



CommunityWFM
A RingCentral company

Securities

How to set up and manage securities in CommunityWFM Enterprise

Webinar handout
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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 CommunityWFM while restricting access for all others.

Notes:

- Security is only available in the Enterprise version of CommunityWFM.
- 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 CommunityWFM 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 12 assets to which securities can be applied. You can review current securities by navigating to Settings > Application settings > Administrative settings > Security.

To view the specific settings for an asset, click the link within the tile. The description in the box shows the number of assets with securities currently applied for that category.

You cannot set up or edit security settings here.

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

Security for User Groups. The system has security applied to 1 User Groups.

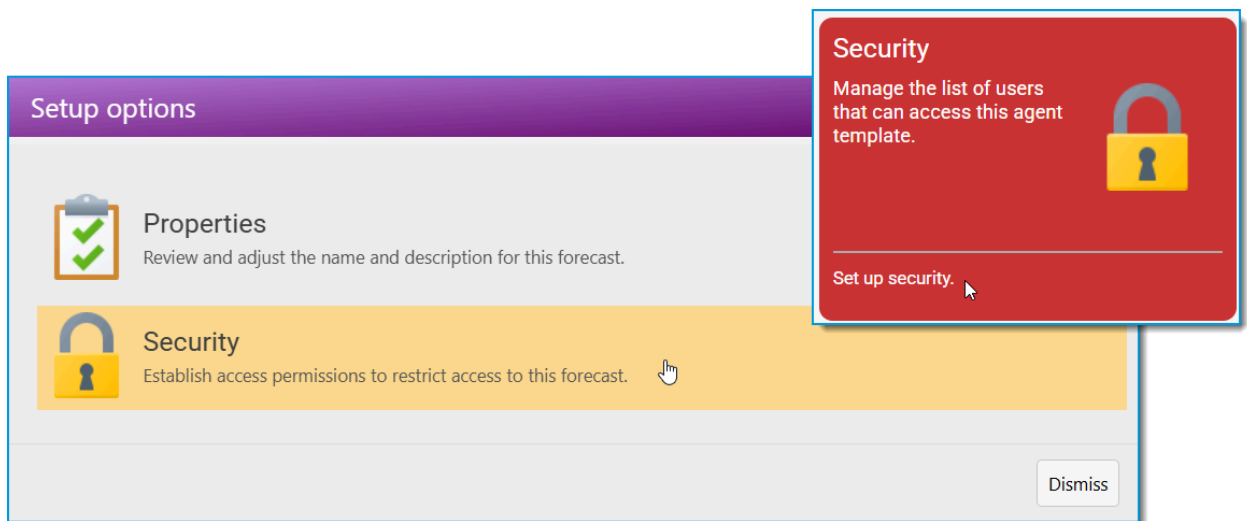


How do I activate securities?

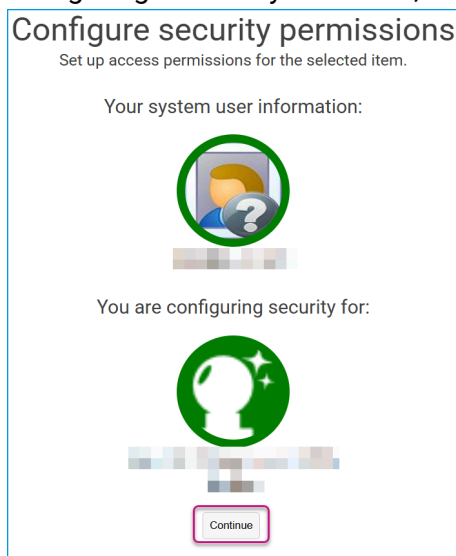
The security function is not activated by default. To activate, you must create a security setting against ONE of these assets.

To create a security against an asset:

1. Navigate to the asset that you wish to place a security against.
2. In the Extras section or in the Setup options, click *Set up security* in the Security tile or *Security* in the Setup options (depending on the asset type).



3. In the pop-up window, review your user information and the asset for which you are configuring a security. If correct, click *Continue*.

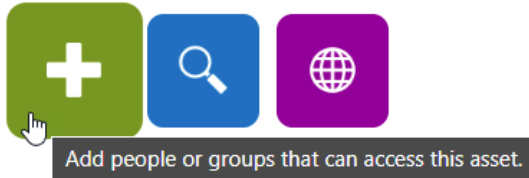




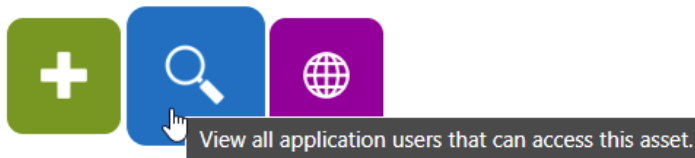
Configuring security permissions

This window includes 3 options:

1. Add people or groups. Be sure to add yourself.



2. View current users who have access. This only opens if there are current users with access.

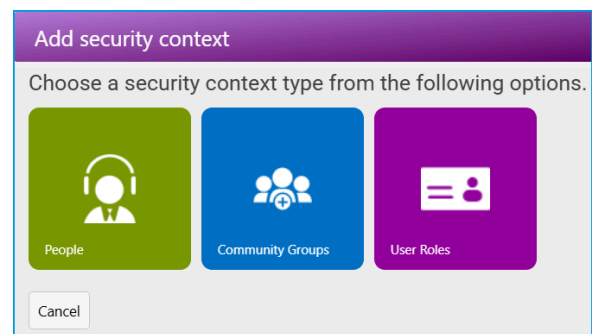


3. Remove all current security settings.



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

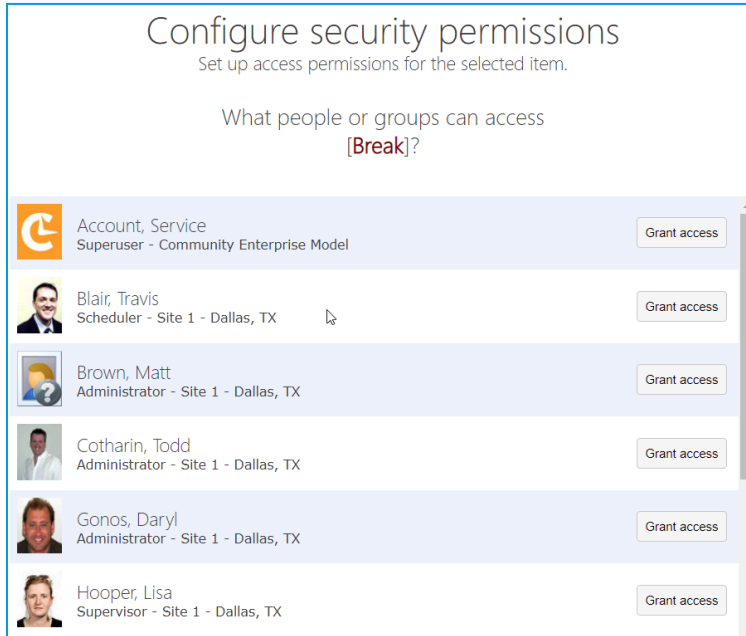
Securities can be granted to individuals, pre-defined groups, or specific user roles (Administrators, Schedulers, Supervisors, or Agents [depending on the asset]).



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

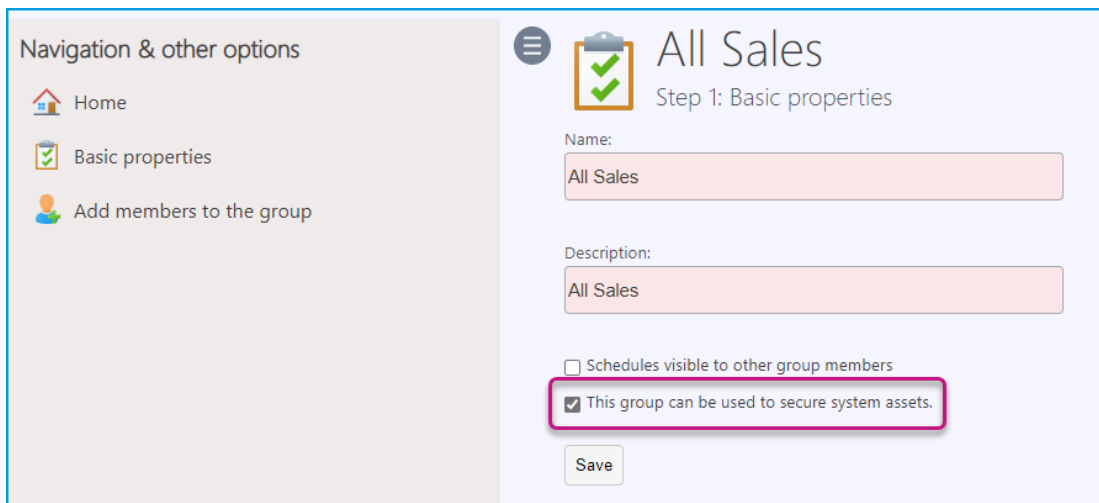


You can grant permissions to another person or group of people from the same window but until you do so, only the person or group originally granted access will be able to see/use the asset.



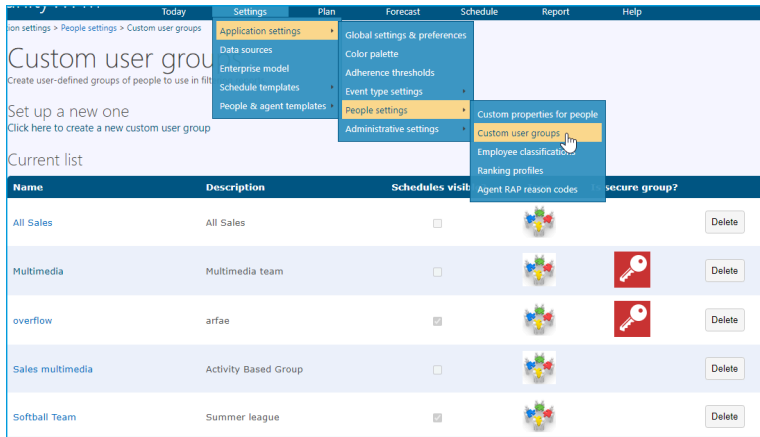
Custom user groups

To create securities for a group, that group must first 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 be 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?

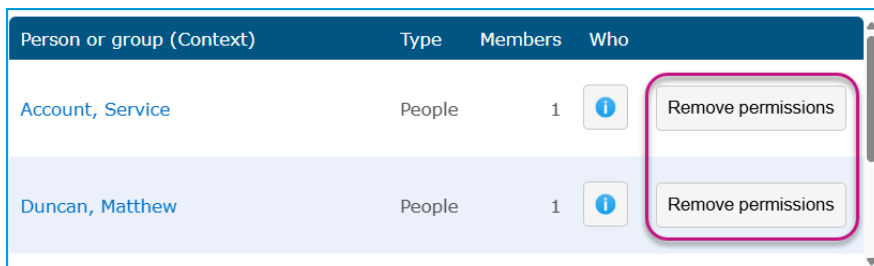
To remove or change the security settings for an entity or asset, you must have permission to access that entity/asset. If improperly configured security settings will not allow access, contact the support team to change the settings.

Changing security settings

To remove the security setting for a person or group, 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.

Select *Remove permissions*.



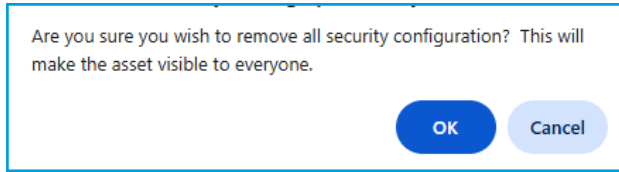


To reset the security for the asset, select the purple box with the globe icon.



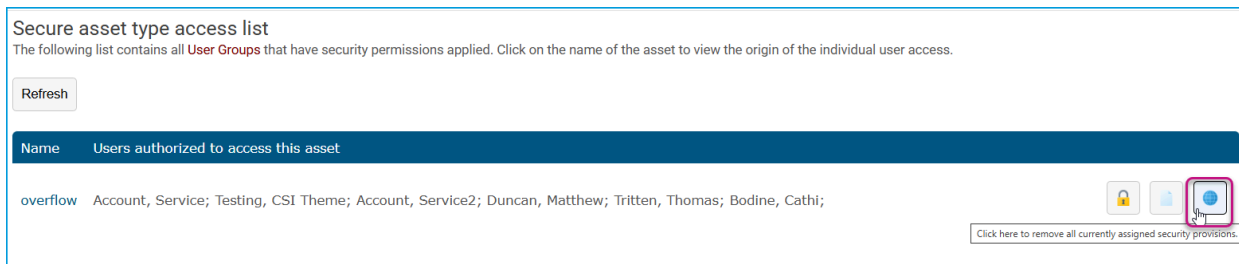
Remove all security context information, making this asset visible to all users.

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



You may also remove all security from an asset in the security settings: Settings > Application settings > Administrative settings > Security and selecting *Go to secure [asset name]* in the tile for the asset.

You can modify the security settings or remove all security settings for the asset.



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.

