RMH SECURITY GUIDE

Retail Management Hero (RMH)

rmhsupport@rrdisti.com www.rmhpos.com

Revision	Version	Date
Draft	3.1	12/01/2016

Disclaimer

Information in this document, including URL and other Internet Web site references, is subject to change without notice. Unless otherwise noted, the example companies, organizations, products, domain names, e-mail addresses, logos, people, places and events depicted herein are fictitious, and no association with any real company, organization, product, domain name, email address, logo, person, place or event is intended or should be inferred. Complying with all applicable copyright laws is the responsibility of the user.

Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Retail Realm. Retail Realm or Retail Hero may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written RMH license agreement, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

The document, SDK help file and demo projects are subject to the Partner's non-disclosure and VAR agreements signed by Retail Realm.

© 2016 Retail Management Hero, under a license from Retail Hero, Inc. All rights reserved. Doc ID: Publication date: Dec. 2016

Support is provided through the RMH support system: http://support.rrdisti.com/account/login.

RMH Product Website: www.rmhpos.com

CONTENTS

Retail Management Hero Security – Role Based Access

Overview

Role-based access control in Retail Management Hero (RMH) regulates access to features or feature groups in the RMH POS and RMH Store Manager based on roles that individual users are assigned to. Access is the ability of an individual user to perform specific business tasks. Examples of such tasks are: as Exit POS or Abort Transactions in the RMH POS application and Define/Edit Currencies or Define/Edit Purchasers in the RMH Store Manager application.

Roles can be referred to as templates for what a user can and cannot do in either the RMH POS or the RMH Back Office Manager. There are two categories or roles: RMH POS roles and RMH Back Office Manager roles. It is possible to define multiple roles under each role category; however, every user can have only one role per category.

Predefined Roles

In RMH, there are two predefined user roles:

- **No Access** role that has no rights selected

- **Full Access** role that has all rights selected

A new RMH user is automatically assigned the **No Access** predefined role when that user is created.

For Microsoft Dynamics RMS legacy users, the following applies:

- If the legacy user had the legacy *Manager* right checked, that user will be automatically assigned the **Full Access** predefined role after an upgrade

- If the legacy user did not have the legacy Manager right checked, that user will be automatically assigned the **No Access** predefined role after an upgrade

Defining a User

To define a user in the RMH Store Manager, complete the following:

1. From **Setup**, click **People & Security**, and then click **Users**.
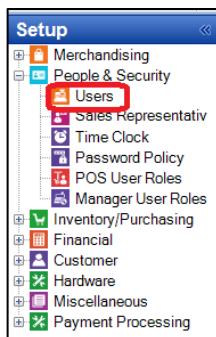
2. When the User properties form displays (see following sample figure), define the applicable options.

- **User Details**

  o **Login ID**: The user login id

  o **User Name**: The user name

  o **Telephone**: The user telephone number

  o **E-mail:** The user email

  o **Password:** The user password

- **Cashier is Inactive**

  All elements in the Define a User form will be active when the *Cashier is Inactive* checkbox is unchecked. When the *Cashier is Inactive* checkbox is checked, this group becomes inactive. **Note**: When the user is inactive, the *User is Inactive* checkbox is still enabled so the user can be activated as necessary.

- **User Roles**

  o **POS role**: Lists available POS roles that can be assigned to that user

  o **Store Manager role**: Lists available Store Manager roles that can be assigned to that user

These boxes contain the roles that have been defined (described later in this document).

- **POS SetUp Overwrite**

  You can overwrite individual rights associated with a POS Role for the user.
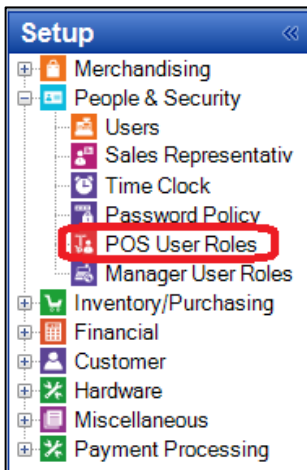
- **Over/Short Limits**

  The option in this group will be enabled for selection only if the cashier has the ***Allowed to generate Z & ZZ Reports*** selected.
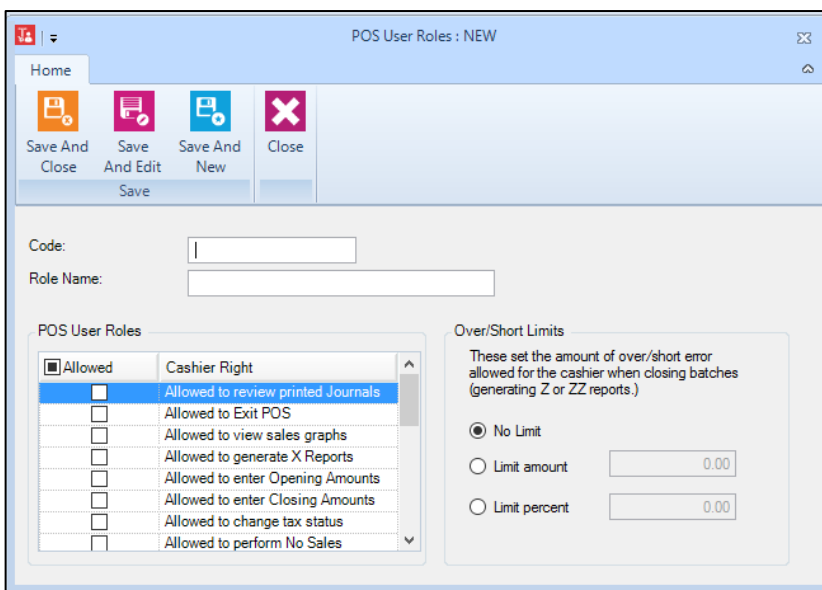
3. Save the edits.

Defining POS User Roles

To define POS User Roles in the RMH Store Manager, perform the following:

1. From **Setup**, click **People & Security**, and then click **POS User Roles**.

2. When the POS User Roles form displays (see following sample figure), specify the relevant role information and configure the assigned rights:

Cashier Rights

The following POS rights are available for assignment:

- Allowed to review printed journals
- Allowed to exit POS
- Allowed to generate X reports
- Allowed to enter opening amounts
- Allowed to change tax status
- Allowed to perform No Sales
- Allowed to perform Drops and Pay Outs
- Allowed to put transactions on hold
- Allowed to perform Closeouts
- Allowed to generate Z & ZZ Reports
- Allowed to delete entries from transactions
- Allowed to view and edit all customers
- Allowed to post empty transactions
- Allowed to sell to employees with discounts
- Allowed to abort transactions

NOTE: The following Microsoft RMS legacy rights are no longer supported:

- Allow to view cost information
- Allowed to view sales graphs
- Allowed to edit Time Clock entries
- Allowed to view others' Time Clock entries
- Manager Rights
- Allowed to access Pricing
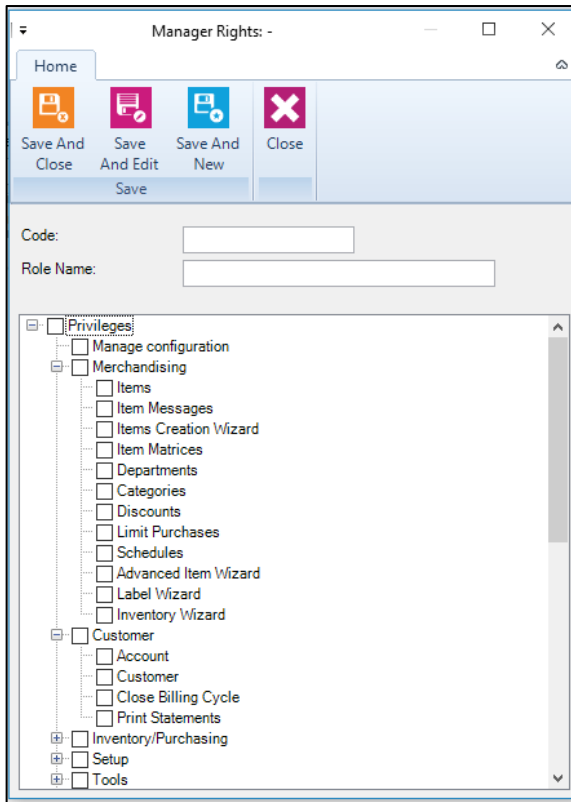- Administrator Rights

3. Save the edits.

Defining Store Manager User Roles

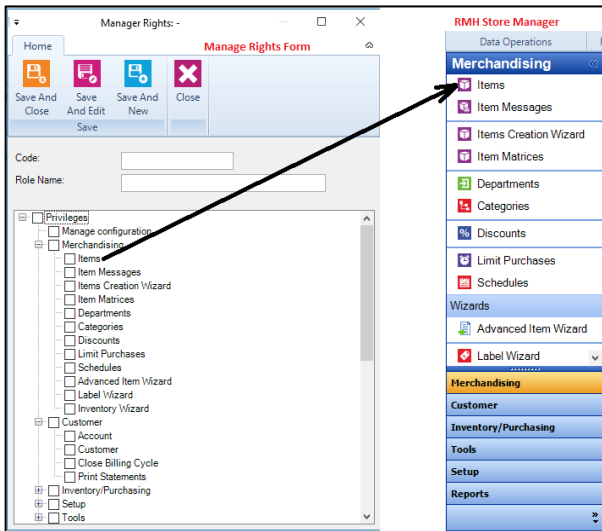To define Store Manager Roles in the RMH Store Manager, perform the following:

1. From **Setup**, click **People & Security**, and then click **Manager User Roles**.
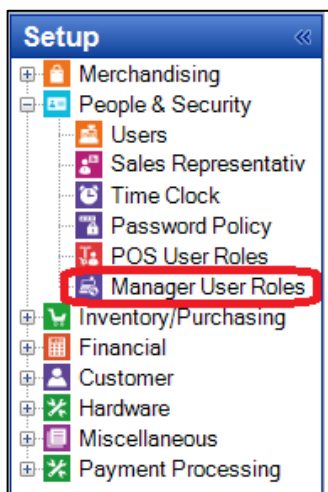
2. When the Manager Rights form displays (see following sample figure), check or clear the applicable privileges.

The **Rights** tree in this form corresponds to all menu choices in the Data Operations section in the RMH Store Manager. A 'right' that is selected in the Manager Rights form will enable user access to its corresponding menu item in the RMH Store Manager Data Operation section:

You can expand the rights tree in this form and select all necessary rights for the Store Manager role. When this role becomes associated with a user (see the previous *Define a User* section) that user will be able to access the following:

Store Manager Rights

Merchandising
Items
Item Messages
Items Creation Wizard
Item Matrices
Departments
Categories
Discounts
Limit Purchases
Schedules
Wizards
Customer
Account
Customers
Close Billing Cycle
Print Statements
Inventory/Purchasing
Suppliers
Supplier Worksheet
Purchase Orders
Purchase Order Requisition
Transfer Ins
Transfer Outs
Worksheet Inventory
Transfer in Requisition
Invoice
Credit Note
Cost Adjustment
Offline Inventory
Tools
Backup Database
Label Designer
Setup
Merchandising
People and Security
Inventory Purchasing
Financial
Customer
Hardware
Miscellaneous
Payment Processing
Reports
Sales
Items
Quotes/Orders
Layaway
Miscellaneous
Memorized
Custom