



# Security Administration Overview



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# Security Administration Overview

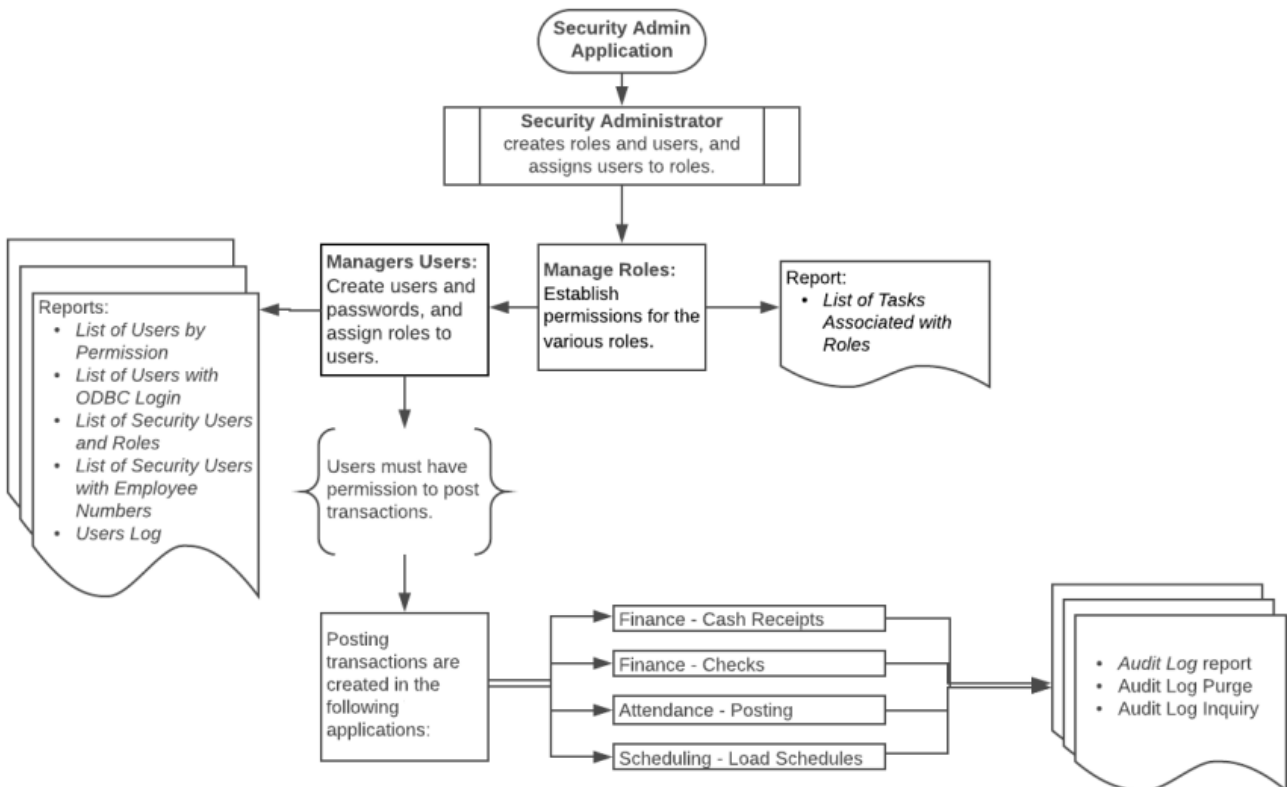
ASCENDER Security Administration provides security administrators or designated users the rights to securely manage roles and permissions for ASCENDER Business and Student users. Additionally, various reports are available to assist with assessing audit information.

This guide provides information about how to create and manage roles and users as well as assign campus rights, pay frequencies, and warehouses.

## Before You Begin:

Review the Security Administration flow chart and terminology in order to understand the relationship between roles, users, and permissions and how they integrate into the ASCENDER Business and Student systems.

[Security Administration flow chart](#)



[Review Security Administration terms.](#)

<b>Term</b>	<b>Description</b>
<b>User</b>	An individual who has access to log on to ASCENDER with a valid user name and password.
<b>Authentication</b>	Determines a user's identity via a user name and password that is entered on the ASCENDER Login page.
<b>Authorization</b>	Determines the user's system permissions (access) after the user's identity is authenticated.
<b>Task</b>	Represents each page or tab within ASCENDER.
<b>User Role</b>	Represents the association of a user with a role. The user role provides campus, payroll frequency, and warehouse permissions.
<b>Role</b>	A group of tasks (page or tab) to which a user has access.
<b>Permission</b>	Determines the relationship between a role and a task in order to extend the appropriate access to the user in ASCENDER.
<b>Component</b>	Refers to an application, page, or tab when managing ASCENDER roles and users.

## What is the purpose of a role?

The Security Administration application is structured to assign roles to users instead of individual tasks, which simplifies the designated security administrator's duty of managing user permissions.

For example, if a new page (task) is added to the Attendance application and only the Attendance Clerks require access to the page, the security administrator can provide page permission to only the Attendance Clerk role, which grants access to all users who are assigned the Attendance Clerk role.

If roles did not exist, each individual user profile would have to be manually updated with access to the new page.

## Why use permissions?

In most cases, roles cover all user access; however, special cases may exist. For example, if a user is assigned to a role but this particular user should not have access to a specific page within that role, you can manually update the user's profile to set the exclude permission to that specific page. The user would still have access to the other role permissions with the exception of the excluded page. You can exclude a permission by simply unselecting a task (page or tab) from the user's profile permissions.

## What is a user role?

For Student users, the user role provides campus access. For example, a user may be assigned the Attendance Clerk role for a high school campus but may also have the Discipline Advisor role for the middle school campus. Based on the campus permissions in the user role, the user cannot modify attendance information for the middle school campus, only the high school campus.

For Business users, the user role provides access to payroll frequencies and warehouses. For example, if a user only has access to a specific payroll frequency, the user can only run Human Resources processes for that specific payroll frequency.

## Manage Roles

The Manage Roles page allows you to create roles with specific permissions to various components, pay frequencies, campuses, and warehouses within ASCENDER. Once roles have been established, you can assign the roles accordingly to each user.

After creating users and performing other functions, exit any applications to which you are logged on, and then log back on to refresh the updated security permissions.

For new LEAs, log on to Security Administration as an admin user. If you have access, use your assigned login information to log in to Security Administration.

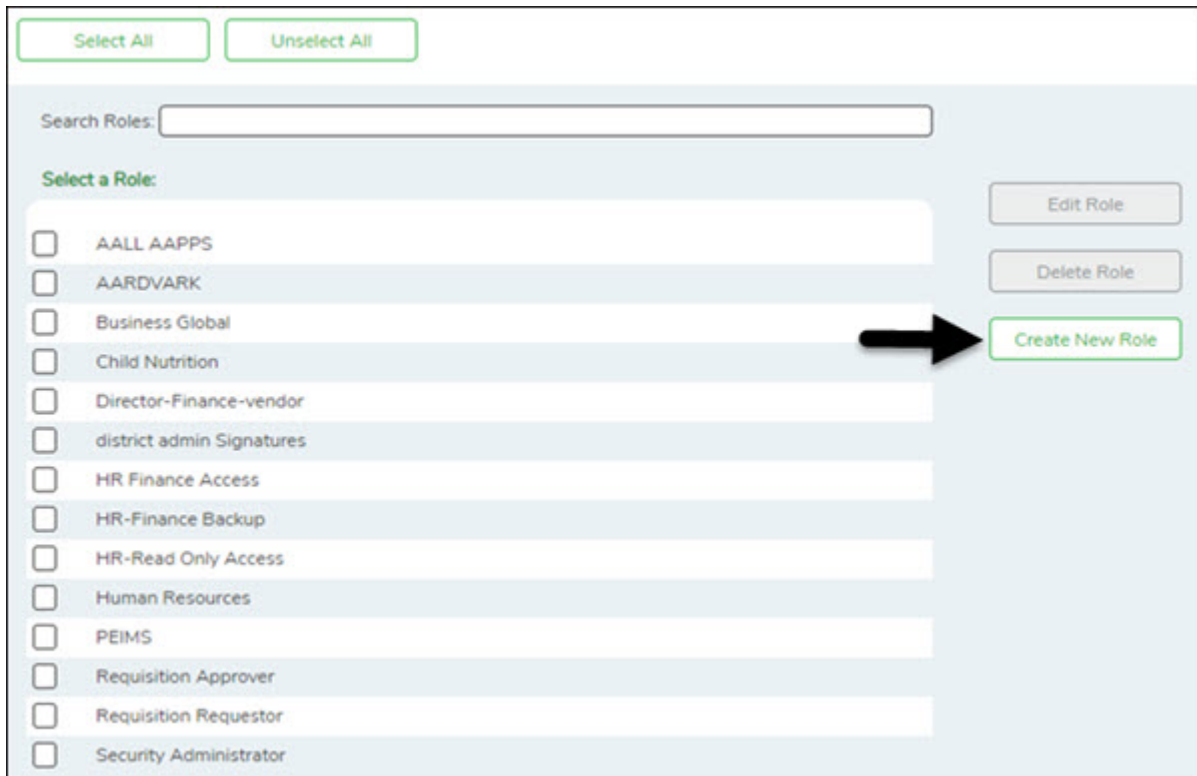
[Create, edit, and delete roles:](#)

### **Security Administration > Create/Edit Roles**

This page is used to create new roles or edit existing roles. You can add or edit roles for which a security component is required. Additionally, you can establish permissions for the various roles; for example, you can assign a database administrator permission to the Finance application.

### **Create a role:**

From the Manage Roles page, click **Create New Role**.



The Create Role page is displayed.

**Role Name** Type the name of the role to be created.

The screenshot shows a web interface for managing permissions. At the top, there is a 'Save' button and a text input field labeled 'Role Name' containing 'Sample Role'. Below this is a section titled 'MANAGE PERMISSIONS:' which contains a list of permissions with expand/collapse icons and checkboxes. The permissions listed are: Accounts Receivable, Asset Management, Attendance, Bank Reconciliation, Budget, and Discipline. To the right of the list are 'Delete Role' and 'Cancel' buttons.

Under **Manage Permissions:**

- Click + - to expand or collapse available role permissions.
- Select the permissions to be added to the role. Once permission is granted to a component, the title is displayed in green and the associated check box is selected.

This screenshot shows the 'MANAGE PERMISSIONS:' section with several permissions selected. The 'Accounts Receivable' permission is expanded and its title is green, with a checked checkbox. Under it, 'Maintenance (read-only)' and 'Reports' are also expanded and have checked checkboxes. 'Tables (read-only)' and 'Utilities' are also expanded and have checked checkboxes. The 'Delete Role' and 'Cancel' buttons are visible on the right.

- Multiple applications can be added to a role.
- Multiple roles can be added to a user.

Click **Save**. The new role is displayed under **Select a Role**.

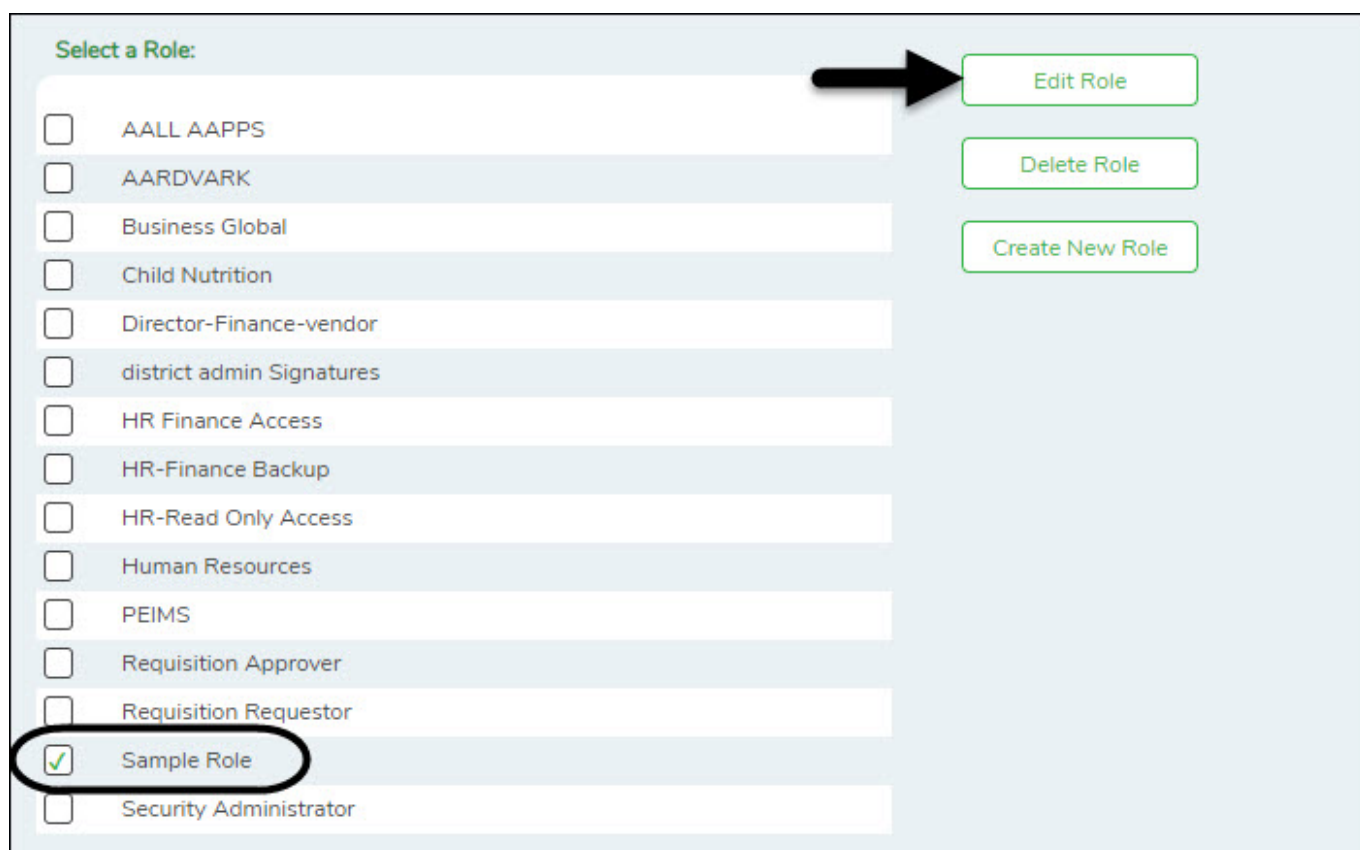
The screenshot shows a 'Search Roles:' input field at the top. Below it is a section titled 'Select a Role:' which contains a list of roles with checkboxes. The roles listed are: Requisition Approver, Requisition Requestor, Sample Role, and Security Administrator.

You can continue creating roles as needed.

## Edit a role:

From the Manage Roles page, you can type a role name in the **Search Roles** field. As you type the role name, the existing roles that match the typed data are displayed under **Select a Role**. The **Edit Role** and **Delete Role** buttons are enabled.

Select the role to be edited.



**Select a Role:**

- AALL AAPPS
- AARDVARK
- Business Global
- Child Nutrition
- Director-Finance-vendor
- district admin Signatures
- HR Finance Access
- HR-Finance Backup
- HR-Read Only Access
- Human Resources
- PEIMS
- Requisition Approver
- Requisition Requestor
- Sample Role
- Security Administrator

**Edit Role**

**Delete Role**

**Create New Role**

Click **Edit Role** to edit the selected role. The Edit Role page is displayed with the selected role name in the **Role Name** field and the existing role permissions.



Role Name:

**MANAGE PERMISSIONS:**

- Accounts Receivable
- Asset Management

**Delete Role**

**Cancel**

Under **Manage Permissions**, add or remove components (i.e., permissions to a page/menu). Any changes made to a role are effective to all users who are assigned to that role.

**Notes:**

- Selected components are displayed in green.
- An application with a component that is not selected is displayed in green italics. For example, if a component under Test Scores is not selected, then Test Scores is displayed in italics denoting that not everything under Test Scores has been granted permission.
- For those components with a read-only capability and **read-only** is selected, the component is displayed in orange. Read-only access limits the user to only be able to view data on a page. The component must be selected along with the read-only option.
- For Budget and Finance, an All Historical File IDs read-only option is available allowing users to view all file IDs when logged on to the application if the option is selected. If the option is not selected, the user can only view the current year.

Click **Save**.

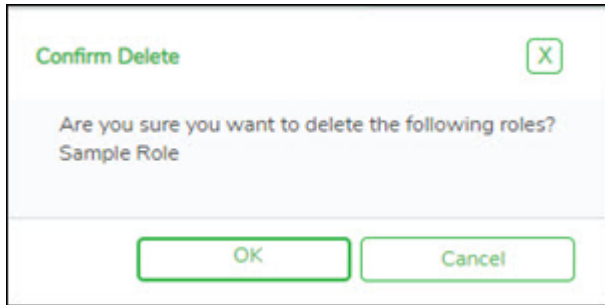
**Delete a role:**

From the Manage Roles page, you can type a role name in the **Search Roles** field. As you type the role name, the existing roles that match the typed data are displayed under **Select a Role**. The **Edit Role** and **Delete Role** buttons are enabled.

The screenshot shows a 'Select a Role' interface. On the left, there is a list of roles with checkboxes. The 'Sample Role' is selected, indicated by a green checkmark and a black oval. On the right, there are three buttons: 'Edit Role', 'Delete Role', and 'Create New Role'. A black arrow points from the 'Sample Role' row to the 'Delete Role' button.

Role Name	Selected
AALL AAPPS	<input type="checkbox"/>
AARDVARK	<input type="checkbox"/>
Business Global	<input type="checkbox"/>
Child Nutrition	<input type="checkbox"/>
Director-Finance-vendor	<input type="checkbox"/>
district admin Signatures	<input type="checkbox"/>
HR Finance Access	<input type="checkbox"/>
HR-Finance Backup	<input type="checkbox"/>
HR-Read Only Access	<input type="checkbox"/>
Human Resources	<input type="checkbox"/>
PEIMS	<input type="checkbox"/>
Requisition Approver	<input type="checkbox"/>
Requisition Requestor	<input type="checkbox"/>
<b>Sample Role</b>	<input checked="" type="checkbox"/>
Security Administrator	<input type="checkbox"/>

Click **Delete Role** to delete a role. A pop-up window prompts you to confirm that you want to delete the role.



- Click **OK** to delete the role.
- Click **Cancel** to not delete the role.

A message indicating that the role was deleted successfully is displayed at the bottom of the page.



## Manage Users

### *Security Administration > Create/Edit Roles*

This page is used to create new roles or edit existing roles. You can add or edit roles for which a security component is required. Additionally, you can establish permissions for the various roles; for example, you can assign a database administrator permission to the Finance application.

### **Create a role:**

- From the Manage Roles page, click **Create New Role**.

Select All    Unselect All

Search Roles:

Select a Role:

- AALL AAPPS
- AARDVARK
- Business Global
- Child Nutrition
- Director-Finance-vendor
- district admin Signatures
- HR Finance Access
- HR-Finance Backup
- HR-Read Only Access
- Human Resources
- PEIMS
- Requisition Approver
- Requisition Requestor
- Security Administrator

Edit Role

Delete Role

Create New Role

The Create Role page is displayed.

**Role Name** Type the name of the role to be created.

Save

Role Name:

**MANAGE PERMISSIONS:**

- Accounts Receivable
- Asset Management
- Attendance
- Bank Reconciliation
- Budget
- Discipline

Delete Role

Cancel

Under **Manage Permissions:**

- Click + - to expand or collapse available role permissions.
- Select the permissions to be added to the role. Once permission is granted to a component, the title is displayed in green and the associated check box is selected.

Role Name:

**MANAGE PERMISSIONS:**

- Accounts Receivable
- Maintenance (read-only )
- Reports
- Tables (read-only )
- Utilities

- Multiple applications can be added to a role.
- Multiple roles can be added to a user.

Click **Save**. The new role is displayed under **Select a Role**.

Search Roles:

**Select a Role:**

- Requisition Approver
- Requisition Requestor
- Sample Role
- Security Administrator

You can continue creating roles as needed.

## Edit a role:

From the Manage Roles page, you can type a role name in the **Search Roles** field. As you type the role name, the existing roles that match the typed data are displayed under **Select a Role**. The **Edit Role** and **Delete Role** buttons are enabled.

Select the role to be edited.

**Select a Role:**

- AALL AAPPS
- AARDVARK
- Business Global
- Child Nutrition
- Director-Finance-vendor
- district admin Signatures
- HR Finance Access
- HR-Finance Backup
- HR-Read Only Access
- Human Resources
- PEIMS
- Requisition Approver
- Requisition Requestor
- Sample Role**
- Security Administrator

**Edit Role**

**Delete Role**

**Create New Role**

Click **Edit Role** to edit the selected role. The Edit Role page is displayed with the selected role name in the **Role Name** field and the existing role permissions.

Role Name:

**MANAGE PERMISSIONS:**

- Accounts Receivable**
- Asset Management*

**Delete Role**

**Cancel**

Under **Manage Permissions**, add or remove components (i.e., permissions to a page/menu). Any changes made to a role are effective to all users who are assigned to that role.

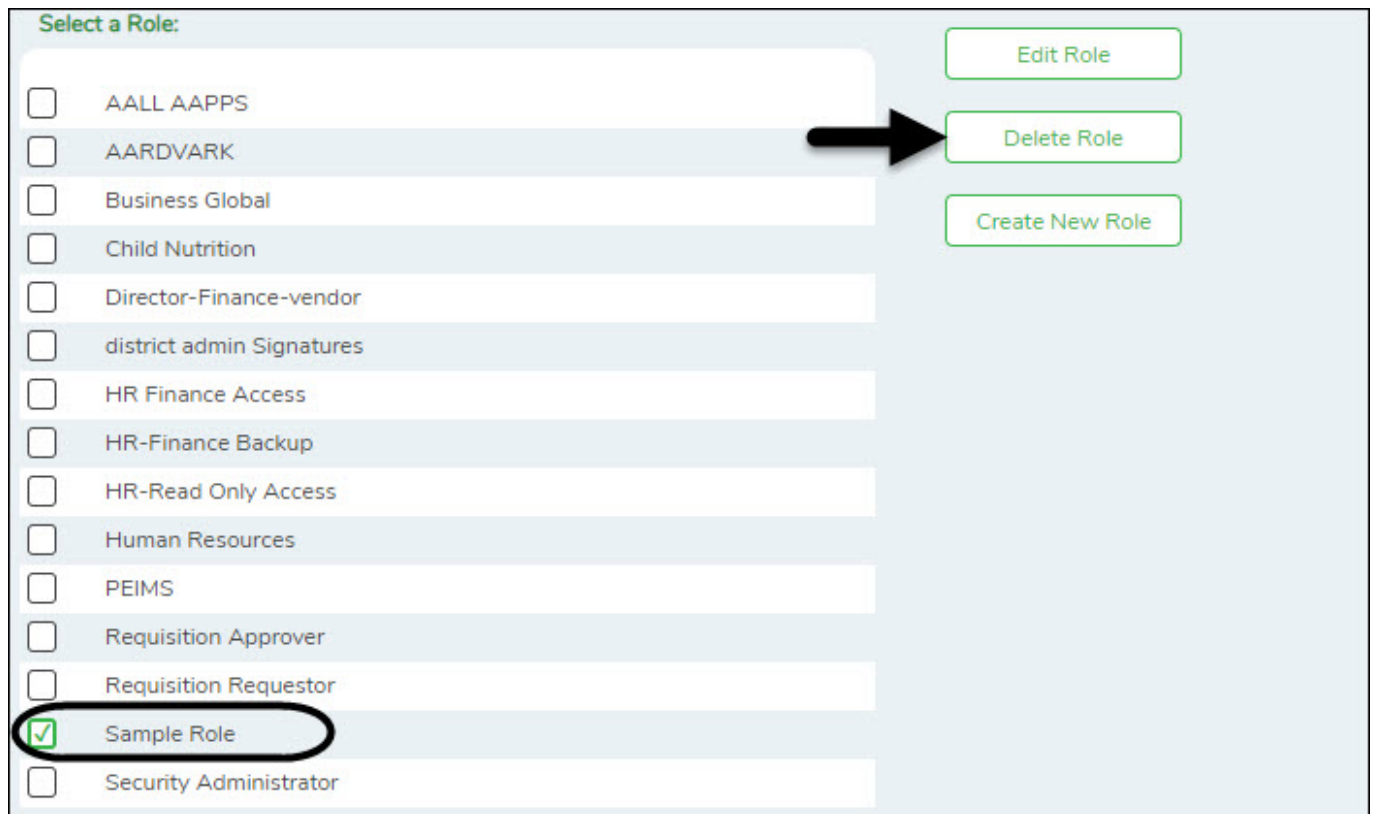
### Notes:

- Selected components are displayed in green.
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- For Budget and Finance, an All Historical File IDs read-only option is available allowing users to view all file IDs when logged on to the application if the option is selected. If the option is not selected, the user can only view the current year.

Click **Save**.

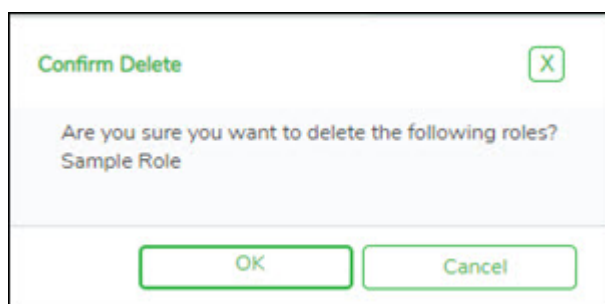
## Delete a role:

From the Manage Roles page, you can type a role name in the **Search Roles** field. As you type the role name, the existing roles that match the typed data are displayed under **Select a Role**. The **Edit Role** and **Delete Role** buttons are enabled.



The screenshot shows a 'Select a Role' interface. On the left, there is a search input field with the text 'Select a Role:' above it. Below the search field is a list of roles, each with a checkbox and a label. The roles listed are: AALL AAPPS, AARDVARK, Business Global, Child Nutrition, Director-Finance-vendor, district admin Signatures, HR Finance Access, HR-Finance Backup, HR-Read Only Access, Human Resources, PEIMS, Requisition Approver, Requisition Requestor, Sample Role, and Security Administrator. The 'Sample Role' entry is selected, indicated by a green checkmark in its checkbox and a black oval around the entire row. To the right of the list are three buttons: 'Edit Role', 'Delete Role', and 'Create New Role'. A black arrow points from the 'Sample Role' row to the 'Delete Role' button.

Click **Delete Role** to delete a role. A pop-up window prompts you to confirm that you want to delete the role.



The screenshot shows a 'Confirm Delete' pop-up window. The window has a title bar with the text 'Confirm Delete' and a close button (X). The main content area contains the text: 'Are you sure you want to delete the following roles?' followed by 'Sample Role'. At the bottom of the window are two buttons: 'OK' and 'Cancel'.

- Click **OK** to delete the role.
- Click **Cancel** to not delete the role.

A message indicating that the role was deleted successfully is displayed at the bottom of the page.



The Security Administration application allows you to search, view, and purge changes made in the Business or Student systems since the last audit log purge.

[Perform an audit log inquiry.](#)

## Audit Log Inquiry

### *Security Administration > Utilities > Audit Log Inquiry*

This page is used to search and view the audit log for Business or Student records. The audit log contains changes made in the Business and Student systems since the last audit log purge. The settings for the audit log inquiry can be changed in the Audit Log Preferences section on the Set ASCENDER Preferences page in DBA Assistant. The settings allow you to designate the number of days the audit log records are saved before an automatic purge and allow you to specify the path for where the audit log reports are to be saved.

**Note:** Changes contained in the audit log are manual changes only. Changes made through a mass-update process are not available.

#### Search for changes:

Under **Search Criteria**, under **Application**:

<b>Business</b>	Select to only display Business audit log records.	OR	<b>Student</b>	Select to only display Student audit log records.
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Use the following search fields to narrow your search:

Field	Description
<b>Module</b>	Click to select the Business or Student tab for you want to include in the search. The tab only displays in the drop down if items changes were made to the tab.
<b>Table</b>	Click to select the table that you want to include in the search.
<b>User</b>	Click to select the user name that you want to include in the search.
<b>Key</b>	Type the key (i.e., employee number, vendor number, social security number, etc.) for which you want to search. <b>Note:</b> Each table can only have one key field. In most cases, the key includes the employee number, the vendor number, or the student's social security number.
<b>From</b>	Type the beginning date from which you want to include records. Use the MMDDYYYY format.
<b>To</b>	Type the ending date to which you want to include records. Use the MMDDYYYY format.

Click **Search** to search the audit log. The search results are displayed under **Results**.

- The action for each change is displayed in the **Action** column.
- The old and new data is listed for each record, and for each field.

Click **Print** to print the report. The Security Report is displayed. [Review the report](#).

Click **Reset** to clear the search criteria on the page.

[Purge audit log data](#).

## Audit Log Purge

### Security Administration > Utilities > Audit Log Purge

This page is used to purge Business or Student audit records for a selected date range, and to create, display, and print an Audit Log report.

#### Purge the audit log:

Under **Audit Log Purge by Date Criteria**:

<b>Business</b>	Select to only purge Business audit log records.	<b>OR</b>	<b>Student</b>	Select to only purge Student audit log records.
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Use the following search fields to narrow your search:

Field	Description
<b>From</b>	Type the beginning date for which you want to purge audit log records in the MMDDYYYY format.
<b>To</b>	Type the ending date to which you want to purge audit log records in the MMDDYYYY format.

Click **Preview** to print a report of the audit log items to be purged. [Review the report](#).

Click **Execute** to purge the audit log. A preview report is displayed with a message asking you to confirm that you want to purge the audit log for the selected dates.

Click **Purge** to purge the log. A message is displayed at the top of the page that the records were deleted successfully. Otherwise, click **Cancel** to not purge the log and return to the Audit Log Purge page.

Click **Reset** to clear the search criteria on the page.

The are multiple reports available in Security Administration to assist you in verifying user information

such as roles, permissions, user names, and audit information. You can view and print the reports as needed.

The following reports are available from the Reports menu:

<b>Reports</b>	<b>Description</b>
<a href="#">List of Users by Permissions</a>	This report provides a list of permissions granted by user. For example, you can generate a report of users who are granted permission to Grade Reporting or Budget Options.
<a href="#">List of Tasks Associated With Roles</a>	This report provides a list of tasks and the read-only status associated with each role.
<a href="#">List of Users With ODBC Login</a>	This report provides a list of users that have an ODBC login.
<a href="#">List of Security Users and Roles</a>	This report provides a list of users and their associated roles.
<a href="#">List of Security Users with Employee Numbers</a>	This report provides a list of users and their associated employee numbers.
<a href="#">Audit Log</a>	This report provides an audit log for a specified date range. The audit log contains all changes made in Business or Student since the last audit log purge.
<a href="#">Users Log</a>	This report provides a user log that contains a list of all users logged on to the system at the time the report is run.