Centage Security

centage

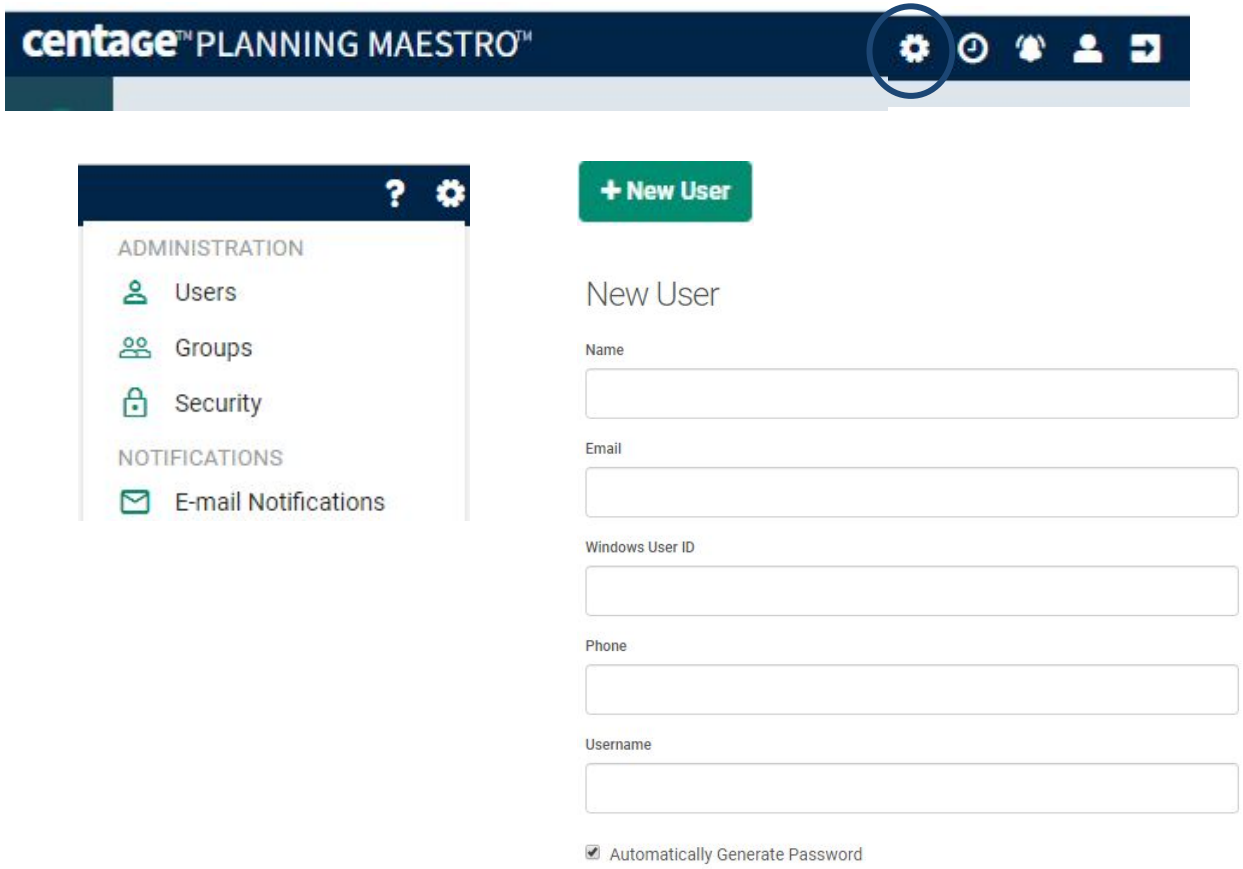
System Security (Must) vs Dimensional Security (Optional)

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

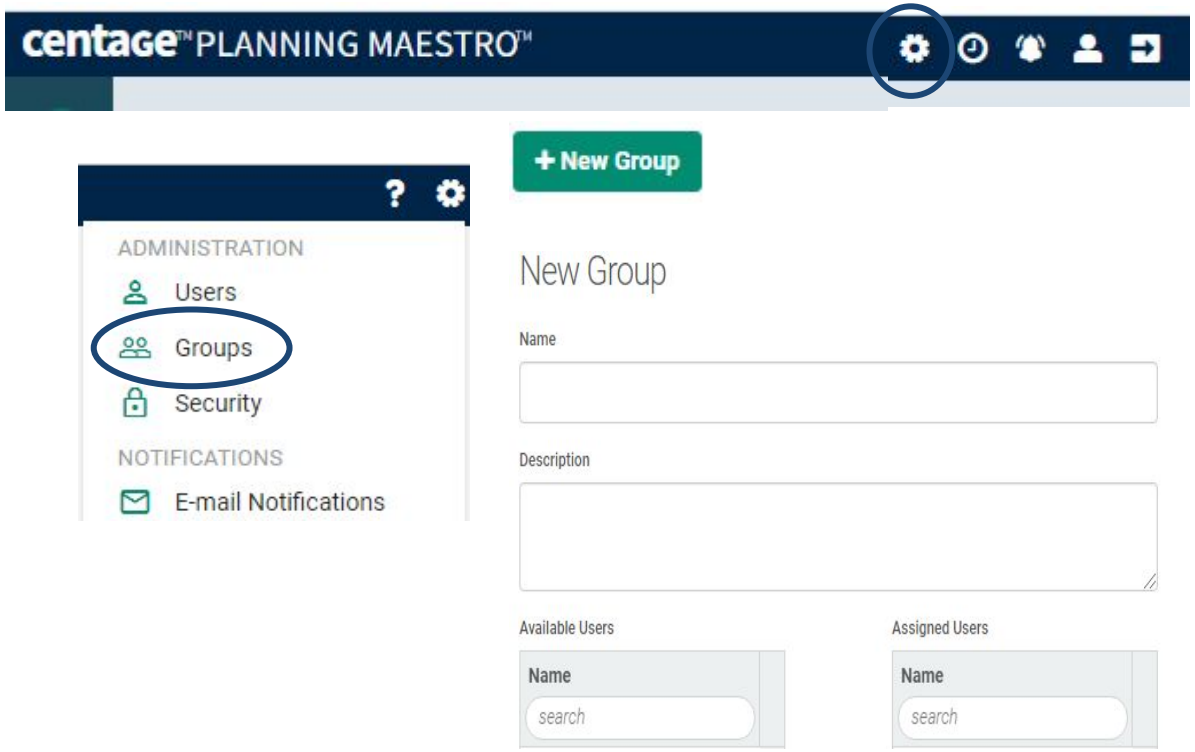
Data Modeler needs to be Deployed for any Dimensional security to take place – Only needed if Dimensional security is set

Centage System Security-Add a user



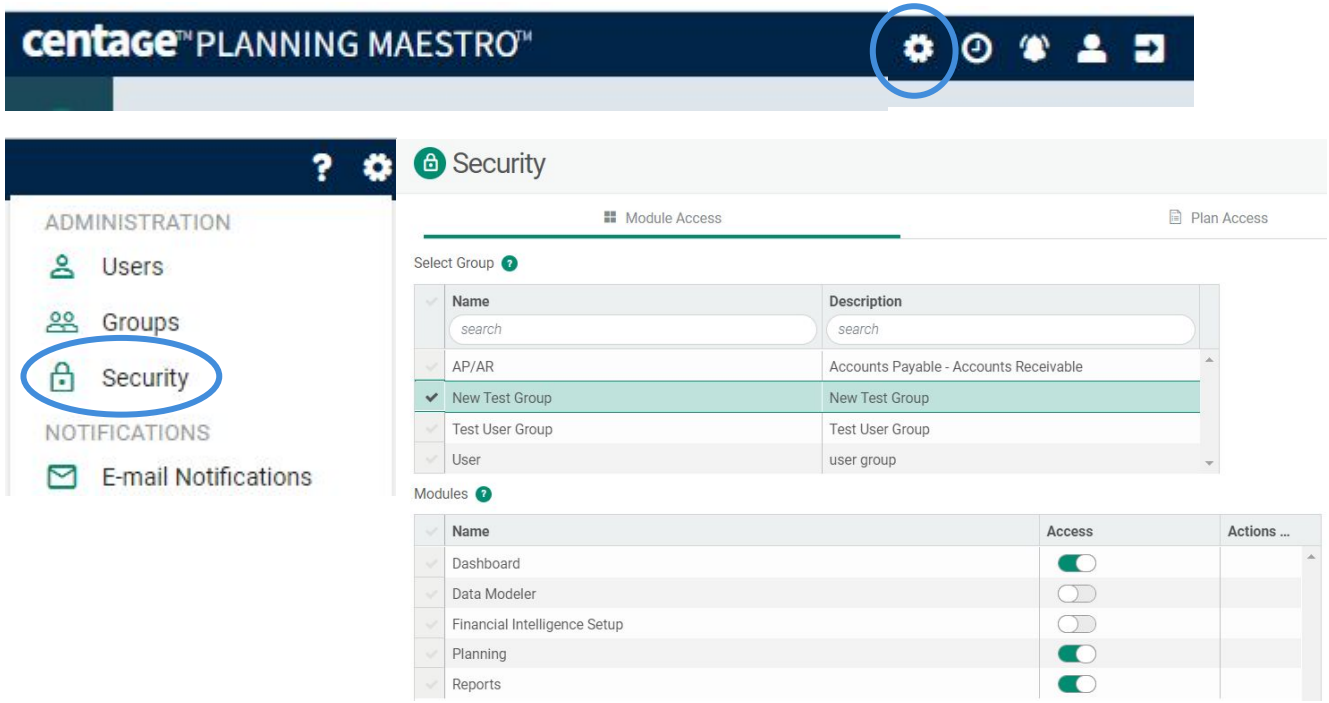
- The system Administrator is the only user that can add new users
- While logged in as the Administrator, select the Administration Icon
- Select “Users” from the dropdown menu
- The following screen needs to be completed with Name, E-mail, Phone and Username (no special characters, must be between 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



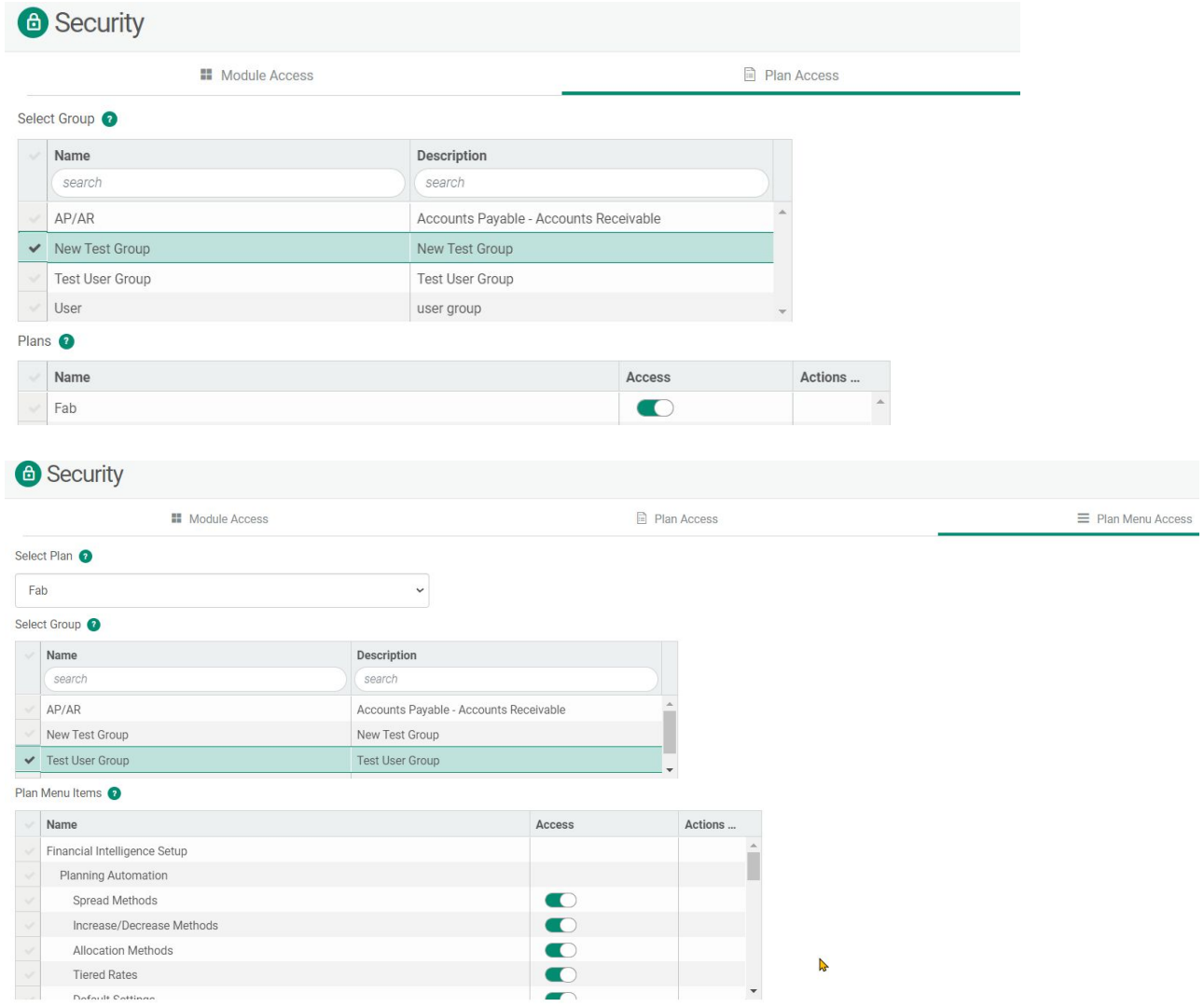
- The system Administrator is the only user that can add new groups
- It is recommended that there is a one-to-one ratio of users to groups based on the security settings
- While logged in as the Administrator, select the Administration Icon
- Select “Groups” from the dropdown menu
- The following screen 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 o 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



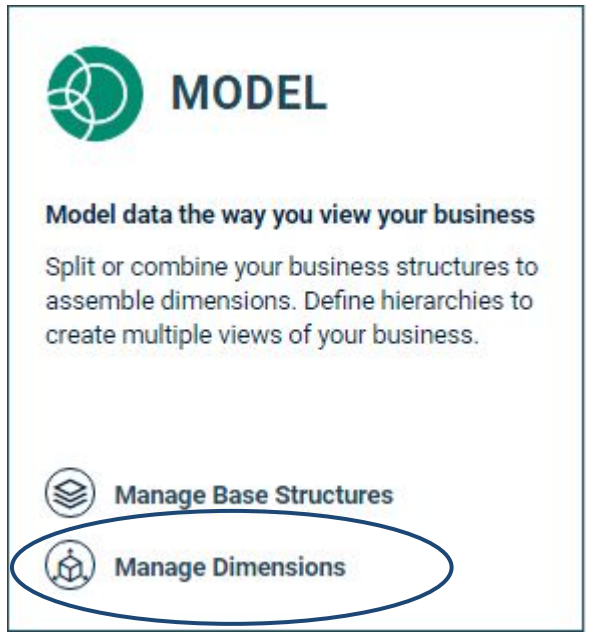
- The system Administrator is the only user that can add security to the new groups
- While logged in as the Administrator, select the Administration Icon
- Select “Security” from the dropdown menu
- All users are part of a User Group; no security should be placed on the “User” Group.
- If the desired 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

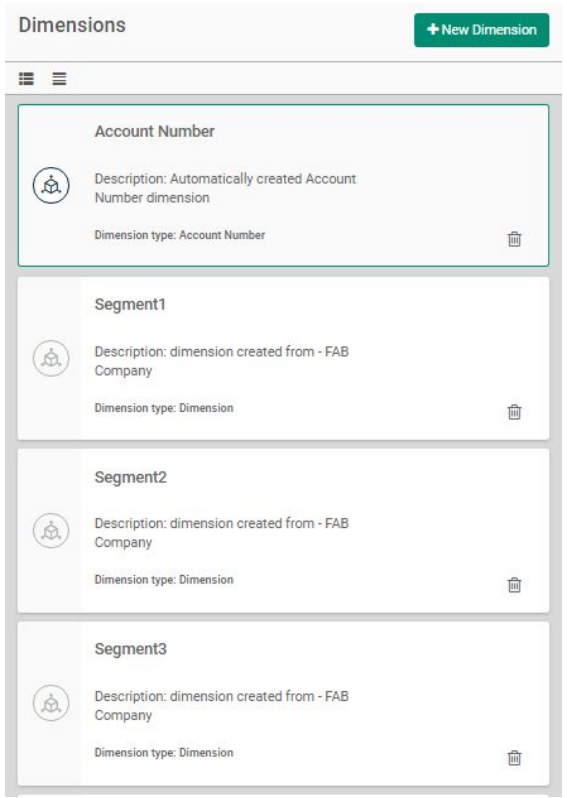
Centage System Security-Security View cont.

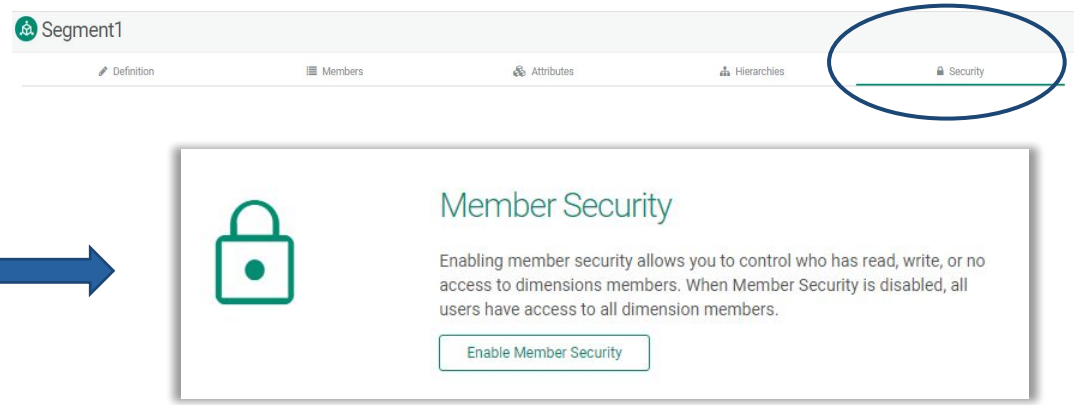


- Plan Access: What Plan within the database does the group have access to?
- Plan Menu Access: What areas of the tool does the group have access to?
- On the Plan Menu Access tab, be sure to set the Plan on the top drop down before assigning permissions
- Assign what area of the permitted modules the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

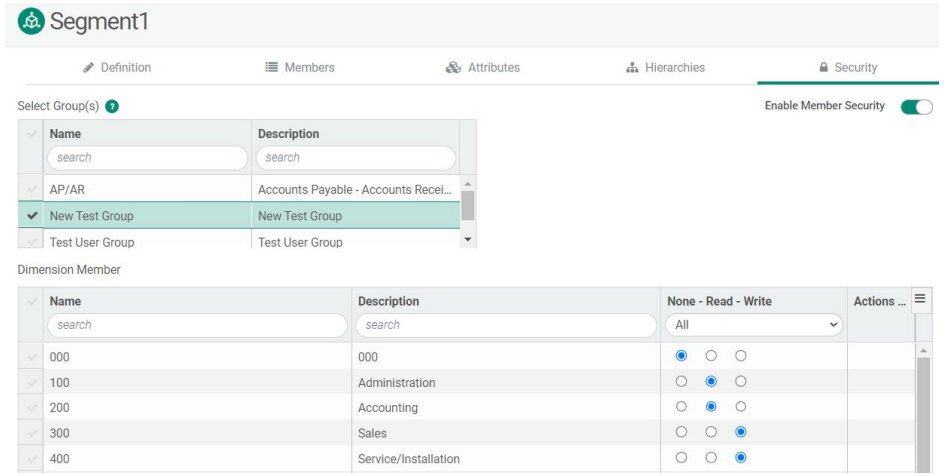
Adding Dimensional Security





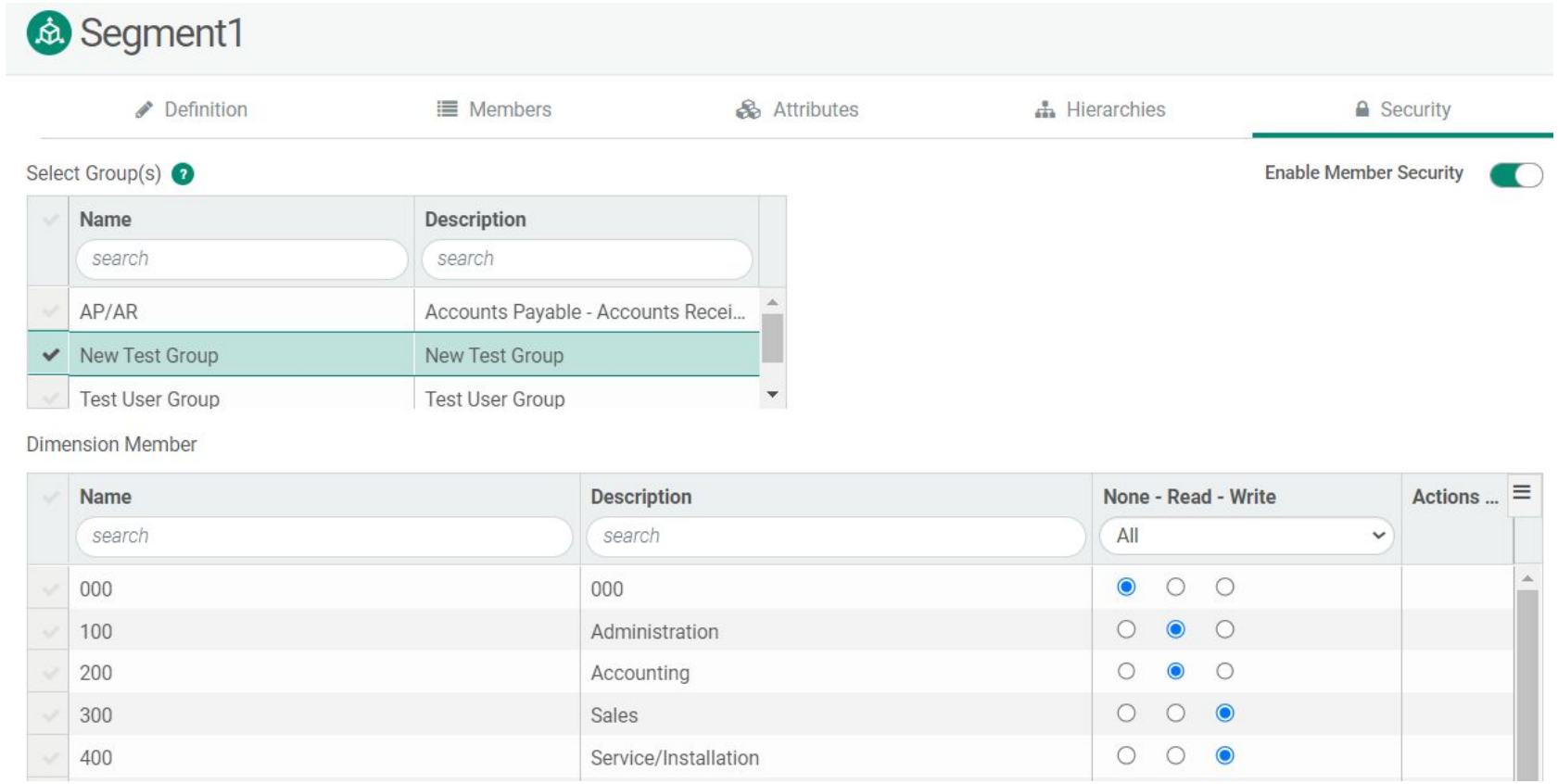


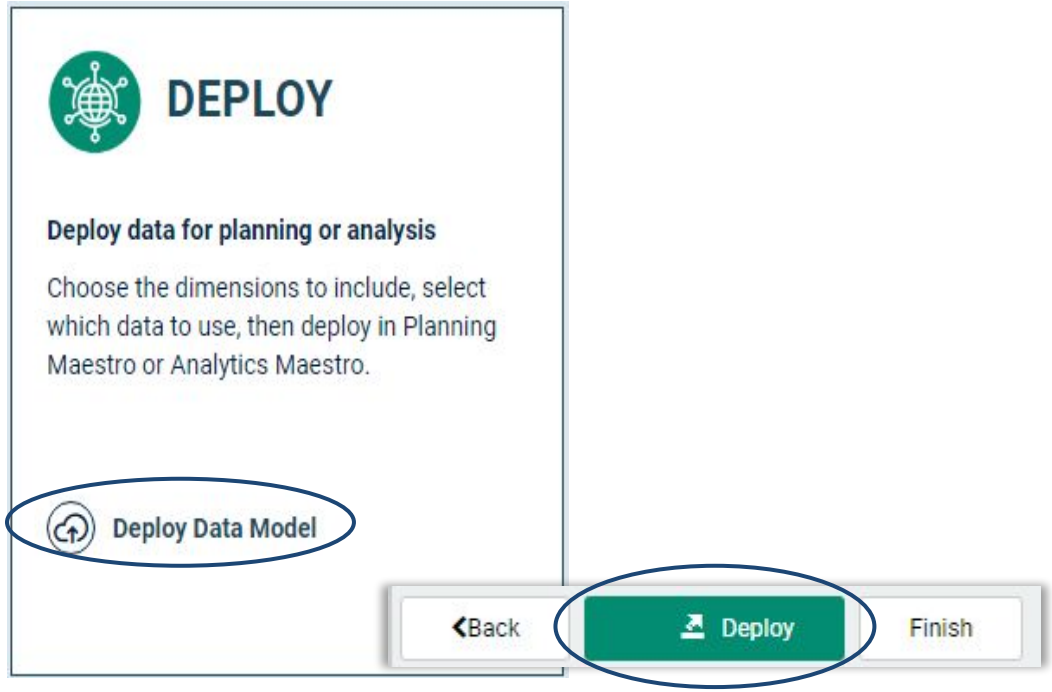
The Group needs to be selected to see the list



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 grated.
- Save once completed.



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.