

# Centage Security

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**centage**

# System Security (Must) vs Dimensional Security (Optional)



User and Group creation along with over-all system security will occur from the top righthand Administration icon – This is a Must



Dimensional security will occur within the specific dimension – This is optional based on clients needs



Data Modeler needs to be Deployed for any Dimensional security to take place – Only needed if Dimensional security is set

# Centage System Security-Add a user

centage™ PLANNING MAESTRO™

ADMINISTRATION

- Users
- Groups
- Security

NOTIFICATIONS

- E-mail Notifications

**+ New User**

New User

Name

Email

Windows User ID

Phone

Username

Automatically Generate Password

- The system Administrator is the only user that can add new users
- While logged in as the Administrator, select the Administration Icon
- Select “Users” from the dropdown menu
- The following screen needs to be completed with Name, E-mail, Phone and Username (no special characters, must be between 5-128 Characters).
- Please note:
  - The Windows User ID is not a field that will be completed, this is for the AM cube and needs to be completed by Centage Tech Support.
  - It is best not to use an e-mail address for the Username
- Allow the system to Automatically Generate a unique password for the new user, the user will change the password upon the first log in.
- The added user will get an e-mail from Automated Support with a link for Centage as well as the username and password credentials.

# Centage System Security-Add a Group

The screenshot displays the Centage Planning Maestro interface. At the top, the navigation bar includes the Centage logo and the text 'PLANNING MAESTRO™'. A gear icon representing 'Administration' is circled in blue. Below the navigation bar, a sidebar on the left lists 'ADMINISTRATION' options: 'Users', 'Groups' (circled in blue), and 'Security', along with 'NOTIFICATIONS' options: 'E-mail Notifications'. The main content area features a green '+ New Group' button. Below it is the 'New Group' form, which includes a 'Name' field, a 'Description' field, and two search boxes labeled 'Available Users' and 'Assigned Users'.

- The system Administrator is the only user that can add new groups
- It is recommended that there is a one-to-one ratio of users to groups based on the security settings
- While logged in as the Administrator, select the Administration Icon
- Select “Groups” from the dropdown menu
- The following screen needs to be completed with Name, and Description of the group [they can be the same]
- Choose the applicable users from the Available users (Left-hand side) and move them with the arrows to the Assigned User (Right-hand side) for the new group
- Once the user is assigned to a group, the user is “live” in the system; it is suggested that the user groups are added first and then attached to the user.
- Each user in the software will also be attached to the “User” group. There is not to be any security placed on the “User” group, this is a default setting.

# Centage System Security-Security View

The screenshot displays the Centage PLANNING MAESTRO Security View. The top navigation bar includes the Centage logo and a settings gear icon circled in blue. The left sidebar shows the 'Security' option circled in blue. The main content area is divided into two sections: 'Select Group' and 'Modules'.

**Select Group Table:**

Name	Description
AP/AR	Accounts Payable - Accounts Receivable
<b>New Test Group</b>	<b>New Test Group</b>
Test User Group	Test User Group
User	user group

**Modules Table:**

Name	Access	Actions ...
Dashboard	<input checked="" type="checkbox"/>	
Data Modeler	<input type="checkbox"/>	
Financial Intelligence Setup	<input type="checkbox"/>	
Planning	<input checked="" type="checkbox"/>	
Reports	<input checked="" type="checkbox"/>	

- The system Administrator is the only user that can add security to the new groups
- While logged in as the Administrator, select the Administration Icon
- Select “Security” from the dropdown menu
- All users are part of a User Group; no security should be placed on the “User” Group.
- If the desired state is to provide global access to a module, the admin can select the applicable group and turn on the required modules.
- Select the desired Group in the top section of the security screen, use the toggles on the bottom screen to give or restrict access to the different database Modules.
- There are three parts to the Security section; Module, Plan and Plan Menu Access
  - Module Access: What Modules does the user group have access to?
  - Data Modeler, Reports, Financial Intelligence Setup, Planning

# Centage System Security-Security View cont.

Security

Module Access Plan Access

Select Group ?

Name	Description
search	search
AP/AR	Accounts Payable - Accounts Receivable
New Test Group	New Test Group
Test User Group	Test User Group
User	user group

Plans ?

Name	Access	Actions ...
Fab	<input checked="" type="checkbox"/>	

Security

Module Access Plan Access Plan Menu Access

Select Plan ?

Fab

Select Group ?

Name	Description
search	search
AP/AR	Accounts Payable - Accounts Receivable
New Test Group	New Test Group
Test User Group	Test User Group

Plan Menu Items ?

Name	Access	Actions ...
Financial Intelligence Setup		
Planning Automation		
Spread Methods	<input checked="" type="checkbox"/>	
Increase/Decrease Methods	<input checked="" type="checkbox"/>	
Allocation Methods	<input checked="" type="checkbox"/>	
Tiered Rates	<input checked="" type="checkbox"/>	
Default Settings	<input checked="" type="checkbox"/>	

- Plan Access: What Plan within the database does the group have access to?
- Plan Menu Access: What areas of the tool does the group have access to?
- On the Plan Menu Access tab, be sure to set the Plan on the top drop down before assigning permissions
- Assign what area of the permitted modules the Group has access to.
- Click save in the bottom right corner

# Adding Dimensional Security

 **MODEL**

Model data the way you view your business

Split or combine your business structures to assemble dimensions. Define hierarchies to create multiple views of your business.

 **Manage Base Structures**

 **Manage Dimensions**



**Dimensions** + New Dimension

- Account Number**  
Description: Automatically created Account Number dimension  
Dimension type: Account Number
- Segment1**  
Description: dimension created from - FAB Company  
Dimension type: Dimension
- Segment2**  
Description: dimension created from - FAB Company  
Dimension type: Dimension
- Segment3**  
Description: dimension created from - FAB Company  
Dimension type: Dimension



Segment1

Definition Members Attributes Hierarchies **Security**

 **Member Security**

Enabling member security allows you to control who has read, write, or no access to dimensions members. When Member Security is disabled, all users have access to all dimension members.

The Group needs to be selected to see the list

Segment1

Definition Members Attributes Hierarchies **Security**

Select Group(s) Enable Member Security

Name	Description
AP/AR	Accounts Payable - Accounts Receivable
<input checked="" type="checkbox"/> New Test Group	New Test Group
<input type="checkbox"/> Test User Group	Test User Group

Dimension Member

Name	Description	None	Read	Write	Actions
000	000	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
100	Administration	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
200	Accounting	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
300	Sales	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
400	Service/Installation	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

# Adding Dimensional Security

- Once a dimension is Enabled, the following screen will appear. The Group needs to be selected as well as a list to build the security by.
- Choose Read or Write from the list based on the user permissions.
- Can use Control or shift commands to choose multiple lines.
- When the security is enabled, all users are defaulted to “none” for permissions; all permission needs to be granted.
- Save once completed.

Segment1

Definition Members Attributes Hierarchies Security

Select Group(s) ? Enable Member Security

Name	Description
<input type="text" value="search"/>	<input type="text" value="search"/>
AP/AR	Accounts Payable - Accounts Recei...
<input checked="" type="checkbox"/> New Test Group	New Test Group
<input checked="" type="checkbox"/> Test User Group	Test User Group

Dimension Member

Name	Description	None - Read - Write	Actions ...
<input type="text" value="search"/>	<input type="text" value="search"/>	All	
<input checked="" type="checkbox"/> 000	000	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	
<input checked="" type="checkbox"/> 100	Administration	<input type="radio"/> <input checked="" type="radio"/> <input type="radio"/>	
<input checked="" type="checkbox"/> 200	Accounting	<input type="radio"/> <input checked="" type="radio"/> <input type="radio"/>	
<input checked="" type="checkbox"/> 300	Sales	<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>	
<input checked="" type="checkbox"/> 400	Service/Installation	<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/>	

# Deploying the Plan

- To confirm and set the security selections for the Dimensions, the plan must be deployed.
- Navigate to the deploy area of the tool
- Navigate through the screens (by clicking on the bottom green icons) to get to the Select Data Version screen.
- Once the plan has deployed, the security settings will take effect and be able to be seen in the Planning area of the tool.

