

Web Link Help File: Security Plan Manager

Abstract

- This help file demonstrates how to manage security roles by enabling or disabling access to certain areas of the site.

Procedure

1. Navigate to “User Management” and then select “Manage User Security Roles” from the drop down menu.



2. The table on the Security Plan Manager page displays the “Role Name”, “Role Description”, and whether the role is “Inbuilt” or “Internal”. The role can be edited and permissions can be assigned with the “Edit Role” and “Edit Permissions” links respectively. Roles that are not Inbuilt (roles that are included with the WebWare system by default) can be deleted by clicking on the trash can icon far right column.

Manage User Security Roles

Role Name	Role Description	Inbuilt	Internal	Edit Role	Edit Permissions	Delete Role
Anonymous	Anonymous	Yes	No			
Website Admin	Website Admin	Yes	Yes			
Salesman	Salesman	Yes	Yes			
Manager	Manager	Yes	Yes			
Counterman	Counterman	Yes	Yes			
Office	Office	Yes	Yes			
Catalog Manager	Catalog Manager	Yes	Yes			
CustomerAdmin	Customer Admin	Yes	No			
Customer User	Customer User	Yes	No			
Customer Office	Customer Office	Yes	No			
Retail User	Web Retail User	Yes	No			
Shipping Manager	Shipping Manager	No	No			
Customer Manager	Customer Account Manager	No	Yes			
Web Activity Manager	Web Activity Manager - Sales Reporting	No	Yes			
Graphics Team		No	No			

Add Role

3. Clicking on the “Edit Role” icon opens up the Edit Role page. Various fields and selection boxes are presented:
- Role Name: This is the name that is assigned for the role selected. This name cannot be changed for roles that are Inbuilt.
 - Description: A brief description of the role can be entered in this field box. This description will be displayed on the main Security Plan Manage page.

Manage User Security Roles

Role Name	Role Description	Inbuilt	Internal	Edit Role	Edit Permissions	Delete Role
Anonymous	Anonymous	Yes	No			
Website Admin	Website Admin	Yes	Yes			
Salesman	Salesman	Yes	Yes			
Manager	Manager	Yes	Yes			
Counterman	Counterman	Yes	Yes			

Edit Role

Role Name

Description

- Default Start Page: From the drop down list the user can select which page that users of under this role are directed to when logging into the site.

Edit Role

Role Name: Anonymous

Description: Anonymous

Default Start Page: Home Page

Internal?

Nuggets to show: Home Page, Part # Search, Browse our catalog, Tool Catalog, Cataloged Parts, New Catalog Search, Reporting, Orders Ready to Ship, test, New Page, Catalog Search, Shipment Main, Admin Dashboard, Order Status, Estimator, Site Map, My Customers, MCL Download, Enter Tracking Number

- Internal: When checked identifies the role as being a website owner role rather than a customer or visitor role.
- Nuggets To Show: Administrator can assign which items such as “News and Offers” and “Featured Items” that users of a given role assignment can view if the default start page is set to Home Page.

Internal?

Nuggets to show: News & Offers, Featured Items, My Coupons, My Gift Certificates, My Savings, My Alerts, Popular Items

4. After all changes have been made to the Edit Role page, click on the “Save” button at the bottom of the screen. Click on the “Cancel” button to cancel all changes made.

Edit Role

Role Name: Anonymous

Description: Anonymous

Default Start Page: Home Page

Internal?

Nuggets to show: News & Offers, Featured Items, My Coupons, My Gift Certificates, My Savings, My Alerts, Popular Items

Save Cancel

5. Clicking on the “Edit Permissions” icon will take the administrator to a page where permissions for all of the menu modules can be granted or declined for each role.

Manage User Security Roles

Role Name	Role Description	Inbuilt	Internal	Edit Role	Edit Permissions	Delete Role
Anonymous	Anonymous	Yes	No			
Website Admin	Website Admin	Yes	Yes			
Salesman	Salesman	Yes	Yes			

Security Plan Manager

Anonymous

Anonymous

[Expand All](#)

	Check All	Clear All
<input type="checkbox"/> Browse Catalog	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Ordering	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Reporting	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Content Management	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> My Account	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Email Management	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Promotions	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> User Manager	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Pricing	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Catalog Management	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Credits and Returns	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Inventory	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Web Activity	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Vehicle Maintenance	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> CRM	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Fulfillment Management	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Customer Services	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Customer Management	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Database Inventory Management	<input type="checkbox"/> Check This Group	
	<input type="button" value="Check All"/>	<input type="button" value="Clear All"/>

6. Menu items for each module group can be displayed or hidden by clicking on the +/- box to the left of the module group name. Alternatively, the "Expand All" link can be selected to expand the view for all module groups.

Security Plan Manager

Anonymous

Anonymous

[Expand All](#)

	Check All	Clear All
<input type="checkbox"/> Browse Catalog	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Ordering	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Reporting	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Content Management	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> My Account	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Email Management	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> Promotions	<input type="checkbox"/> Check This Group	
<input type="checkbox"/> User Manager	<input type="checkbox"/> Check This Group	

Collapse All

Check All Clear All

☐ Browse Catalog ☐ Check This Group

MenuId	Module Name	Description	Allow
1.01	Shop by Part Number	Search By Part # allows you to quickly and easily search and order products by simply entering a complete, or partial part #.	<input checked="" type="checkbox"/> Allow
1.02	Shop Catalog	Browse our catalog through make, model and category so that you can find the parts appropriate for your vehicle	<input type="checkbox"/> Allow
1.03	Shop by Brand	Express catalog is for searching the catalog through brands. Thus you need to choose brands you prefer	<input type="checkbox"/> Allow
1.04	Keyword Search *	Keyword Search allows you to search parts by just providing a description or name of part you are searching for	<input type="checkbox"/> Allow (Not Subscribed)
1.05	Last Ten Lookups *	Last Ten Lookups give you your last 10 lookups of the vehicle, so you donot need to choose the year, make, model all the time for your vehicles	<input type="checkbox"/> Allow
1.06	Specialty Import	Custom catalog contains parts that are not available through ePartExpert	<input type="checkbox"/> Allow (Not Subscribed)
1.07	Search Catalog	Search Catalog by selecting all make, model, year and categories on single page with parts	<input type="checkbox"/> Allow
1.13	Stock Order Parts	Bulk Order is for order in bulk. The order should be in the prescribed Excel format	<input type="checkbox"/> Allow
1.08	Allow Place Order *	Allow Place Order	<input type="checkbox"/> Allow
1.09	Shop Multiple Categories	Multi Category Search	<input type="checkbox"/> Allow
1.17	Create Estimate	Create Estimate	<input type="checkbox"/> Allow
1.10	Speed Catalog	Speed Catalog	<input type="checkbox"/> Allow (Not Subscribed)
1.11	Other Recommendations *	Other Recommendations	<input type="checkbox"/> Allow (Not Subscribed)
1.12	Multiple Subcategory *	Multiple Subcategory	<input type="checkbox"/> Allow
1.16	Dispaly Custom Catalog/s	Allow Custom Catalog	<input checked="" type="checkbox"/> Allow

7. Each module name within the module group can be activated or deactivated for each role by selecting or deselecting the “Allow” check box in the far right column for each Menu Id. If it is decided that all module names be allowed for a given module group then the “Check This Group” box can be selected. Doing this will automatically allow all modules within the group.

Collapse All

Check All Clear All

☐ Browse Catalog ☐ Check This Group

MenuId	Module Name	Description	Allow
1.01	Shop by Part Number	Search By Part # allows you to quickly and easily search and order products by simply entering a complete, or partial part #.	<input checked="" type="checkbox"/> Allow
1.02	Shop Catalog	Browse our catalog through make, model and category so that you can find the parts appropriate for your vehicle	<input type="checkbox"/> Allow
1.03	Shop by Brand	Express catalog is for searching the catalog through brands. Thus you need to choose brands you prefer	<input type="checkbox"/> Allow
1.04	Keyword Search *	Keyword Search allows you to search parts by just providing a description or name of part you are searching for	<input type="checkbox"/> Allow (Not Subscribed)

8. Selecting one of the role profiles from the drop down list at the top of the page and clicking on the “Copy Permission From” box to the right of the list will apply all permissions from that selected role to the role that is currently being edited. Once all of the desired changes have been made, click on the “Save” button

at the bottom of the page. Click the "Cancel" button to cancel all changes made.

Security Plan Manager

Expand All

	Anonymous	
	Anonymous	Copy Permission From
	Website Admin	
	Salesman	Check All Clear All
<input type="checkbox"/> Browse Catalog	Manager	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Ordering	Counterman	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Reporting	Office	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Content Management	Catalog Manager	<input type="checkbox"/> Check This Group
<input type="checkbox"/> My Account	CustomerAdmin	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Email Management	Customer User	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Promotions	Customer Office	<input type="checkbox"/> Check This Group
<input type="checkbox"/> User Manager	Retail User	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Pricing	Super Lite Installer	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Catalog Management	Super Lite Admin	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Credits and Returns	Cataloge Manager	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Inventory	SHOPPING PLUS	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Web Activity	Estimator	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Vehicle Maintenance	Marketing & Content	<input type="checkbox"/> Check This Group
<input type="checkbox"/> CRM	Shipping Manager	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Fulfillment Management	Customer Manager	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Customer Services	Web Activity Manager	<input type="checkbox"/> Check This Group
<input type="checkbox"/> Customer Management		Check All Clear All
<input type="checkbox"/> Database Inventory Management		