



# Securities

## How to set up and manage securities in CommunityWFM Enterprise

Webinar handout  
Version: April 20, 2023

3400 Waterview Parkway, Suite 325  
Richardson, Texas 75080

phone 877-668-6870  
web [CommunityWFM.com](https://CommunityWFM.com)

## Table of Contents

About this document.....	3
About securities.....	3
How do securities work?.....	3
Version 4.4.....	4
Version 5.0.....	4
How do I activate securities? .....	5
Configuring security permissions.....	5
How do I remove securities?.....	7
Changing security settings.....	8
Help! I need to start over .....	9

## About this document

This document accompanies the CommunityWFM College webinar *Setting up and managing securities*. It includes additional details about the features discussed during the webinar and steps for activating the securities functions, adding permissions for a person or group of people, and rescinding permission.

## About securities

Securities allow granting access to specific assets within Community while restricting access for all others.

### Notes:

- When granting permission to a person or group to access an entity or asset, this **immediately removes the access for all other people/groups**.
- Make sure to **include yourself** in any security setting or you will lose access to make changes.

Securities are resource intensive. When there is a security in place, at start-up the system will check every section of every asset to determine whether there are permissions in place for that asset. If there are multiple securities in place, there may be delays in response times for the system.










## How do securities work?

Security in Community is a system used to restrict access to certain assets (Activities, Event Types, Data Sources, etc.) to specific people or groups of people.

There are 9 assets (in Community Enterprise version 4.4) or 11 assets (in Community Enterprise version 5.0) to which securities can be applied. You can review the current securities by navigating to Settings > Application settings > Administrative settings > Security. To view the specific settings for an asset, click the link within the box. The description in the box shows the number of assets with securities currently applied for that category.

## Version 4.4












**Current secure asset list**  
 The badge numbers indicate the number of assets with any security context applied. Click on a tile to see what assets have security and what users have permission to access that asset.

 Activities 0	 Agent Templates 0	 Data Sources 0
 Event Types 0	 People 0	 Schedule Templates 0
 User Groups 0	 Working Forecasts 0	 Working Schedules 0

## Version 5.0

**Security**  
 Manage application security settings

**Current secure asset list**  
 The badge numbers indicate the number of assets with any security context applied. Click on a tile to see what assets have security and what users have permission to access that asset.

<p><b>Activities</b></p> <p>Security for <b>Activities</b>. The system has security applied to <b>0</b> Activities.</p>  <p>Go to secure Activities.</p>	<p><b>Agent Templates</b></p> <p>Security for <b>Agent Templates</b>. The system has security applied to Agent Templates.</p>  <p>Go to secure Agent Templates.</p>	<p><b>Data Sources</b></p> <p>Security for <b>Data Sources</b>. The system has security applied to <b>0</b> Data Sources.</p>  <p>Go to secure Data Sources.</p>	<p><b>Event Types</b></p> <p>Security for <b>Event Types</b>. The system has security applied to <b>0</b> Event Types.</p>  <p>Go to secure Event Types.</p>
<p><b>People</b></p> <p>Security for <b>People</b>. The system has security applied to <b>0</b> People.</p>  <p>Go to secure People.</p>	<p><b>PTO Policies</b></p> <p>Security for <b>PTO Policies</b>. The system has security applied to <b>0</b> PTO Policies.</p>  <p>Go to secure PTO Policies.</p>	<p><b>Schedule Templates</b></p> <p>Security for <b>Schedule Templates</b>. The system has security applied to <b>0</b> Schedule Templates.</p>  <p>Go to secure Schedule Templates.</p>	<p><b>User Groups</b></p> <p>Security for <b>User Groups</b>. The system has security applied to <b>1</b> User Groups.</p>  <p>Go to secure User Groups.</p>
<p><b>Working Accrual Calendars</b></p> <p>Security for <b>Working Accrual Calendars</b>. The system has security applied to <b>0</b> Working Accrual Calendars.</p>  <p>Go to secure Working Accrual Calendars.</p>	<p><b>Working Forecasts</b></p> <p>Security for <b>Working Forecasts</b>. The system has security applied to <b>0</b> Working Forecasts.</p>  <p>Go to secure Working Forecasts.</p>	<p><b>Working Schedules</b></p> <p>Security for <b>Working Schedules</b>. The system has security applied to <b>0</b> Working Schedules.</p>  <p>Go to secure Working Schedules.</p>	<p><b>Security for User Groups.</b>                  The system has security applied to <b>1</b> User Groups.</p>

## How do I activate securities?

The Security function is not activated by default. To activate, you must create a Security against ONE of these assets.

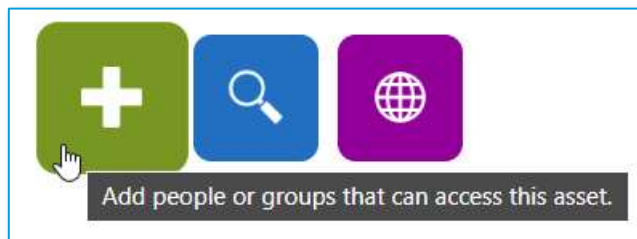
To create a Security against an asset:

1. Navigate to the asset that you wish to place a Security against:  
Settings > Application settings > Event type settings > Event types.
2. Select the event.
3. In the Extras section
  - **In version 4.4:** Select the red Security tile with the Key icon.
  - **In version 5.0:** Click *Set up security for this event type* in the red Security box.
4. In the pop-up window, review your user information and the asset for which you are configuring a security. If correct, click *Continue*.

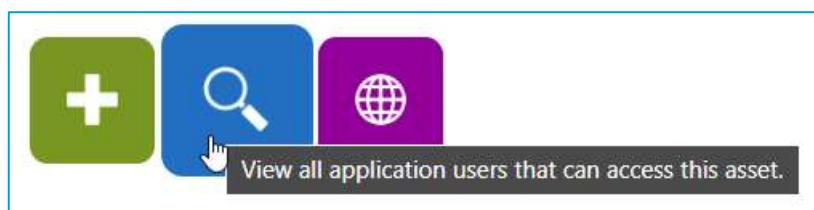
## Configuring security permissions

This window includes 3 options:

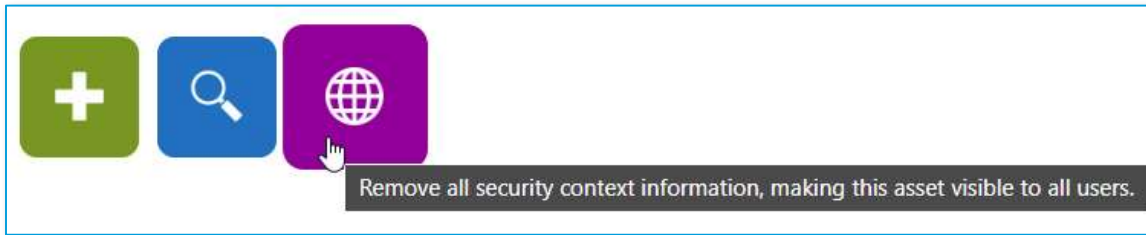
Add people or groups.



View current users who have access.



Remove all current security settings.



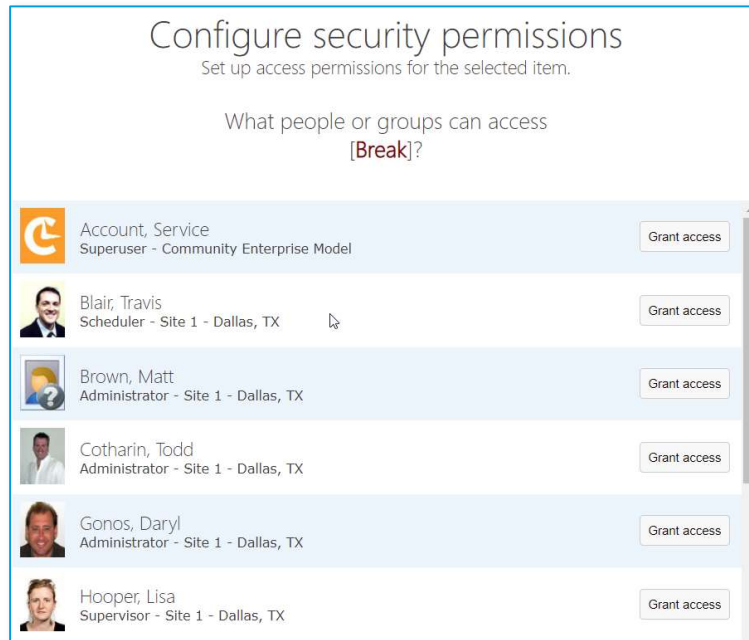
To add a person or group, follow the on-screen wizard to grant access.

Securities can be granted to individuals, pre-defined groups, or specific user roles (Administrators, Schedulers, Supervisors, or Agents [depending on the asset]).



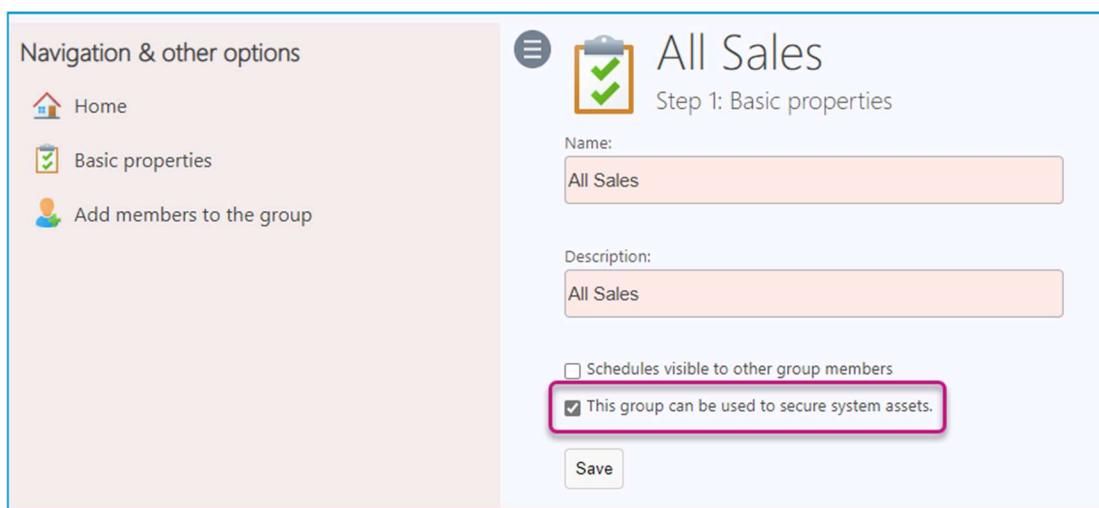
**Note: Securities cannot be placed against Superusers.** Superusers (typically the Community Support team) retain the rights to remove improperly configured security settings.

You can grant permissions to another person or group of people from the same window but until you do so, only the person or group originally granted access will be able to see/use the asset.

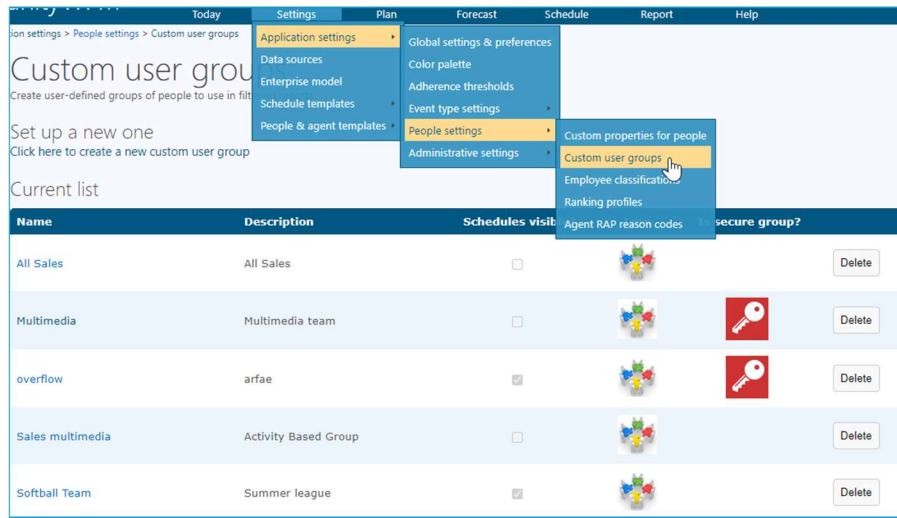


## Custom user groups

To create securities for a group, that group must be configured to allow securities (be considered a secure group). Navigate to Settings > Application settings > People settings > Custom user groups and click on the group name. Go to the basic properties and check the box *This group can use used to secure system assets*.



After saving, the group will have a red key icon and will be available when selecting groups for securities.



## How do I remove securities?

To remove or change the security settings for an entity or asset, you must have permission to access that entity/asset. If improperly configured security settings will not allow access, contact the support team to have a Superuser log in and change the settings.

## Changing security settings

Navigate to the asset that you wish to change Security settings for.

In the new window, review your user information and the asset name. The top of the screen will list the people or groups with access permission.

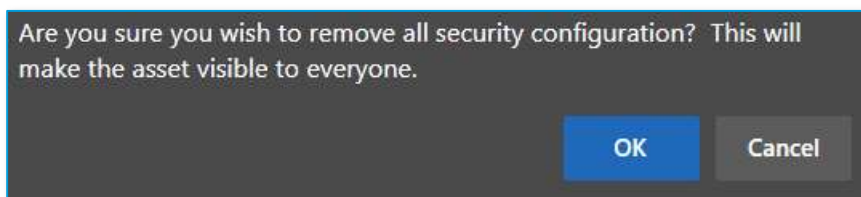
To remove permission for people or groups, select *Remove permissions*.

Person or group (Context)	Type	Members	Who
Supervisor	User Roles	4	Remove permissions
Scheduler	User Roles	2	Remove permissions
Administrator	User Roles	4	Remove permissions

To reset the security for the asset, select the purple box with the globe icon.



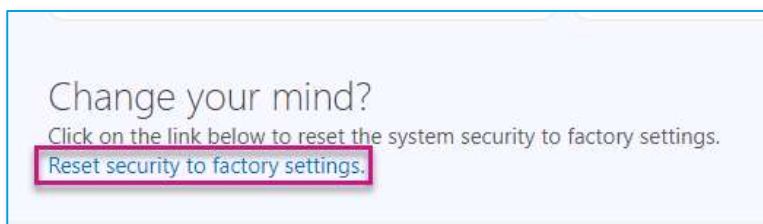
Click *OK* to confirm that you wish to remove all security settings.



## Help! I need to start over

### The nuclear option

1. Navigate to Settings > Application settings > Administrative settings > Security.
2. At the bottom of the window, select the link *Reset security to factory settings*.
3. In the pop-up message, click *OK* to confirm that you want to reset all securities.



To reset only some securities, contact your support desk for assistance.