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CLINIC

# ENTERPRISE MANAGER SECURITY

HOME &  
MOBILE

BEAUTY



*it suits you*

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## ABOUT THIS DOCUMENT

Working hand in hand with Shortcuts Fusion at your individual sites, Enterprise Manager provides you with the power and flexibility to make fast and intelligent decisions to enhance and grow your business.

With Enterprise Manager, you can configure items such as products, services, sundry items, payment options, employee details, security levels and much more!

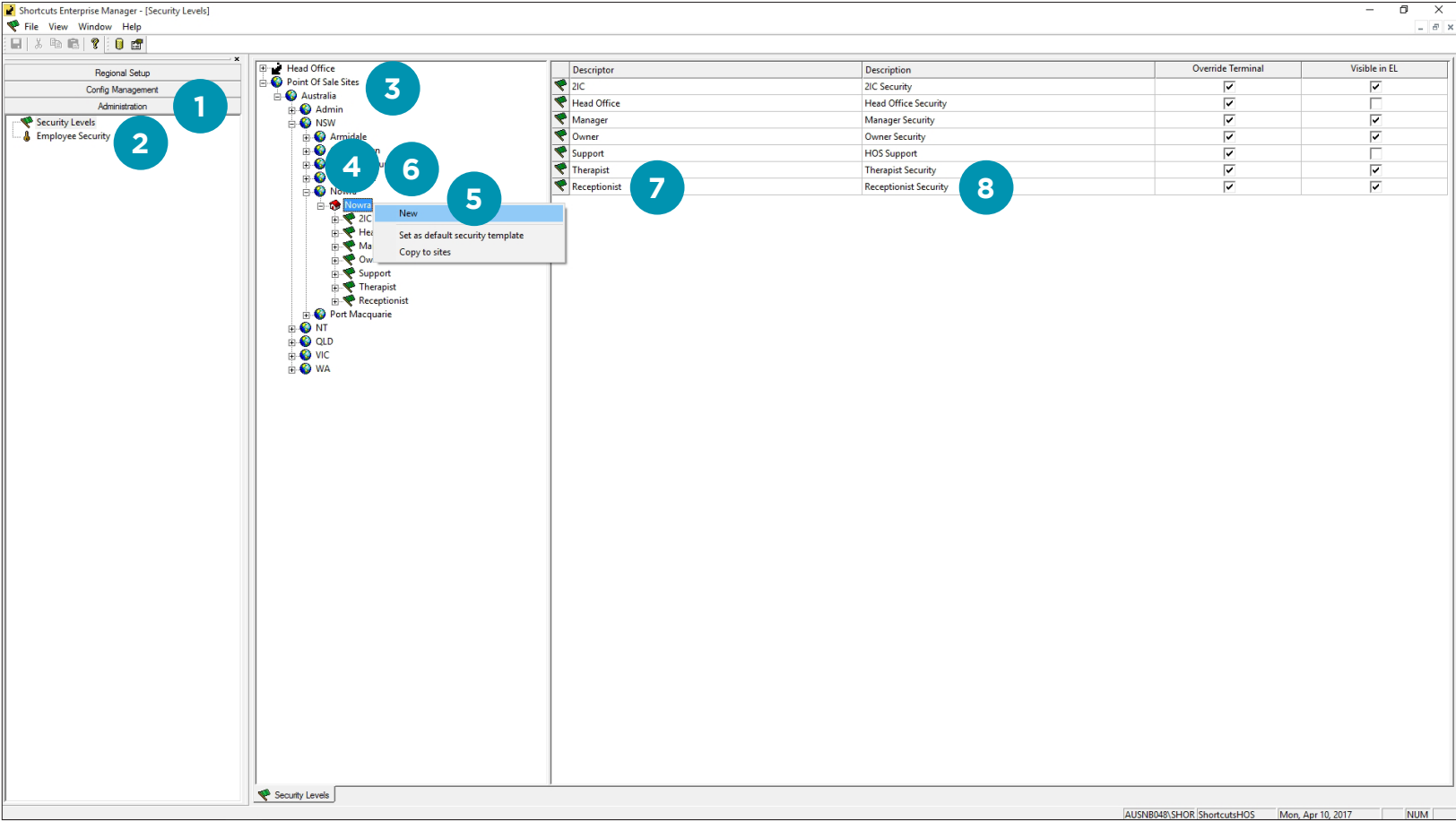
This document is designed to give you a helping hand when it comes to setting up and managing your sites in Enterprise Manager.

# SHORTCUTS FUSION SECURITY

## ADDING A SECURITY LEVEL

Security levels allow you to determine which actions, items and screens employees have access to in Shortcuts Fusion. Security levels for Shortcuts Fusion are defined at site level. Once you have created security levels and specified their permissions, you must then assign the relevant employees to each security level.

- 1 Click on the **administration** menu.
- 2 Double click on **security levels**.
- 3 Double click to expand **point of sale sites** and subsequent regions to display the site that you want to update.
- 4 Right click on the site you want to add a security level for.
- 5 Select **new**.
- 6 Click on the relevant site in the tree to update the new level's name in the grid on the right hand side.
- 7 Enter the name of the security level.
- 8 **Optional:** Enter a description.



9

Tick the **override terminal** box if you want employees within this security level to be able to access their defined areas regardless of the security settings for terminals. It is highly recommended that this box is ticked.

10

Tick the **visible in EL** box if you want to make this security level available in Enterprise Live.

11

Click **save** to save your progress.

The screenshot shows the 'Shortcuts Enterprise Manager - [Security Levels]' application. On the left, a tree view displays a hierarchy of sites: Head Office, Point Of Sale Sites, Australia, Admin, NSW, Armidale, Charlestown, Coffs Harbour, Crows Nest, Nowra, and Port Macquarie. Under 'Nowra', there are sub-items: 2iC, Head Office, Manager, Owner, Support, Therapist, Receptionist, Actions, Items, and Screen. The 'Receptionist' item is selected. On the right, a table lists security levels with columns for 'Descriptor', 'Description', 'Override Terminal', and 'Visible in EL'. The 'Receptionist' row is highlighted, and callout 9 points to the 'Override Terminal' checkbox, which is checked. Callout 10 points to the 'Visible in EL' checkbox, which is also checked. Callout 11 points to the 'Save' button in the top-left toolbar. The status bar at the bottom right shows 'AUSNB048.SHOR ShortcutsHOS | Mon, Apr 10, 2017 | NUM |'.

Descriptor	Description	Override Terminal	Visible in EL
2iC	2iC Security	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Head Office	Head Office Security	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Manager	Manager Security	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	Owner Security	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Support	HOS Support	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Therapist	Therapist Security	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Receptionist	Receptionist Security	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

12

Double click on **actions** to view the different actions that security can be applied to. Note that some of these actions have sub-actions. Double-click on an action category to view sub-actions.

13

Tick the **no access** box to restrict access to an action for the selected security level. A tick means employees in this security level will NOT have access.

14

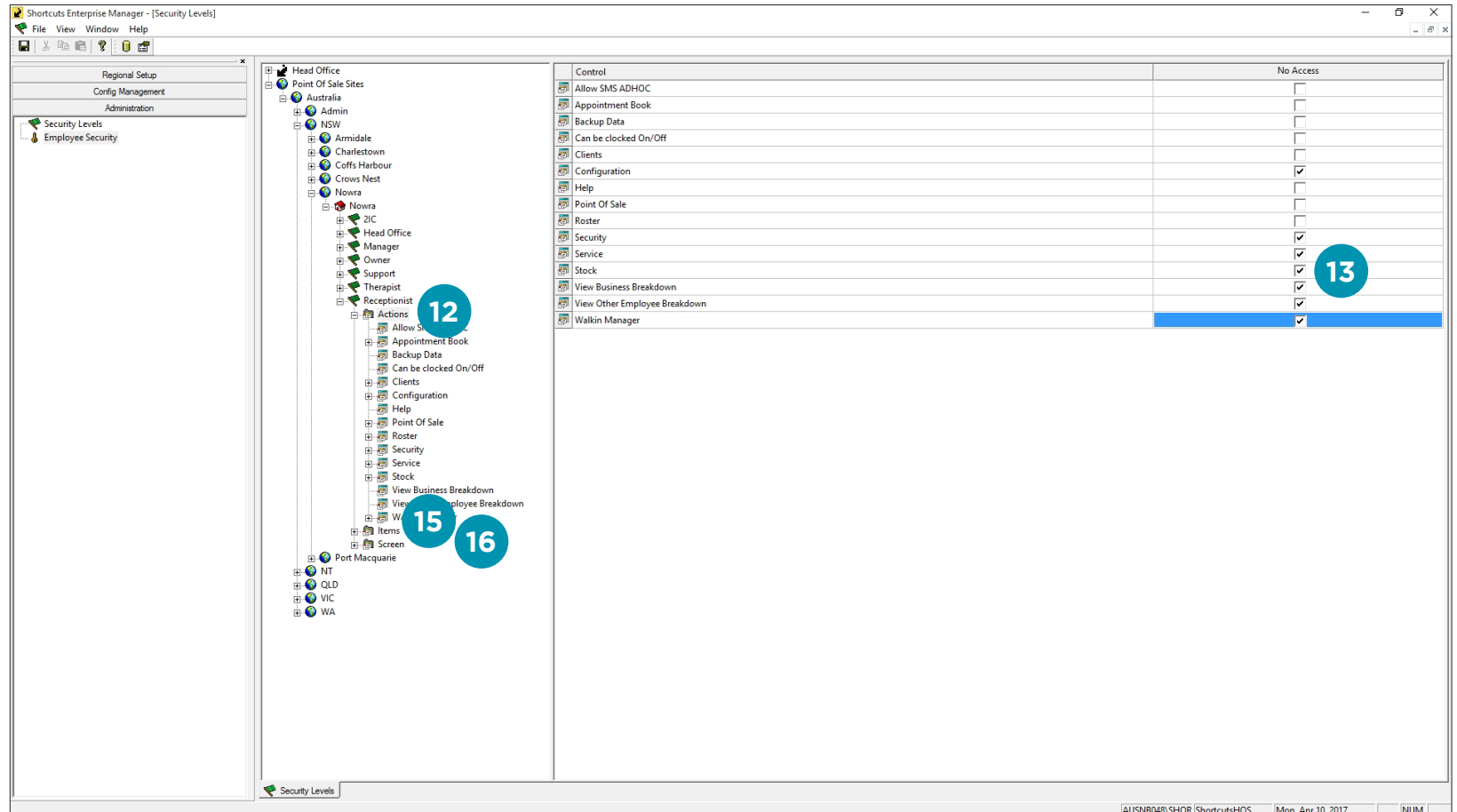
If you tick/untick the **no access** box for an action that has sub-actions (e.g. Appointment Book), a popup window will appear asking if you would like to change the child controls. Click **yes** to apply this setting to the sub-actions within this category, or **no** to leave the sub-actions in their current state.

15

Repeat steps 12 - 14 for **items** to define security for different items.

16

Repeat steps 12 - 14 for **screens** to define security for different screens.



17

Click **save**.

The screenshot shows the 'Shortcuts Enterprise Manager - [Security Levels]' application. The interface is divided into several sections:

- Left Panel:** A navigation tree showing a hierarchy of sites. The 'Nowra' site is expanded, showing roles like 'Head Office', 'Manager', 'Owner', 'Support', 'Therapist', and 'Receptionist'. Under 'Receptionist', there is an 'Actions' folder containing various permissions such as 'Allow SMS ADHOC', 'Appointment Book', 'Backup Data', etc.
- Top Panel:** A breadcrumb trail showing 'Regional Setup' > 'Config Management' > 'Administration' > 'Security Levels' > 'Employee Security'.
- Right Panel:** A table with two columns: 'Control' and 'No Access'. The 'Control' column lists various permissions, and the 'No Access' column contains checkboxes. The 'Walkin Manager' row is highlighted in blue, and its checkbox is checked.

Control	No Access
Allow SMS ADHOC	<input type="checkbox"/>
Appointment Book	<input type="checkbox"/>
Backup Data	<input type="checkbox"/>
Can be clocked On/Off	<input type="checkbox"/>
Clients	<input type="checkbox"/>
Configuration	<input checked="" type="checkbox"/>
Help	<input type="checkbox"/>
Point Of Sale	<input type="checkbox"/>
Roster	<input type="checkbox"/>
Security	<input checked="" type="checkbox"/>
Service	<input checked="" type="checkbox"/>
Stock	<input checked="" type="checkbox"/>
View Business Breakdown	<input checked="" type="checkbox"/>
View Other Employee Breakdown	<input checked="" type="checkbox"/>
Walkin Manager	<input checked="" type="checkbox"/>

At the bottom right of the window, the status bar displays: AUSNB048\SHOR ShortcutsHOS | Mon, Apr 10, 2017 | NUM

## COPYING A SECURITY LEVEL

After you have created or modified your security levels for one site, you may want to copy that security level to the rest of your sites. You can choose to copy all the security levels from a site at once, or you can copy an individual security level.

1

Click on the **administration** menu.

2

Double click on **security levels**.

3

Double click to expand **point of sale sites** and subsequent regions to display the site/security levels you want to copy from.

4

Right click on the site name if you want to copy all of its security levels, or right click on an individual security level to just copy that level.

5

Select **copy to sites**.

6

Select the sites you want to copy to from the **available sites** list.

7

Click on the > arrow to move your selection to the **selected sites** list on the right. Alternatively, click on the >> arrow to select all sites.

8

Click **OK**.

The screenshot shows the 'Shortcuts Enterprise Manager - [Security Levels]' application. The interface is divided into several panes. On the left, a tree view shows a hierarchy: 'Point Of Sale Sites' > 'Australia' > 'Admin' > 'NSW' > 'Armidale'. A right-click context menu is open over 'Armidale', with 'Copy to sites' selected. A 'Copy to sites' dialog box is overlaid on the bottom right. It has two columns: 'Available Sites' and 'Selected Sites'. The 'Available Sites' list contains many site paths, with 'Australia > QLD > Capalaba > Capalaba' selected. The 'Selected Sites' list contains 'Australia > QLD > Noosaville > Noosaville' and 'Australia > QLD > Robina > Robina'. Navigation arrows are between the lists, and an 'OK' button is at the bottom right.

Category	Description
Actions	Actions in the Application
Items	Items in the Application
Screen	Application Windows

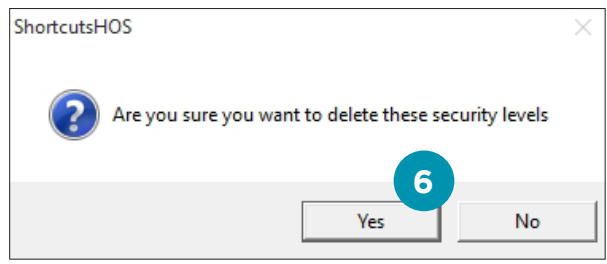
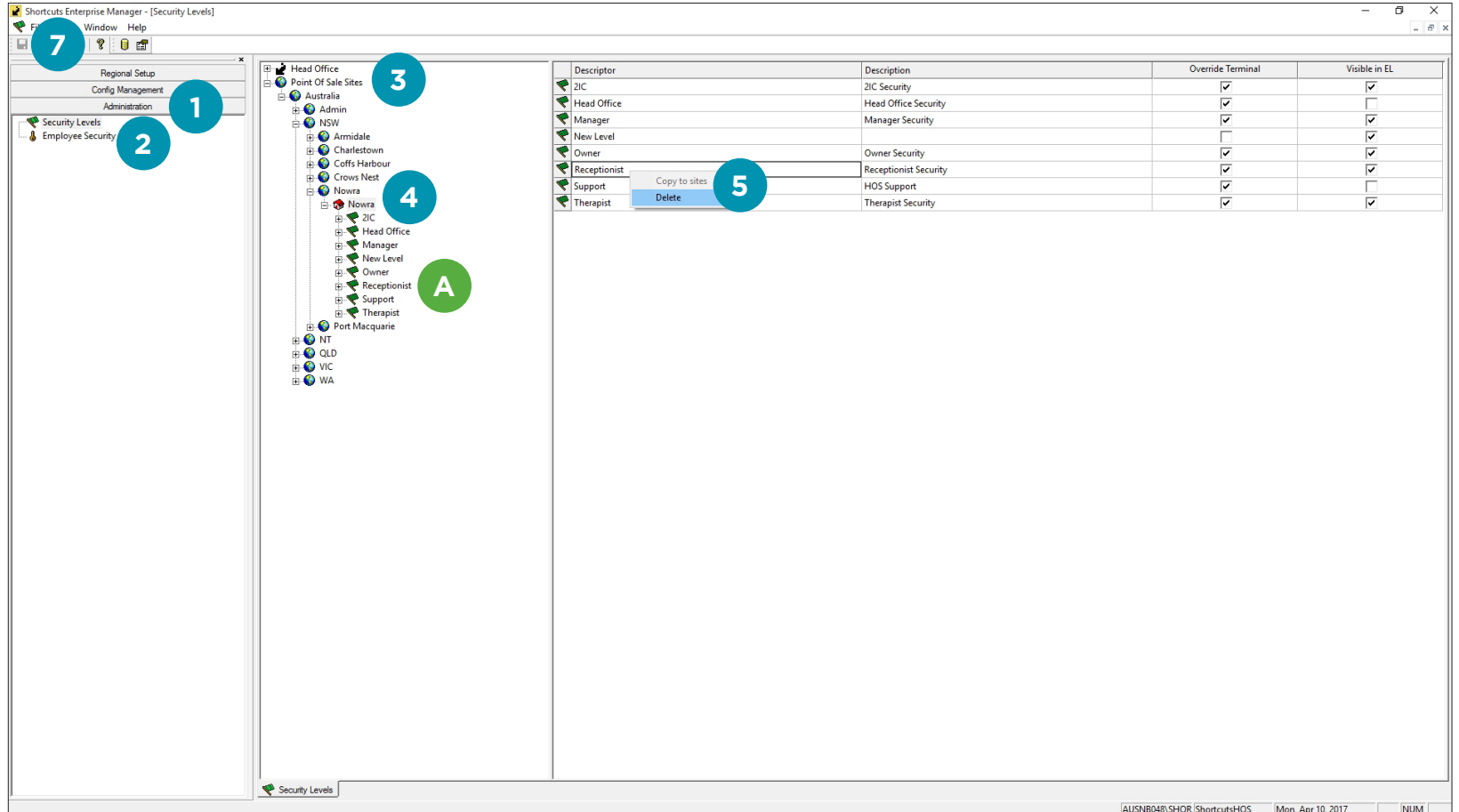
Available Sites	Selected Sites
Australia > Admin > AdminPOS	Australia > QLD > Noosaville > Noosaville
Australia > NSW > Armidale > Armidale	Australia > QLD > Robina > Robina
Australia > NSW > Charlestown > Charlestown	
Australia > NSW > Coffs Harbour > Coffs Harbour	
Australia > NSW > Crows Nest > Crows Nest	
Australia > NSW > Port Macquarie > Port Macquarie	
Australia > NT > Fannie Bay > Fannie Bay	
Australia > QLD > Capalaba > Capalaba	
Australia > QLD > Cleveland > Cleveland	
Australia > QLD > Hamilton > Hamilton	
Australia > QLD > Post Office Square > Post Office Square	
Australia > QLD > Toowoomba > Toowoomba	
Australia > VIC > Bendigo > Bendigo	
Australia > VIC > Camberwell > Camberwell	
Australia > VIC > Collins Square > Collins Square	
Australia > VIC > Doncaster > Doncaster	
Australia > VIC > Echuca > Echuca	
Australia > WA > Kalgoorlie > Kalgoorlie	
Australia > WA > Morley > Morley	



## DELETING A SECURITY LEVEL

If a security level is no longer in use and no employees are assigned to the level, you may delete the security level.

- 1 Click on the **administration** menu.
- 2 Double click on **security levels**.
- 3 Double click to expand **point of sale sites** and subsequent regions to display the site that you want to update.
- 4 Double click on the site to view its security levels in the grid on the right.
- ! You can only delete a security level if there are no employees assigned to the level.
- 5 Right click on the level you want to delete and select **delete** from the popup menu.
- A Alternatively, right click on the level in the tree and select **delete** from the popup menu.
- 6 Click **yes** to confirm.
- 7 Click **save**.



## ASSIGNING EMPLOYEES TO SECURITY LEVELS

Once you have set up security levels, you must then assign each employee to their appropriate security level. Employees can only be assigned one security level per site.

1

Click on the **administration** menu.

2

Double click on **employee security**.

3

Double click to expand the **global** region and subsequent regions to display the site that you want to update.

4

Double click on the relevant site to view the security levels for that site.

5

Find the employee you want to assign to a security level. They may be displayed under a security level, or in the **unassigned employees** list, and will always be displayed in the **all employees** list.

6

Right click on the relevant employee and select **cut** or **copy** from the popup menu.

The screenshot shows the Shortcuts Enterprise Manager interface for Employee Security. The interface is divided into several sections:

- Left Panel (Navigation):** Contains a tree view of the organization structure. The 'Global' region is expanded, showing sub-regions like 'Australia', 'NSW', and 'Nowra'. The 'Nowra' region is further expanded to show a list of employees: Alice, Denied, Head Office, Lauren, Manager, Claire Cooper, Owner, Business, Chrissy Jones, Receptionist, Jess M, Maria, Support, Stacy Patterson, Therapist, Fiona, Georgia Drew, Jasmine, Kate, Patrick Greer, Shelly, and Tracey. A right-click context menu is open over the 'Georgia Drew' employee, showing options: Cut, Copy, and Delete.
- Top Panel (Menu):** Shows the 'Administration' menu with 'Employee Security' selected.
- Right Panel (Table):** Displays a table of security levels with columns for 'Security Level', 'Description', and 'Default'. The table contains the following data:

Security Level	Description	Default
2IC	2IC Security	No
Denied	No Access	No
Head Office	Head Office Security	No
Manager	Manager Security	No
Owner	Owner Security	No
Receptionist	Receptionist Security	No
Support	HOS Support	No
Therapist	Therapist Security	No

The status bar at the bottom of the window shows the file path 'AUSNB048.SHOR.ShortcutsHOS', the date 'Mon, Apr 10, 2017', and the user 'NUM'.

7

Right click on the desired security level in the site where the employee works (this can be the same site or a different site) and select **paste** from the popup menu.

8

Click **save**.

The screenshot shows the Shortcuts Enterprise Manager interface for Employee Security. On the left, a tree view displays a hierarchy of sites. A right-click context menu is open over the 'Clan' site, with the 'Paste' option highlighted. A red circle with the number '7' is placed over the 'Paste' option. On the right, a table displays employee details. A red circle with the number '8' is placed over the 'Save' button in the top-left corner of the application window.

Surname	First Name	Comments
Cooper	Claire	

Employee Security

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