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In this session we want to look at Access Management Strategies. In IES there are so many tools for Managing Access.

We do not necessarily have to use all of them.

So how do we determine which ones should we use in a particular installation?



Why do we have Menu Access at all?

The reason why we have Menu Access is for purposes of Control, Responsibility and Accountability.

In a Small Business, run by a single person, everything is done by the same person. In that case Menu Access and Privileges in the Business System is irrelevant since that one person should have Access to everything and all functions, to be able to perform everything that needs to be done.

In a bigger Business with more people, it becomes apparent that it is essential to define the tasks and responsibilities of different people in different jobs. Therefore Access and Privileges in the Business System becomes important so that people, who are responsible for certain functions, are also the ones that have Access to those functions, and are accountable for how the tasks are performed.

Only some people are allowed to Update certain information, while others have Access to look at some information, but will not be able to change it.

This is more or less where Menu Access and Privileges become relevant.



Access Strategies

- ◆ Very small operations
- ◆ Small to medium size operations
- ◆ Large number of Users

Access Strategies

All the Tools and Options for managing Access and Privileges are dealt with in detail in the various Tutorials.

In this session we are not looking at the detail, but we are considering the various Access Strategies and we discern the following Categories:

Very Small Operations

Small to Medium Size Operations

Large Operations with a Large Number of Users.



Very Small Operation

- ◆ For 1, 2 or 3 Users, we use mirror & copy from the 'full access' profiles, and possibly trim some options or privileges if considered necessary

Very Small Operation

In a Small Operation where we have 1, 2 or 3 Users, generally these Users are quite powerful in terms of the Access Privileges, i.e. they have Access, if not to everything, then usually to almost everything.

So the easiest way to manage the Access and to have the least amount of Administration in this operation, we use "Mirror" when we create a New User.

We "Mirror" from the Master Profile and we possibly also use the "Copy From" the "Full Access" Profiles.

Sometimes we may Trim some Options or Privileges if considered necessary.



Small to medium size operation

- ◆ Possibly 4 to 20 Users
- ◆ Use mirror and / or copy from 'full access' profiles, trim where necessary
- ◆ Possibly use Groups for adding new options when necessary
- ◆ Optional whether to use Profile Subscription


Small to medium size operation

In Small to Medium size Operations, where we possibly have a User number somewhere between 4 and 20 Users, the recommended Strategy would be to use the "Mirror Access" function and also "Copy from Full Access" Profiles, and trimming those Profiles where necessary.

We may even use User Groups and Register each User to such a Group.

We can have one or more Groups, for having the convenience of adding New Options, when they become available to such Groups.

It is still optional whether we may want to use Profile Subscription.



Large number of Users

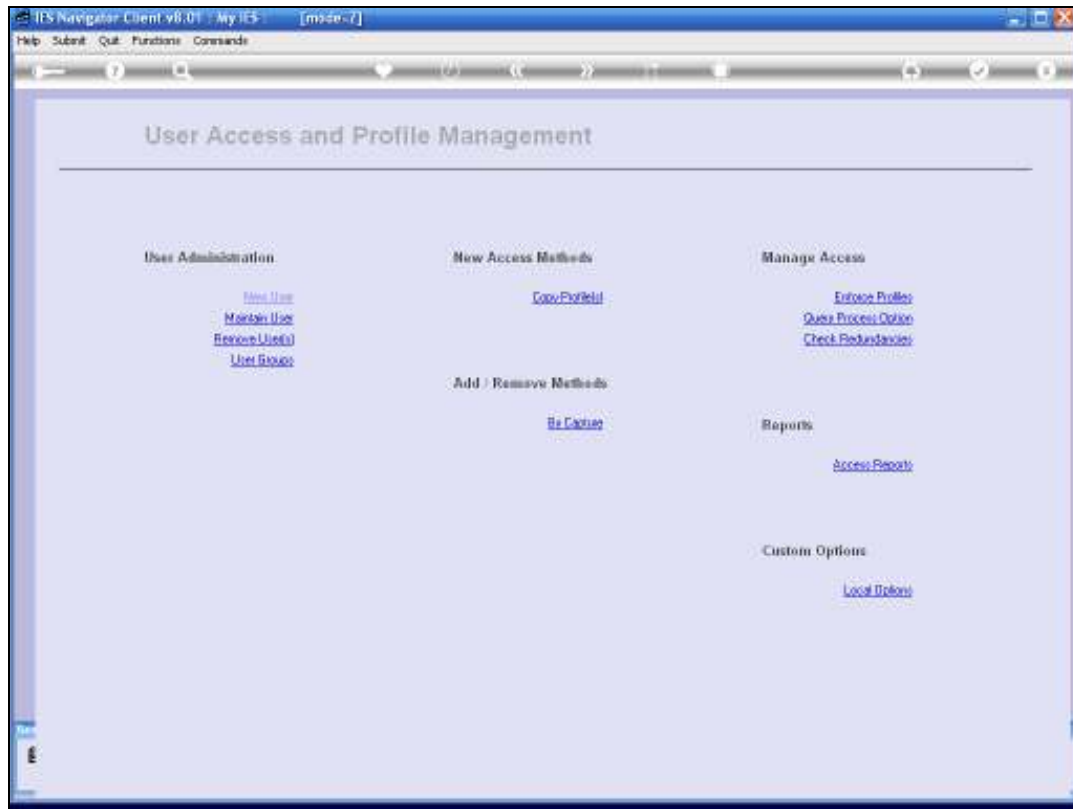
- ◆ Recommended option is to set up Subscription Profiles in any suitable configuration for attaching to various Job Positions, so new Users are set up by Profile Subscription
- ◆ However, mirror and copy is allowed, and the balance is achieved by considering the amount of work in managing Menu and Privilege access

Large number of Users

In larger Setups that exceed 20 Users, it is usually the best way to go to "Set up Subscription Profiles" in any suitable configuration of the number of subscription Profiles that we may have and that we can mix and match and combine for attaching to various Job positions, so that when we set up New Users, we can simply Subscribe them to the Profiles that are available.

This would probably be the most efficient and effective way of managing our Access in the System.

However the "Mirror" and "Copy" Options are still available and allowed and we have to determine the balance by considering the amount of work in Managing the Menu and Privilege Access.



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In the final analysis, we can say that all the Options and Tools available for Managing Access Profiles, Menu Access and Privileges, are available at all Installations in all Sites. It is really up to us to determine, in each case, what is the most efficient and effective Method to manage the Access Profiles in our particular Site, by choosing which Tools are appropriate to use, and what our policy is with regards to Access Management.