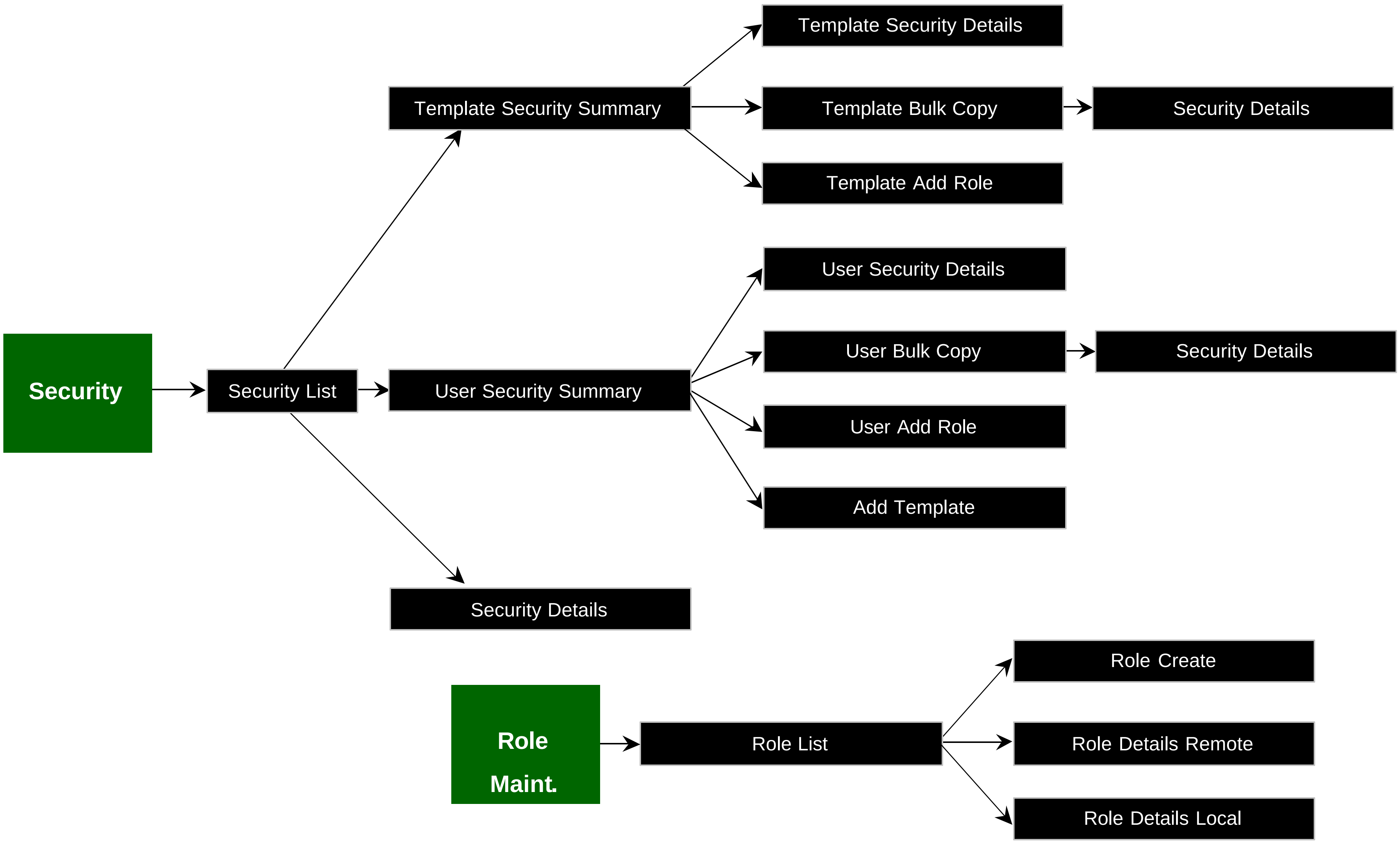
Security
Security List
Template Security Summary
Template Security Details
Template Bulk Copy
Security Details
Template Add Role
User Security Summary
User Security Details
User Bulk Copy
Security Details
User Add Role
Add Template
Security Details
Role Maint.
Role List
Role Create
Role Details Remote
Role Details Local

Security

Manage Users: Create New User

Security → **Security List** → **User Security Summary**

1. On the **Security List** page, choose where you want the new user to be added by selecting the *Select View, HQ Office, Hub,* and *Field Office.*

   Note: Dropdown menu options are dependent on what was selected in the previous dropdown menus.

2. Click on the **<u>Create New User</u>** link.
3. Enter the required information into the text boxes.

   Note: Blue asterisks indicate required information.

4. Select what type of user you want to create.
5. Select if the user’s rights will be active or not.
6. Save the information by clicking on the **Save** button. You will be taken to the **Security Summary** page for the user you just created.

Manage Users: Modify a User

Security → **Security List** → **User Security Summary** → **User Security Details**

1. From the **Security List** page, click on the user you want to modify in the table provided. You will now be on the **Security Summary** page for that user.
2. Click on the **Modify User** link. The names of HUD users cannot be modified.
3. Modify the information as needed in the text boxes.
4. Save the information by clicking on the **Save** button.
5. Once the information is saved, you will be returned to the **Security Summary** page for that user.

Manage Users: Add Role to Users

Security → **Security List** → **User Security Summary** → **User Add Role**

1. From the **Security List** page, click on the user to whom you want to add a role. You will now be on the **Security Summary** page for that user.
2. Select the *Module* and *Sub-module* for the role you want to add.
3. Click on the **Add Role** link. You will now be on the **Add Role** page for that user.
4. Select *Role* from the dropdown menu.
5. Click on the **View Actions** button and review the actions for the role you chose.
6. Click on the **Close Actions** button to return to the **Add Role** page.
7. Select *Security* from the dropdown menu. The user will have access for all entities below the chosen access point in the HUD hierarchy.
8. Click on the **Save** button. The role will be added to that user in the Role table.
9. Once the information is saved, you will be returned to the **Security Summary** page for that user.

Manage Users: Copy User Rights to User

Security → **Security List** → **User Security Summary** → **User Bulk Copy**

1. From the **Security List** page, click on the user whose rights you want to copy to another user. You will now be on the **User Security Summary** page.
2. Select *Module* and *Sub-module* from the dropdown menu.

   Note: The Sub-module dropdown menu defaults to User Profile. You need to select a different Sub-module since once a user is created, they are automatically given rights to the User Profile and there is nothing else that can be allocated for that role.
3. Click on the **<u>Copy Rights to User</u>** link. You will now be on the **User Bulk Copy** page.
4. Review the user information.
5. In the Resources section, select the staff member to whom you want to apply the rights. Rights can only be copied between users of the same user type.
6. Click on the right arrow button. The selected user(s) will copy to the *Copy Selected Staff* text box.
7. Click on the **Copy** button. The selected user(s) will now have access to those rights that were copied. You will be returned to the **Security Summary** page for the user whose rights you copied.

Manage Users: Add Template to Users

Security → **Security List** → **User Security Summary** → **Add Template**

1. From the **Security List** page, click on the user to whom you want to add a template. You will now be on the **User Security Summary** page.
2. Select *Module* and *Sub-module* from the dropdown menu.

   Note: The Sub-module dropdown menu defaults to User Profile. You need to select a different Sub-module because once a user is created, they are automatically given rights to the User Profile and there is nothing else that can be allocated for that role.
3. Click on the **Add Template** link.
4. Review the user information.
5. Review the Template Table.
6. Select the desired template in the Template Table to be added to the user by clicking the **Apply** checkbox next to the template name.
7. Click on the **Save** button. The template will be added to the user.

Manage Templates: Create a Template

Security → **Security List** → **Template Security Summary** → **Template Security Details**

1. From the **Security List** page, click on the **Create New Template** link.
2. Enter a name in the *Template Name* text box.
3. Select the type of template you want to create.
4. Select whether or not the template will be active.
5. Enter a description in the *Template Description* text box.
6. Click on the **Save** button. The template will be created. You will be taken to the **Security Summary** page for the template you just created.

   Note: Only Super Users will have access to this page.

Manage Templates: Add a Role to a Template

Security → **Security List** → **Template Security Summary** → **Template Add Role**

1. From the **Security List** page, click on the template to which you want to add a role. You will now be on the **Security Summary** page for that template.
2. Select the *Module* and *Sub-module* from the dropdown menus of the role you want to add.
3. Click on the **<u>Add Role</u>** link. You will now be on the **Add Role** page for that template.
4. Select *Role* from the dropdown menu.
5. Click on the **View Actions** button and review the actions for the role you chose.
6. Click on the **Close Actions** button to return to the **Add Role** page.
7. Select *Security* from the dropdown menus. The template will have access for all entities below the chosen access point in the HUD hierarchy.
8. Click on the **Save** button. The role will be added to the template.

Manage Templates: Modify a Template

Security → **Security List** → **Template Security Summary** → **Template Security Details**

1. From the **Security List** page, click on the template you want to modify in the table provided. You will now be on the **Security Summary** page for that template.
2. Click on the **Modify Template** link.
3. Modify the information as needed in the text boxes.
4. Save the information by clicking on the **Save** button.
5. Once the information is saved, you will be returned to the **Security Summary** page for that template.

Note: Only Super Users will have access to this page.

Manage Templates: Copy Template Rights to Users

Security → **Security List** → **Template Security Summary** → **Template Bulk Copy**

1. From the **Security List** page, click on the template you want to copy to a user. You will now be on the **Template Security Summary** page.
2. Click on the **Copy Template to User** link. You will now be on the **Template Bulk Copy** page.
3. Review the template information.
4. In the Resources section, select the staff member to whom you want to add the template.
5. Click on the right arrow button. The selected user(s) will copy to the *Copy to Selected Staff* text box.
6. Click on the **Copy** button. The selected user(s) will now have access to the template rights. You will be returned to the **Security Summary** page for the template whose rights you copied.

Manage Roles: Create New Role

1. From the **Role Maintenance** tab, go to the **Role List** page.
2. Select the M*odule* and *Sub-module* for whom you want to create a role.
3. Click on the **Create Role** link. You will now be on the **Role Create** page.
4. Enter the *Role Name* and *Role Description*.
5. Select the *User Type* from the dropdown menu.
6. In the Actions table, select the desired action(s) you want the role to have. You may select as many as needed.
7. Click on the **Save** button. The role will now be created and added to the database. You will be returned to the **Role List** page.

Manage Roles: Copy Remote Role to Local Role

1. Go to the **Role List** page.
2. Click on either the global or local role you want to copy. Regardless of the category of the role, all roles are remote to you if you did not create them yourself. You will now be on the **Role Details** page for that role.
3. Click on the **Copy to Local** button. The role will now be copied to your local list of roles.
4. Once the role is copied, you can either modify the role or apply the role to users.

Manage Roles: Modify Local Role

Role Maintenance → **Role List** → **Role Details Local**

1. Go to the **Role List** page.
2. Click on a local role that you created. You will now be on the **Role Details** page for that role.
3. To delete the role, click on the **Delete** button. The role will be removed from your list of roles.
4. Select or deselect the desired actions to add or remove actions from that role.
5. Click on the **Save** button. The role will be saved to your list of roles.