C H A P T E R 8
Security

Security

Chapter Contents

This chapter will show you how to setup login-based security for your Smartroster users which implements levels of authority and allows users to edit and access relevant data while preventing alteration to data or schedules to which they are not authorised. This is great for allowing Role or Role-group coordinators or Event coordinators to create their own schedules while preserving the integrity of data outside those areas.

Login Authentication

Smartroster can be run with or without the requirement for login authentication.

Login authentication is turned off by default. While security is off anyone who has access to the file will be able to turn it on and create logins. Once it is on then only a System Administrator (SysAdmin) can add, delete, or change logins.

Limitations

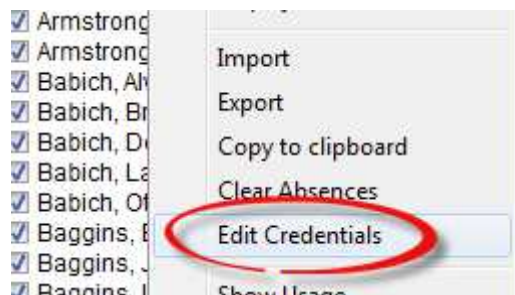Login authentication is not available in SmartrosterLite.

To turn ON login authentication

Select menu File > Options, and tick the checkbox as shown below:
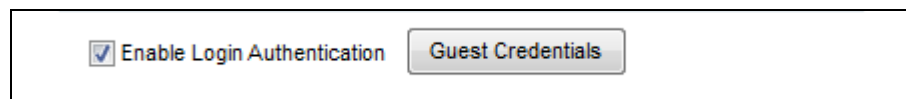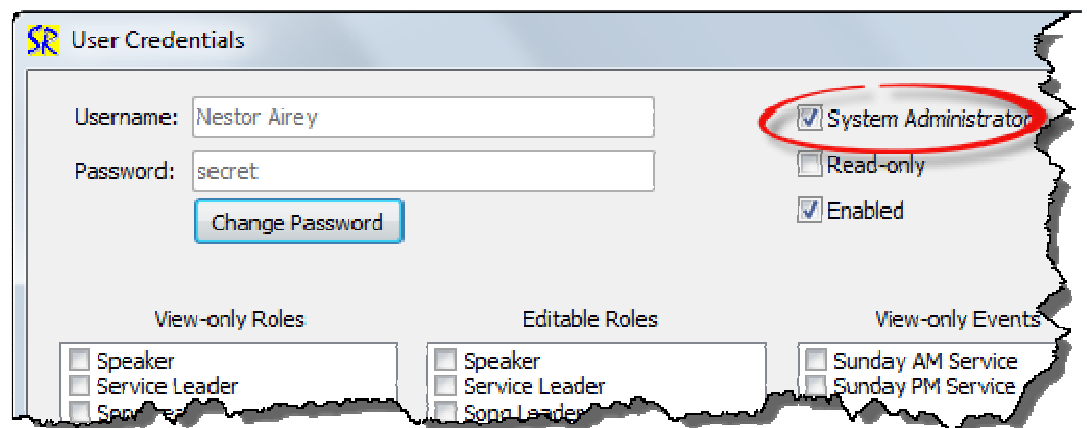

Then click OK to save.

Now you must create at least 1 system administrator. Right click on the person in the People panel as shown. Select "Edit Credentials"

You will then see the User Credentials dialog as show:

Tick "System Administrator". Then click "Change Password" to create a password.

Click Save to save your changes. Now you have created your first system administrator ("SysAdmin" for short).

Now save your datafile (File > Save or click on the save icon on the toolbar).

From now on this Smartroster datafile will require a user login to open and edit the data.

User Credentials

The same dialog is used to define all login users for your system. This defines exactly what a user can and cannot do with the data.

System Administrator (SysAdmin)

This login user (can be more than one) has unrestricted access to all the data in the file as well access to changing login user credentials.

In general, any user who is NOT a system administrator cannot edit details of any Event regardless of the permission granted below. They will be able to adjust details of Roles to which they have permission to edit but will NOT be able to create a new Role nor remove any existing Role. To do this they will need to ask a SysAdmin. Also they cannot in general edit the Person details except for those persons that are role members for Roles they are allowed to edit.

The main reason for creating login accounts which are not SysAdmin is to allow them to create a schedule for a generally restricted range or roles or even a single role, and a restricted range of Events or even a single event, without inadvertently or accidentally changing data that may affect other users of SmartRoster (for that database).

Read-only

Tick "Read-only" to make a login user read-only. They will be limited in what they can see by the other elements of the User Credentials dialog, but under no circumstances will they be able to make or save changes to anything in the Smartroster database.
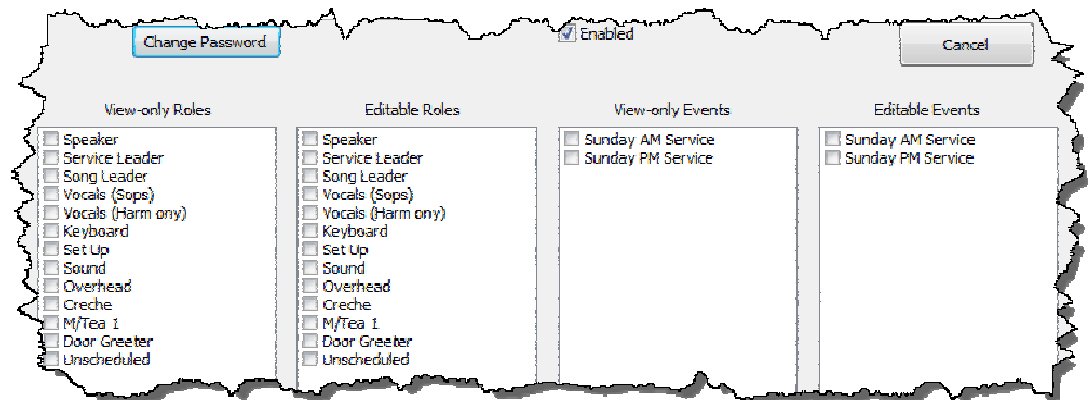
Enabled

Tick "enabled" to enable this user login. The SysAdmin can use this to temporarily disable a particular user login without losing the user credentials.

Change Password

Click on the "Change Password" button to create or change a password for the user.

Event and Role restrictions

Finally you can restrict what a login user can see and edit by role and event. Typically a user may want to schedule only a subset of Roles but take into account the personnel absences and association preferences already entered. In this case you can make all roles viewable but restrict which roles they can edit. You can also restrict which events can be viewed and which edited.

(See note above under SysAdmin for further restrictions applied to NON SysAdmins).

A logged-in user will also only be able to edit the personal details for persons who are members or role which they are able to edit.

The SysAdmin can of course view and edit any details.

Saving the User Credentials

Once you have created this template save it by clicking "Save". You can at this point create more user credentials for all the other users who will be logged into the Smartroster database. You can come back later if you wish to finish creating user credentials. You can also edit user credentials at any time if you are logged in as a SysAdmin. Don't forget to save all your changes with File > Save or clicking on the Save icon on the toolbar.

Guest Credentials

You can define a set of credentials to be active if a person clicks on "Guest Login" in the main login dialog instead of entered a username/password.

To create Guest credentials select File > Options and click on the "Guest Credentials" button (only SysAdmin can do this of course). Set the credentials as you would for any other user. Click save to save these credentials (and File > Save to update the database).

Once Guest Credentials have been created by the SysAdmin, the "Guest Login" button will be active. If this is clicked then the person will login as "Guest" and will be able to see and do whatever is permitted by the guest credentials.

Logging into Smartroster

When you start Smartroster after setting up Login Authentication you will see the following dialog
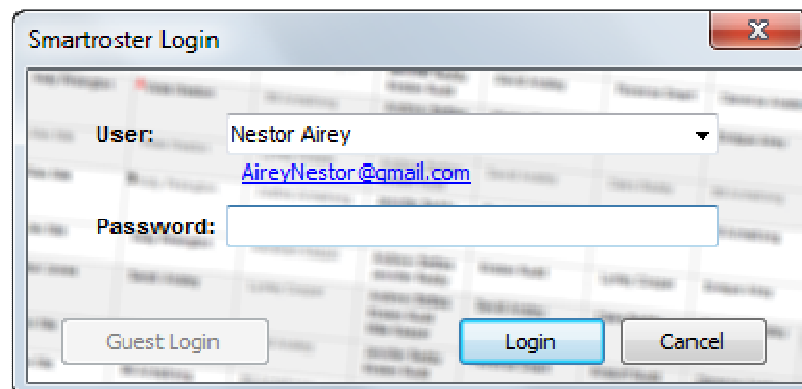
Type in your name or select from the drop-down box next to "User". After selecting a user, you will see the users email below the box as shown:

Click on the email address to have the password for that user emailed to them in case it is forgotten.

Now enter the Password and click Login. If it is incorrect you will have to option to try again.

If Guest credentials have been created by the SysAdmin, then the "Guest Login" button will be active. If this is clicked then the person will login as "Guest" .

If you click Cancel then Smartroster will close the current database and the User will be left in a plain empty "untitled" Smartroster application with no ability to interact with the data in the datafile.

Working with Smartroster after logon.

Once you have logged in you will see your login userid in the bottom left of the main Smartroster dialog:
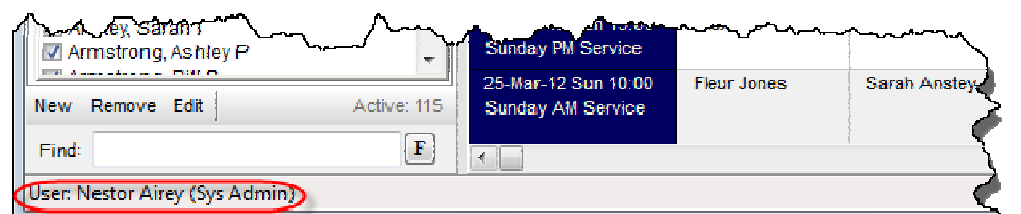
Now you can work with Smartroster as normal.

If you have restrictions on the Events or Roles you can edit or view then these will be evident from what you can see in the various Smartroster views.

If you are using Smartroster and think that you should be able to edit or view something then in the first instance talk to your SysAdmin and request appropriate access.

If you are a SysAdmin and think that access you have defined it being incorrectly applied than contact Smartroster support via the "Help > Email Tech-support" menu and we will try to assist you in a timely manner.

Changing your password

To change your password after logging in, select "Change Password" from the File menu. You will see the change password dialog as show:

Enter your old password followed by a new password and re-enter the new password to confirm and click OK.
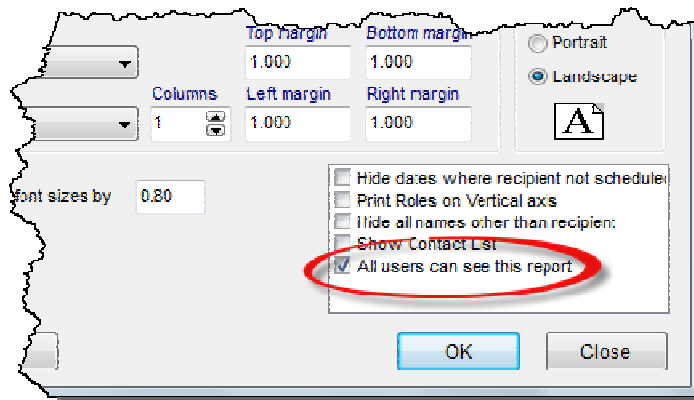
If you are logged in as Guest OR you are a read-only user then you cannot change the password. In the latter case you will need to request the SysAdmin to change your password for you.
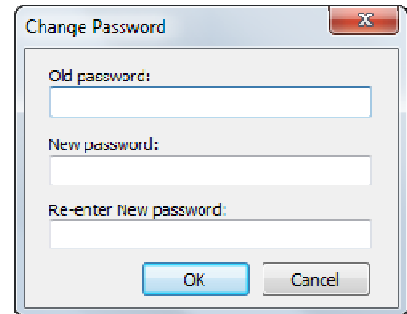
Reports

After login authentication is activated, reports that a user creates can be made only visible to that user OR are visible to any user.

This is set in the Report Parameters dialog:

If the box is ticked than all users will see the report definition. If not ticked then it will only be available to the person who was logged in when the report was created.

If you are logged in as Guest or are a read-only user then you cannot save new report definitions.