

## Security / User Access Help Guide

Retail Backbone provides security as the main mechanism for driving access privileges to clients. User permissions, which define the security access to pages within Retail Backbone, are essential to promote separation of duties and help provide a security audit trail. Because each client manages their business a bit differently, security groups and user access can be customized to meet your business' specific needs. Maintain control and consistency in your database by managing your own permission and securing pages in your database.

### To create a security group:

1. Navigate to Admin → List Management → Security Groups
2. Select the Edit link on the first record in the table, titled \*New Record

Select	Contact Group	Admin Override	
<input type="checkbox"/>	*New Record	<input type="checkbox"/>	<a href="#">Edit</a>

3. Provide a name for the new security group, and select Update
  - a. NOTE: Select the check box under the "Admin Override" column if System Admins should be granted access to edit this group

Select	Contact Group	Admin Override	
<input type="checkbox"/>	Example Security Group	<input checked="" type="checkbox"/>	<a href="#">Update</a> <a href="#">Cancel</a>

### To delete a security group:

1. Navigate to Admin → List Management → Security Groups
2. Search for the security group you'd like to delete in the search window at the top, OR simply scroll through the table
3. Once you've located the correct security group, check the box in the far left "Select" column, and select the Delete button

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Contact Group

Select	Contact Group	Admin Override	
<input type="checkbox"/>	*New Record	<input type="checkbox"/>	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	Example Security Group	<input checked="" type="checkbox"/>	<a href="#">Edit</a>

**To assign users to a security group:**

1. Navigate to Admin → Staff
2. Enter the name of the employee for whom you'd like to assign a security group, and select Search

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First Name	<input type="text"/>	Last Name	<input type="text"/> Casanta
Email	<input type="text"/>	Login Name	<input type="text"/>
Payroll Departments	<input type="text"/>	Payroll Employee Code	<input type="text"/>
Groups	<input type="text"/>	Primary Store	<input type="text"/>
Hire Date Range	<input type="text"/>	Department	<input type="text"/>
Hire Start Date	<input type="text"/>	Hire End Date	<input type="text"/>

Search  Export  Clear  [New Staff](#)  Active  Sales Associates Only

3. When the applicable record appears in the Results table, select the check box in the "Select" column
4. Use the dropdown to select the correct security group, then select the Add to Group button

Example Security Group

Add to Group  Remove From Group

Select All  UnSelect All

1 Results

1	Select	Edit	Email	Login Name	Primary Store	BP Earned YTD	BP Spent YTD	BP Remaining
<input checked="" type="checkbox"/>	<a href="#">Casanta, Laura</a>		lcasanta@retailbackbone.com	lcasanta				

**To verify a user's security access, or to remove a user's access to a security group:**

1. Navigate to Admin → Staff
2. Enter the name of the employee for whom you'd like to assign a security group, and select Search
3. When the applicable record appears in the Results table, click on the user's name in the "Edit" column

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First Name	<input type="text"/>	Last Name	<input type="text" value="Casanta"/>
Email	<input type="text"/>	Login Name	<input type="text"/>
Payroll Departments	<input type="text"/>	Payroll Employee Code	<input type="text"/>
Groups	<input type="text"/>	Primary Store	<input type="text"/>
Hire Date Range	<input type="text"/>	Department	<input type="text"/>
Hire Start Date	<input type="text"/>	Hire End Date	<input type="text"/>

[New Staff](#)  Active  Sales Associates Only

1 Results

1	Select	Edit	Email	Login Name	Primary Store	BP Earned YTD	BP Spent YTD	BP Remaining	BP Earned Last Year
<input type="checkbox"/>	<a href="#">Casanta, Laura</a>	<input type="text" value="Casanta@retailbackbone.com"/>	<input type="text" value="Casanta"/>						

1

4. Scroll to the bottom of the page and review the Security Group table to verify access

Select	Group
<input type="checkbox"/>	Everyone
<input type="checkbox"/>	Example Security Group
<input type="checkbox"/>	System Admin

5. To delete a security group from the user, check the box in the "Select" column and select the Delete Items button

**To assign pages/permissions to a security group:**

1. Navigate to Admin → Site Navigation
2. Select Edit in the “Edit Column” of the applicable page, or select Drill for a further breakdown of pages
3. Click on the Security Group dropdown menu to select the security group(s) that should have access to this page
4. Select Save

### Navigation Item Properties

Navigation Level	Tab	Parent	Main Tabs
Item Name	Intranet	Application Module	
Display Mode	URL	URL	
Tool Tip	Intranet	Help URL	
Default Menu			<input type="checkbox"/> Display in New Window
Sort	10	Menu ID	1226
Page Height		Page Width	
Security Group	Example Security Group		
<input type="checkbox"/> hidden			
Local File Path	Choose File	No file chosen	
New File Name		<input type="button" value="Upload"/>	
<input type="button" value="Save"/>		<input type="button" value="Save &amp; Close"/>	

For further questions about Security & User Access functionality, please reach out to Laura Casanta at [lcasanta@retailbackbone.com](mailto:lcasanta@retailbackbone.com).

