

Setting Security in SIRS 3

Setting security in SIRS 3 is very important. Security settings:

- Set security on certain forms to allow user read access, write access or no access;
- Allow easy access for users by setting modified menu items to select;
- Restrict users from adding or removing values from lookup tables;
- Restrict users from using Delete buttons on certain forms;
- Set field level security on specific fields.

There are three levels of security:

1. **Field level security** – ability to edit a field.
2. **Lookup tables** – ability to add, remove or edit values in lookup tables;
3. **Menu and menu items** – ability to get into forms and reports;

Type of Security	Where to find in SIRS:
Field Level	Field Maintenance - Security Level
Lookup Tables	Item Descriptions - Lookup Datatypes
Menu Items ¹	1) Menu Editor - Menu Items ²
	2) Window & Report Attributes – Forms & Reports ² OR
	3) Menu Group Security ³

¹ Regardless of how you set menu security, the security set for field level and lookup tables still applies.

² Setting security through menu editor or forms and reports is the same. If you set a security level in menu editor at 50 for a specific form, you will see a security level of 50 for that form in Window and Report attributes.

³ Once a user is linked to a menu group, the security set up in menu editor or window and report attributes no longer applies. Menu group security overwrites menu editor/window and report attributes. Users not linked to a menu group will have the security set up in menu editor / window and report attributes.

There are a few exceptions to the rules above. These exceptions are related to forms that may appear to be lookup tables, but are actually listed in Window and Report Attributes. *Reasons* is example of this exception. If you expect to find a table in *Item Descriptions - Lookup Datatypes* and it is not listed, check *Window and Report Attributes – Forms*.

Menu Security

A user needs to first determine how they are going to set menu security. They can use:

1. **Menu Editor / Forms and Reports** – involves setting a specific numeric security level on menus (*File, Edit, Student...*) and forms (*Demographics, Individual Attendance...*).
2. **Menu Group Security** – involves attaching users to groups where read/write access is set for each form and report in SIRS.

Notes:

- Menu group security is much easier to set up. It does not require specific security levels for forms. As well, whole menus are easily selected and de-selected.
- If a user is not attached to a menu group, the security set in menu editor / forms and reports will apply.
- Lookup table and field level security apply the same, regardless of the method used to set security on forms and reports.

For specific details on setting security through either menu editor, forms and reports or menu group security, please see the *Administrative Utilities* section of the manual and the *Menu Group Security* procedure sheet. Both are available on the MIG website at www.migsirs.com.

Lookup Table Security

Once menu security has been set, lookup table security should be set. These security settings allow users to select values from lookup tables, but not add, edit or remove values. Tables such as government tables, attendance reasons, and grades are some examples of tables where security should be set.

Security for lookup tables is done through **Setup – Admin Setup – Item Descriptions**. Once in Item Descriptions, select **Lookup Datatypes** from the drop down box.

Find the appropriate table in the list. It is important to remember when looking for a specific table, to make note of the name that appears in the title bar of that table. This name is the same name that will appear in the list.

To ensure you have the correct table, click on the **Values** button to ensure the expected values for that table are in this form.

Notes:

- If a table does not appear in this list, it will appear under *Window and Report Attributes*.
- Security settings set for lookup tables will apply, using the user's security level, regardless of whether menu group for menu item security is used.

- Lookup table security cannot be set in field maintenance. Use of the Add/Remove buttons is not restricted. Only the ability to enter or edit information in the name and code fields is restricted. For example, if a user sets security in field maintenance on the attendance reasons form, for name and code, users will be able to add and remove. They will simply not be able to enter or edit reasons and codes.

For specific details on setting security on lookup tables, please see the *Administrative Utilities* section of the manual. It is available on the MIG website at www.migsirs.com.

Field Level Security

Once a user has been restricted access to specific forms and lookup tables, it may be necessary to set field level security for some field on forms where a user has write access. For example, the student id number field on the demographics form is grayed out for all users with security lower than 75. This is because field level security is set at 75 for the ID field.

Identify forms where users need write access for some fields, but may not need write access to all fields.

Security is set for all fields in **Setup – Admin Setup – Field Maintenance**.

Find the appropriate area and click on the *Fields* tab. Find the appropriate field and set the security in the *Security Level* field.

Notes:

- Security settings set for fields will apply, using the user's security level, regardless of whether menu group for menu item security is used.