

Abila netFORUM Pro



Security Group Setup and Configuration Guide

abila[™]

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Getting Started

In addition to the standard **Access Groups** used to control limited module access to the netFORUM Pro application for users, netFORUM Pro now includes the implementation of **Security Groups** for **netFORUM Pro** application users. Security Groups add much more precise control over both an organization's user access, and module and child form manipulation, including:

- Four baseline Security Groups:
 - Accounting
 - Customer Service
 - Events Management
 - Executive
- Precise module control access that enables **adding and removing all netFORUM Pro modules** to and from Security Groups
- The ability to **add new Security Groups** in addition to the baseline Security Groups
- The ability to go beyond the module level and **control access at the child form level** with **view and read-only** access management in each Security Group

Security Groups are an *advanced* netFORUM Pro feature that require additional implementation and training. Further, this feature is only available for the netFORUM Pro application. To request this feature, contact a **Customer Support** representative to arrange implementation and training.

Who Should Use This Document

This document assumes that you:

- are a licensed user of netFORUM Pro
- have Administrator level Access Group rights
- have completed Security Group Setup and Configuration training

Once you have completed training, your Security Group access will be provided by the netFORUM Pro Customer Support Team.

Note: A good working-knowledge of the netFORUM Pro application is assumed before you begin working with Security Groups. This document does not detail how to use other functions or features of netFORUM Pro. Security Group setup and configuration is for advanced netFORUM Pro users only. Use of this functionality poses a risk to your user's access and rights.

Support, Training, and Documentation

The latest training videos and online schedule can always be found on the **Welcome** module tab within the netFORUM Pro application. Release notes can be found under the netFORUM Pro Released link. To reach the netFORUM Pro support team, submit a ticket online or call 1-866-623-3629.

Security Group Overview

This section provides an overview of access groups, security groups, and baseline access groups.

Access Groups Versus Security Groups

When new users are first added to the netFORUM Pro application by an Administrator, they are placed into an **Access Group** and provided a log-in name with a password. An Access Group specifies what modules the user may have access to while they use netFORUM Pro.

There are currently three Access Groups within netFORUM Pro:

- Administrator
- User
- Express User

The difference between **Access Groups** and **Security Groups** is:

- Access Group modules are set and cannot be changed.
- Security Group modules security options enable changing the child forms within a module.

Security Groups are for organizations that need much more control over users and organizations. Security Groups provide a level of control by enabling the addition and deletion of any number of modules to a group which can then be accessed by all users who are part of that Security Group.

Example: An **Accounting Security Group** could be set-up to enable the Accounting staff with the only access to financial records.

Important! Security Groups implementation is for advanced netFORUM Pro users only. The level of user account detail that is offered with this feature means that it will be easy for the novice user to quickly lock-out staff to key features of the application by accident. This also means extra support time trying to troubleshoot the issues for the Support staff should this happen. As a result, training before implementation is mandatory.

Access Groups

Every licensed user within netFORUM Pro is placed into an Access Group. netFORUM Pro Access Groups grant the following access by group:

- **Administrator** – The Administrator Access Group is the Administrator’s access and provides full rights to the entire system including all modules. Few users for an entity have this level of access.
- **User** – The User Access Group is the next level down from Administrator access in that this Access Group has access to every module with two exceptions; no access to the Administrator module and no access to the Website module.
- **Express User** – The Express User Access Group is the final group and has the most limited access. This Access Group only has access to three modules; CRM, Committee, and Reports. Executives that simply need to view data are normally granted this level of access.

Important! Granting access to a **Security Group** that provides rights to a module that is not provided in the user’s baseline **Access Group** overrides the Access Group and the module access will be enabled. In other words, Security Group rights will always override Access Group rights. Always take both groups into consideration when considering what rights to grant.

Baseline Security Groups

When **Security Groups** are implemented within a system the Administrator, User, and Express User Access Groups are retained and become Baseline Security Groups.

Note: The Express User Access Group is renamed to Executive Security Group.

The following four additional Baseline Security Groups are deployed:

- **Accounting** – The **Accounting Security Group** is used to grant the Accounting staff access to financial information. This group has access to the **CRM, Accounting, Exhibits, Reports,** and **Administration** modules so that only the Accounting staff can add payments, process voids, cancellations, and create invoices, and so forth, if you desire (although they cannot add customer

- records).
- **Customer Service** – A **Customer Service Security Group** has been created that can add and edit customer records within the CRM module, add and edit historical activity, find registrants and events with access to the Events module, as well as set-up CRM demographics. However, they are not able to process financial information (other than simply viewing an Order profile). This means that a Customer Service Security Group member can answer questions on the phone, can make address changes, process event registrations, etc., but financial information resides with the Accounting Group, for example. In addition to the **CRM** and **Events** module, this group has access to **eMarketing, Awards, Certification, Exhibits, and Reports** modules although some functionality may be limited as described.
- **Event Management** – Finally, an **Event Security Group** is enabled to manage everything about **Events** including the ability to look-up **individuals** and **registrations** through the **CRM** and **Event** modules, as well as the ability to add and edit customer records if they need to manage **speakers**. Also open to this group are the **eMarketing** and **Exhibits** modules that support their **Events**.
- **Executive** – The **Executive Security Group** can view **Customer** and **Committee** records, including **Awards** for Executives. For this reason, the **CRM** module is available with the ability to view individual and organization records but it cannot create them. The **Committee** module and all associated functionality is available, however, along with the **Awards** module and the ability to view award entries and judges. The **Accounting** module is not available for this Security Group nor is the ability to process financial information, although members of this group can view a Customer's financial transactions.

To use the netFORUM Pro baseline Security Groups, click the **Administration** tab, expand the **Overview** group item, and then click the **Set Group Security (Client)** link.

Note: Remember that you need **Administrator Access Group** rights to access Security Group features and functionality as well as additional setup and training. Contact your **Customer Support** representative for more information.

Security Group Features and Functionality

This section provides information about adding a user to, updating, and editing security group functionality and descriptions.

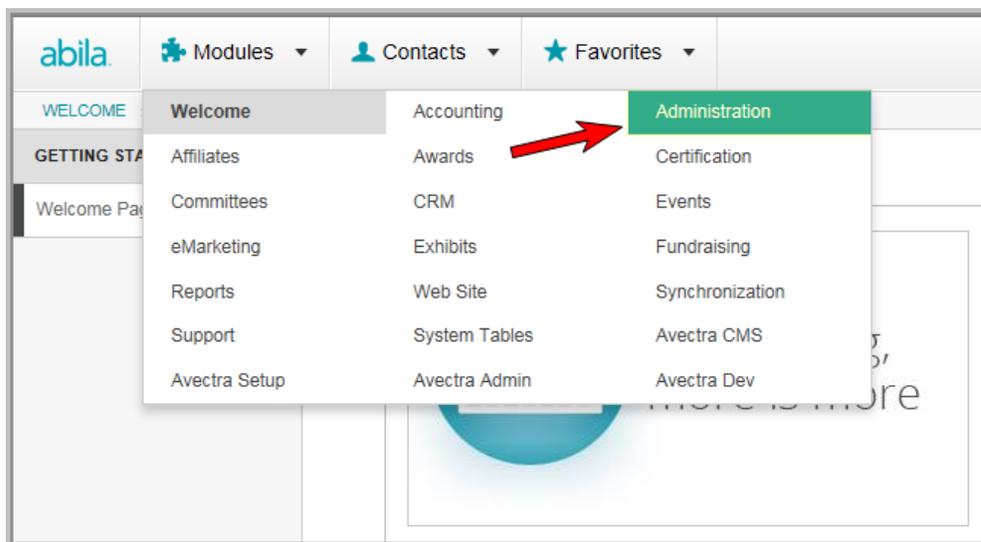
Important! Contact **netFORUM Pro Support** to clear the server cache any time a person is added to a security group or moved between security groups. Additionally, iWeb and eWeb sessions lose all work in progress during a server cache clear so clearing the server cache should be an off-hours activity. For example, a customer would lose their shopping cart if server cache were cleared while they were shopping.

Adding a User to a Security Group

Adding a new user to a **Security Group** requires access to the **Administration Module**. Click the **Set Group Security** link and the **Group Security Setup** window displays. All active (licensed) users in the system are listed at the bottom of this window along with all baseline Security Groups and any additional custom Security Groups created. If a user needed for a Security Group does not display, this means that the user is not a licensed netFORUM Pro user and they have not been added to the system. Contact **netFORUM Pro Support** to ensure that enough licenses are in place so that required users can be added to Security Groups.

To add a new user to a security group:

1. Hover over the **Modules** tab in the top navigation bar. In the fly out menu, click **Administration**.



The **Administration/Overview** window displays.

2. Expand the **Overview** group item and click **Set Group Security (Client)**. The **Add/Edit/Delete Security Group** window displays.

Add/Edit/Delete Security Group

Security Group: Administrator

Group Code: Administrator

Group Description: Administrator Role Access to onDemand

Copy New Group From: < leave empty >

Buttons: Add New, Update Group, Delete Group

Show Report Links Only?

Security Group	Group Description
Accounting	Accounting Security Group
Administrator	Administrator Role Access to onDemand
Customer Service	Customer Service
Event Management	Event Management
Executive	Executive Security Group
User	User Role Access to onDemand

User/Group	Accounting	Administrator	Customer Service	Event Management	Executive	User
aarontestadmin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
user01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
user02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
user03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
user04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Select the **Security Group** from the drop down list to which the user should be added.
4. Click the box next to the user name to be added.

For example, aarontestadmin in the example above is added to the Administrator Security Group.

5. Click **Save** to save the changes.

The user is now a part of the selected Security Group.

Note: The changes will not take affect until the newly added user logs out and back into the system.

Important! Contact netFORUM Pro Support to [clear the server cache](#) to see the changes.

Updating the Security Group Description

After creating or changing a Security Group, it may become necessary to make changes to the Group Description before making module or child form modifications.

To update a Security Group Description:

1. Select the **Security Group** from the drop down list requiring description changes.
2. Update the description in the **Group Description** field.

3. Click **Update Group** to save the changes.

Editing Module Access within a Security Group

You may decide that you want to modify which modules are accessible by **Security Group** members. For example, you may want your **Customer Service Security Group** members to also be able to **Find, List,** and **Add Web Site** articles so that they can direct customers to relevant information (and add timely articles to the system during their downtime).

It is generally not encouraged that you modify the baseline Security Groups unless you are extremely comfortable with Security Group setup and configuration. Instead, if you want to modify a baseline group, it is suggested that you first add a new Security Group by copying an existing group's setup and then use your new group to make any changes desired.

An entire section exists on Adding or Copying a Security Group in [Advanced Features and Functionality](#).

To add or delete module feature access within a Security Group:

1. Hover over the **Modules** tab in the top navigation bar. In the fly out menu, click **Administration**.
2. Expand the **Overview** group item and click **Set Group Security**. The **Add/Edit/Delete Security Group** window displays.
3. Select the **Security Group** from the drop down list to be modified.

4. Click the [+] **Expand** button to expand the selected **Security Group**. The module features currently available to users display.

Security Group	Group Description	Access?
Accounting	Accounting Security Group	
Administrator	Administrator Role Access to onDemand	
Customer Service	Customer Service	
Welcome	View netFORUM's online help, implementation & training videos. Configure netFORUM and review additional documentation.	enable all <input checked="" type="checkbox"/>
Accounting	Establish multiple automatic pricing structures based on membership status and dates. Quickly export data to third party accounting systems.	enable all <input checked="" type="checkbox"/>
Administration	Configure netFORUM to meet the unique needs of your organization. Set up and manage association specific functionality including multiple membership types and fees for individuals and organizations.	enable all <input checked="" type="checkbox"/>
Affiliates	Whether your organization has Chapters, Sections, Regions or Special Interest Groups; you can manage the details of these affiliate groups with ease. Track details like the type of affiliate group, charter date, website for the affiliate group, and tax ID number. Users can also indicate that a member type, committee, or event is that of an affiliate group.	enable all <input type="checkbox"/>
Awards	Manage multiple award types and categories by year. Track award entries by number, by customer or by nominator. Assign award judges to an award and collect the award entry score for each judge. Award entry scores are tracked and calculated on average to easily identify the award winner.	enable all <input checked="" type="checkbox"/>
Certification	Requirements, terms, and designations to be awarded upon certification are set up specific to each program. Track exams and courses as events in the event module. Centralize the tracking of education credits in netFORUM by assigning the credit value to each product or enter those self-reported credits into customer record.	enable all <input checked="" type="checkbox"/>
Committees	Track current and historical member participation. Run committee rosters and easily communicate with the entire committees at the click of a button.	enable all <input type="checkbox"/>
CRM	More than just a membership database, the CRM module manages all interactions with the individuals and organizations you do business with, including prospects and vendors. With a customer-service focus, the CRM module aggregates data from the entire system for a complete 360 degree view of members and prospects.	enable all <input checked="" type="checkbox"/>
Events	Set up and process unlimited registration fees. Identify and enforce key dates for early, regular, and late registrations. Track critical information on sponsors, locations, and speakers. Provide online registration and process payments in real-time.	enable all <input checked="" type="checkbox"/>
eMarketing	Set up templates and send personalized messages in HTML, or plain text to individuals or groups directly from all search or query results. Build and save mailing lists for future campaigns or group correspondence. Scheduled and deliver follow up messages to all requests, event registrations, and e-Commerce transactions.	enable all <input checked="" type="checkbox"/>
Exhibits	Set up and process unlimited exhibitors, contracts and booths. Track critical information on exhibitors and booths. Process payments in real-time.	enable all <input checked="" type="checkbox"/>
Fundraising	The Fundraising module is a comprehensive tool for managing funds and donations. Track the purpose of each fund, campaigns and their appeals. Staff can set goals for a fund, campaign or appeal and track the success of each.	enable all <input checked="" type="checkbox"/>
Properties	Tracking properties is accomplished in this module with the ability to create a property record tracking specific data elements like property type, property category, subdivision, lot size and more. Relate organization customers to the property through owner types and create annual assessments for billing purposes.	enable all <input type="checkbox"/>
Reports	In this module you can access over 300 Reports, Executive Dashboards, and Queries related to each module. With a single click you can easily access data that you need to manage your organization and export it to a variety of formats. Pro query tool users have the ability to transform pre-defined queries into a report type format with the Dataset Designer. Select the option to create a list report or a chart of the dataset produced by your query. Add the logo, select the columns for output display and determine the layout. Perform aggregate calculations and group the data for meaning representation of results. Creating a report on the fly was never so easy.	enable all <input checked="" type="checkbox"/>
Web Site	The web site management wizard creates a personalized web experience for your members and instantly delivers the right information to the right people at the right time. Enable members to view and edit their member profiles to ensure accuracy of member data.	enable all <input checked="" type="checkbox"/>
Event Management	Event Management	
Executive	Executive Security Group	
User	User Role Access to onDemand	

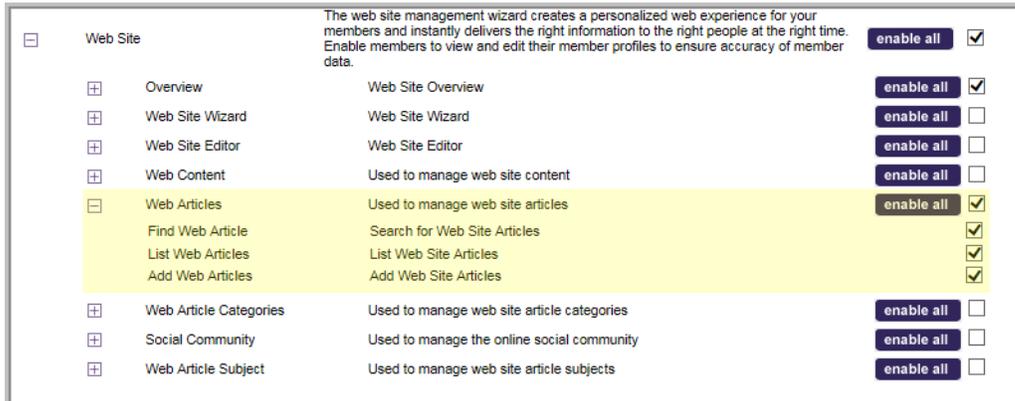
Note: Although a module is 'enabled' on the main page does not mean that all functionality of that module is enabled.

5. Click the box in the **Access** column next to the module you want to edit and then click on the [+] **Expand** button for that module.

Customer Service		Customer Service		
<input type="checkbox"/>	Welcome	View netFORUM's online help, implementation & training videos. Configure netFORUM and review additional documentation.	enable all	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Accounting	Establish multiple automatic pricing structures based on membership status and dates. Quickly export data to third party accounting systems.	enable all	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Administration	Configure netFORUM to meet the unique needs of your organization. Set up and manage association specific functionality including multiple membership types and fees for individuals and organizations.	enable all	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Affiliates	Whether your organization has Chapters, Sections, Regions or Special Interest Groups; you can manage the details of these affiliate groups with ease. Track details like the type of affiliate group, charter date, website for the affiliate group, and tax ID number. Users can also indicate that a member type, committee, or event is that of an affiliate group.	enable all	<input type="checkbox"/>
<input type="checkbox"/>	Awards	Manage multiple award types and categories by year. Track award entries by number, by customer or by nominator. Assign award judges to an award and collect the award entry score for each judge. Award entry scores are tracked and calculated on average to easily identify the award winner.	enable all	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Certification	Requirements, terms, and designations to be awarded upon certification are set up specific to each program. Track exams and courses as events in the event module. Centralize the tracking of education credits in netFORUM by assigning the credit value to each product or enter those self-reported credits into customer record.	enable all	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Committees	Track current and historical member participation. Run committee rosters and easily communicate with the entire committees at the click of a button.	enable all	<input type="checkbox"/>
<input type="checkbox"/>	CRM	More than just a membership database, the CRM module manages all interactions with the individuals and organizations you do business with, including prospects and vendors. With a customer-service focus, the CRM module aggregates data from the entire system for a complete 360 degree view of members and prospects.	enable all	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Events	Set up and process unlimited registration fees. Identify and enforce key dates for early, regular, and late registrations. Track critical information on sponsors, locations, and speakers. Provide online registration and process payments in real-time.	enable all	<input checked="" type="checkbox"/>
<input type="checkbox"/>	eMarketing	Set up templates and send personalized messages in HTML or plain text to individuals or groups directly from all search or query results. Build and save mailing lists for future campaigns or group correspondence. Scheduled and deliver follow up messages to all requests, event registrations, and e-Commerce transactions.	enable all	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Exhibits	Set up and process unlimited exhibitors, contracts and booths. Track critical information on exhibitors and booths. Process payments in real-time.	enable all	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Fundraising	The Fundraising module is a comprehensive tool for managing funds and donations. Track the purpose of each fund, campaigns and their appeals. Staff can set goals for a fund, campaign or appeal and track the success of each.	enable all	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Properties	Tracking properties is accomplished in this module with the ability to create a property record tracking specific data elements like property type, property category, subdivision, lot size and more. Relate organization customers to the property through owner types and create annual assessments for billing purposes.	enable all	<input type="checkbox"/>
<input type="checkbox"/>	Reports	In this module you can access over 300 Reports, Executive Dashboards, and Queries related to each module. With a single click you can easily access data that you need to manage your organization and export it to a variety of formats. Pro query tool users have the ability to transform pre-defined queries into a report type format with the Dataset Designer. Select the option to create a list report or a chart of the dataset produced by your query. Add the logo, select the columns for output display and determine the layout. Perform aggregate calculations and group the data for meaning representation of results. Creating a report on the fly was never so easy.	enable all	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Web Site	The web site management wizard creates a personalized web experience for your members and instantly delivers the right information to the right people at the right time. Enable members to view and edit their member profiles to ensure accuracy of member data.	enable all	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Overview	Web Site Overview	enable all	<input checked="" type="checkbox"/>
	Overview	Overview		<input checked="" type="checkbox"/>
	Training Videos			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Web Site Wizard	Web Site Wizard	enable all	<input checked="" type="checkbox"/>
	Web Site Wizard			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Web Site Editor	Web Site Editor	enable all	<input checked="" type="checkbox"/>
	Web Site Editor			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Web Content	Used to manage web site content	enable all	<input checked="" type="checkbox"/>
	List Web Content	List Web Site Content		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Web Articles	Used to manage web site articles	enable all	<input checked="" type="checkbox"/>
	Find Web Article	Search for Web Site Articles		<input checked="" type="checkbox"/>
	List Web Articles	List Web Site Articles		<input checked="" type="checkbox"/>
	Add Web Articles	Add Web Site Articles		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Web Article Categories	Used to manage web site article categories	enable all	<input checked="" type="checkbox"/>
	Find Web Article Categories	Search for Web Site Article Categories		<input checked="" type="checkbox"/>
	List Web Article Categories	List Web Site Article Categories		<input checked="" type="checkbox"/>
	Add Web Article Categories	Add Web Site Article Categories		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Social Community	Used to manage the online social community	enable all	<input checked="" type="checkbox"/>
	Social Community			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Web Article Subject	Used to manage web site article subjects	enable all	<input checked="" type="checkbox"/>
	Find Web Article Subjects	Search for web Site Article Subjects		<input checked="" type="checkbox"/>
	List Web Article Subjects	List Web Site Article Subjects		<input checked="" type="checkbox"/>
	Add Web Article Subjects	Add Web Site Article Subjects		<input checked="" type="checkbox"/>

Clicking the box in the Access column next to a module feature enables that module feature.

Example: Select all the Web Articles boxes to enable finding, listing, and adding web articles.



6. Alternatively, click the **Enable All** button to select all the module features for a module.

Important! When a module is checked as 'enabled' at the top level of a Security Group this does not mean that all features are enabled. Use the [+] Expand button to expand the module to view exactly what functionality is truly enabled.

7. Click the **Update Group** button to save the enabled features for a **Security Group**.

Important! Contact netFORUM Pro Support to [clear the server cache](#) to see the changes.

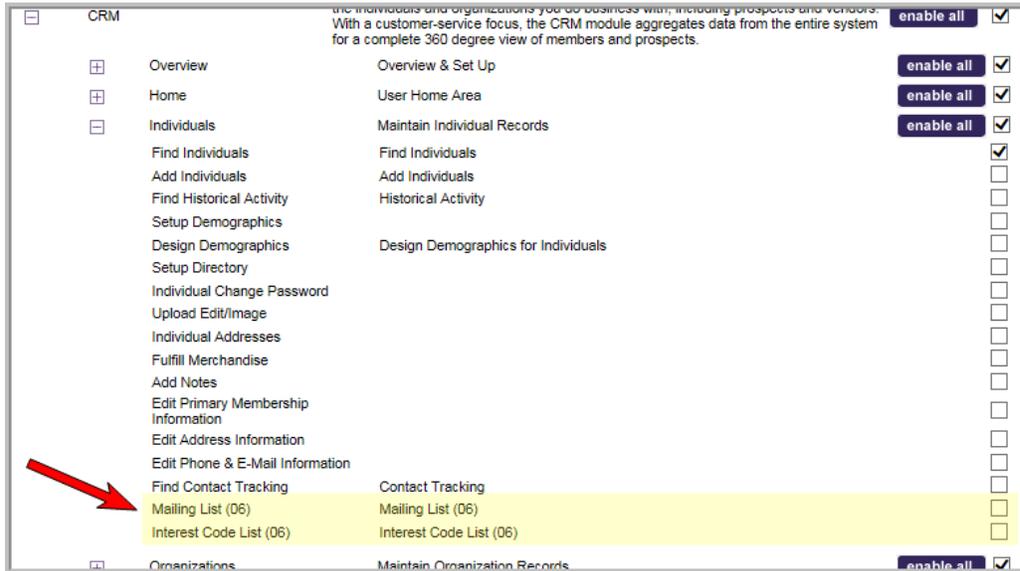
Managing Report and Query Access

When you give an individual access to a **Security Group**, all **reports** associated to each module within that group are also granted. For example, the Accounting Security Group has access to functionality within the **CRM** module. Because the CRM module is enabled for this group as a result, the Accounting Security Group has access to all CRM reports by default. The Accounting Security Group also has access to Exhibits functionality which means all Exhibits reports are enabled and so forth. All Security Groups have access to all **queries** by default no matter which modules are enabled.

Just as you can decide which modules each Security Group has access to, you can also manage report and query access within each as well if you want to add or disable access beyond the baseline access. For example, note in this figure that the Accounting Security Group has access to all reports and queries by default.

Security Group	Group Description	Access?
Accounting	Accounting Security Group	
+ Welcome	View netFORUM's online help, implementation & training videos. Configure netFORUM and review additional documentation.	enable all <input type="checkbox"/>
+ Accounting	Establish multiple automatic pricing structures based on membership status and dates. Quickly export data to third party accounting systems.	enable all <input checked="" type="checkbox"/>
+ Administration	Configure netFORUM to meet the unique needs of your organization. Set up and manage association specific functionality including multiple membership types and fees for individuals and organizations.	enable all <input checked="" type="checkbox"/>
+ Affiliates	Whether your organization has Chapters, Sections, Regions or Special Interest Groups, you can manage the details of these affiliate groups with ease. Track details like the type of affiliate group, charter date, website for the affiliate group, and tax ID number. Users can also indicate that a member type, committee, or event is that of an affiliate group.	enable all <input type="checkbox"/>
+ Awards	Manage multiple award types and categories by year. Track award entries by number, by customer or by nominator. Assign award judges to an award and collect the award entry score for each judge. Award entry scores are tracked and calculated on average to easily identify the award winner.	enable all <input type="checkbox"/>
+ Certification	Requirements, terms, and designations to be awarded upon certification are set up specific to each program. Track exams and courses as events in the event module. Centralize the tracking of education credits in netFORUM by assigning the credit value to each product or enter those self-reported credits into customer record.	enable all <input type="checkbox"/>
+ Committees	Track current and historical member participation. Run committee rosters and easily communicate with the entire committees at the click of a button.	enable all <input checked="" type="checkbox"/>
+ CRM	More than just a membership database, the CRM module manages all interactions with the individuals and organizations you do business with, including prospects and vendors. With a customer-service focus, the CRM module aggregates data from the entire system for a complete 360 degree view of members and prospects.	enable all <input checked="" type="checkbox"/>
+ Events	Set up and process unlimited registration fees. Identify and enforce key dates for early, regular, and late registrations. Track critical information on sponsors, locations, and speakers. Provide online registration and process payments in real-time.	enable all <input checked="" type="checkbox"/>
+ eMarketing	Set up templates and send personalized messages in HTML or plain text to individuals or groups directly from all search or query results. Build and save mailing lists for future campaigns or group correspondence. Scheduled and deliver follow up messages to all requests, event registrations, and e-Commerce transactions.	enable all <input type="checkbox"/>
+ Exhibits	Set up and process unlimited exhibitors, contracts and booths. Track critical information on exhibitors and booths. Process payments in real-time.	enable all <input checked="" type="checkbox"/>
+ Fundraising	The Fundraising module is a comprehensive tool for managing funds and donations. Track the purpose of each fund, campaigns and their appeals. Staff can set goals for a fund, campaign or appeal and track the success of each.	enable all <input type="checkbox"/>
+ Properties	Tracking properties is accomplished in this module with the ability to create a property record tracking specific data elements like property type, property category, subdivision, lot size and more. Relate organization customers to the property through owner types and create annual assessments for billing purposes.	enable all <input type="checkbox"/>
+ Reports	In this module you can access over 300 Reports, Executive Dashboards, and Queries related to each module. With a single click you can easily access data that you need to manage your organization and export it to a variety of formats. Pro query tool users have the ability to transform pre-defined queries into a report type format with the Dataset Designer. Select the option to create a list report or a chart of the dataset produced by your query. Add the logo, select the columns for output display and determine the layout. Perform aggregate calculations and group the data for meaning representation of results. Creating a report on the fly was never so easy.	enable all <input checked="" type="checkbox"/>
+ Overview	Overview of Reports	enable all <input type="checkbox"/>
+ Report Central	Report Central	enable all <input checked="" type="checkbox"/>
+ Reports	Report Central	<input checked="" type="checkbox"/>
+ Query Central	Query Central	enable all <input checked="" type="checkbox"/>
+ Queries	Queries	<input checked="" type="checkbox"/>
+ Dataset Designer	Dataset Designer	enable all <input type="checkbox"/>
+ Executive Dashboard	Executive Dashboard	enable all <input checked="" type="checkbox"/>
+ Web Site	The web site management wizard creates a personalized web experience for your members and instantly delivers the right information to the right people at the right time. Enable members to view and edit their member profiles to ensure accuracy of member	enable all <input type="checkbox"/>

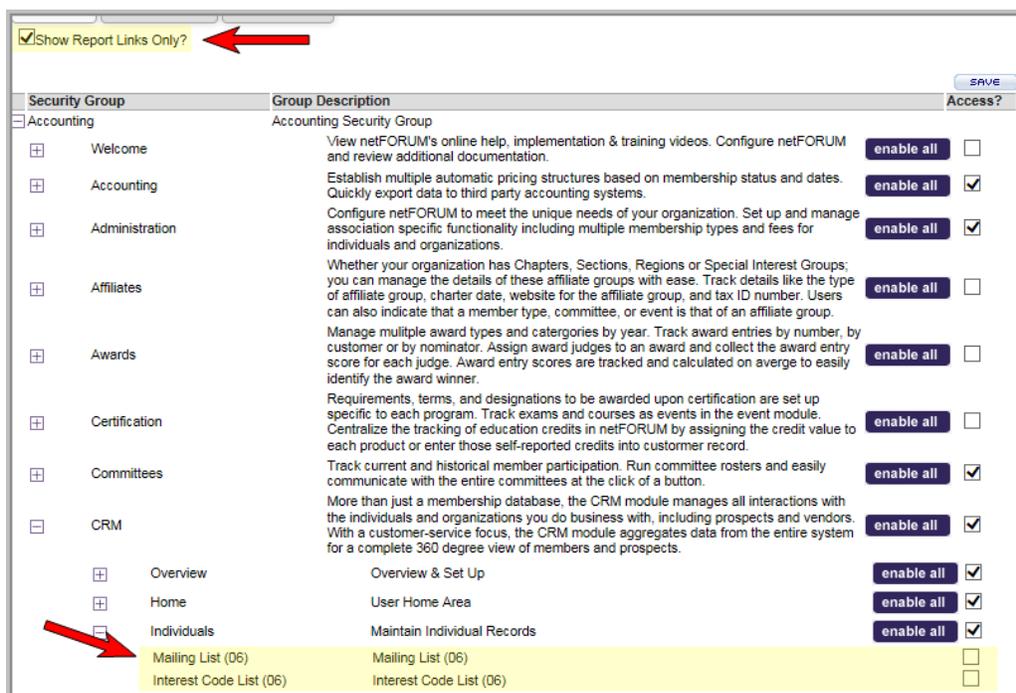
You may also, however, choose to manipulate your group's report access even further by choosing which report functions are available for each individual module as well. For example, you may decide that you want your Accounting Group to be able to run all reports except for the CRM Individual reports of **Mailing Lists** and **Interest Code Lists**. To accomplish this, expand the CRM module within the Accounting Security Group and disable those two check boxes as seen in the following figure.



In this manner, you are able to be very specific which reports each Security Group is able to use. As noted previously, queries are either enabled or disabled in their entirety and are not able to be individually managed at this time.

The number of module options available to each group can often be overwhelming. The Security Group interface provides a quick method for finding all reports per module for this reason. If you want to view only the reports per module so that you can decide if you want to enable or disable them, expand the module, and then click the Show Report Links Only check box. This will then show you only the report links under each expanded module.

The number of module options available to each group can often be overwhelming. The Security Group interface provides a quick method for finding all reports per module for this reason. If you want to view only the reports per module so that you can decide if you want to enable or disable them, expand the module, and then click the **Show Report Links Only** check box. This will then show you only the report links under each expanded module.



Selecting **Show Report Links Only** removes all links in the expanded module that are not report links.

Advanced Features and Functionality

This section provides information about:

- adding, copying, and deleting security groups
- customizing child form security within a security group

Adding or Copying a Security Group

When possible, use the baseline **Security Groups** provided upon implementation. However, there may come a time when you need additional Security Groups other than the provided baseline groups. Further, it is suggested that if you need to modify a baseline group that you instead use your own Security Group to do so instead of modifying a baseline group. For this reason, the ability to **add** your own Security Groups is provided along with the ability to **copy** the features of a current group so you do not have to start your group from scratch (if desired).

Example: You may want to create a Training Security Group that begins with a limited set of features such as those found in the Executive group.

To copy and add a security group:

1. Hover over the **Modules** tab in the top navigation bar. In the fly out menu, click **Administration**.

The **Administration/Overview** window displays.

2. Expand the **Overview** group item and click **Set Group Security (Client)**.

The **Add/Edit/Delete Security Group** window displays.

3. Make sure <add a new security group> appears in the **Security Group drop-down**.
4. Enter a **Group Code** for your new **Security Group**. This should be a fairly short, but accurate, description of what your new group will be called. This code is what will appear in the **User/Group table** at the bottom of the **Group Security Setup** window. For this example, the Group Code will be 'Training'.
5. Enter a **Group Description**. This can be a longer description of the group's intent.
6. In the **Copy New Group From:** drop-down field, select **Executive**. This means that your new Training group will have all features and functionality of the Executive group enabled upon creation. If you want to create a new group from scratch and enable all aspects of the group yourself, leave this drop-down blank.
7. Your new group should look similar to the following figure if you are copying it from an existing baseline group. Remember, if you are starting from scratch, the **Copy New Group From** field will remain blank and you will update your modules individually as described in the section, "[Editing Module Access within a Security Group](#)" (page 7). Otherwise, this field should contain the Security Group that has the functionality you want to start with in your new group.

Add/Edit/Delete Security Group

Security Group: < add new security group > ▼

Group Code: Training

Group Description: Training Security Group using Exec baseline

Copy New Group From: Executive ▼

Show Report Links Only?

8. Click the **Add New** button to add your new Security Group to the system.

Notice in Figure 12 that the new group with the **Group Code** and **Description** specified is now available and can have more modules added to it (if desired) as well as have group members assigned. If you use the [+] **Expand** button, you will note that it also has all the functionality of the group it was copied from as well - in this case, the Executive Security Group.

Security Group	Group Description							
Accounting	Accounting Security Group							
Administrator	Administrator Role Access to onDemand							
Customer Service	Customer Service							
Event Management	Event Management							
Executive	Executive Security Group							
Training	Training Security Group using Exec baseline							
User	User Role Access to onDemand							

User/Group	Accounting	Administrator	Customer Service	Event Management	Executive	Training	User
aarontestadmin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
user01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
user02	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
user03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
user04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Customizing Child Form Security within a Security Group

netFORUM Pro now provides customers an additional layer of security to their organizations and applications with the addition of Security Groups that allow you to enable or disable modules and their functionality as needed. Some organizations also desire an additional layer of security beyond modules and this is now provided through **Child form Security**.

Child form Security is similar to Group Security and Adding New Users in that you must have access to the **Administration** module for access. It is implemented as part of Security Groups and is considered an advanced feature.

Organizations that implement Child form Security are dictating which specific child forms in their application (per module) are either **invisible** or **read-only** for each Security Group in use. Using the following figure as an example, note the following:

Show Child Forms for module: Administration

SAVE

Child Forms			Security Groups						
Profile Form	Profile Tab	Child Form Title	Accounting	Administrator	Customer Service	Event Management	Executive	Training	User
Individual	Membership	Membership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Dues Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Supplemental	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Recurring Payment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Membership Log	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Membership History from National	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Membership Flow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Relations	Linked Organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Linked Individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Relationships to Organizations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
		Relationships to Other Individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
		Relationships from Other Individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Purchases	Merchandise Purchased	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Miscellaneous Items Purchased	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Donations/Funds Purchased	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Historic RPAC Contributions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Merchandise History from National	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Late Fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Subscriptions	Current Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- The screenshot above is a partial graphic showing all the current child forms for the **CRM** module. The CRM is displayed in the **Show Child Forms for module:** drop-down at the top of the screen.
- Beside the Child forms column is the **Security Groups** column displaying each of the active Security Groups in place for this organization.
- For each Security Group, you have two choices for each child form. You may choose to make it completely **invisible** to the user of that Security Group or you may choose to make it simply **read-only**. Hover over the check boxes to view the options as displayed in this figure.

Accounting	Administrator	Customer Service	Event Management
<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/>
<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/>
<input type="checkbox"/> <input type="checkbox"/>			

- For example, note that for the Event Management group, several of the CRM child forms are read-only.
- If you select *both* **invisible** and **read-only** as options, the child form will be invisible to the group member.
- If neither check box is selected, the child form is both visible and editable as dictated by both the user's normal **Access Group** and **Security Group** settings.

To activate child form security:

1. Hover over the **Modules** tab in the top navigation bar. In the fly out menu, click **Administration**.
2. Expand the **Overview** group item and click **Child Form Security (Client)**.

The **Child Form Access** window displays.

3. Select the module you want to modify child form access to in the **Show Child Forms for module:** drop-down. Click the **invisible** or **read-only** check box as desired for each child form.
4. Click the **Save** button to save your work.

Your changes will not be registered by the Security Group member until he/she logs out and back into the system.

Important! Just as with module manipulation, it is recommended that you do not make changes to the child form security of the four baseline **Security Groups**. This makes troubleshooting and support much harder should an issue occur for netFORUM Customer Support managers. Just as with adding and deleting module options, it is recommended that, if you want to modify your child form options for a Security Group, you create your own Security Group first to do so instead of changing a baseline Security Group.

Deleting a Security Group

Deleting a Security Group that is no longer in use is similar to adding a new Security Group.

To delete a Security Group:

1. Hover over the **Modules** tab in the top navigation bar. In the fly out menu, click **Administration**
2. Expand the **Overview** group item and click **Set Security Group (Client)**.

The **Add/Edit/Delete Security Group** window displays.

3. Make sure the **Security Group** that you want to delete appears in the **Security Group drop-down**. In the example shown in the following figure, the **Training Security Group** created in ["Adding or Copying a Security Group" \(page 13\)](#) will be deleted.
4. Click the **Delete Group** button. The Security Group will be immediately removed. Note you are not able to delete baseline Security Groups.

Add/Edit/Delete Security Group

Security Group: Training

Group Code: Training

Group Description: Training Security Group using Exec baseline

Copy New Group From: < leave empty >

Add New Update Group Delete Group

Show Report Links Only?

Important! If you delete a Security Group, all members of that Security Group are immediately removed from the group as well which includes all rights associated (or disabled) with that group! Think carefully before deleting a Security Group!

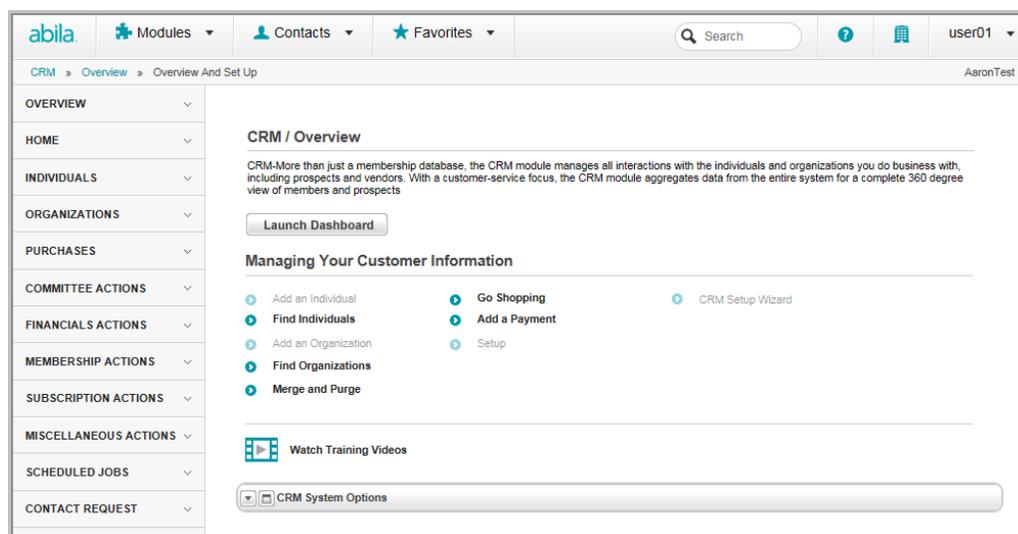
Use Cases

Once you add a user to a **Security Group**, their experience in netFORUM and how they may interact with the system will change, sometimes dramatically depending upon how you have your Security Groups set-up. Below are two use cases and sample descriptions of how accounts may work when used in conjunction with two baseline Security Groups, **Accounting** and **Customer Service**.

Note: This section is to be used for learning and demonstration purposes only. Abila makes no guarantee that your Security Groups will work exactly the same since Security Groups may be modified.

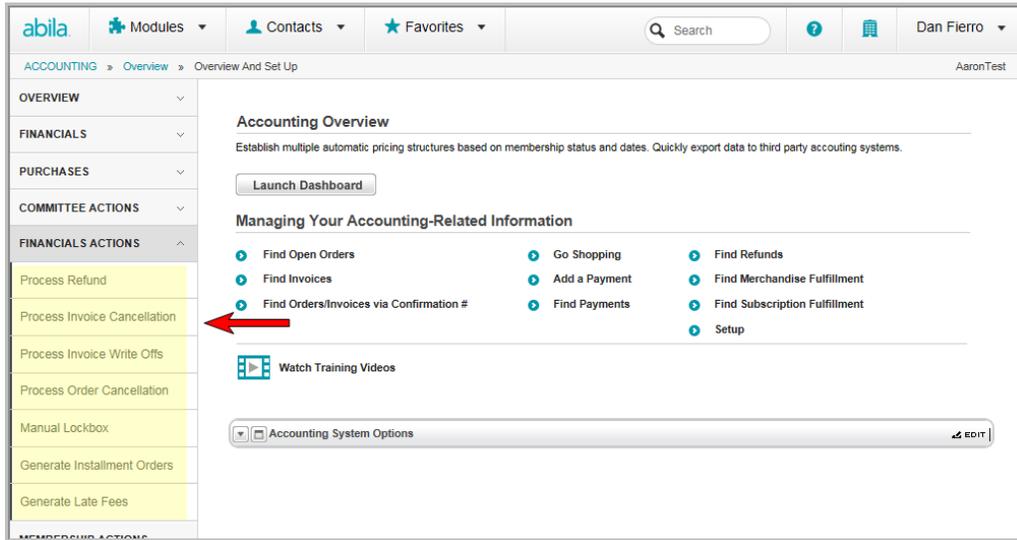
Use Case #1 – Accounting Security Group

As noted in the Baseline Security Groups section, the **Accounting Security Group** is used to grant the Accounting staff access to financial information. This group has access to the **CRM, Accounting, Exhibits, Reports, and Administration** modules. However, notice in the figure below, that the functionality with the CRM module is somewhat limited for this Security Group.

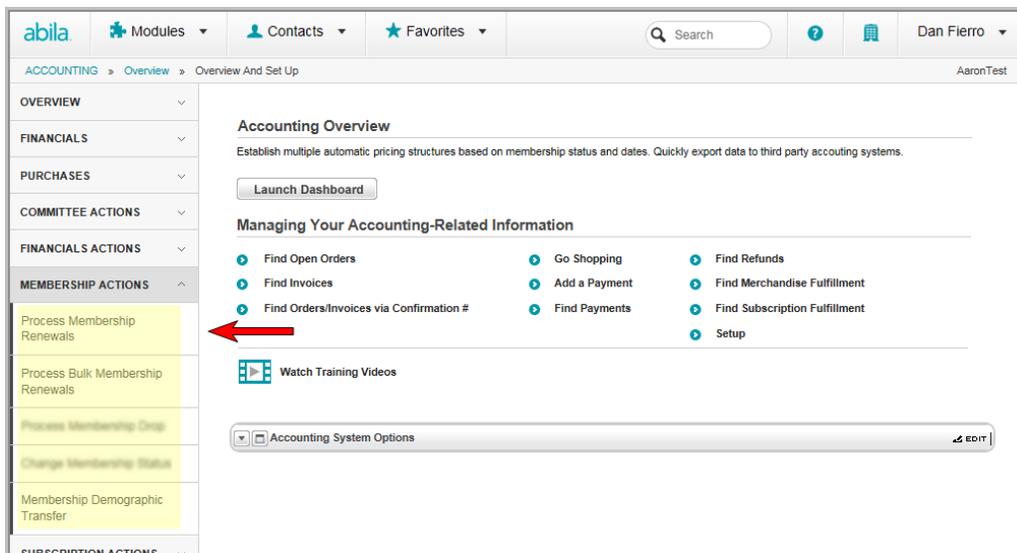


Because the Accounting Security Group is designed to focus on financials only, the options in CRM are limited in that this group is not enabled to add individuals or organizations, for example. Nor are they enabled to perform Set Up functions. Further, the Accounting Security Group Actions Menu also limits this group to financials as observed by the next figures.

For example, the group can perform all invoice associated items such as cancellations and write-offs but cannot process fulfillments.



Membership and Subscription Renewals can be conducted but not drops or status changes.

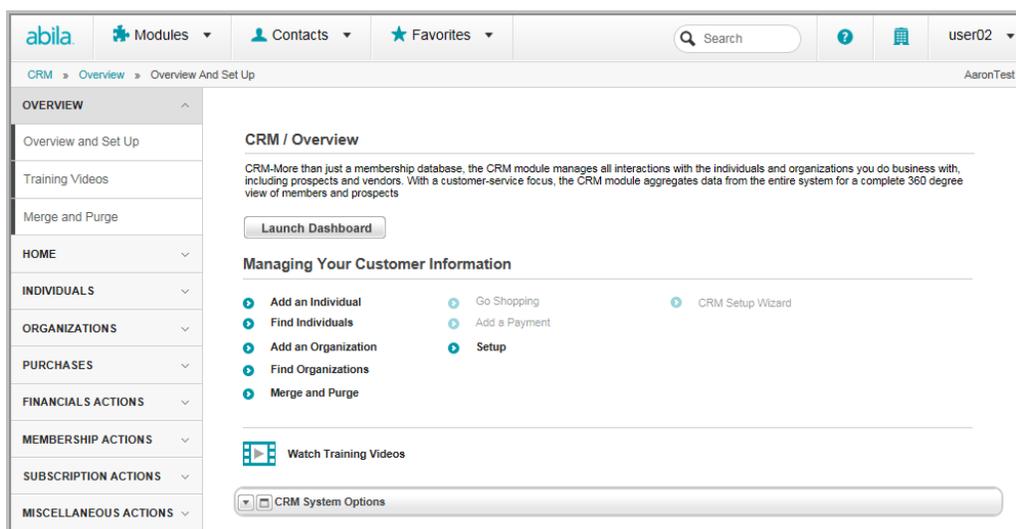


As expected, all functionality within the Accounting module itself is enabled for this Security Group. For more complete information on what is available for this Security Group, you may look at the modules themselves within Security Group Setup or add a new member and view the set-up yourself before making massive changes to your organization (recommended).

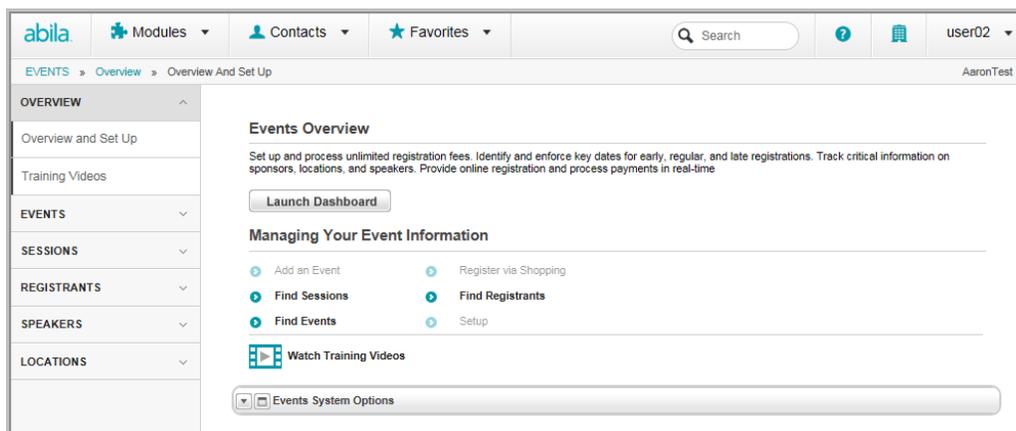
Use Case #2 – Customer Service Security Group (Modified)

A **Customer Service Security Group** has been created that can add and edit records, add and edit historical activity, find registrants and events, as well as set-up CRM demographics. The intent of the Customer Service Group is to be able to answer the phone and find out information without having to conduct a lot of the processing or financial work. As a result, some of the following screens are available for a baseline Customer Service Group.

This figure shows the **Customer Service Group CRM** module. This group can add individuals and organizations as well as search for them but, as noted, Go Shopping and Add a Payment are disabled.



The Events, Awards, Certification, and Exhibits modules are very similar for the Customer Service Group, shown in this figure.



Members of this group may search for an Event, Session, or Registrant to relay this information to customers (over the phone, for example) but they may not add an event.

Finally, if you recall in the section "[Editing Module Access within a Security Group](#)" (page 7), this baseline group was modified slightly in that we wanted Customer Service Reps to be able to add **Web Site Articles** during downtime but not to actually be able to modify the Web Site which is your Web Master's job. As a result, this group now has the ability to do that as well. Find, List and Add are available but the Web Site Wizard and the Web Site Editor are still disabled. This demonstrates the power available in Security Groups.

For more complete information on what is available for this Security Group, you may look at the modules themselves within Security Group Setup or add a new member and view the set-up yourself before making massive changes to your organization (recommended).

Note: Remember to contact your **Customer Support** representative for **training and implementation** of Security Groups.

Frequently Asked Questions

Q. What if I place a user in two Security Groups and a conflict occurs where a module (or child form) is enabled in one Security Group but disabled in the other? Which Security Group will take precedence?

A. Enabled modules and forms will take precedence over disabled modules and forms if there is ever a conflict. However, this illustrates how quickly Security Groups can become convoluted and confusing if not thought-out in advance and used carefully. It is highly encouraged that users are always placed in one Security Group at a time for this reason and to keep things simple.

Q. Do Security Group rights override Access Group rights?

A. Yes. For example, User A currently has Express User Access Group rights. The Express User Access Group grants him CRM, Committee, and Reports module access. You decide to make User A also part of the Accounting Security Group. The Accounting Security Group provides access to the Accounting, Exhibits, and Administration modules. This will override User A's Express User Access limited rights and will also provide those additional modules to him.

Q. I accidentally deleted a Security Group! Is there any way I can get it back with all the members restored through Support?

A. Unfortunately not. The only way to restore your Security Group is to manually recreate it and add your users again.

Q. I have a module enabled in my Security Group but I still can't modify any records. Why not?

A. Double-check your Child form security and make sure that it is not in conflict with your Group Security. You may have a child form set to read-only or invisible access for your Security Group.

Q. Is there a limit to the number of users I can add to a Security Group?

A. There is no limit to the number of users you may add. You may have many users or you may set-up a Security Group for only one (1) user if needed.
