

Chapter 1.02: Security Level Codes and Login Policies

Overview

To maintain “law and order” in your system, it is necessary to set up security options that match the needs of your organization. Smaller companies may not require strict security settings, while others, such as large multi-branch companies may take advantage of the security options built into the system to establish a more secure environment.

Introduction

This chapter has been designed to help you establish a secure system based on *Security Level Codes* and *Login Policies*.

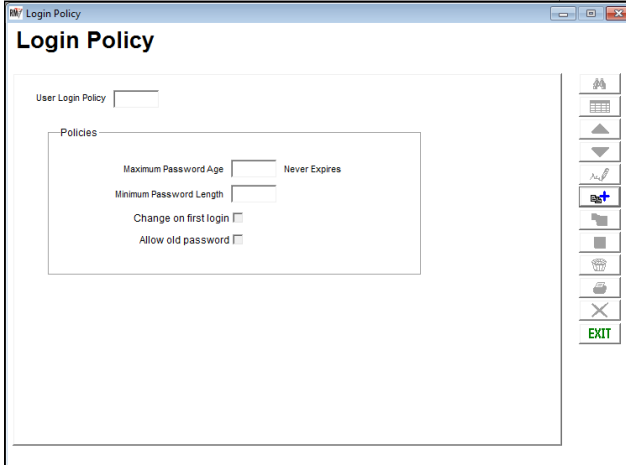
The topics covered include:

- ▶ Setting up of Login Policies
- ▶ Basics of Security Level Codes
- ▶ Setting up Security Level Codes
- ▶ Establishing Security with Employees

Setting up Login Policies (Optional)

Using *Login Policies* in Route Manager is entirely your preference. This option allows you to add a level of security by forcing each user to update their password information periodically.

A typical *Login Policy* created for a standard user is shown below (*Login Policy* is found under *Lists > Employee Setup*):



The Login Policy option allows you to establish the following information:

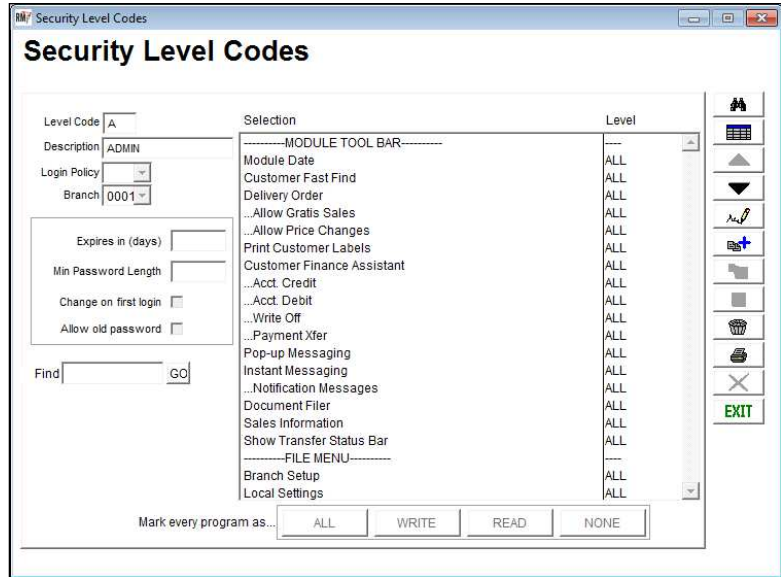
- ▶ **Maximum Password Age:** Establish the number of days that will pass before the system prompts the user for a new password.
- ▶ **Minimum Password Length:** Enter the minimum number of characters required for the password length.
- ▶ **Change on first login:** Select this option to require that each user change their password the first time they log in to Route Manager.
- ▶ **Allow old password:** Select this option if each user will be allowed to use their old passwords when the current password expires.

Create all of the *Login Policies* your company will use, and continue to the next section.

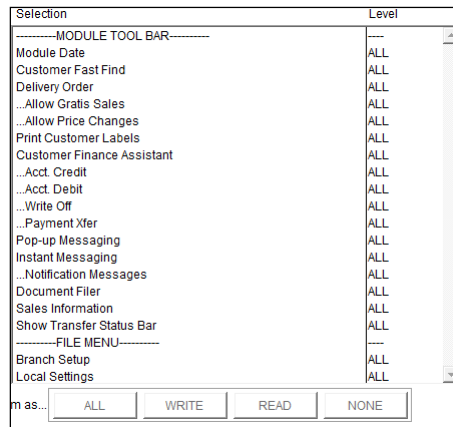
Setting up Security Level Codes

Security Level Codes control the level of access granted to each user in Route Manager, and can be found under *Lists > Employee Setup*.

Listed on the right portion of the screen, you can control the level of access granted to each area of the program. The screen below displays a standard 'Admin' code. Each employee assigned to this code will have full access to the system, since all of the items in the list are set to 'All' access.



Changing the access level is as simple as double-clicking on each item as you scroll down the list.



Four levels of access can be assigned to most of the items in the list:

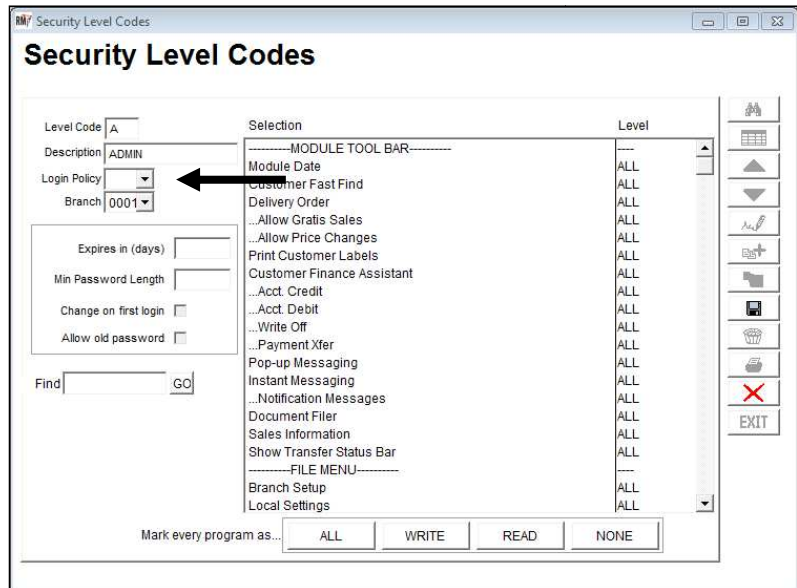
- ▶ **ALL (Full Access):** Gives the user the ability to modify, add, and delete data.
- ▶ **WRITE:** Gives the user the ability to modify and add data.
- ▶ **READ:** Gives the user the ability to view the data only.
- ▶ **NONE:** Restricts the user from viewing the data.

NOTE: Not all four of the access options are available on some items within the list.

Additionally, you can mark all of the items as ALL, WRITE, READ, or NONE globally by clicking one of the buttons on the bottom of the *Security Level Codes* screen:



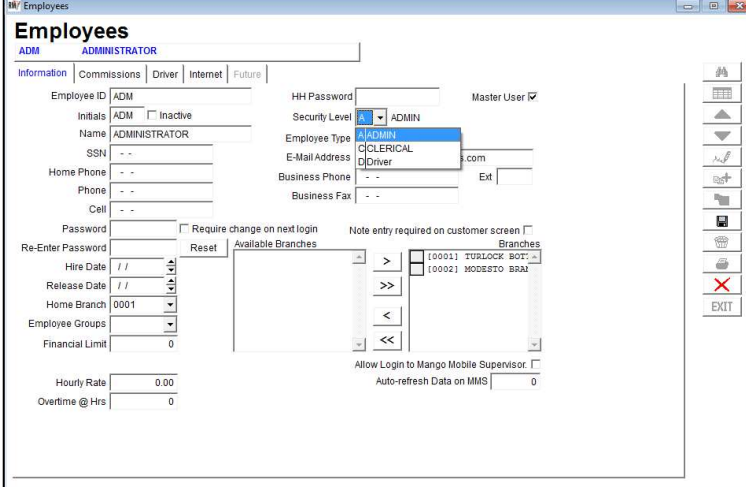
If you are using the Login Policy option (discussed earlier), assign a policy to each Security Level Code.



Create all of the *Security Level Codes* that will be needed in your company (e.g., Admin, Clerical, Drivers).

Establishing Security with Employees

Assign the appropriate *Security Level Code* to each employee under *Lists > Employee Setup > Employees*, on the *Information* tab.



The screenshot shows the 'Employees' information tab. The 'Security Level' dropdown is set to 'ADMIN'. The 'Master User' checkbox is checked. Other fields include Employee ID (ADM), Name (ADMINISTRATOR), SSN, Home Phone, Phone, Cell, Password, Re-Enter Password, Hire Date, Release Date, Home Branch (0001), Employee Groups, Financial Limit (0), Hourly Rate (0.00), and Overtime @ Hrs (0). The 'Available Branches' list shows two entries: [0001] TURLOCK BOT and [0002] MODESTO BRAN.

After selecting the *Security Level Code*, establish a password for each employee — Advantage Route Systems always recommends password protecting the system.

Another important option is the 'Master User' checkbox on the top-right portion of the *Employees Information* tab.

Master User

The 'Master User' option will enable the user to setup and view *Security Level Codes* within the system. Generally, only administrative users should have this option selected.

Summary

Please take advantage of the added security options we have included within the Route Manager program. Teamed with the security of your network, these options will contribute to a safe and secure environment.



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Advantage Route Systems, Inc.

3201 Liberty Square Parkway

Turlock, CA 95380 USA

Phone: 1.209.632.1122

Web Site: www.AdvantageRS.com

Email: info@AdvantageRS.com

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Series 7: Version Date, January 6, 2016