SAP-RAPIDE TOURMATIC SECURITY

Introduction

In TM the security is conceptualised at a granular level. Before discussing this in detail lets examine what is normally displayed on a screen. We also suggest that you read this document first in the sequence it is presented and not hop from place to place due to impatience. As with any new system it is *your onus* to invest the time necessary to become familiar with the subject matter.
This would save you and us much time.

The Screen

If one looks at any screen one will notice that it is typically composed of several elements or components. Sub-consciously you are probably aware of them and have already used them in other applications. The table below lists examples of them, for the purpose of your understanding on a more formal basis.

Screen Elements	**Naming Convention**	
Buttons	btnXxxx	
Edit Boxes	edtXxxxx	
Check Boxes	chkXxxx	
Context Menus (or Popup Menus)	popXxxxx	
Dropdown Lists (or Combo Boxes)	cboXxxx	
Grids	grdXxxxx	
Group Boxes	gpbXxxxx	
Labels	lblXxxxx	Note security for a label is not required and rarely makes sense.
Memos	memXxxxx	
Menus	mnuXxxxxx	
Panels	pnlXxxxx	
Radio Buttons	radXxxxx	

Table 1: Screen Elements and Naming Convention

In the naming convention, the first 3 characters indicate the type of screen element. For example **btn** indicates a Button. Please note that there may be some with the prefix Adv and they can be ignored during the security process. However, this must be first verified if necessary.

With respect to the screen elements, its important to realize that a Group Box or Panel have several other elements placed on them. Therefore, it is said that the Group Box and Panels are the parents of the elements. The same applies to a grid as you will notice that a popup menu can be opened by a mouse right click. The Grid is the parent of the popup menu.

The Granular Security Level - What it means?

It was stated earlier stated that Tourmatic security is conceptualised at a granular level. In Tourmatic each element (see the table above) of a screen can be set to one of possible three states. That is,

enabled/disabled; visible/invisible and read only. Depending of the level of security that is required for a user the access to the elements will be set accordingly. *Because user access can be defined for each screen element, we call this Granular Security Level. Tourmatic implements this type of security to provide the highest protection possible using the award winning TMS Security System*

Setting the Security in Tourmatic

PLAN PLAN PLAN !

Before commencing it is strongly recommended that you **PLAN** your security as to who sees what and have access to what screen elements in Tourmatic. The best is to:

- Make a list of your users.
- Decide on a user login naming convention
- Make a list of the logins that will be used using the naming convention.
- Make a list if each users access privileges as to which screen elements he sees.
- Decide on a naming convention for all policies. This is important because you should be able to easily identify them when you are applying Permissions (explained later).

How to Set User Security

You must have permission to be able to set user security. As a default when Tourmatic starts you login with a default login **Sysadmin** (case sensitive) and no password. *You may add a password later and it is recommended.* As **Sysadmin** you have the required permission to set security. See the screen shot below.

Click the **Security Manager** Option (see below).

Then select the **Set Security** option.

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When the **Set Security** option is selected the **Tourmatic Security Manager** is opened (see screen below).

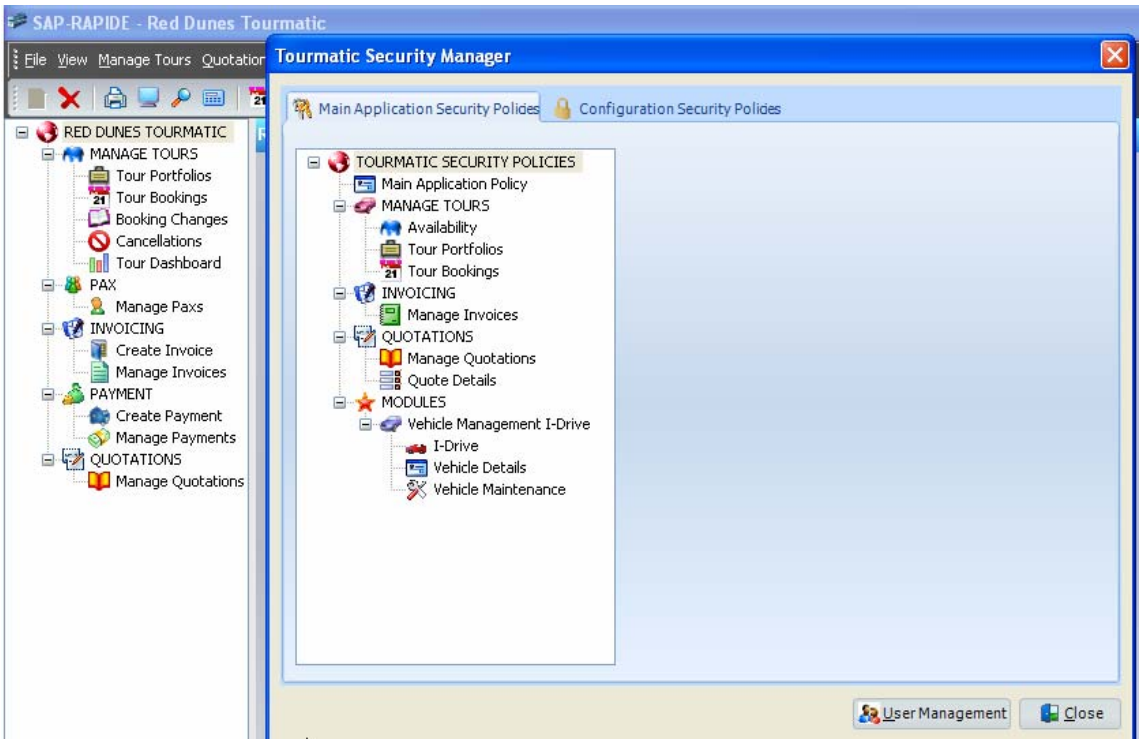
There are two tabs, namely:

- Main Application Security Policies
- Configuration Security Policies.

You will notice that it security options are listed more or less in a similar order to the Tourmatic options in the main application. The same applies to the Configuration Securities Policies. This has been done to help you orientate faster.

Note: To change your password select the **Change Password** option.

After you have changed your password re-start Tourmatic in order that this change takes effect.



Now you are ready to define the security policies for the respective functions.

NOTE: ***If you have not planned the security required please do so now before proceeding.***

Click the function that you wish to apply security to from the **Security Manager**.

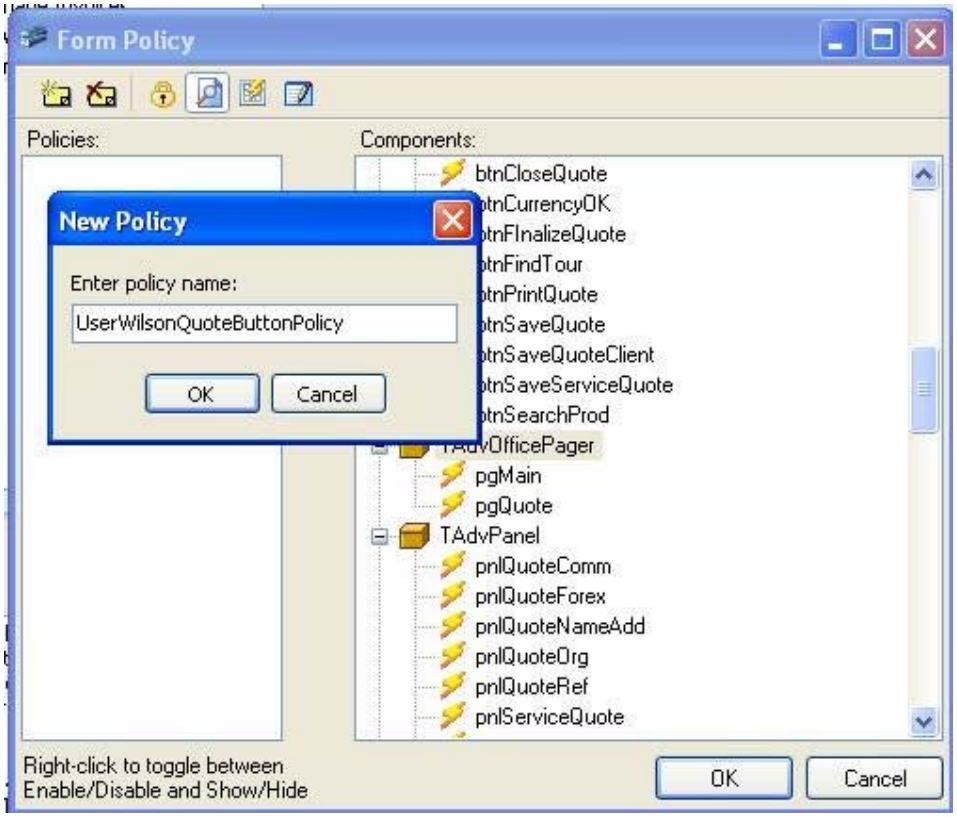
The screen below (named Form Policy) will open.

In this example the **Manage Quotations** option was clicked.

Now please take a few minutes to observe the methodical listing of all the screen elements relevant to the **Manage Quotations** on the right hand side pane of the screen. Refer to **Table 1** above as well where this was explained. Scroll up and down to see all of them.

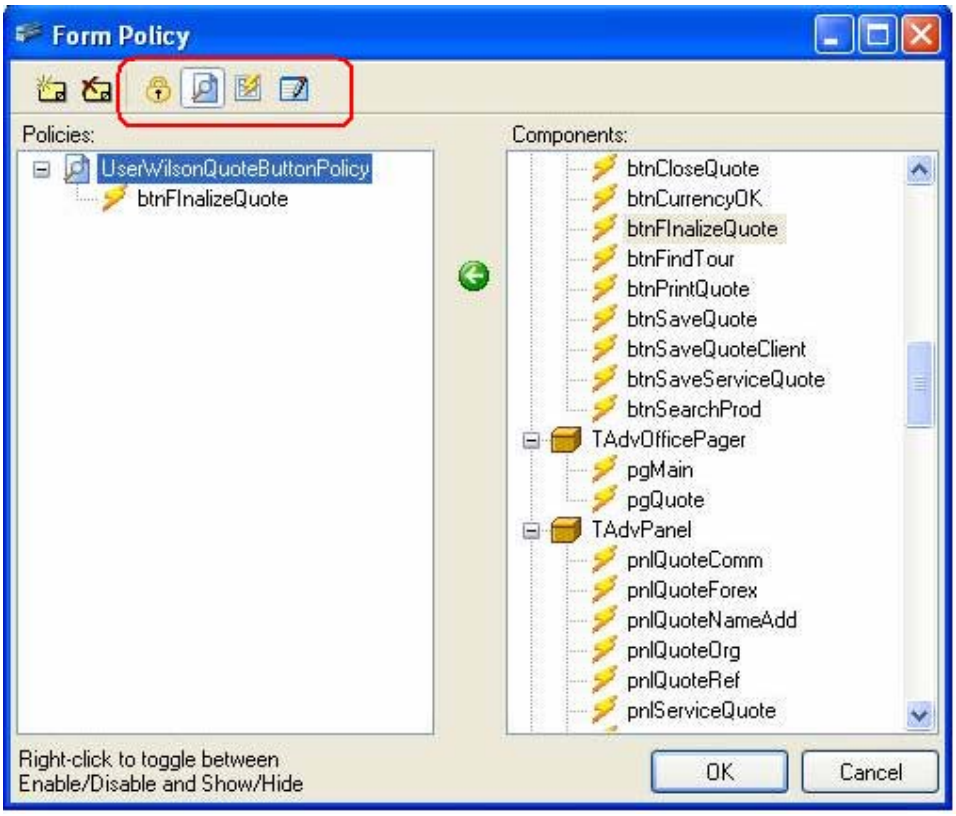
Click the **New Policy** icon to commence setting a policy (the term policy will soon be clarified below).

Notice that the **New Policy Dialogue** box opens.



Enter the name of the policy you decided upon and Click OK.

This example shows **UserWilsonQuoteButtonPolicy**.



Associating Screen Elements with a Policy Name

Click the **Policy Name** you created.

Click the screen element that to wish to associate with the policy. In this example the screen element **btnFinalizeQuote** is associated.

Click the green arrow button to make the association.

Associating a State with a Policy Name

Click the **Policy Name** you created.

Click one of the 4 icons ringed in red as shown in the screen above.

Important: Only enabled/disabled; visible/invisible and read only states are used. Customized is not used.

Explanation on Policy

By now it should be clear that a policy has a **Name**, **Screen Elements** (any number of elements be can be associated with a policy. To keep it simple one was used) and a **State**.

So what does the above policy mean?

The action of the above steps simply means that the **Finalize Button** in the **Quotation Management** function has as a **Security Policy** been made **Invisible** in Tourmatic. *That is, irrespective who the user is, he cannot see this button when working with the Quotation Management function.*

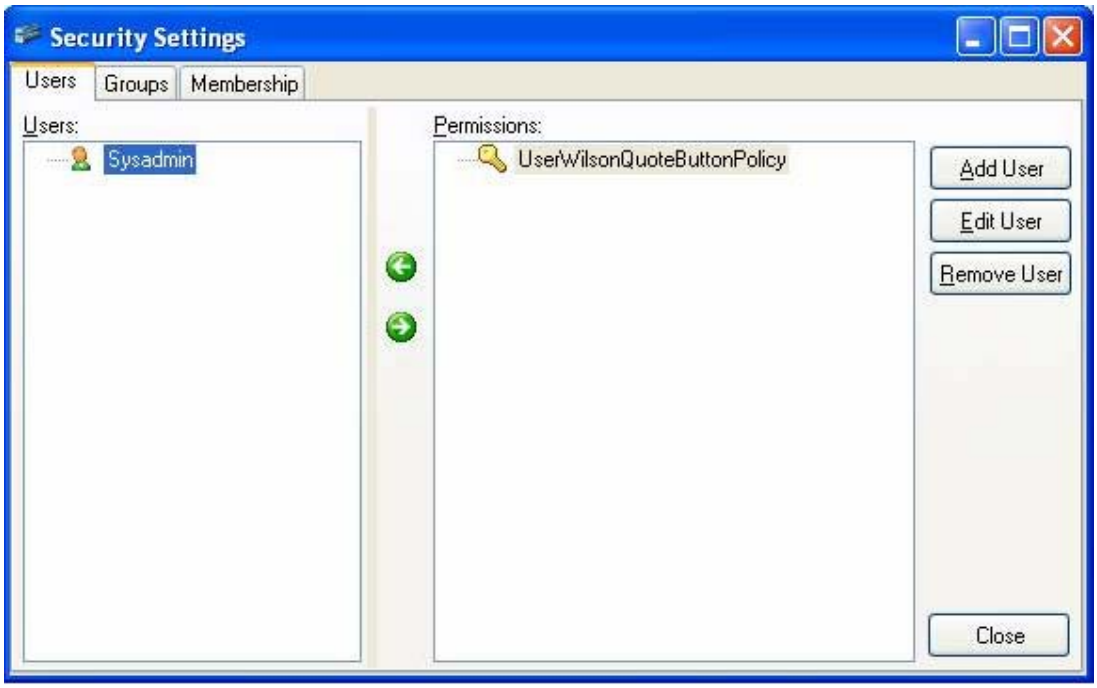
In order that a user see the Finalize Button. Two conditions must be satisfied:

1. The user must be defined in Tourmatic with a Login and Password.
2. He must be assigned *permission on that policy*, so that when he uses Manage Quotations the Finalize button is visible.

GIVING A USER PERMISSION TO USE A POLICY

Click the **User Management** button. The **Security Setting** screen shown below is displayed.

Click the **Add User** button to add a user according to your naming convention.



However, you can already see above the default **Sysadmin** user.

Also notice that the policy you defined appears in the **Permissions Pane** on the right hand side.

Any policy that you defined will be listed in the permissions pane.

TEST: At this point to convince yourself to the following test

Close the Security Manager

Close Tourmatic

Restart Tourmatic

Select the Manage Quotation

Select a Quotation. You should notice that the **Finalized Button** is *not visible*.

Assigning the Permission

Select the **Set Security** option

Click **User Management** to open the screen above again.

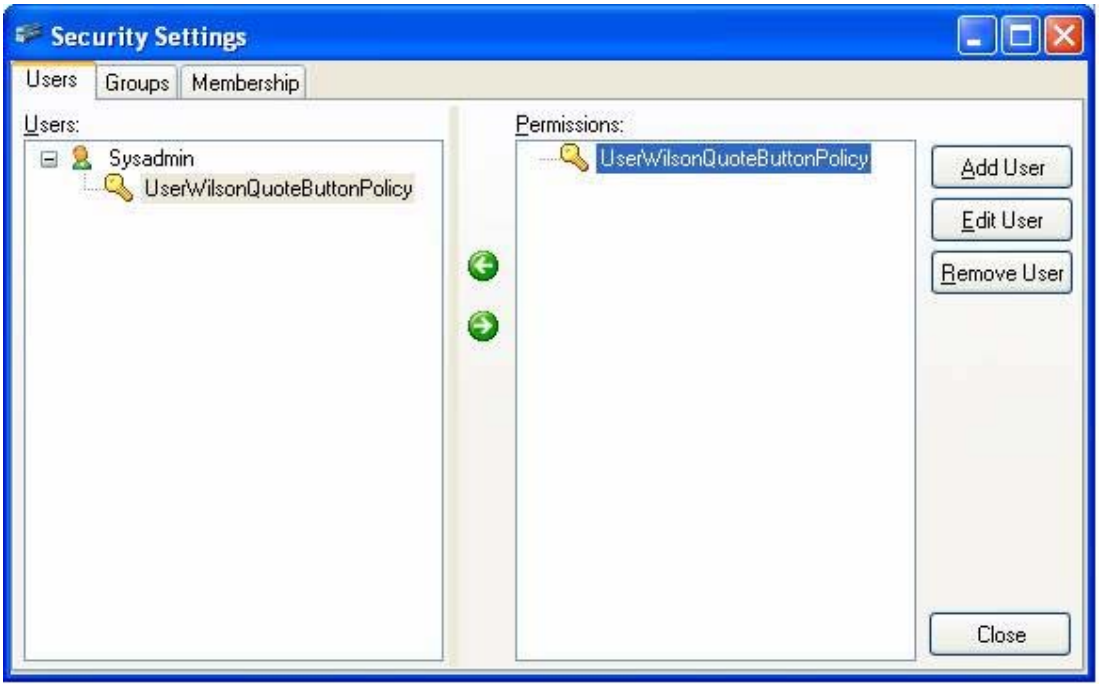
Click the user (in this example Sysadmin).

Click the policy you want assign to the user.

Click the green arrow button pointing to the left to make the assignment.

When done you will see that screen as shown below.

Follow the above steps to assign ANY POLICY to ANY USER as you require.



Explanation:

The above steps mean that **Sysadmin** now has been given permission, such that when he uses the **Quotation Management** function, the **Finalize Button** will be visible to him. Hence he will be able to finalize a Quote.

If you run the test above at this point and log on as Sysadmin you should see the **Finalize Button**.

Revoking a Permission

A permission can be revoked from a user.

Click the user.

Click the permission to be revoked

Click the Green Arrow pointing to the right.

The permission should disappear.

NOTE: In all cases whenever changes have been made to a user, such as assigning and revoking permissions OR a policy is changed, restart Tourmatic in order that the changes have the desired effect.

General:

Refrain from using groups. It may save a little time, but reduces flexibility for individual user security settings. *We don't recommend its use.*

ATTENTION

If you as a Sysadmin user set a policy to restrict access to the options **Set Security** and **Tourmatic Security Manager,** make sure that BEFORE LOGGING OUT that you give yourself permission have access to these options. Failing to do so will result in you being locked out of the system. The recovery for this disaster is to run the reset utility and can be found in Tourmatic installation folder. You should copy this utility in a safe place so that other users do not have access to it.

Dialogue Overrides – In some cases you may set a policy to make a screen element for example read only or disabled or invisible. The specific policy may have no effect, because the screen dialogue behavior may override this. For example, you want to make a button disabled, however, when Tourmatic runs the button always appears enabled. In this exceptional case apply another policy, for example make it invisible. The net result is the same, namely, the button is in accessible to the user.