

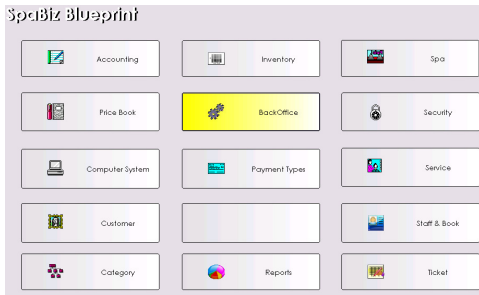
security manager

an Enterprise only feature

Use this guide as a reference to the security manager.

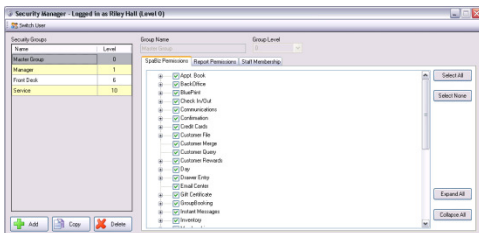
Access

Security Manager can be secured with "BackOffice – Security Manager".

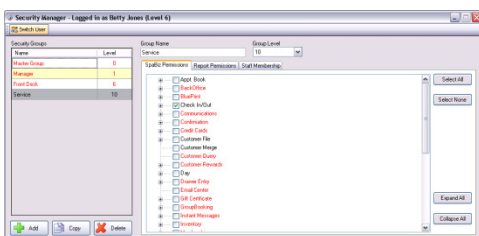


1. From the main menu bar, click on the Blueprints icon.
2. Once you are in the Blueprints screen, click on the BackOffice button.
3. Next, click on the Security Manager button.
4. Enter your password and then click the OK button.
 - The password entered must belong to a staff member in SalonBiz/SpaBiz, and the staff member must be checked to use SalonBiz/SpaBiz in their staff file.

If this is your first time accessing the Security Manager you will be presented with a notification that there are no security groups currently set up. In order to use the application you must create a master security group. You will automatically be added to this master group. Click OK to proceed.

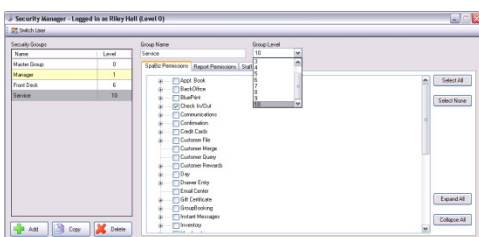


5. Logged in staff will be checked to see which areas of security they have access to modify.
6. If the staff member has access to an option in any of his/her groups at any location, he/she is allowed access to modify that option.
7. If the staff member does not have access to an option in any of his/her groups at any location, he/she does not have access to modify that option.
8. When the logged in staff does not have access to modify an area it will be displayed in red.
 - ❖ If the staff tried to modify an area that they do not have access to alter, a message will be displayed and the setting will not be changed.
9. Click the Switch User button in the upper left corner to log out.



Security Groups

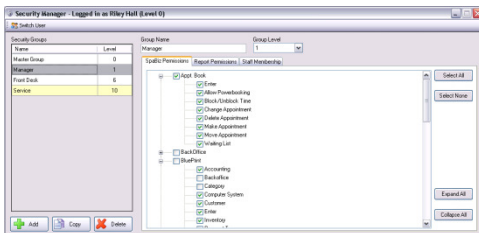
1. To add a new group, click the Add button.
2. Type in the name of the Security Group and then click the OK button.
3. Using the Group Level drop down menu, assign a security level to the group.
 - Level 0 – Master level has access to everything
 - Level 10 – Default access level, does not have access to everything (the higher the level, the less access)
4. If you have created a group that you would like to duplicate, then slightly modify, select the group you would like to replicate and then click the Copy button.



5. Name the new group and make any changes necessary. Changes will save automatically.
6. To alter only the name of the group, select the group and in the Group Name field, type in the new name of the group.
 - ❖ You can update the level of a group at any time.
 - You can only set the level of the group to be higher than your own. For example, if you are a level 1, you will not be able to set another staff member to a level 1, only level 2-10.
 - ❖ You should not attempt to rename or alter the level of the Master Group.
7. To remove a group, select the group and then click the Delete button.
8. Answer 'Yes' to permanently remove the group.
 - ❖ You can only delete groups with a higher level than your own.

SpaBiz Permissions

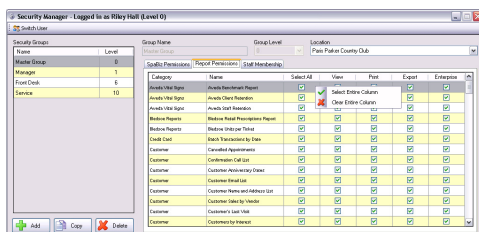
The Security Manager will display secured areas that are set in Blueprints-Security. To enable or disable security on an area of the software, you will continue to change the settings for a specific area in Blueprints-Security.



1. From the SpaBiz Permissions tab, you will see the full menu of areas that may be secured within the software.
 - ❖ Unsecured areas in Blueprints – Security will appear in gray font. You can continue to set access for areas within the Security Manager, the gray font is a visual cue to quickly let you know which areas are not secured.
2. A check next to a category will include each item within the category.
3. To expand an individual category, click the 'plus sign' next to the category name, then you may select specific items within the category.
4. Using the buttons on the right-side navigation panel:
 1. Select All – to select every item listed
 2. Select None – to deselect every item listed
 3. Expand All – to view every item listed
 4. Collapse All – to minimize the list, to view categories only

Report Permissions

Report Permissions need to be set for each location. We recommend setting report access the same for each group at each location when staff is shared. Owners can make exceptions and limit report access for groups that contain staff across locations.



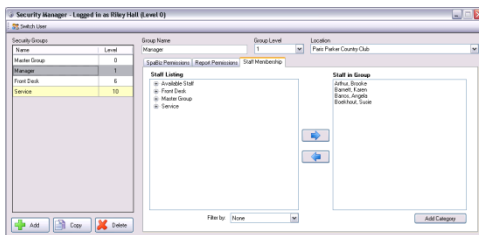
1. From the Report Permissions tab, you will see a full list of Reports for the selected store.
2. The Location drop down list has the current location displayed, change the location in the dropdown menu above the list of reports.
3. Sort the list ascending or descending by report category.
4. Sort the list ascending or descending by report name.



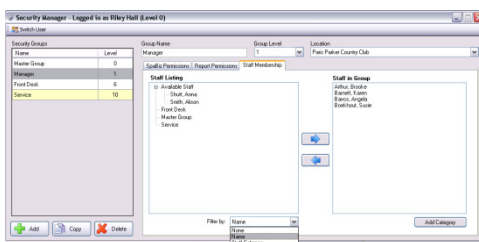
5. Checking:
 - Select All – will automatically select or uncheck each column within the selected report
 - View – will grant or deny the user from creating the report
 - Print – will grant or deny the user from printing the report
 - Export – will grant or deny the user from exporting the report
 - Enterprise – will grant or deny the user from generating enterprise-wide data
6. To grant access to a security option for all reports at one time, right click in the column and then click “Select Entire Column”.
7. To deny access to a security option for all reports at one time, right click in the column and then click “Clear Entire Column”.
 - ❖ This option is available on the Select All column allowing ALL areas to be edited at once for all reports listed.
 - ❖ This option is available on View, Print, Export, and Enterprise view.

Staff Membership

Assigning staff members to a group will overwrite their individual security settings in Blueprints. If they are not assigned to a group, their individual settings will still apply.



1. From the Staff Membership tab, you will assign available staff into their appropriate security groups.
2. Clicking the plus (+) sign next to Available Staff and/or the other groups listed in the Staff Listings field will expand the full list of available staff that can be moved to your current group.
3. Make sure the correct group and location is selected, then highlight the staff member's name and click the arrow pointing to the right indicating a move to the Staff in Group field.
 - ❖ You can only move staff from one group to another if they are in a group with a higher level than your own.
4. To remove a staff member from a group and place them back into the Available Staff list, select their name in the Staff in Group list and click the Left Arrow button.
5. To filter the staff by name, select Name from the Filter by drop down menu and then type in all or part of the staff name. Click the OK button.
6. The Available Staff list will automatically refresh showing those matching names.
7. To filter by staff category, select Category from the Filter by drop down menu and then double click the desired category from the list.
8. The list will automatically refresh showing the staff members within the selected staff category.
9. Select 'None' from the Filter by drop down menu to return to the full list of available staff.
10. To add an entire category of staff to a group, click the Add Category button.



11. Select the desired category from the list by double-clicking on the category name. You will be notified when a category has been successfully added to the group along with the number of staff members added.

- ❖ Only staff members that are not currently in a group for that location will be added to the selected group.

Copy a Group

1. To copy an existing group to create a new group, select a group that already has SpaBiz and Report permissions created.
2. Click the Copy button.
3. Type in a new name for the group, then click the OK button.
 - Group name must be unique
4. The new group is created with permissions equal to the original group.

Delete a Group

1. To delete an existing group, select a group from the list and then click the Delete button.
2. Answer the alert asking if you are sure you would like to permanently delete the group.
 - ❖ If staff members are in the group you are trying to delete, you will be notified to remove the staff prior to deleting the group.

Integration

1. The Location Information tab within the Staff file will allow you to view the names of the security groups that the staff belongs to at any location.
2. Any staff member that belongs to a security group at a location will appear in Security within Blueprints with a red column. Their column will not be editable.
3. In order for Report Security to be enforced, enable security on Reports – Enter.
4. Security will be enforced with groups the same way it is enforced with individual security.

