

Core - Assigning Security Roles & Hierarchy Permissions

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What is a Security Role?

Security roles (also known as sec roles) define what a service rep (user) has the ability to interact with in Core.

On a broad scale, security roles allow certain service reps access to the Pay/Bill or Administration modules of Core while others (without the related role) will not be able to access that area of the software. Additionally, security roles define what types of reports reps will have access to. For example, it may be beneficial for recruiters to have access to the *Employee Info* report group, but not the *Financial* report group. Security roles allow this type of distinction to be made.

On a more narrow scale, security roles can allow service reps to interact with very specific functionality in Core.

How Do I Set or Change a User's Security Role?

Security roles can only be changed by those who have System Admin access. Users must first be added to the system before their security role can be set see [Core - Bridge](#) for more information.

1. Navigate to Reports in the bottom left
2. Select User Security Setup
3. Choose the report titled: "Core Set or Update User Security Role" & select the  icon to open
4. A new window will open, select the following parameters:
 - Select the User you wish to set or update a security role for

- Select the Security Role you wish to set or change the user to
- Select the True option (if you do not select True the report will show what the user's current role is set to and the role will not be updated)

5. Select View Report

Report Viewer - Core Set or Update User Security Role

Select User: Core FORecruiter | Select Secrole to Set on This User: Front Office - Recruiter | View Report

Set New Secrole: True False

Core Set or Update User Security Role
Core Template Temp CvT

ClassVsTemp Level (Hierid 3)

tempworks SOFTWARE

Report used to update TempWorks users security roles.

****The users Secrole has been updated from "Front Office - Recruiter" to "Front Office - Recruiter". If the user is logged in, they will need to log out and log back in for it to take full effect.**

User Name	User Full Name	Current Secrole	Change To Secrole
Core.FORecruiter	Core FORecruiter	Front Office - Recruiter	Front Office - Recruiter

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Note The report will show the update made and let you know at the top those changes have been completed successfully.

Security Roles vs. Hierarchy

Hierarchy determines which set of records we are seeing (ex. seeing only records from one branch or all records in the system) while Security Roles change what fields and sections a user can add, update, or view (ex. being able to view or add any customer record). To learn more about hierarchy see [Core - Hierarchy](#)

Hierarchy is also something you can limit for users in the system. A great example for this is when you have a recruiter who only works at one specific branch. They do not need to see the records in other branches and they do not need to see staff record side of the system either.

To Limit a Users Hierarchy:

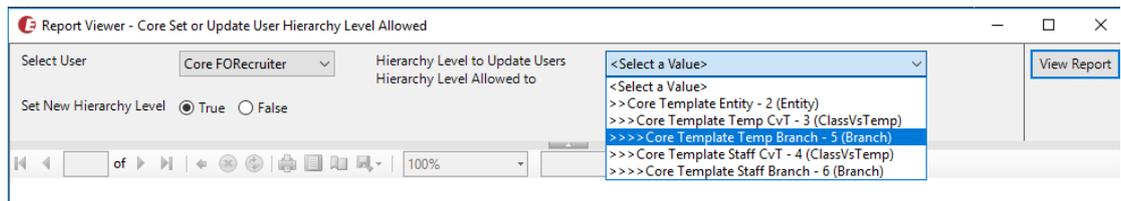
1. Navigate to Reports in the bottom left

2. Select User Security Setup

3. Choose the report titled: "Core Set or Update User Hierarchy Level Allowed" & select the  icon to open

4. A new window will open, select the following parameters:

- o Select the user from the first drop down
- o Select the highest level that user should be able to see
 - ex. branch can only see branch records or Temp would allow them to see all temporary staffing records (not see internal) or entity would be every record
- o Select the True option (if you do not select True the report will show what the user's current hierarchy level allowed instead of updating it)



5. Select View Report

User Name	User Full Name	Current Hierarchy Level Allowed	Change To Hierarchy Level Allowed
Core.FORecruiter	Core FORecruiter	Core Template Entity - 2 (Entity)	Core Template Temp CvT - 3 (ClassVsTemp)

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