2. Security

Security within the WIC Application suite can be categorized into 2 specific areas; *Authentication* and *Authorization*. Authentication refers to the user's ability to gain access to the system based on their credentials. The user provides credentials by supplying the appropriate user id and password when prompted. This is accomplished via the *Sign on* dialog. The Sign on dialog is displayed at the beginning of a *session*. A session is defined as the time span between signing on and signing off the system. During a session, access to applications as well as features and functions within those applications is controlled through the use of Authorization.

Authorization is best described as the process of checking whether or not a user has permission to access to or perform specific operations against a specific set of data. This is controlled by assigning *users* to *locations* to establish *staff member* relationships. Staff members are then assigned one or more *roles* thereby establishing the roles a user may assume while acting as a staff member of a particular location.

As stated above, one or more roles can be assigned to a staff member. Roles are more global in nature as can be used across the organization. Examples of these roles are: Nutritionist, Clerk, Administrator, etc. Each role has a comprehensive list of all *permissions* in the system. Permissions are a combination of *feature* and *access level*. Features are abstract statements that can be related to functionality in the system. An example of a feature would be 'Participant Demographics' (this would map to the presentation of participant demographic information within the system.) The access level associated with features can be set to one of the following; *None*, *View*, or *Full Control*. In this case, *None* would prohibit the role from viewing participant demographic information while *View* would restrict the role to a read-only view of the information, and *Full Control* would allow the role to View, Add, Edit, and Delete the information. Since each role has a comprehensive list of features, the access level must be set for all features in order to define the permissions for the role. By default a new role has no permissions. This is accomplished by defaulting all features to an access level of None. Note that if the permissions for a role are changed, all staff members assigned that role will inherit the changes.

The permissions given to a staff member will be a combination of the highest permissions across all the roles assigned to the staff member. Consider the following example. Jane Smith is a staff member assigned to a Clinic. She assumes the roles of Clerk and Administrator for the clinic (via her staff member profile). The role of Clerk has been granted full control of Participant Demographic Information while the role of Administrator is only able to view Participant Demographic information. Jane will be granted full control of Participant Demographic Information since the access level granted to the Clerk role (full control) overrules the lower access level granted to the Administrator role (view). Note that if the Clerk role was removed from Jane's staff member profile she would only be able to view Participant Demographic Information.

This Authorization model allows for a user to be defined to a specific agency as an administrator and to a specific clinic as a Clerk (or any combination of the two). This model has value in that it allows the system administrator to define explicit access at a location level.

For the SPIRIT implementation is assumed that all Clerks can work at any clinic defined in the system but in order to make any modifications to the participant's information, the participant must be transferred into the clinic that is servicing the participant at that point in time. (This is required in order to provide caseload and dual participation information.) In order to satisfy this requirement, users will be required to select a specific location (in this case a clinic) as the current location. Establishing this relationship allows the system to prompt the user to transfer the participant when appropriate.

In order to allow the user to select from a list of all clinics and subsequently work as a staff member of the clinic, the system will automatically create a staff member relationship to each clinic location for users that will be performing the role of Clerk at a clinic.

The process of adding a new user would be as follows (assuming the system administrator creating the user has the appropriate permissions):

- Create a user (must be a user in the active directory)
- Assign the user as a staff member to one or more locations
    - For each location select one or more roles that the user may assume as a staff member of the location.
    - If there is no appropriate role then create one and assign the appropriate permissions to the role.
- Alternatively, designate the user as a Clerk. (This will create a staff member relationship for each clinic with a role of Clerk.)

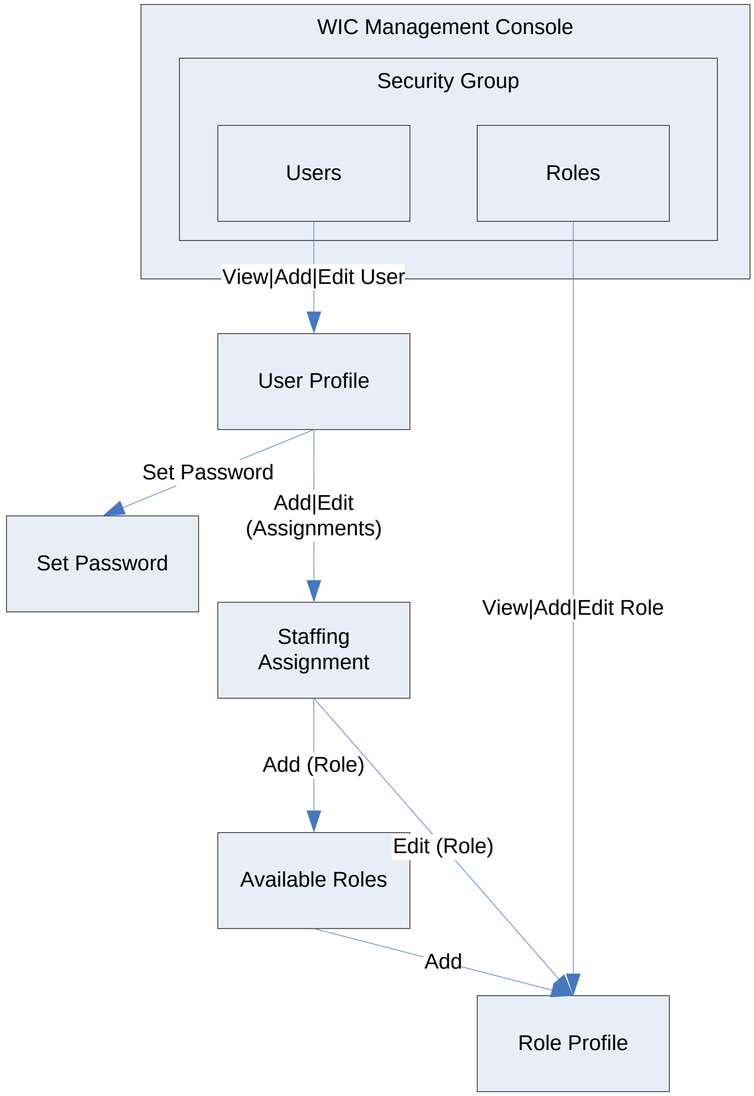
The Permission destination list will be provided at a later date. See below for sample roles and permissions:

Clerk	
Feature	*Access Level*
Participant Demographics	Full Control
Nutrition Education	Full Control
Check Issuance	Full Control
Appointment Scheduling	Full Control
Alerts	Full Control
User Administration	None
Role Administration	None

Administrator	
Feature	*Access Level*
Participant Demographics	View
Nutrition Education	View
Check Issuance	View
Appointment Scheduling	View
Alerts	None
User Administration	Full Control
Role Administration	Full Control

The system will log attempts by users to access applications for which they do not have sufficient privileges. For example if a user whose role is nutritionist attempts to start the Data Synchronization Client application but the permission for that role is set to None the attempt to start the application will be logged. The information will include the user id, application name, as well as the date and time of the attempt. This information will be made available via the report generator utility.

2.1 Navigation



2.2 WIC Management Console – Users

The Users group item located in the Security group of the WIC Management Console provides the interfaces required to manage users as well as their, staff assignments, roles, and role permissions.

2.2.1 Menu Bar Exceptions

The menu bar for the WIC Management Console is modified by the Security group such that when the Users group item is selected the menu bar displays the Users menu.

The Roles menu contains the following menu items; View, Add, and Delete. In the case of viewing or deleting users an item must be selected from the list. If no item is selected the following standard error message "Please select an item from the list." Is displayed and the requested action is cancelled.

2.2.2 Users Menu

The Users menu contains menu items allowing the user to view, add, or delete users. The mnemonic for the Users menu is ‘U’ The Users menu will invoke as follows:

- Users
    - View
    - Add
    - Delete

2.2.2.1 View Menu Item

This menu item allows the user to view the user profile for the selected user (list item). This menu item will be enabled when the Users menu is active. It has a mnemonic of ‘V’.

2.2.2.2 Add Menu Item

This menu item allows the user to add a new user profile to the system. This menu item will be enabled when the Users menu is active. It has a mnemonic of ‘A’.

2.2.2.3 Delete Menu Item

This menu item allows the user to delete the user profile for the selected user (list item). This menu item will be enabled when the Users menu is active. It has a mnemonic of ‘D’.

2.2.3 Users Menu Processing

Selecting the View menu item will allow the user to view the user profile of the selected user (list item) by invoking the User Profile as described in the section entitled User Profile Dialog. In order to perform this action the user must be granted an access level of View or higher for the Users feature.

Selecting the Add menu item will allow the user to add a new user profile by invoking the User Profile dialog as described in the section entitled User Profile Dialog. In order to perform this action the user must be granted an access level of Full Control for the Users feature.

Selecting the Delete menu item will allow the user to delete the user profile of the selected user (list item). Prior to deleting the user profile, the application will prompt the user to confirm the request to delete using the standard Yes/No message “Delete selected user?”. In order to perform this action the user must be granted an access level of Full Control for the Users feature.

Upon completing any of the aforementioned actions the list will be refreshed.

Note that if the user does not have the appropriate permission to perform the requested action standard information message “You are not authorized to perform the specified operation.”

2.3 Toolbar Exceptions

There is no toolbar displayed on the window when the Security Group is selected.

2.4 Users Group Item (View)

When the Users group item is selected from the Security group, the list area of the window displays all users in the system.

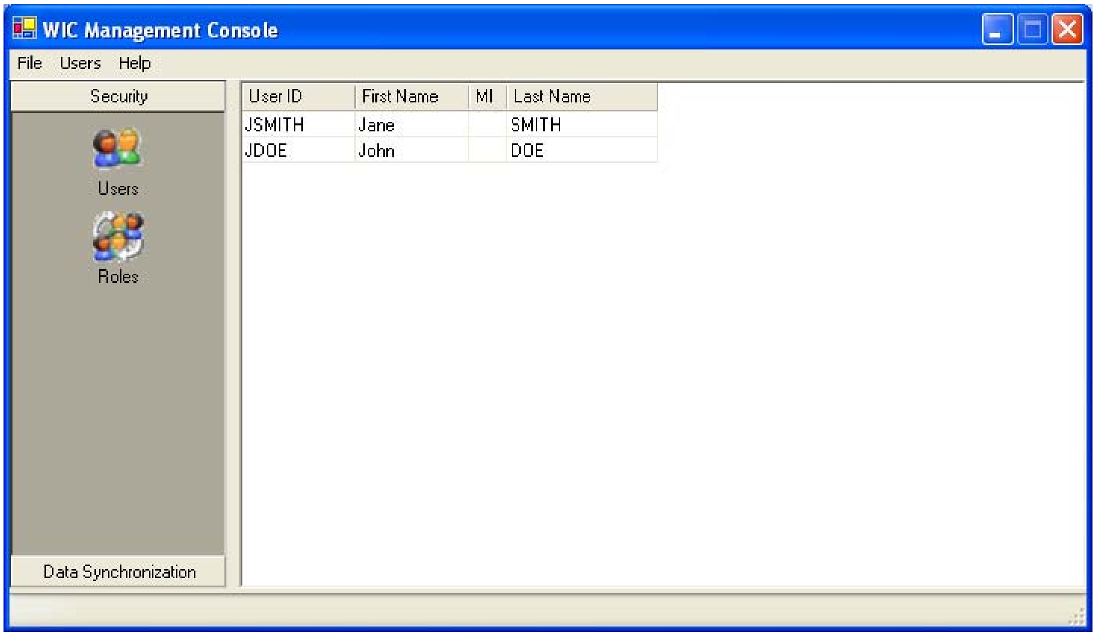


Figure 1 – Users View

2.4.1 Controls

This section describes the behavior of the controls on the WIC Management Console when the Users group item is selected.

2.4.1.1 Users List

This control displays the list of users known to the system. The items in the list will be sorted in alphabetical order by User ID. The first item in the list will be selected. The list is read-only. Information displayed in the list cannot be modified. The list will display four (4) columns of information and supports single selection only. Items in the list may be sorted by clicking on the column headings.

The list columns will consist of the following headings:

- User ID
- First Name
- MI (Middle Initial)
- Last Name

An entry will be added to the list for each user defined in the USERPROFILE entity.

2.4.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken in this view.

2.4.2.1 Clicking on the Users group item

Clicking on the Users item in the Security group will display the list of users.

2.4.2.2 Clicking on a list item

Clicking a list item highlights the entire list item.

2.4.2.3 Double Clicking on a list Item

Double clicking a list item performs the same action as selecting the Users>View menu item.

2.5 WIC Management Console – Roles

The Roles group item located in the Security group of the WIC Management Console provides the interfaces required to manage roles as well and role permissions.

2.5.1 Menu Bar Exceptions

The menu bar for the WIC Management Console is modified by the Security group such that when the Roles group item is selected, the menu bar displays the Roles menu.

The Roles menu contains the following menu items; View, Add, and Delete. In the case of viewing or deleting roles an item must be selected for the list. If no item is selected the following standard error message "Please select an item from the list." is displayed and the requested action is cancelled.

2.5.2 Roles Menu

The Roles menu contains menu items allowing the user to view, add, or delete roles. The mnemonic for the Roles menu is 'R' The Roles menu will invoke as follows:

- Roles
  - View
  - Add
  - Delete

2.5.2.1 View Menu Item

This menu item allows the user to view the role profile for the selected role (list item). This menu item will be enabled when the Roles menu is active. It has a mnemonic of 'V'.

2.5.2.2 Add Menu Item

This menu item allows the user to add a new role profile to the system. This menu item will be enabled when the Roles menu is active. It has a mnemonic of 'A'.

2.5.2.3 Delete Menu Item

This menu item allows the user to delete the role profile for the selected role (list item). This menu item will be enabled when the Roles menu is active. It has a mnemonic of 'D'.

2.5.3 Roles Menu Processing

Selecting the View menu item will allow the user to view the role profile of the selected user (list item) by invoking the Role Profile dialog as described in the section entitled Role Profile Dialog. In order to perform this action the user must be granted an access level of View or higher for the Roles feature.

Selecting the Add menu item will allow the user to add a new role profile by invoking the Role Profile dialog as described in the section entitled Role Profile dialog. In order to perform this action the user must be granted an access level of Full Control for the Roles feature.

Selecting the Delete menu item will allow the user to delete the role profile of the selected role (list item). Prior to deleting the role profile, the application will prompt the user to confirm the request to delete using the standard Yes/No message "Delete selected role?". In order to perform this action the user must be granted an access level of Full Control for the Roles feature. If the user attempts to delete a role that is associated with one or more users (via staff assignments) the application will prompt the user to confirm the request using the standard Yes/No message 'This selected role is in use. Deleting this role will remove the role from all staff member associations. Delete selected role?"

Upon completing any of the aforementioned actions the list will be refreshed.

Note that if the user does not have the appropriate permission to perform the requested action standard information message "You are not authorized to perform the specified operation."

2.6 Toolbar Exceptions

There is no toolbar displayed on the window when the Security Group is selected.

2.7 Roles Group Item (View)

When the Roles group item is selected from the Security group the list area of the window displays all users in the system.

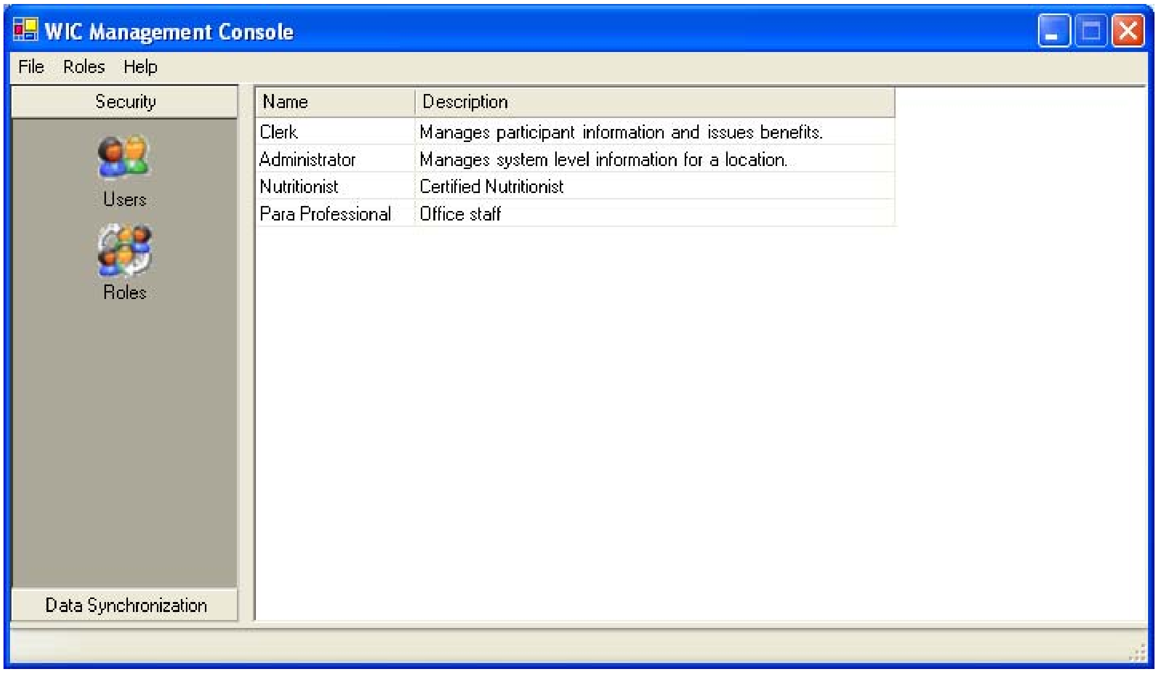


Figure 2 – Roles View

2.7.1 Controls

This section describes the behavior of the controls on the WIC Management Console when the Roles group item is selected.

2.7.1.1 Roles List

This control displays the list of roles known to the system. The items in the list will be sorted in alphabetical order by Name. The first item in the list will be selected. The list is read-only. Information displayed in the list cannot be modified. The list will display two (2) columns of information and supports single selection only. Items in the list may be sorted by clicking on the column headings.

The list columns will consist of the following headings:

- Name
- Description

An entry will be added to the list for each role defined in the ROLEPROFILE entity.

2.7.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken in this view.

2.7.2.1 Clicking on the Roles group item

Clicking on the Roles item in the Security group will display the list of roles.

2.7.2.2 Clicking on a list item

Clicking a list item highlights the entire list item.

2.7.2.3 Double Clicking on a list Item

Double clicking a list item performs the same action as selecting the Users>View menu item.

2.8 User Profile Dialog

The User Profile dialog displays all information pertinent to a user's profile. The dialog has 3 modes: Add, Edit, and View. In Add mode the dialog is presented to the user with all of the controls empty. In Edit and View mode the dialog is presented to the user with all of the controls filled in accordingly.

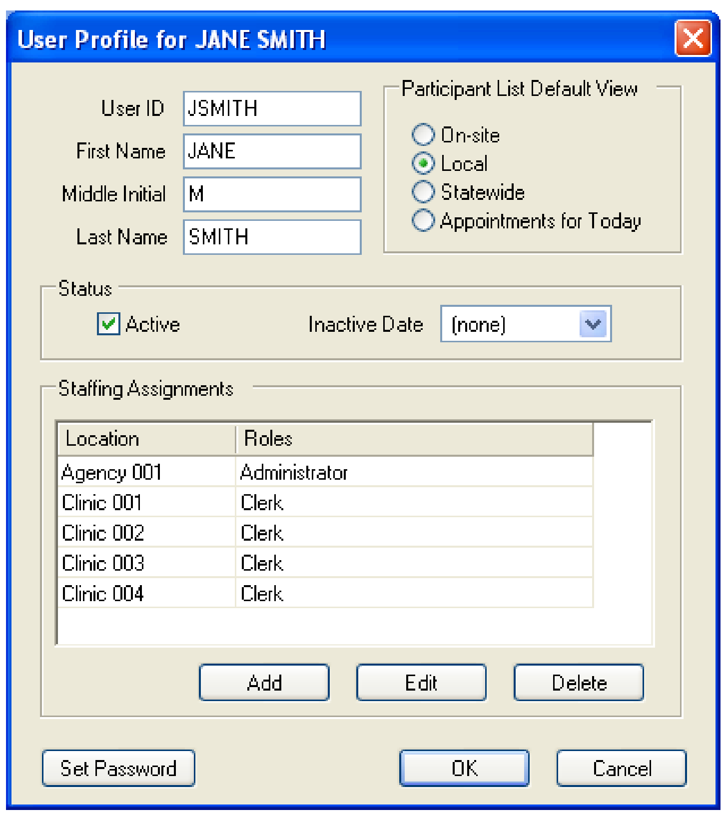


Figure 3 – User Profile Dialog

2.8.1 Controls

This section describes the behavior of the controls on the User Profile dialog.

2.8.1.1 User ID Text Box

This control allows the user to specify the user ID for the user. It will be **enabled** when the User Profile dialog is displayed and is in Add mode. The maximum size of this control will be ten (10) characters. The minimum size will be six (6) alphanumeric and special characters. It will convert all entered characters to upper case. The User ID is not case sensitive.

The control will be **disabled** when the User Profile dialog is displayed and is in View mode.

2.8.1.2 First Name Text Box

This control allows the user to specify the first name of the user. It will be **enabled** when the User Profile dialog is displayed and is in Add or Edit mode. The maximum size of this control will be twenty (20) characters. Only characters A-Z and {space} are allowed. It will convert all alphabetic characters to upper case.

The control will be **disabled** when the User Profile dialog is displayed and is in View mode.

2.8.1.3 Middle Initial Text Box

This control allows the user to specify the middle initial of the user. It will be **enabled** when the User Profile dialog is displayed and is in Add or Edit mode. The maximum size of this control will be one (1) character. Only characters A-Z are allowed. It will convert all entered characters to upper case.

The control will be **disabled** when the User Profile dialog is displayed and is in View mode.

2.8.1.4 Last Name Text Box

This control allows the user to specify the last name of the user. It will be **enabled** when the User Profile dialog displayed and is in Add or Edit mode. The maximum size of this control will be twenty-five (25) characters. Only characters A-Z, {space}, hyphens and apostrophes are allowed. It will convert all alphabetic characters to upper case.

The control will be **disabled** when the User Profile dialog is displayed and is in View mode.

2.8.1.5 Participant List Default View Radio Button Group

This group of radio buttons allows the user to specify the default view to be invoked when starting the Participant List application. It will be **enabled** when the User Profile dialog is displayed and is in Add or Edit mode.

It will contain 4 radio buttons:

- Local
- Statewide
- On-site
- Appointments for Today

The Local radio button will be initially selected

The control will be **disabled** when the User Profile dialog is displayed and is in View mode.

2.8.1.6 Active Checkbox

The Active checkbox is used to control the status of the user. It will be **enabled** when the User Profile dialog is displayed and is in Add or Edit mode. If the user is active, the active checkbox will be checked.

The control will be **disabled** when the User Profile dialog is displayed and is in View mode.

2.8.1.7 Inactive Date Masked Edit Box

The Inactive Date masked edit box will be **enabled** when the User Profile dialog is displayed and the Active checkbox is unmarked. If an inactive date has been specified, the date will display in the inactive date control.

The control will be **disabled** when the User Profile dialog is displayed and is in view mode.

2.8.1.8 Staffing Assignments List Box

The staffing assignment list displays all the staff assignments associated with the user. It will be **enabled** when the User Profile dialog is active. Each assignment indicates the location and role(s) applicable for that assignment.

2.8.1.9 Add Button

The Add button will be enabled when the User Profile dialog is active. It has a mnemonic of “A”.

2.8.1.10 Edit Button

The Edit button will be enabled when the User Profile dialog is active. It has a mnemonic of “E”.

2.8.1.11 Delete Button

The Delete button will be enabled when the User Profile dialog is active. It has a mnemonic of "D".

2.8.1.12 Set Password Button

The Set Password button will be enabled when the User Profile dialog is active. It has a mnemonic of "P".

2.8.1.13 OK Button

The OK button will be enabled when User Profile Dialog is active. Characteristics for the OK button are defined in *Consistencies*.

2.8.1.14 Cancel button

The Cancel button will be enabled when the User Profile Dialog is active. It is the cancel button for the dialog. Characteristics for the Cancel button are defined in *Consistencies*.

2.8.2 Processes

This section describes the processes that take place as a result of the actions taken on this dialog.

2.8.2.1 Initializing the interface

During the initial presentation of the dialog the following activities are performed.

- All input controls are emptied
- The Local radio button is selected.
- The active checkbox is checked
- The inactive date is set to (none)
- The Staffing Assignments list is cleared
- The dialog title is set to "User Profile for [New User]"

2.8.2.2 Loading the Data

If the dialog is in View mode the specified profile is loaded in the dialog. All input controls are valued accordingly. Radio buttons and checkboxes are selected accordingly. The Staff Assignment list is populated. The dialog caption is set to "User Profile for [User]" where [User] is the full name of the user.

If the user's permission (feature/access level) indicates that they can only view the information, the dialog will disable all controls except the OK and Cancel buttons.

2.8.2.3 Adding a Staff Assignment

Adding a staff assignment displays the Staffing Assignment dialog as described in section entitled Staff Assignment Dialog. Upon pressing the OK button on the Staff Assignment dialog, the list is refreshed.

2.8.2.4 Editing a Staff Assignment

Editing a staff assignment displays the selected staffing assignment in the Staffing Assignment dialog as described in section entitled Staff Assignment Dialog. Upon pressing the OK button on the Staff Assignment dialog, the list is refreshed. If no item is selected in the list the standard information message “Please select an item in the list.” is displayed.

2.8.2.5 Deleting a Staff Assignment

Deleting a staff assignment deletes the selected staff assignment. Prior to deleting the item the standard confirmation message “Delete selected item?” is displayed. Pressing the Yes button deletes the item and refreshes the list. If no item is selected in the list the standard information message “Please select an item in the list.” is displayed.

2.8.2.6 Saving the Profile

Saving the user profile updates the system using the information displayed on the dialog and subsequently dismisses the dialog. Staffing Assignments are not saved during this operation. Changes to the staffing assignments are saved at the time the list is modified.

2.8.2.7 Canceling the dialog

Canceling the system dismisses the dialog without saving any changes.

2.8.3 Data map

Control	Table	Field
User ID	USERPROFILE	USER_ID
First Name	USERPROFILE	FIRST_NAME
Middle Initial	USERPROFILE	MIDDLE_INITIAL
Last Name	USERPROFILE	LAST_NAME
Participant List Default View	USERPROFILE	PART_LIST _VIEW_DEFAULT
Active checkbox	USERPROFILE	ACTIVE_IND
Inactive Date	USERPROFILE	INACTIVE_DT
Staffing Assignments	USERPROFILE_STAFF_XREF	

2.9 Staffing Assignment Dialog

The Staffing Assignment dialog displays all information pertinent to a user's staff assignments. The dialog has 2 modes; add and edit. In add mode, the dialog is presented to the user empty. In edit and view mode, the dialog is presented to the user, filled in accordingly.

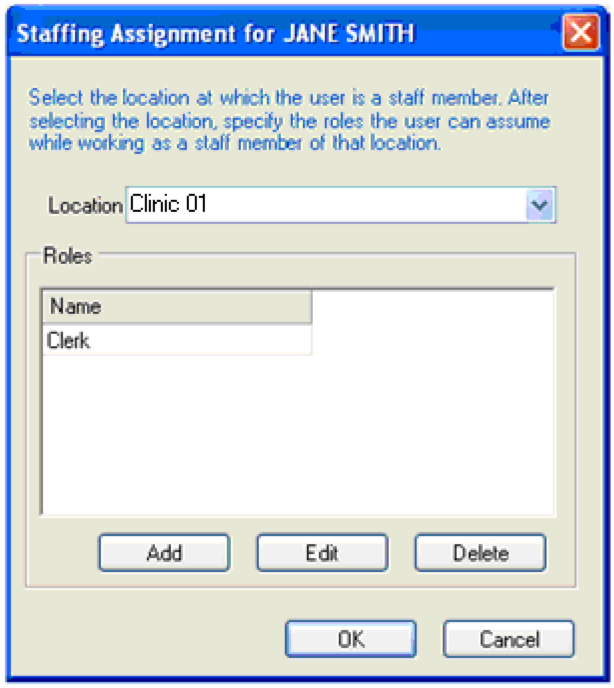


Figure 4 – Staffing Assignment Dialog

2.9.1 Controls

This section describes the behavior of the controls on the Staff Assignment dialog.

2.9.1.1 Location Dropdown

This control allows the user to select the location for which the user can have access. The dropdown will be enabled when the Staffing Assignment dialog is active. The Location list will be filled with an entry for each Clinic defined in the ServiceSite entity associated with the Tribal Agency listed in the Agency entity. The entries will be sorted in numeric order by Clinic ID. The Clinic selected for the present session will be initially selected in the control.

2.9.1.2 Roles List Box

The roles list displays all the roles associated with the staff assignment for the selected Location. . It will be **enabled** when the Staffing Assignment dialog is active.

2.9.1.3 Add Button

The Add button will be enabled when the Staffing Assignment dialog is active. It has a mnemonic of “A”.

2.9.1.4 Edit Button

The Edit button will be enabled when the Staffing Assignment dialog is active. It has a mnemonic of “E”.

2.9.1.5 Delete Button

The Delete button will be enabled when the Staffing Assignment dialog is active. It has a mnemonic of “D”.

2.9.1.6 OK Button

The OK button will be enabled when the Staffing Assignment dialog is active. Characteristics for the OK button are defined in *Consistencies*.

2.9.1.7 Cancel Button

The Cancel button will be enabled when the Staffing Assignment dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

2.9.2 Processes

This section describes the processes that take place as a result of the actions taken on this dialog.

2.9.2.1 Initializing the interface

During the initial presentation of the dialog the following activities are performed.

- The location drop down list is populated with a list of all locations. The list is ordered alphabetically by Name.
- The Roles list is cleared
- The dialog caption is set to “Staff Assignment for [User]” where [User] is the full name of the user.

2.9.2.2 Loading the Data

If the dialog is in Edit mode the specified staffing assignment is loaded in the dialog. The appropriate location is selected in the drop down list. The Roles list is populated.

If the user’s permission (feature/access level) indicates that they can only view the information the dialog will disable all controls except the OK and Cancel buttons.

2.9.2.3 Adding a Role

Adding a role displays the Select Roles dialog as described in section entitled Select Roles Dialog. Upon pressing the OK button on the Select Roles dialog, the list is refreshed.

2.9.2.4 Editing a Role

Editing a role displays the selected role in the Role Profile dialog as described in section entitled Role Profile dialog. Upon pressing the OK button on the Role Profile dialog the list is refreshed. If no item is selected in the list, the standard information message "Please select an item in the list." is displayed.

2.9.2.5 Deleting a Role

Deleting a role deletes the role from the staff assignment. Prior to deleting the item the standard confirmation message "Delete selected item?" is displayed. Pressing the Yes button deletes the item and refreshes the list. If no item is selected in the list the standard information message "Please select an item in the list." is displayed.

2.9.2.6 Saving the Staffing Assignment

Saving the staff assignment updates the system using the information displayed on the dialog and subsequently dismisses the dialog. Role assignments are not saved during this operation. Changes to the role assignments are saved at the time the list is modified.

2.9.2.7 Canceling the dialog

Canceling the dialog dismisses the dialog without saving any changes.

2.9.3 Data map

Control	**Table**	**Field**
Location	STAFF	LOCATION_ID
Roles	STAFF_ROLE_XREF	FIRST_NAME

2.10 Select Roles Dialog

The Select Roles dialog displays a list of all available roles (i.e. roles that are not currently assigned to the specified staffing assignment). The dialog has 3 modes View, Add and Edit. In Add mode, the dialog is presented to the user empty. In Edit and View mode, the dialog is presented to the user, filled in accordingly.

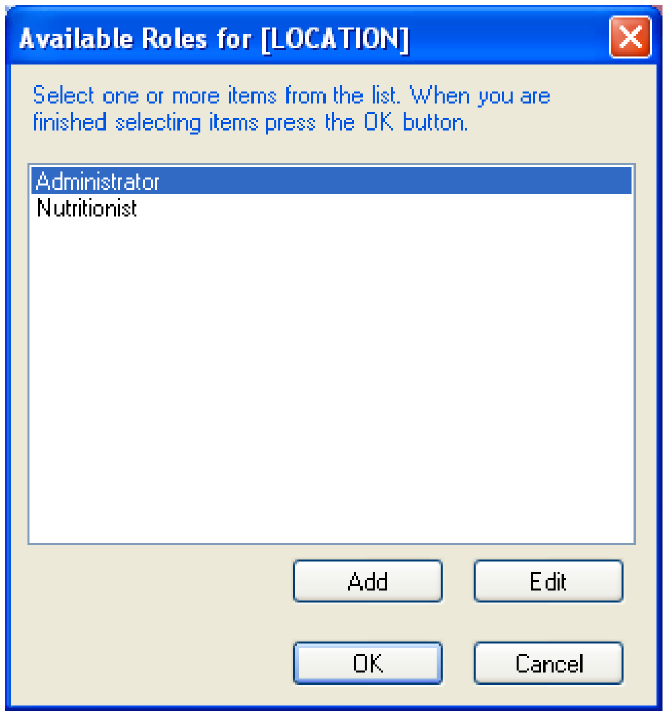


Figure 5– Select Roles Dialog

2.10.1 Controls

This section describes the behavior of the controls on the Select Roles dialog.

2.10.1.1 Roles List Box

The Roles list displays all the staff assignments associated with the user. It will be **enabled** when the Select Roles dialog is active. The roles list displays all the roles that are not assigned to the specified Staff Assignment Location.

2.10.1.2 Add Button

The Add button will be enabled when the Select Roles dialog is active. It has a mnemonic of “A”.

2.10.1.3 Edit Button

The Edit button will be enabled when the Select Roles dialog is active. It has a mnemonic of “E”.

2.10.1.4 OK Button

The OK button will be enabled when the Select Roles dialog is active. Characteristics for the OK button are defined in *Consistencies*.

2.10.1.5 Cancel Button

The Cancel button will be enabled when the Select Roles dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

2.10.2 Processes

This section describes the processes that take place as a result of the actions taken on this dialog.

2.10.2.1 Initializing the interface

During the initial presentation of the dialog the following activities are performed.

- The list is populated with a list of all roles that are not assigned to the specified staff assignment. (EDIT/VIEW MODE) The list is ordered alphabetically by Name.
- The Roles list is cleared (ADD MODE)
- The dialog caption is set to "Available Roles for [Location]" where [Location] is the location of the staff assignment.

If the user's permission (feature/access level) indicates that they can only view the information, the dialog will disable all controls except the OK and Cancel buttons.

2.10.2.2 Adding a Role

Adding a role displays the Role Profile dialog in add mode as described in section entitled Role Profile Dialog. Upon pressing the OK button on the list of available roles is refreshed.

2.10.2.3 Editing a Role

Editing a role displays the selected role in the Role Profile dialog as described in section entitled Staff Assignment Dialog. Upon pressing the OK button on the Role Profile dialog, the list is refreshed. If no item is selected in the list the standard information message "Please select an item in the list." is displayed.

2.10.2.4 Adding Roles to a Staffing Assignment

Adding the selected role(s) updates the specified staffing assignment and subsequently dismisses the dialog.

2.10.2.5 Canceling the dialog

Canceling the dialog dismisses the dialog without saving any changes.

2.10.3 Data map

Control	**Table**	**Field**
Roles	ROLE	

2.11 Role Profile Dialog

The Role Profile dialog displays role and permission information to the user. The dialog has 3 modes View, Add, and Edit. In Add mode, the dialog is presented to the user empty in its initialized state. In Edit and View mode, the dialog is presented to the user, filled in accordingly.

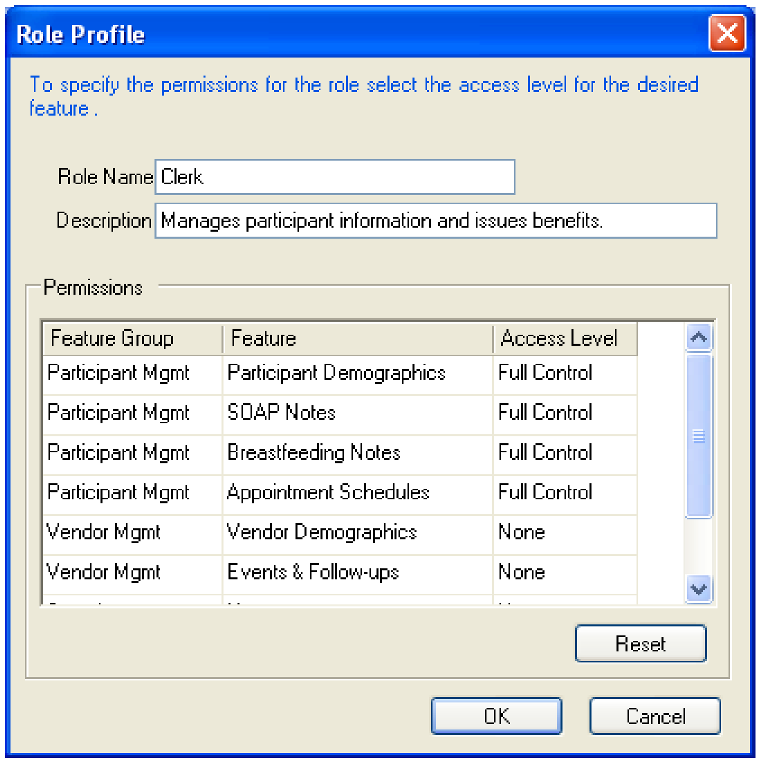


Figure 6–Role Profile Dialog

2.11.1 Controls

This section describes the behavior of the controls on the Role Profile dialog.

2.11.1.1 Role Name Text Box

This control allows the user to specify the name of the role. It will be **enabled** when the Role Profile dialog is active. The maximum size of this control will be twenty (20) characters. Only characters A-Z and {space} are allowed. It will convert all alphabetic characters to upper case.

2.11.1.2 Description Text Box

This control allows the user to specify the description of the role. It will be **enabled** when the Role Profile dialog is active. The maximum size of this control will be twenty (20) characters. Only characters A-Z and {space} are allowed. It will convert all alphabetic characters to upper case.

2.11.1.3 Reset Button

The Reset button will be enabled when the Role Profile dialog is active. The reset button in the permissions group resets the permissions to settings that were initially displayed.

2.11.1.4 OK Button

The OK button will be enabled when the Role Profile dialog is active. Characteristics for the OK button are defined in *Consistencies*

2.11.1.5 Cancel Button

The Cancel button will be enabled when the Role Profile dialog is active. It is the cancel button for the dialog. Characteristics for the Cancel button are defined in *Consistencies*.

2.11.2 Processes

This section describes the processes that take place as a result of the actions taken on this dialog.

2.11.2.1 Initializing the interface

During the initial presentation of the dialog the following activities are performed.

- All input controls are emptied (ADD MODE).
- The permissions list is populated with all features in the system. The list is ordered alphabetically by feature group and name. All access levels are set to [None].
- The dialog caption is set to "Role Profile for [New Role]".

2.11.2.2 Loading the data

If a role is being edited, the name and description of the role is displayed in the appropriate input controls. The access level for each feature in the permissions list is set accordingly.

If the user's permission (feature/access level) indicates that they can only view the information, the dialog will disable all controls except the OK and Cancel buttons.

2.11.2.3 Setting Permissions

The user can set each permission by clicking on the appropriate access level setting for the specific feature. Clicking on an access level setting will display a dropdown list allowing the user to select one of the following access levels; None, View, or Full Control. Refer to the Permission Matrix as described below for specific user roles available.

2.11.2.4 Saving the Role

Pressing the OK button saves the role and permission information and dismisses the dialog.

2.11.2.5 Canceling the dialog

Canceling the dialog dismisses the dialog without saving any changes.

2.11.3 Data Map

Control	Table	Field
Role Name	ROLE	NAME
Description	ROLE	DESCRIPTION
Permissions List	ROLE_PERMISSION_XREF	

2.11.4 Permission Matrix

Unless otherwise noted, if the user's permission set to none (via the roles assigned to the user) and the user attempts to invoke a function that requires a higher permission the application will display a message indicating that the user does not have sufficient permissions to access the requested functionality.

If the user's permission is set to Add, the user also has View permissions to the functionality. If the user's permission is set to Full Control, the user also has Add and View permissions to the functionality.

Feature Group	Feature	View	Add	Full Control
State Office	Inventory Management	View Inventory	Add Inventory	Add/Edit/Delete Inventory
State Office	Purchase Orders	View/Print Purchase Orders	Add Purchase Orders	Add/Edit/Delete Purchase Orders/ Cancel Orders
Data Synch	Clinics	View checked in/out status of each clinic	N/A	Cancel (undo) the checked out status of a clinic

Feature Group	Feature	View	Add	Full Control
Data Synch	Machines	View list of off-line capable machines	Add machines capable of off-line operation	Add/edit/delete machines capable of off-line operation
Data Synch	Remoting	Use the machine while in off-line mode View list of clinics checked out to the current machine	N/A	Switch between on-line and off-line operation (Check in/out data)
Management Console	Security Roles	View Roles	View/Add Roles	View/Add/Edit/ Delete Roles
Management Console	Security Users	View Users	View/Add Users	View/Add/Edit/ Delete Users
Management Console	Data Synch Administration	View Remote Machines Profiles	Add Remote Machine Profile	View/Add/Edit/Delete Remote Machine Profile
Management Console	Data Synch Check Out	View Remote Machines List – Off line/On-line	View Remote Machines List – Off line/On-line / Switch to Off-line Mode/	View Remote Machines List/ Switch to Off-line Mode /Cancel Remote Machine Check-out
Management Console	Data Synch Check In	View Remote Machines List – Off line/On-line	View Remote Machines List – Off line/On-line/ Switch to On-line Mode	View Remote Machines List – Off line/On-line/ Switch to On-line Mode/View Discrepancy List/Resolve Discrepancies

Feature Group	Feature	View	Add	Full Control
Participant Mgmt	Alerts	View alerts (automatically display when folder is opened)	Add alerts	Add/edit/delete alerts
Participant Mgmt	Appointments	View Appointments Tab View Appointments for Today View Appointments for Date	Add Appointments Mark Appointments as Kept Confirm Appointments	Add/reschedule/delete Appointments Follow-Up Appointment
Participant Mgmt	Breastfeeding Contacts	View Breastfeeding Contacts	Add Breastfeeding Contacts	Add\Delete Breastfeeding Contacts
Participant Mgmt	Breastfeeding Item Issuance	View Breastfeeding Item Issuance View Breastpump Reports View Breastpump History	Add Breastpump Issuance Add Breastfeeding Items Replace Breastpumps	Add/Edit/Delete Breast Pump Issuance Add/Edit/Delete Breastfeeding Items
Participant Mgmt	Breastfeeding Notes	View Breastfeeding Notes	Add Breastfeeding Notes	N/A
Participant Mgmt	Certification	View certifications Create [outbound] VOC documents	N/A	Add/Edit certifications Process [inbound] VOC documents

Feature Group	Feature	View	Add	Full Control
Participant Mgmt	CPA Follow-Up	View CPA Follow-Up	N/A	Edit CPA Follow-Up Information
Participant Mgmt	Check Issuance	View Check History tab View FI Disposition	Issue Checks	Issue/Void/Replace checks Mark Checks as Lost/Stolen
Participant Mgmt	Demographics	View Demographics Tab	Add demographic information Copy demographics	Add/edit demographic information Copy demographics
Participant Mgmt	Diet Intake History	View Diet Intake tab	Add Diet Intake items	Add/edit Diet Intake items
Participant Mgmt	Document Imaging	View/Print Scanned Documents	Scan a Document	Reassign/Delete Scanned Documents
Participant Mgmt	FI Disposition		N/A	N/A
Participant Mgmt	Food Prescriptions	View FP tab	Add food prescriptions	Add/edit/delete food prescriptions
Participant Mgmt	General Notes	View General Notes	Add General Notes	N/A
Participant Mgmt	Health Information	View Health Info tab View Infant Born from Pregnancy dialog	Add Health Info items Add/Infant Born from Pregnancy dialog	Add/edit Health Info items Add/edit/delete Infant Born from Pregnancy dialog

Feature Group	Feature	View	Add	Full Control
Participant Mgmt	Height/Weight and Blood	View HWB tab	Add HWB information	Add/Edit HWB information
Participant Mgmt	Household	View Household ID change history	N/A	Change a participants household
Participant Mgmt	Immunizations	View Immunizations	Add Immunizations	Add/edit/delete Immunizations
Participant Mgmt	Income History	View Income History tab	Add income information (use the Income Calculator)	Add/edit/delete income information (use the Income Calculator)
Participant Mgmt	Nutrition Education	View NE tab	Add nutrition education items	Add/edit/delete nutrition education items
Participant Mgmt	On-Site Group	Search by On-site group enabled View on-site group list	Add participants to on-site list	Add/remove participants from on-site list
Participant Mgmt	Participant Status	N\A	N/A	Terminate a Participant Reinstate a Participant
Participant Mgmt	Participant Transfer	View transfer history	N/A	Transfer participants

Feature Group	Feature	View	Add	Full Control
Participant Mgmt	Prescreening	N/A	Add prescreening information or a participant or new household	N/A
Participant Mgmt	Protected Alerts	View protected alerts (automatically displayed when folder is opened)	Add protected alerts	Add/edit/delete protected alerts
Participant Mgmt	Referrals	View Referrals tab	Add referrals Add other programs	Add/edit referrals Add/remove other programs
Participant Mgmt	Risk Factors	View risk factors	Add risk factors	Add/edit/delete risk factors
Participant Mgmt	SOAP Notes	View SOAP Notes	Add SOAP Notes	N/A
Participant Mgmt	Waiting List	View Waiting List	Add participants to the waiting list	Add/remove participants from the waiting list
Participant Questionnaire	Participant Questionnaire	N/A	N/A	Login to Participant Questionnaire
Participant Questionnaire	Participant Questionnaire Reports	N/A	N/A	Login to Participant Questionnaire Reports

Feature Group	Feature	View	Add	Full Control
Security	Roles	View Role list View Role Profile	Add roles (includes modifying the permissions granted to a role)	Add/edit/delete roles (includes modifying the permissions granted to a role)
Security	Staffing Assignments	View Staffing Assignment List	Add staffing assignments (includes assigning roles to the staffing assignment)	Add/edit/delete staffing assignments (includes assigning roles to the staffing assignment)
Security	Users	View User list View User Profile	Add users	Add/edit/delete users
System Admin	Caseload	View Caseload	Add Caseload	Add/Edit Caseload
System Admin	FI Disposition	View FI Disposition	N/A	N/A
System Admin	Master Calendar	View the master calendar	Add calendar items (for clinics that are not currently checked out)	Add/edit/delete calendar items (for clinics that are not currently checked out)
System Admin	Outreach	View/Print Outreach Agencies	Add Outreach Agencies	Add/Edit/Delete Outreach Agencies
System Admin	Participant Investigation	View Participant Investigation	N/A	Edit Participant Investigation
System Admin	Participant View	View Participant Folder	N/A	N/a
System Admin	Reference Utility	N/A	Add Reference Utility data	Add/Edit/Delete Reference Utility data

Feature Group	Feature	View	Add	Full Control
System Admin	Report Generator	N/A	N/A	Create/Run report
System Admin	System Administration	View System Administration Functions	Add System Administration Functions	Add/Edit/Delete System Administration Functions
System Admin	Agency Settings	View Agency Settings	Edit Agency Settings	N/A
System Admin	Filter Appointments by Resource	View Filter Appointments by Resource	Edit Filter Appointments by Resource	N/A
System Admin	Clinic Information Maintenance	View Clinic Information	Edit Clinic Information	N/A
System Admin	Local Use Questions	View Local Use Questions/Answers	Add Local Use Questions/Answers	Add/Edit/Delete Local Use Questions/Answers
System Admin	State Defined External Referral Agencies	View State Defined External Referral Agencies	Add State Defined External Referral Agencies	Add/Edit/Delete State Defined External Referral Agencies
System Admin	Locally Defined External Referral Agencies	View Locally Defined External Referral Agencies	Add Locally Defined External Referral Agencies	Add/Edit/Delete Locally Defined External Referral Agencies
System Admin	Clinic Defined External Referral Agencies	View Clinic Defined External Referral Agencies	Add Clinic Defined External Referral Agencies	Add/Edit/Delete Clinic Defined External Referral Agencies

Feature Group	Feature	View	Add	Full Control
System Admin	Locally Defined Other Programs	View Locally Defined Other Programs	Add Locally Defined Other Programs	Add/Edit/Delete Locally Defined Other Programs
System Admin	Event Logs	View Event Logs	N/A	N/A
System Admin	System Access Log	View System Access Log/Report	N/A	Purge System Access Log
Vendor Mgmt	Demographics	View Demographics Tab	Add demographic information Copy demographics	Add/edit demographic information Copy demographics
Vendor Mgmt	Notes	View Notes	Add /Edit Notes	Add/Edit/Delete Notes
Vendor Mgmt	Redemption History	View Redemption History	N/A	N/A
Vendor Mgmt	Food Pricing Price Survey	View Price Survey List	Create Price List	Create Price List/ Edit Prices
Vendor Mgmt	Food Pricing Food Basket	View Food Basket	N/A	N/A
Vendor Mgmt	Applicant	View Applicant Event	Add New Vendor/ Add Applicant Event	Delete Applicant Event (except Initial)
Vendor Mgmt	Compliant	View Complaint	Add Complaint	Add/Delete Complaint

Feature Group	Feature	View	Add	Full Control
Vendor Mgmt	Compliance Buy	View Compliance Buy	Add Compliance Buy	Add/Delete/Void Compliance Buy
Vendor Mgmt	Renewals	View Renewals	Add Renewal	Add/Delete Renewal
Vendor Mgmt	Terminatio n	View Termination	Add Termination	Add/Delete Termination
Vendor Mgmt	Routine Monitoring Visit	View Routine Monitoring Visit	Add Routine Monitoring Visit	Add/Delete Routine Monitoring Visit
Vendor Mgmt	Stamp Replaceme nt	View Stamp Replacement	Add Stamp Replacement	Add/Delete Stamp Replacement
Vendor Mgmt	New Vendor Authorizati on	View New Vendor Authorization	Add New Vendor Authorization	Add/Delete New Vendor Authorization
Vendor Mgmt	Send Letters	View Letter Sent	Add Letter Sent	Add/Delete Letter Sent
Vendor Mgmt	Sanction	View Sanction	Add Sanction	Add/Delete Sanction
Vendor Mgmt	Approved Checks	View Approved Checks	Add Approved Checks	Add/Delete Approved Checks
Vendor Mgmt	Special Training	View Special Training	Add Special Training	Add/Delete Special Training
Vendor Mgmt	Approved Checks Adjusted Pay Amount	View Approved Checks Adjusted Pay Amount	Add Approved Checks Adjusted Pay Amount	Add/Delete Approved Checks Adjusted Pay Amount
Vendor Mgmt	Checks Not Approved	View Checks Not Approved	Add Checks Not Approved	Add/Delete Checks Not Approved

Feature Group	**Feature**	**View**	**Add**	**Full Control**
Vendor Mgmt	Hearing	View Hearing	Add Hearing	Add/Delete Hearing
Vendor Mgmt	Annual Training Scheduled	View Annual Training Scheduled	Add Annual Training Scheduled	Add/Delete Annual Training Scheduled
Vendor Mgmt	Interactive Training Scheduled	View Interactive Training Scheduled	Add Interactive Training Scheduled	Add/Delete Interactive Training Scheduled
Vendor Mgmt	New Vendor Training Scheduled	View New Vendor Training Scheduled	Add New Vendor Training Scheduled	Add/Delete New Vendor Training Scheduled
Vendor Mgt	Terminate Stamp	View Terminate Stamp	Add Terminate Stamp	Add/Delete Terminate Stamp
Vendor Mgt	Telephone Call	View Telephone Call	Add Telephone Call	Add/Delete Telephone Call
Vendor Mgt	Log Application	View Log Application	Add Log Application	Add/Delete Log Application
Vendor Mgt	Compliance Buy Returned	View Compliance Buy Returned	Add Compliance Buy Returned	Add/Delete Compliance Buy Returned
Vendor Mgt	Application Wizard	View Application Wizard	Add Application Wizard	Add/Delete Application Wizard
Vendor Mgt	Monitoring Visit	View Monitoring Visit	Add Monitoring Visit	Add/Delete Monitoring Visit
Vendor Mgt	Violation	View Violation	Add Violation	Add/Delete Violation
Vendor Mgt	Denial	View Denial	Add Denial	Add/Delete Denial

Feature Group	Feature	View	Add	Full Control
Vendor Mgt	Stamp Issuance	View Stamp Issuance	Add Stamp Issuance	N/A (not allowed to delete)
Vendor Mgt	Signature Page Returned	View Signature Page Returned	Add Signature Page Returned	Add/Delete Signature Page Returned
Vendor Mgt	Final Disposition	View Final Disposition	Add Final Disposition	Add/Delete Final Disposition
Vendor Mgt	Hearing	View Hearing	Add Hearing	Add/Delete Hearing
Vendor Mgt	Appeal	View Appeal	Add Appeal	Add/Delete Appeal
Vendor Mgt	Disqualification	View Disqualification	Add Disqualification	Add/Delete Disqualification
Vendor Mgt	Fines Collected	View Fines Collected	Add Fines Collected	Add/Delete Fines Collected
Vendor Mgt	First Denial Letter Returned	View First Denial Letter Returned	Add First Denial Letter Returned	Add/Delete First Denial Letter Returned
Vendor Mgt	Rescheduled Hearing Date	View Rescheduled Hearing Date	Add Rescheduled Hearing Date	Add/Delete Rescheduled Hearing Date
Vendor Mgt	Second Denial Letter Returned	View Second Denial Letter Returned	Add Second Denial Letter Returned	Add/Delete Second Denial Letter Returned
Vendor Mgt	Annual Training Attended	View Annual Training Attended	Add Annual Training Attended	Add/Delete Annual Training Attended
Vendor Mgt	Interactive Training Attended	View Interactive Training Attended	Add Interactive Training Attended	Add/Delete Interactive Training Attended

Feature Group	Feature	View	Add	Full Control
Vendor Mgt	New Vendor Training Attended	View New Vendor Training Attended	Add New Vendor Training Attended	Add/Delete New Vendor Training Attended
Vendor Mgt	Special Training Attended	View Special Training Attended	Add Special Training Attended	Add/Delete Special Training Attended
Vendor Mgt	Stamp Returned	View Stamp Returned	Add Stamp Returned	Add/Delete Stamp Returned
Vendor Mgt	Probation	View Probation	Add Probation	Add/Delete Probation
Vendor Mgt	Reinstate Vendor and Vendor Stamp	View Reinstate Vendor and Vendor Stamp	Add Reinstate Vendor and Vendor Stamp	Add/Delete Reinstate Vendor and Vendor Stamp
Vendor Mgt	Action Dates	View Action Dates	Add Action Dates	Add/Edit Action Dates
Vendor Mgt	Vendor Reports	N/A	N/A	Access Vendor Reports
Vendor Mgt	Food Instrument Types	View Food Instrument Types	N/A	Update Food Instrument Types
Manage Peer Groups	Peer Groups	View Peer Groups	Add Peer Groups	Add/Edit Peer Groups
Manage Peer Groups	Peer Group Average	View Peer Group Average	N/A	Edit Override Prices/ Recalculate Prices
Manage Peer Groups	Peer Group Food Basket	View Peer Group Food Basket	N/A	Edit Food Basket Items
Vendor Mgt/ Ref Util.	Maintain Owners	View Owners	Add/Edit Owners	Add/Edit/Delete Owners

Feature Group	Feature	View	Add	Full Control
Vendor Mgt/ Ref Util.	Maintain Corporate Parents	View Corporate Parents	Add/Edit Corporate Parents	Add/Edit/Delete Corporate Parents
Vendor Mgt/ Ref Util.	Maintain Primary Grocery Wholesalers	View Primary Grocery Wholesalers	Add/Edit Primary Grocery Wholesalers	Add/Edit/Delete Primary Grocery Wholesalers
Vendor Mgt/ Ref Util.	Maintain Pharmacy Wholesalers	View Pharmacy Wholesalers	Add/Edit Pharmacy Wholesalers	Add/Edit/Delete Pharmacy Wholesalers
Vendor Mgt/ Ref Util.	Maintain Milk Wholesalers	View Milk Wholesalers	Add/Edit Milk Wholesalers	Add/Edit/Delete Milk Wholesalers
Vendor Mgt/ Ref Util.	Maintain Licensed Formula Wholesalers	View Licensed Formula Wholesalers	Add/Edit Licensed Formula Wholesalers	Add/Edit/Delete Licensed Formula Wholesalers
Schedule Job Admin	Schedule Job Admin	N/A	N/A	Access Schedule Job Admin
Financial Management	Journal	View Journal	N/A	Add/Edit/Delete/ Post Journal/ Import Journal File
Financial Management	Financial Reports	N/A	N/A	Access Financial Reports
Financial Management	Financial Account Inquiry	N/A	N/A	Financial Account Inquiry
Financial Management	Accounting Schedule	View Accounting Schedule	N/A	Add/Edit Accounting Schedule/ Add Accounting Year

Feature Group	Feature	View	Add	Full Control
Financial Management	Funds	View Funds	N/A	Add/Edit/Delete Funds
Financial Management	Financial Accounts	View Financial Accounts	N/A	Add/Edit/Delete Financial Accounts
Financial Management	Natural Accounts	View Natural Accounts	N/A	Add/Edit/Delete Natural Accounts
Financial Management	Financial Statements	View Financial Statements	N/A	Add/Edit/Delete Financial Statements/ Financial Statement Line List/ Financial Statement Line/ Financial Statement Fund Variant List/ Add Financial Statement Variant Year
Rebates	Rebate Suppliers	View Rebate Suppliers	N/A	Add/Edit Rebate Suppliers/ Contacts/ Products/ Agreements/ Add Rebate Schedule/ Select Rebate Products/ Rebate Items
Rebate	Rebate Supplier Account	View Rebate Supplier Account	N/A	Add/Edit/Delete Rebate Supplier Accounts/ Invoice Items/ Generate Invoice/ Reprint Invoice/ Account Transactions

2.12 Set Password Dialog

The Set password dialog allows the user to set the password for the specified user profile.

Figure 7– Set Password Dialog

2.12.1 Controls

This section describes the behavior of the controls on the Role Profile dialog.

2.12.1.1 Current Password Text Box

This control allows the user to specify a password for the user. It will be **enabled** when the Set Password dialog is active. If this dialog is displayed in the course of managing a user profile other than the current user's profile and the current user has full control for the Users feature this control is hidden. It is assumed that the individual has sufficient permission to set the user's password. The maximum size of this control will be fifteen (15) characters. The minimum size will be six (6) characters. All numeric, alphabetic and special characters are allowed. Spaces and Tabs are not allowed. The control will be case sensitive.

2.12.1.2 New Password Text Box

This control allows the user to specify a password for the user. It will be **enabled** when the Set Password dialog is active. The maximum size of this control will be fifteen (15) characters. The minimum size will be six (6) characters. All numeric, alphabetic and special characters are allowed. Spaces and Tabs are not allowed. The control will be case sensitive..

2.12.1.3 Confirm New Password Text Box

This control allows the user to specify a password for the user. It will be **enabled** when the Set Password dialog is active. The maximum size of this control will be fifteen (15) characters. The minimum size will be six (6) characters. All numeric, alphabetic, and special characters are allowed. Spaces and Tabs are not allowed. The control will be case sensitive.

2.12.1.4 OK Button

The OK button will be enabled when Set Password dialog is active. Characteristics for the OK button are defined in *Consistencies*.

2.12.1.5 Cancel Button

The Cancel button will be enabled when the Set Password dialog is active. It is the cancel button for the dialog. Characteristics for the Cancel button are defined in *Consistencies*.

2.12.2 Processes

This section describes the processes that take place as a result of the actions taken on this dialog.

2.12.2.1 Initializing the interface

During the initial presentation of the dialog the following activities are performed.

- All input controls are emptied.
- The dialog caption is set to “Set Password for [User]” where [User] is the full name of the user.

2.12.2.2 Edits

Upon selection of the OK button, the following validation steps are applied:

- If specifying the current password is required, the value in the current password must match the password in the user’s profile. Otherwise the system will invoke a standard error message with the text, “Invalid password entered.”
- The value in the new password control must match the value in the confirm new password control. Otherwise the system will invoke a standard error message with the text, “The New Password and Confirm New Password values do not match.”
- The new password must not match the existing password. If it does, the system will invoke a standard error message with the text, “The New Password must not match the existing password.”

2.12.2.3 Saving the Data

If the validation steps succeed than the user’s password is updated.

2.12.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving any changes.

2.12.3 Data map

Control	**Table**	**Field**
Current Password	USERPROFILE	PASSWORD
New Password	USERPROFILE	PASSWORD