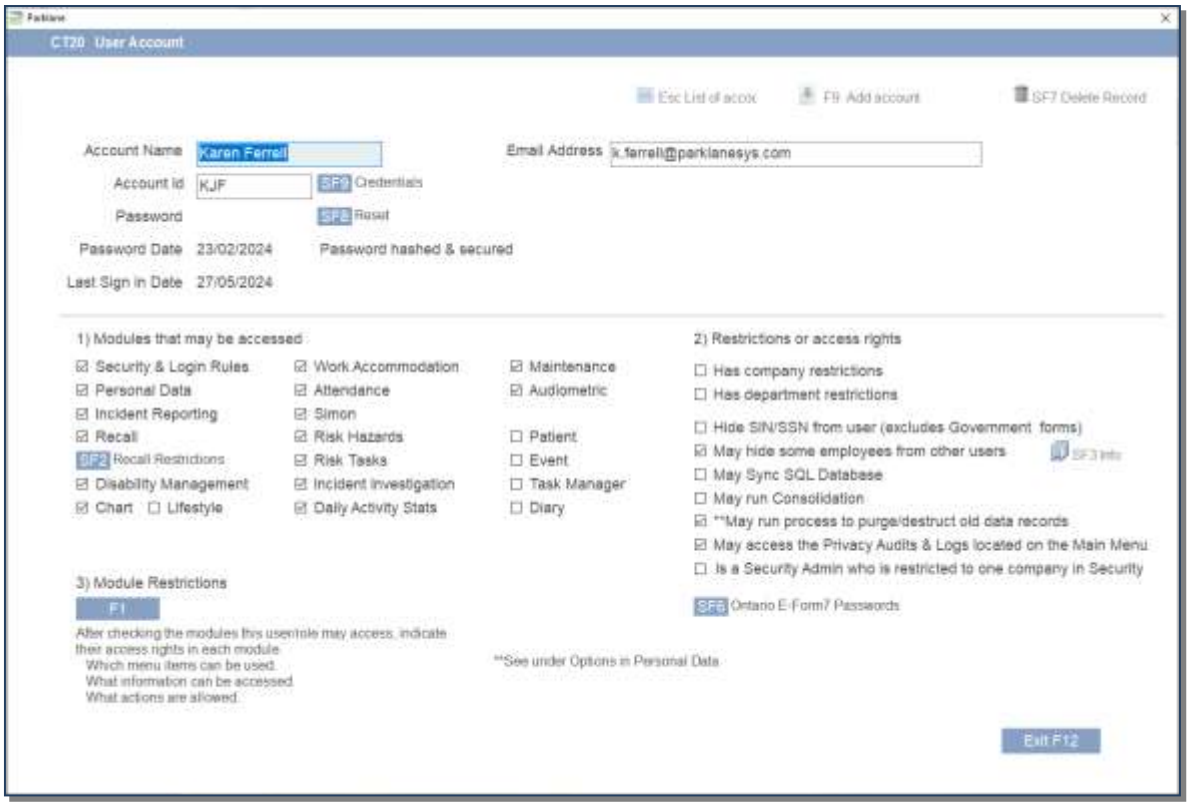


Note that accounts listed with “-r” after their name were added under a role and use the rights as defined in that role.

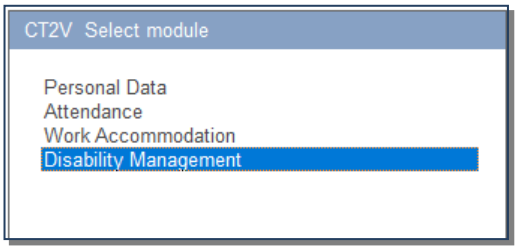
Adding a Unique User Account

After selecting “Add an Account”, on the next screen (below) complete:

1. Name, User Id, Password, Email Address
2. Select the modules that may be accessed
3. If the user is restricted to specific departments, check “Has department restrictions”.
   A button will appear to allow you to define which departments.
4. Select F1 at the bottom of the screen to indicate the menu, data & rules rights in each module.

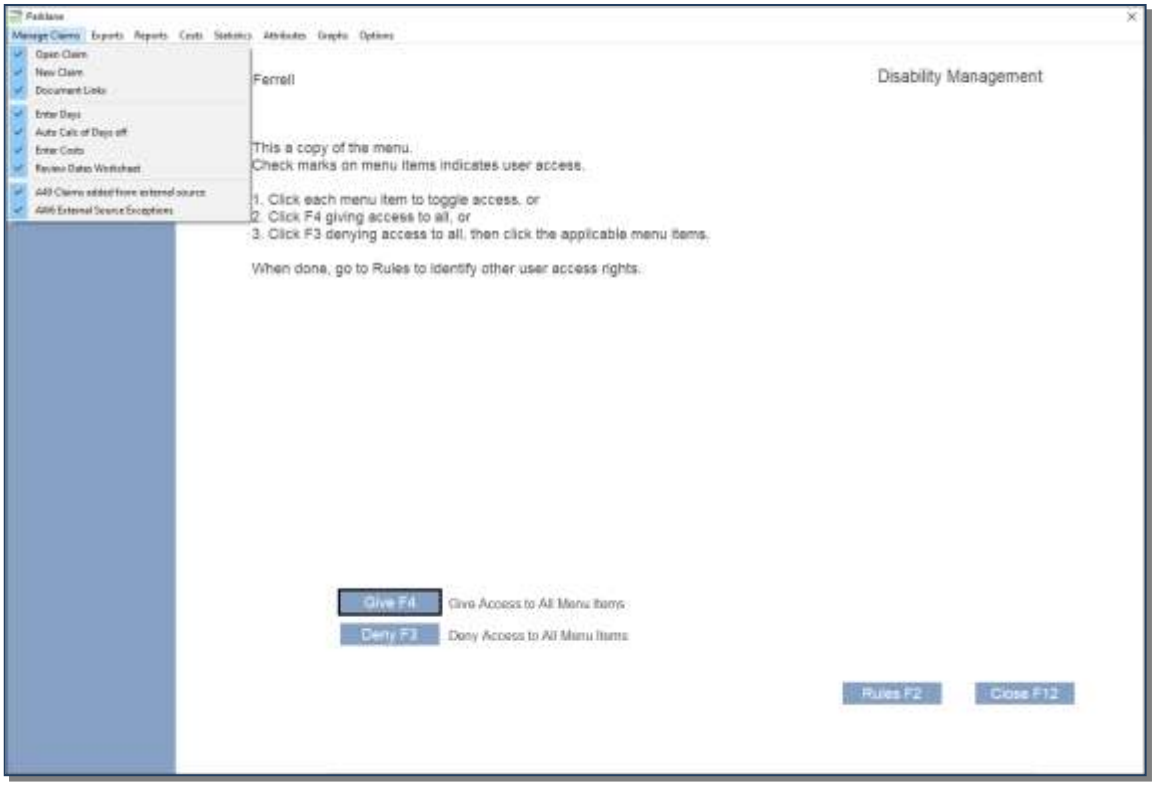


Select a module from the list to proceed to its menu.



From the menu check the applicable menu items or, select F4 to give access to all menu items.

Then select F2 to identify the Rules.



Below is a sample of the Rules. They vary by module.

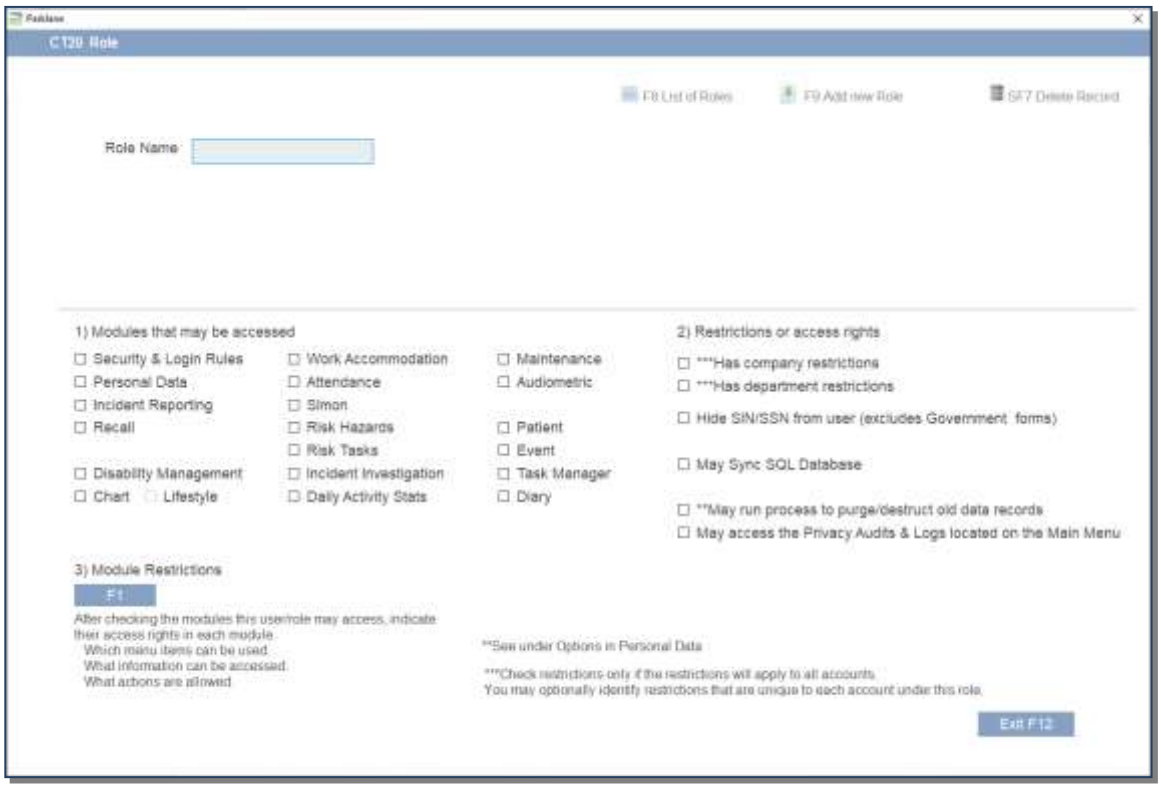
The left lists the input screens available in the module. Give access to all or chose specific screens.

The right lists actions that may or may not be allowed. The example below indicates that the user may not cancel a record or change comments entered by another user.

Initially, it is recommended that Nutshell not be used until the users are familiar with the system.

Adding a Role Profile and the Role-based Accounts

Enter the Role Profile by using the same procedure for a Unique User Account.
Once established, you can identify accounts that would use this role profile.
Role Profiles may be copied and then modified for ease of setup.



Company and Department Restrictions

(Company Restrictions apply to those who use Parklane's multi-company option)

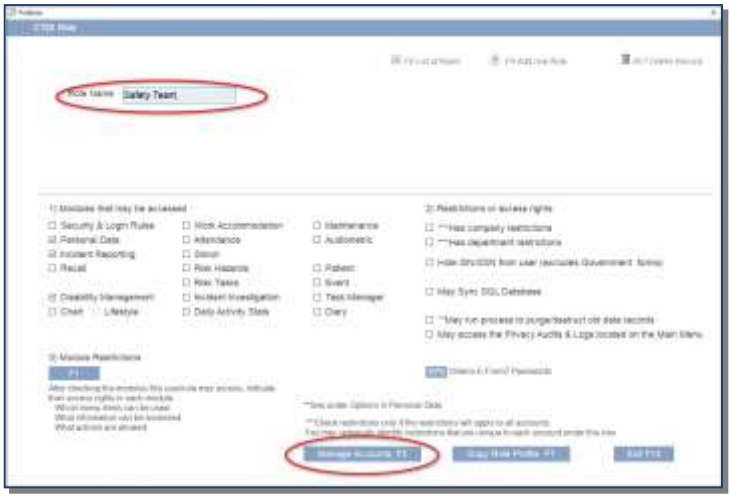
You have three options here:

- If all accounts will be restricted to the same companies/departments, you may identify those restrictions on this screen.
- If the restrictions vary by account, leave these boxes unchecked. You may then identify at the account level.
- You may restrict certain companies/departments that will apply to all accounts; then identify additional restrictions for certain accounts.

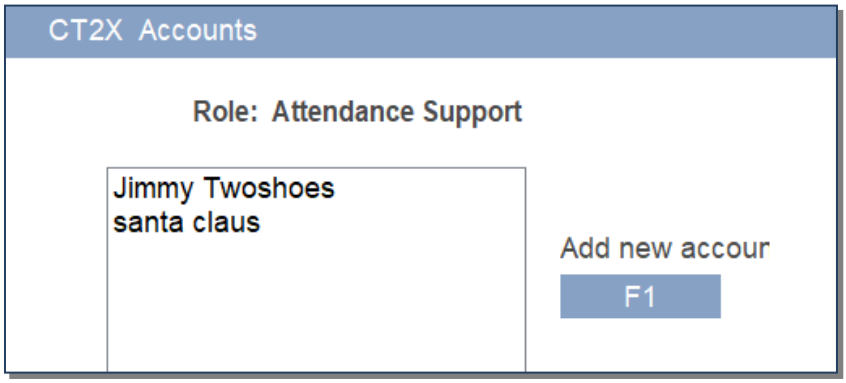
Once you have completed the above screen, Select F2-Manage Accounts to manage the accounts under this role profile.

Managing Accounts for Role Profiles

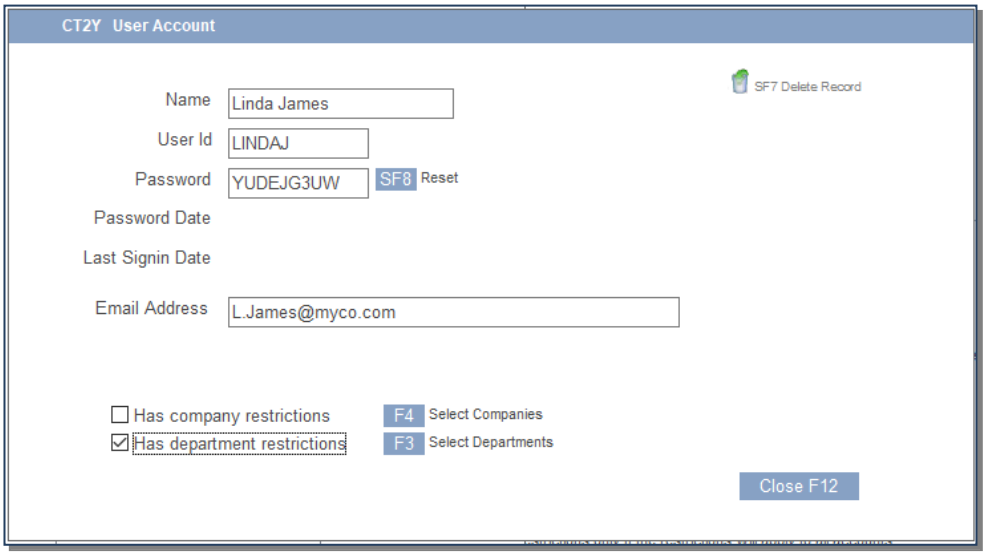
Role Profiles – Managing Accounts



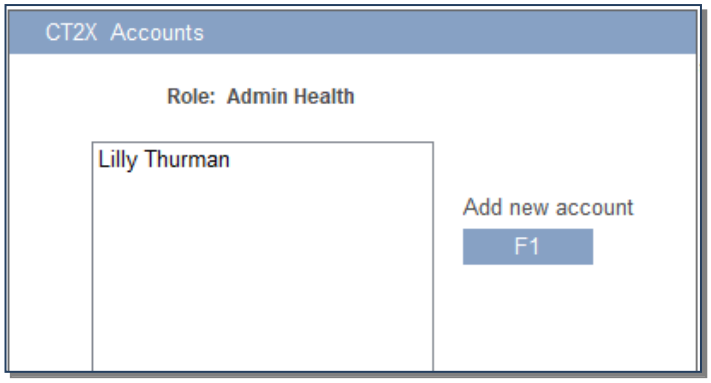
Select F1 to add a new account.



Enter Name, User Id, Password, Email Address and applicable restrictions.

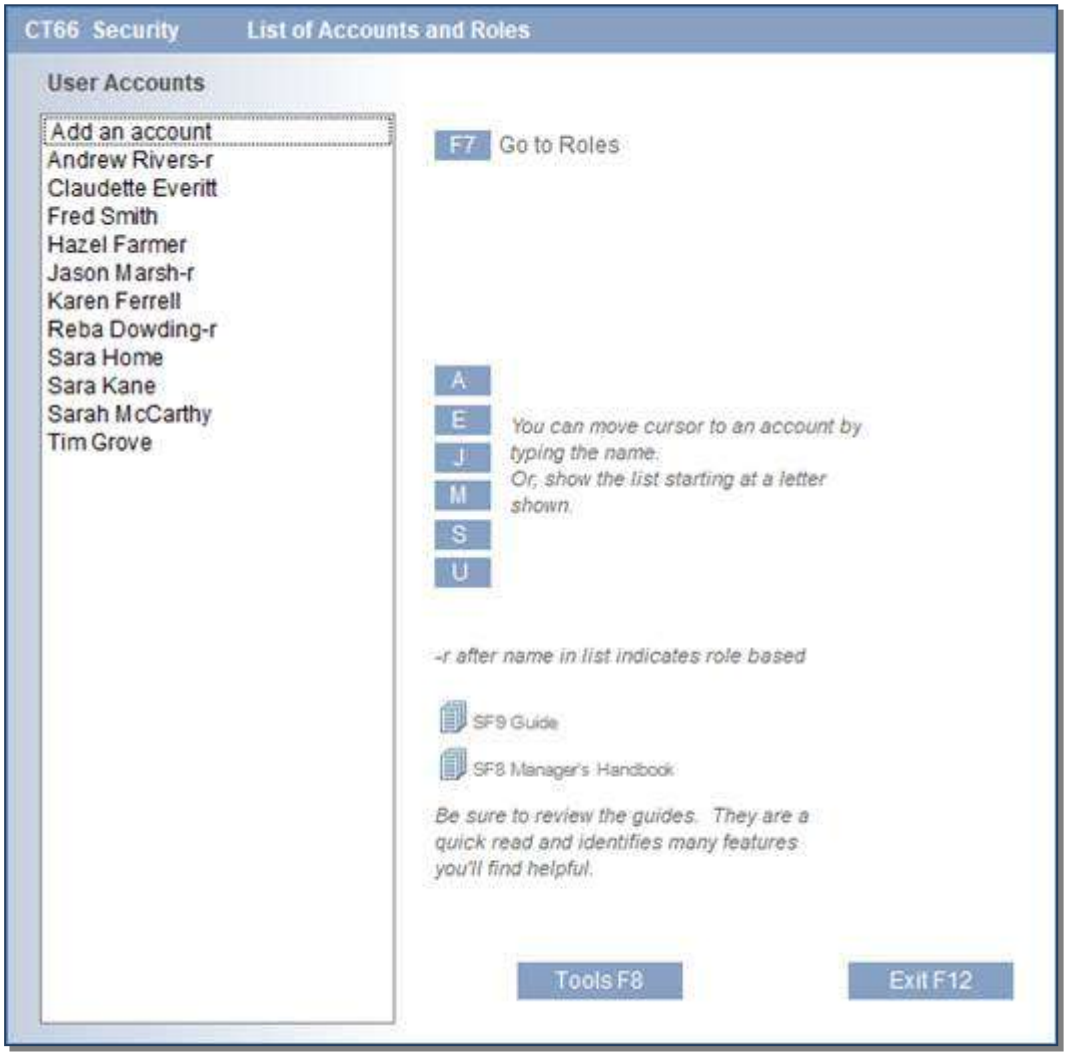


Repeat to add additional accounts.



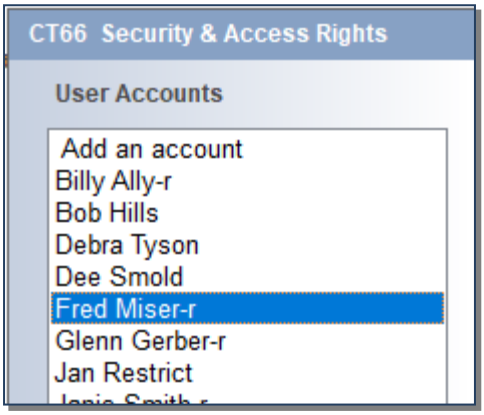
Notes re: Role Profiles

1. The Role Profile can be modified after accounts are added.
2. The accounts will appear on the Home screen in the list of accounts.
   "-r" at the end of each name indicates the account is Role based.

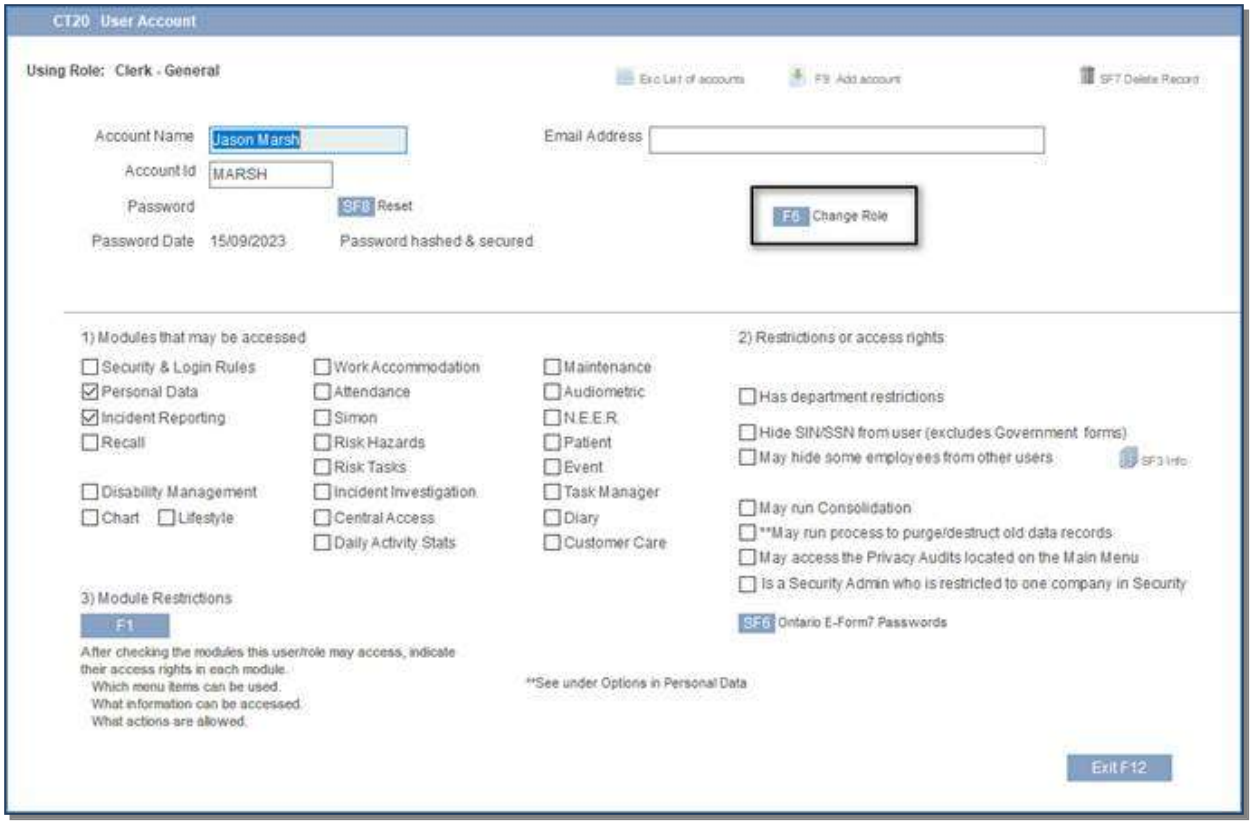


Assigning an Account to another Role

Select the account.

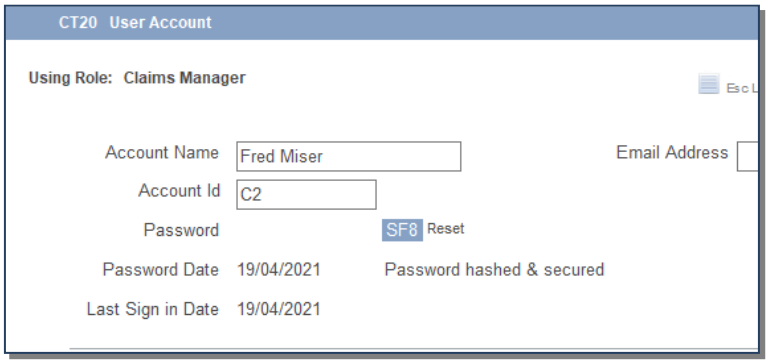


Select F6-Change Role.



Select the new Role

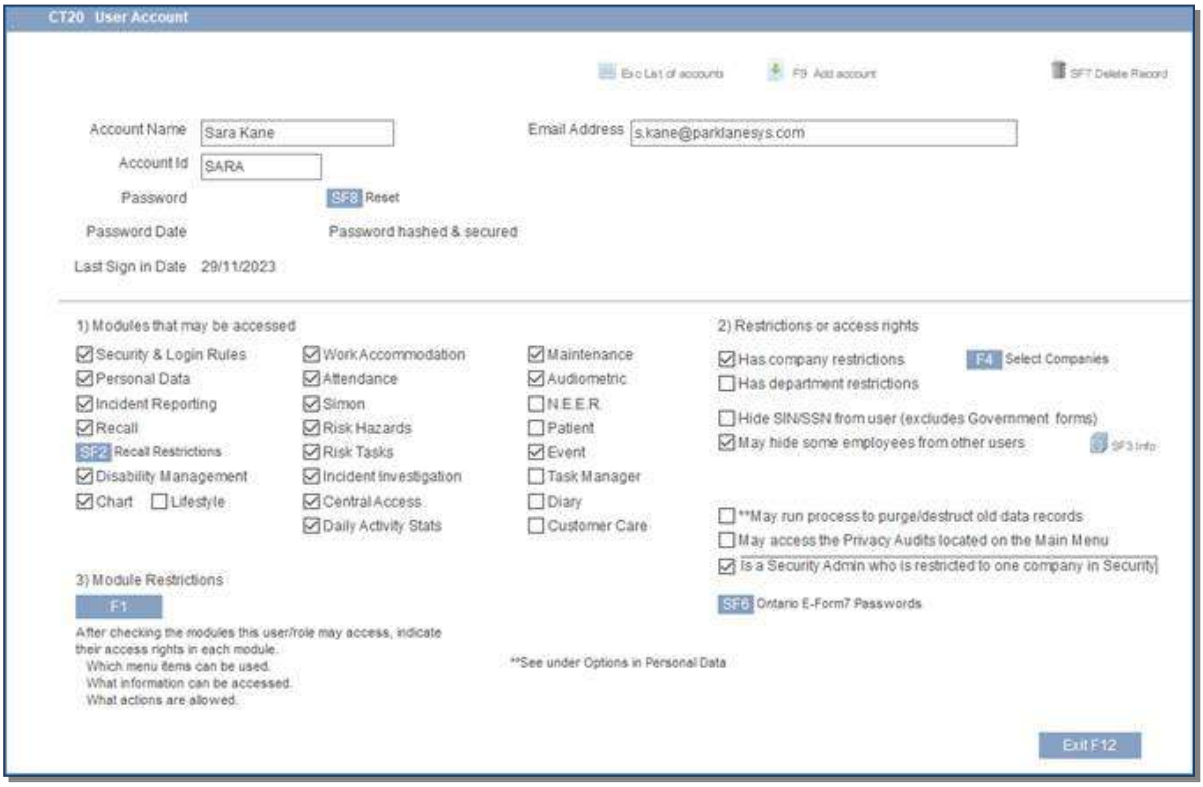
Any company/department rights that were previously specific to that account remains.



Adding a Restricted Administrator (Multi-company option only)

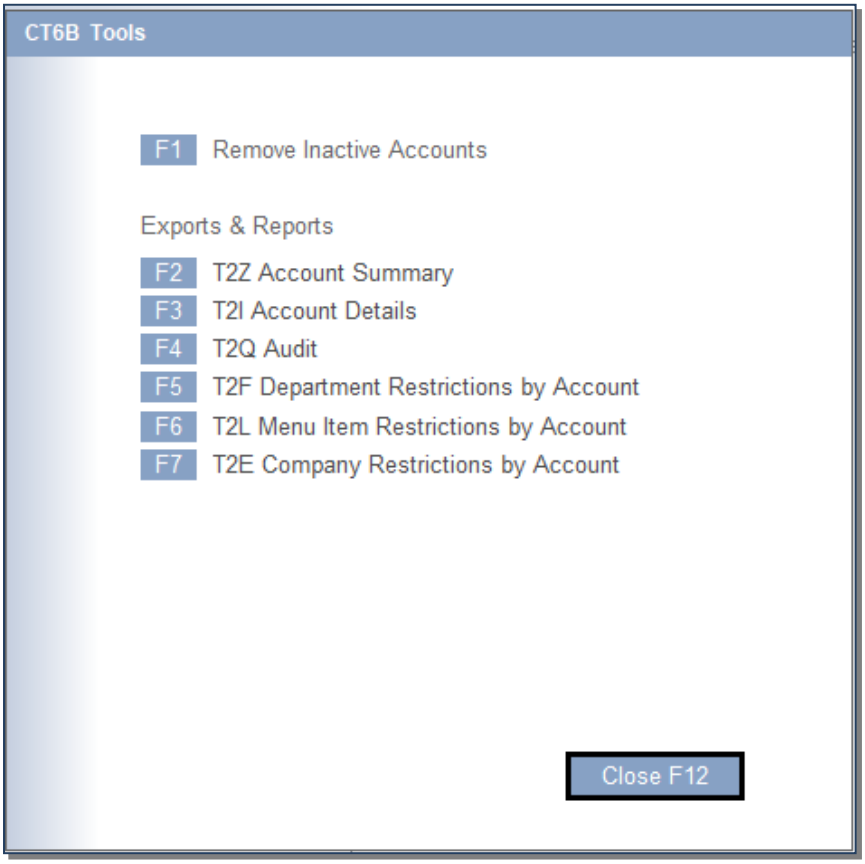
Under the multi-company option, you may set-up administrators who will manage accounts under their assigned company only.

1. Add a user account.
2. Check:
    a. Security & Login Rules
    b. Is a Security Admin who is restricted to one company in Security
    c. The modules the administrator has access to
    (Note that the administrator can also modify the module access rights)
    d. Has Company Restrictions & select the one company
    e. F1 Module Restrictions



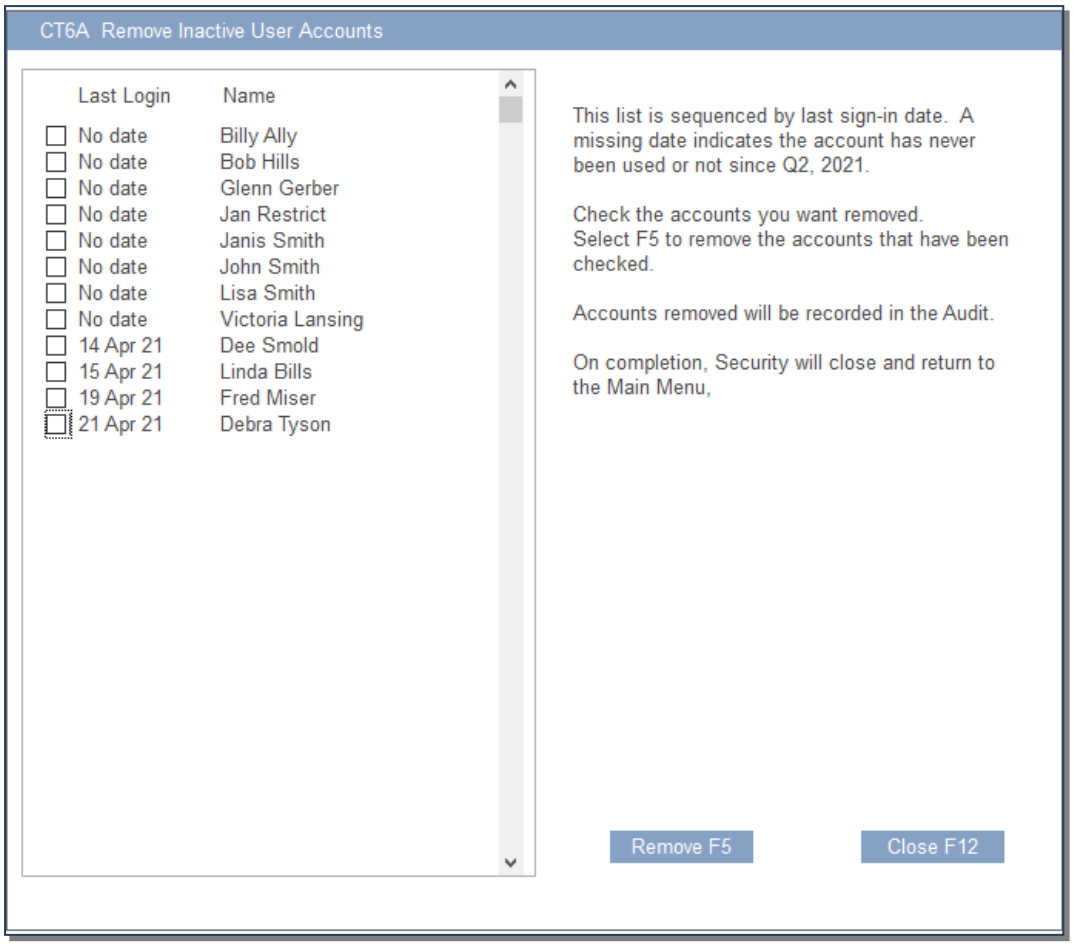
Security Tools

There are some tools that will help you manage your user accounts more effectively.
On the Home screen, select F8 Tools.



F1 Remove Inactive Accounts

- Helps you easily establish retired accounts that should be removed.



F2 Account Summary

- Provides a quick glance of the accounts and can be used to ensure that each account has the necessary criteria such as email address.

A	B	C	D	E	F	G	H	I
Account	Name	Uses Role	Role Used	Email	Last Sign in	Restr Admin	Dept Restr	Comp Restr
GLENNGE	Glenn Gerber	Y	Claims Manager		13/03/2021			
JANRE	Jan Restrict				01/04/2021	Yes		Yes
BOBHI	Bob Hills				02/04/2021			
LISASM	Lisa Smith	Y	Claims Manager	L.Smith@myco.com	10/04/2021			
JOHNS	John Smith				01/03/2021			
VLANSING	Victoria Lansing			V.Lansing@myco.com	09/04/2021			

F3 Account Details

- Shows list of all role profiles and user accounts
- Lists all modules each account has access to (for both unique accounts and those that use a role)

A	B	C	D	E	F	G	H	I	J	K
Account	Name	Uses Role	Role Used	Security	Personal	Incidents	Recall	Disability	Chart	Work Acc
.Role Profile	Claims Manager		Claims Manager		Y			Y		Y
.Role Profile	Occupational Health		Occupational Health		Y	Y		Y		Y
GLENNGE	Glenn Gerber	Y	Claims Manager		Y			Y		Y
JANRE	Jan Restrict			Y	Y		Y	Y	Y	Y
LISASM	Lisa Smith	Y	Claims Manager		Y			Y		Y

F4 Audit

- System tracks all actions and maintains an audit of resulting changes

A	B	C	D	E	F	G	H	I	J	K	L
Date	Time	Account Id	Name	Administrat	Admin Na	Action	Role Profile	Uses Role	Role Used	Security	Personal
01/04/2021	8:41	GLENNGE	Glenn Gerber	SusanL	Susan Lan	Add					Y
01/04/2021	8:41	GLENNGE	Glenn Gerber	SusanL	Susan Lan	Access					
01/04/2021	8:42	GLENNGE	Glenn Gerber	SusanL	Susan Lan	Access					
01/04/2021	8:42	LARRYB	Larry Billis	SusanL	Susan Lan	Delete		Y			

F5 Department Restrictions by Account

A	B	C	D	E
ID	Name	Company	Dept Code	Department
BOB	Bob Hills	All		
LINDAB	Linda Bills	1	FINANCE	Finance
LINDAB	Linda Bills	1	HEALTH	Employee Health
LINDAB	Linda Bills	1	HR	Human Resources
LINDAB	Linda Bills	1	IT	Information Technology

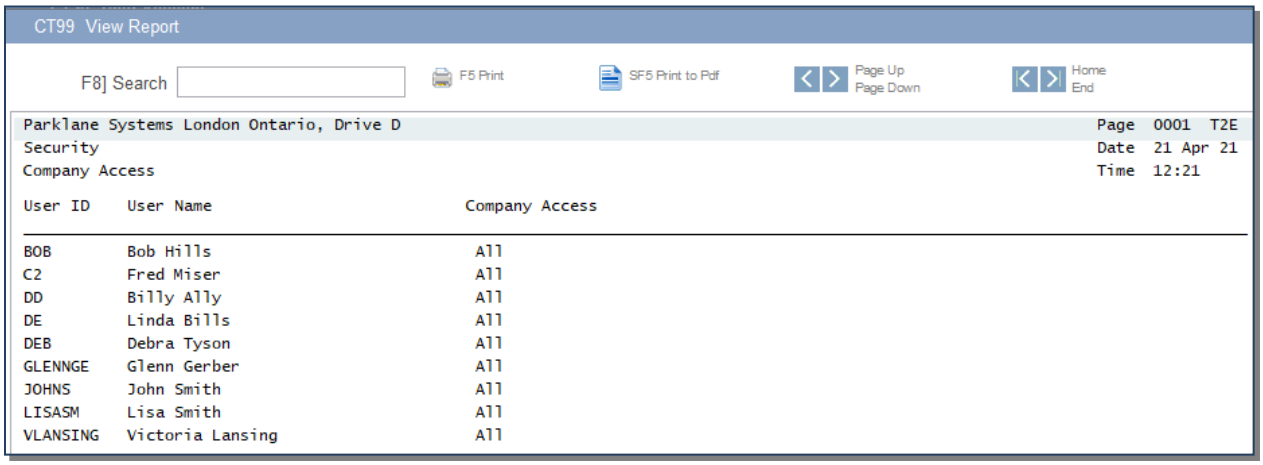
F6 Menu Item Restrictions By Account

- By module, shows menu items that can be accessed by each account

A	B	C	D	E	F
ID	Name	Module	Menu Item	Access Yes	Access No
FREDM	Fred Miser	DisMngr	Open Claim	Yes	
FREDM	Fred Miser	DisMngr	New Claim	Yes	
FREDM	Fred Miser	DisMngr	Document Links	Yes	
FREDM	Fred Miser	DisMngr	Enter Days	Yes	

F7 Company Restrictions by Account

- For those with Multi-company option only



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