Management Console Training Reference Guide

etfile

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etfile Management Console

Introduction:

The purpose of this section is to create **Users** for the etfile software. The **Users** will be added to **Groups**. Permissions are granted or removed for each **Group** to determine what features of the software you will allow each **User** to have. By adding **Users** to a **Group** you can control permissions easier at the **Group** level and simplify the process of managing permissions. The Management Console is intended for Administrators of the etfile Software. We recommend designating a few **Users** to be the Administrator of the **etfile** system and ensuring those **Users** have sufficient privileges, which is discussed in this Training Guide.

Security Manager Console Topics Covered:

- Creating **Groups** and **Users**
- Adding **Users** to a **Group**(s)
- Setting permissions for **Groups** and **Users**.
- Discuss **User** Passwords
- Setting security for the **User** passwords
- Resetting a password for a **User**
- Setting a **Security Policy**

Concepts and Definitions

User
A **User** is a login into etfile and any of its associated modules.
- Each **User** has an ID and a password to login into etfile
- A **User** can be a member of one or more **Groups**.
- A **User** can have access rights on top of those derived from the **Groups** of which they are a member.

Group
A **Group** is a container with defined permissions to features in eTFile.
- **Group** could have one or more users.

User Interface of the Management Console

- On the left hand side of the display is a tree view showing all the **Groups** and **Users** in etfile.

- Right hand side of the display is a list view that shows details of items selected in tree on the left hand side.

Standard Groups

There are four standard **Groups** pre-defined in the Security Manager Console:
1. Document Viewer
2. Power User
3. Administrator
4. Super Admin

Document Viewer

This is the most basic group in etfile.
- This is the default group for any new **User** created in **etfile**.

Power User

- This **Group** is for more advanced **Users** since it has permissions to create and modify data in etfile.
- Typically, a scan station **User** would belong to this group.

Administrator

- Members of this Group are responsible for overall administration of **etfile** like creating File Rooms and cabinets, creating scan descriptions, etc.
- This **Group** has most of rights in etfile except for deleting data.

Super Admin

- The select few members of this **Group** have all the rights in etfile except the right to manage **User** accounts and permissions.

Creating a Custom Group

In addition to pre-defined **Groups**, **Users** can create their own **Groups** with custom access rights. Creating your own Group is recommended if the access rights you want to grant your **Users** are not satisfied by the pre-defined **Groups** and you have a few **Users** to whom you want to assign those rights.

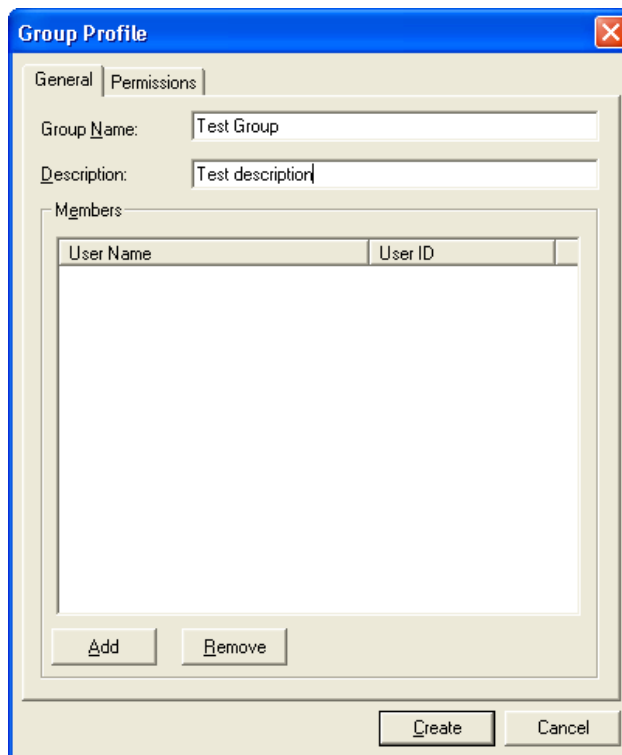1. Log into the Security Management Console by double clicking the icon

    on your desktop: .

    If this icon is not present navigate to where **etfile** is installed, for isntance, **C:\Apres\etfile.** Right click on **eTSecureMan,** and choose send to desktop. This will create the icon for the Management Console.

    > *NOTE:* If you cannot locate the install directory please contact our Technical Support Group for assistance or your IT department. Please note in order to proceed with these document instructions you will need to to login with a **User** that has sufficient privileges to create **Group** and **Users** and set permissions.

2. Use one of the following options to create a new G**roup** and launch the **Group Profile** dialog box:

    - Select the item *Groups* on the left side console tree and use the menu option *Action – New Security Group*.
    - Right click the item *Security Groups* on the left side console tree and use the menu option *New Security Group*.

General Tab

- *General* tab allows you to enter a name and description for your G**roup**.
- You can add and remove **Users** belonging to the group using the *Add* and *Remove* buttons respectively in the above dialog.

> *NOTE:* Creating new **Users** is discussed in the next section. Once a new **User** is created you can **Add** them to a **Group** through the **Member of Tab** on the **User Profile** screen or you can follow the instructions below to **Add** a **User** to the **Group** in the **Group Profile** screen. By right clicking on the **Security Group** or the **Users** you can **Modify** a **User** or **Group**.

1. To add a User to a Group select the *Add* button. A list of the Users will display.

2. Select the **Users** in the list and click *OK* to add selected **Users** to the **Group**.

3. To remove **Users** from the **Group,** select the **Users** and click the *Remove* button.
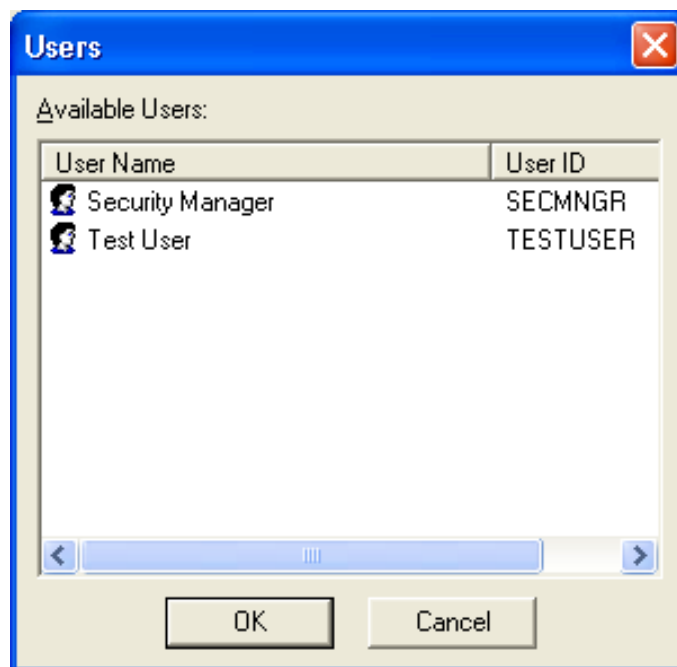
Permissions Tab

The **Permissions Tab** on the Group Profile enables you to set the **Group** permissions. All **Users** belonging to this **Group** will inherit these permissions.

1. Select the **Permissions Tab** on the **Group Profile** screen next to the **General** tab.

2. Click on the checkbox below the **Allow** column to grant the **Group** access to a particular feature or select the checkbox below the **Deny** column to take away the permission of a feature.
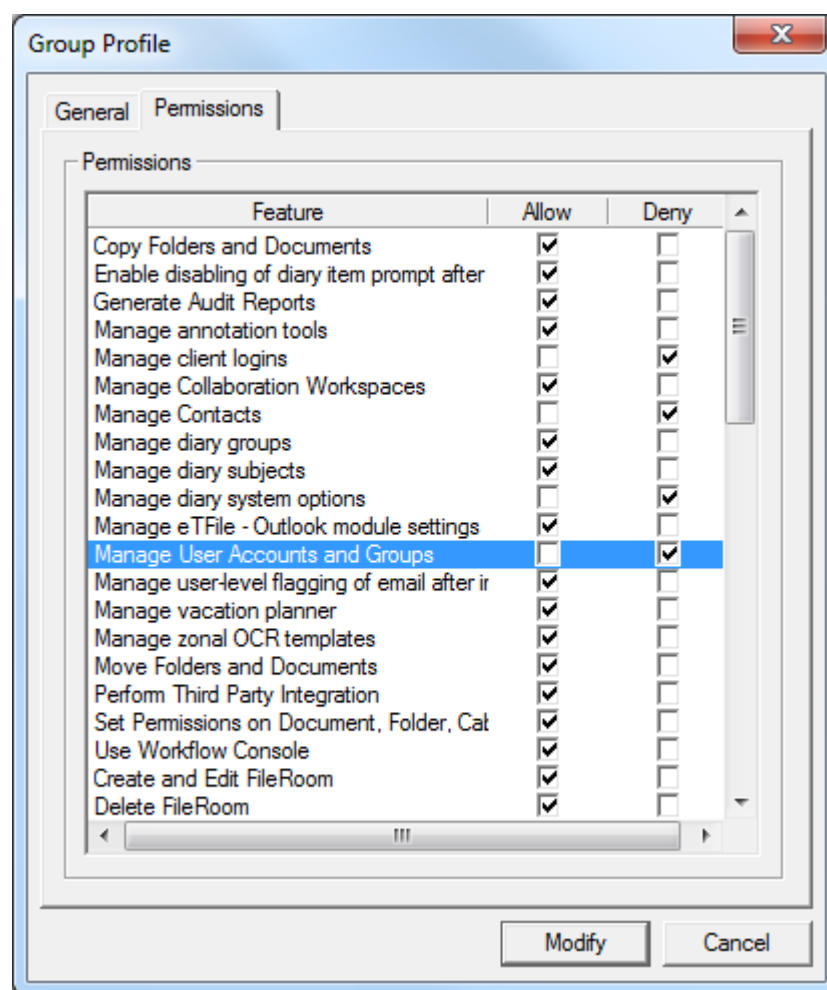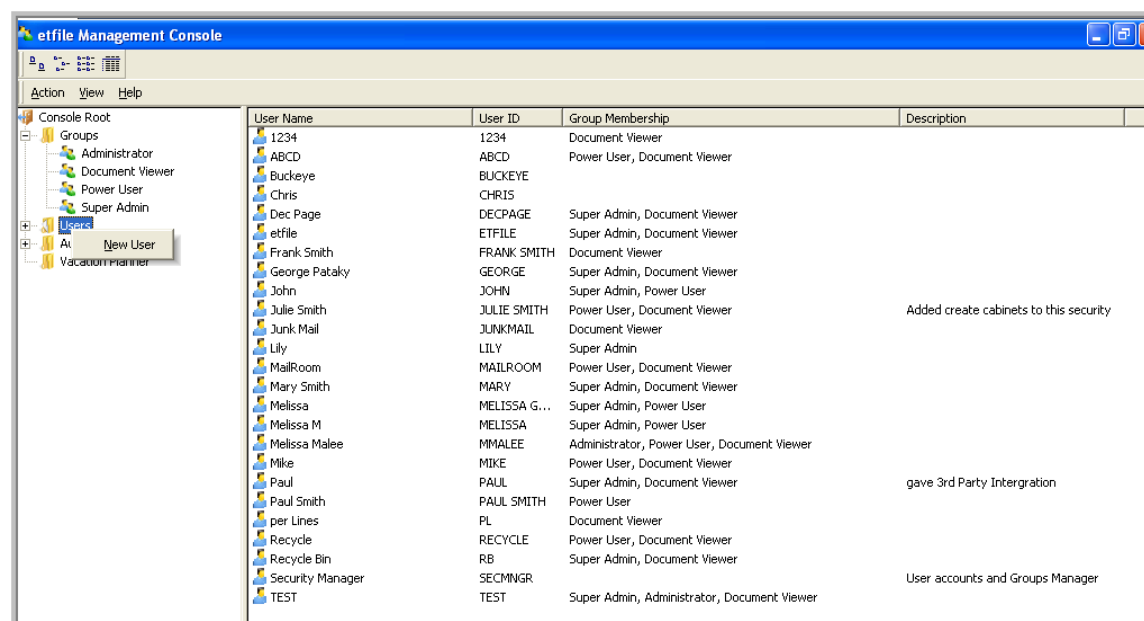
Creating Users

Note: The system is set up with a few default **Users**. Our Technical Support group uses the **APRES** user and **Security Manager User** for purposes of troubleshooting any issues during a support call. Please do not change the password to these users.

- Any **User** who uses **etfile** or its associated modules should have an account (**User ID** and password) to login into **etfile**.
- It is not recommended to use common accounts for multiple users since **User IDs** are used to track their actions in the **etfile Analytics Tool.**

1. To Create a **User** choose one of the methods described below:

- Select the item *Users* in console tree and use the menu option *Action – New User* or
- Right click the item *Users* in console tree and use the menu option *New - User*.

General Tab

This tab allows you to enter the basic information for the **User**.

- *User Name:* Required. Full name of the **User**
- *User ID:* Required. Login ID of the **User**. This is used when the **User** logs in into **etfile** or any of its associated modules. **User ID** can be up to 16 characters long. Please note that **User ID** cannot be changed once the **User** is created.
- *Description:* (Optional). A general description for the **User.**
- *Password:* Password can be a combination of letters and numbers up to 10 characters long.
- *Confirm Password:* Confirm the password entered in *Password* field.

NOTE: Passwords can be left blank when creating a User. This will allow the User to enter their User ID and a **blank password**. The user will be prompted to create a password at login. This method is recommended when creating Users.
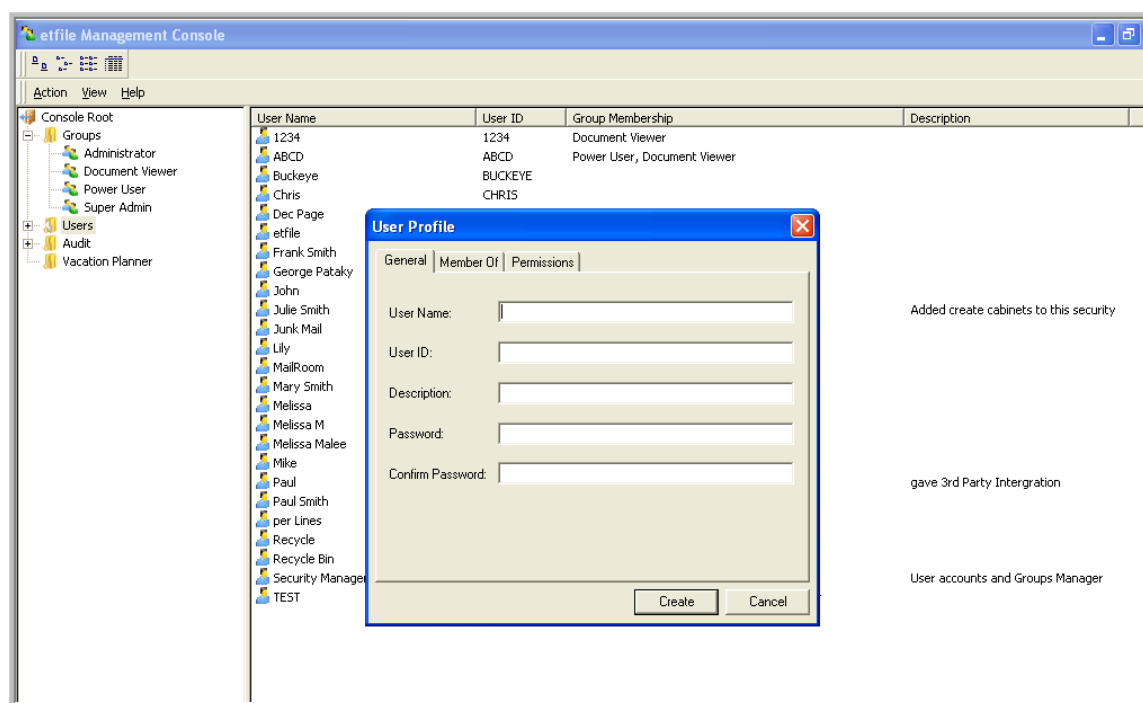
2. Fill in the **User Name, User ID** and the optional **Description and Password** on the **General Tab**.

Member of Tab

This tab defines **Group** memberships for the **User**.

- A **User** can be a member of more than one **Group**. In this case, the **User** gets access rights of the highest **Group** that he is the member of. For example, if the **User** is a member of **Document Viewer** and **Power User**, resultant **User** rights are those of the **Power User**.
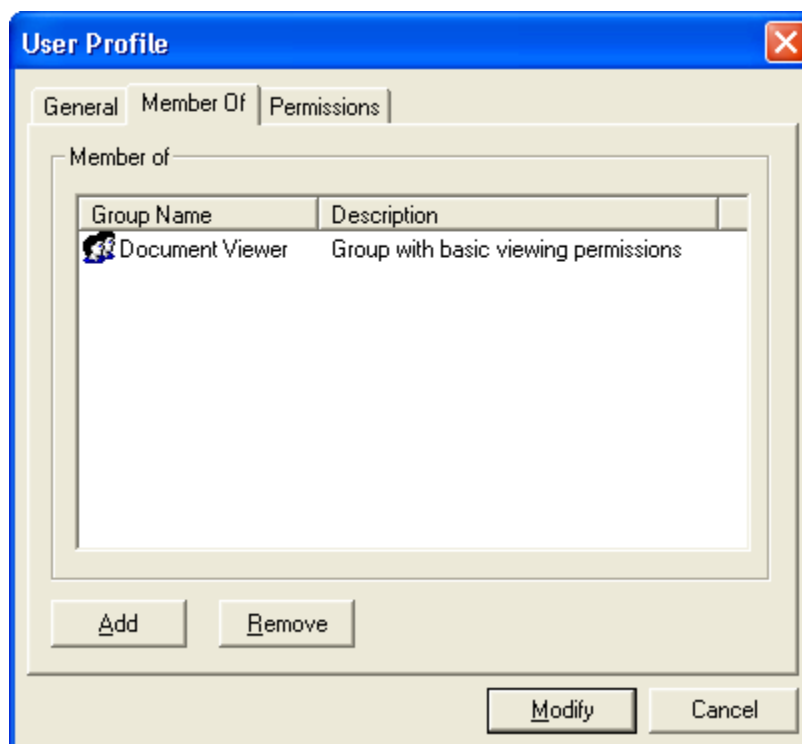
3. Click **Add** at the bottom of the **Member of** tab on the **User Profile** screen to add the **User** to one or more **Groups.** Only those **Groups** that the **User** is not a member of are listed.

    - The following dialog is displayed:
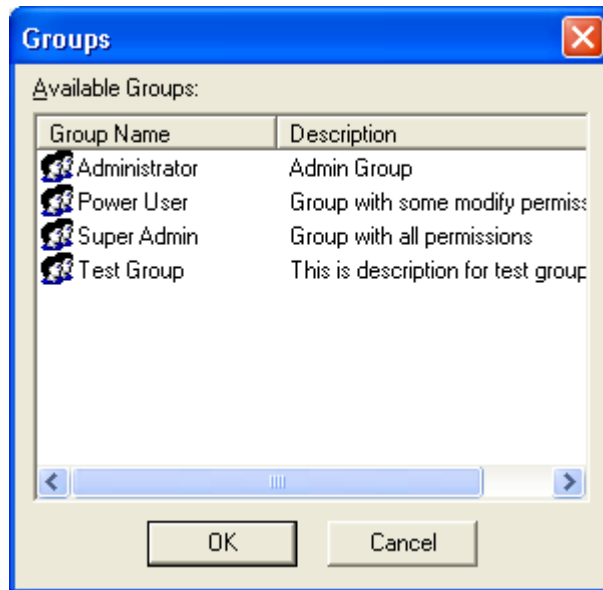
![Groups dialog box showing Available Groups with Group Name and Description columns: Administrator - Admin Group, Power User - Group with some modify permiss, Super Admin - Group with all permissions, Test Group - This is description for test group. OK and Cancel buttons.](groups_dialog)

4. Select the Group(s) and click *OK* to add the **User** to the **Group(s)**

5. To remove a User(s) from a **Group** select the **Group(s)** to remove the **User** from and click the **Remove** button.

Permissions Tab

This tab displays the permissions of the **User** and enables you to modify individual **User** rights.

Note: Please note that it is not possible to remove any access rights that the **User** inherits from the Group memberships. You can assign **Users** additional rights in addition to the rights inherited from the **Groups** that they are a member. For example, if the **User** is member of **Power User Group** the **User** has the right to scan documents. It is not possible to take this right away from the **User** as long as he is a member of the **Power User Group**. You can assign the **User** additional rights (e.g. Create Cabinet …) that are not a part of **Power User Group**.
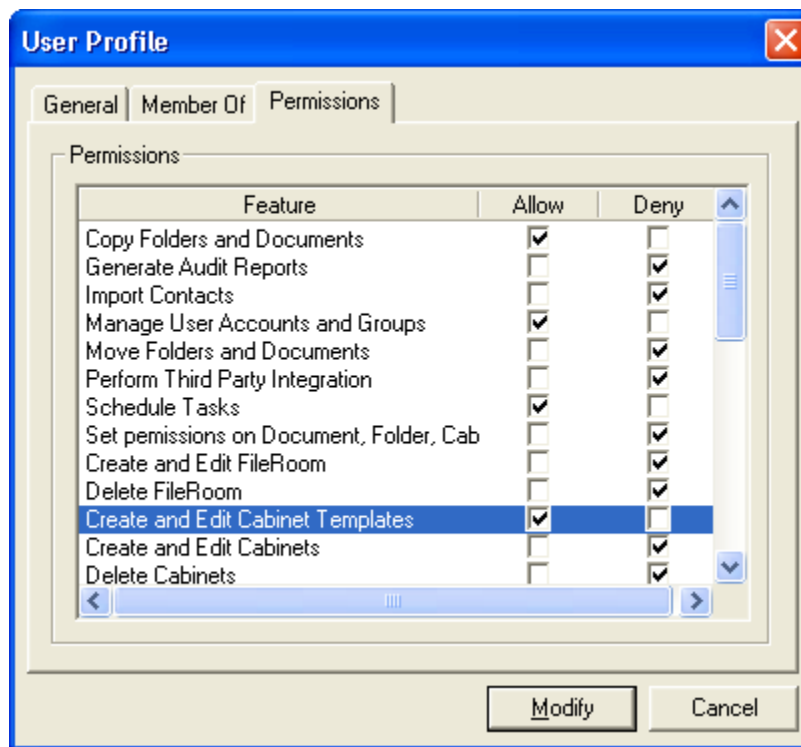
6. Select **Allow** or **Deny** for each feature of **etfile** you want the **User** to have permissions to use.

Modifying a Group

Use any of the following options to modify a **Group**,
- Select the **Group** in console tree and use **Action – Modify Group** menu.
- Right click the **Group** in console tree and use **Modify Group** option.
- Double click the **Group** in the console tree.
- Double click the **Group** in the list view on the right hand side.
- Right click the **Group** in the list view on the right hand side and use **Modify Group** option.

All dialogs and operations for modifying a **Group** are same as creating new **Group**. Please refer to the section on creating new **Group** for details.

- It is not possible to modify a name and permissions of standard (**etfile** predefined) **Groups**.

Modifying a User

Use any of the following options to modify a **User**,
- Select the **User** in console tree and use **Action – Modify User** menu.
- Right click the user in console tree and use **Modify User** option.
- Double click the **User** in the console tree.
- Double click the **User** in the list view on the right hand side.
- Right click the **User** in the list view on the right hand side and use **Modify User** option.

All dialogs and operations for modifying a **User** are same as creating new **User**. Please refer to the section on creating new **User** for details.

- All attributes of **User** can be modified except the **User ID.**
- It is not possible to modify name and permissions of standard (**etfile** predefined) **Users**.

Deleting a Group

To delete a **Group**, select the **Group** in the console tree and use **File – Delete Group** menu option.
- It is not possible to delete standard **Groups**.

Deleting a User

To delete a **User**, select the **user** in the console tree and use **File – Delete User** menu option.
- It is not possible to delete standard **users**. If you delete a **user** you will not be able to run reports on this **User** in the AUDIT Tool.

# Setting a Security Policy for User Passwords

Introduction:

The purpose of this section is to describe how to set a Security Policy for **Users** of **etfile**. Setting a **Security Policy** ensures a more secure method for User's passwords. Each **User** of **etfile** has the ability to select the **Change** option at the etfile Login in order to change their password anytime. When a Security Policy is setup the **User** has to follow a certain criteria in order to set up their password.
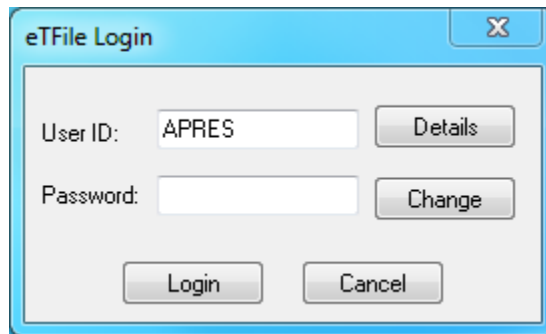


To Set a security Policy:

1. Log into **etfile Security Manager.**

2. On the top right menu bar Select **Actions-Set Security Policy.**
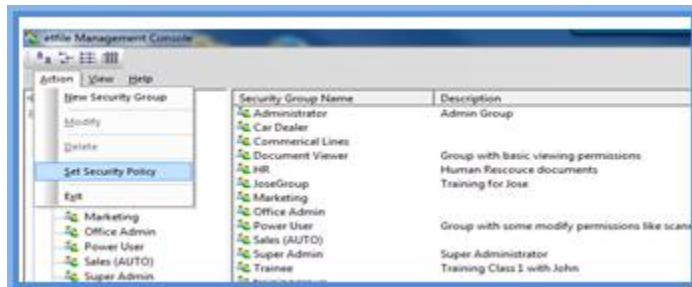
3. The **Security Policy** window will display. Select the options you want to set and select **OK**.

4. If a **User** tries to log into etfile with a password that does not meet the criteria set for the **Security Policy** the message below will display for the **User** which describes the policy so they can reset the password accordingly.
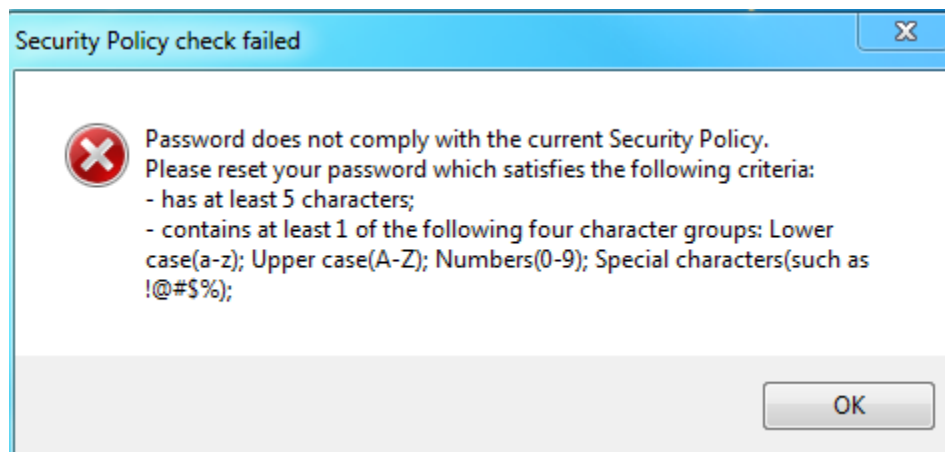
Resetting a User's Password

If a **User** forgets their password log into the **Management Console** to reset the password.

1. Right click on the **User** and select **Modify User.**

2. On the **General** Tab of the **User Profile** screen type in a **Password** and type it a second time in the **Confirm Password** field for this **User**.

3. Select **Modify** and provide the **User** with the new password. The **User** can select **Change** at the login screen to change their password.