

Harmony - Security - How to Create Security Groups and User Accounts

You can provide different levels of access to the system using Harmony's security module. The security module lets you define security groups and their level of access, and add new user accounts.

Note: If you have accidentally created the wrong email address for your employee, do not create a new one. Please contact Paymate Support to change or delete the incorrect user account that you have created.

Creating Security Groups

Security groups are groups of employees that share the same permissions or rights. For example, you may have groups called *Employees* and *Managers*. Your *Managers* group may have more permissions than your *Employees*, such as approving timesheets or accessing reports.

1. Navigate to Security > Groups.
2. Click "**Add**" to add a new security group.
3. Ensure that the toggle is on (green) to activate the group. An inactive group will not allow your employees in this group to log in.
4. Enter all required fields, such as "*Code*" and "*Name*" (identifies the group).
5. Click the save icon to save the security group.

Setting Up Permissions For Your Security Groups

After creating security groups, the next step is to define the permissions/rights/level of access for your security groups.

1. Navigate to Security > Permissions.
2. Select the correct "*Group*" in the dropdown to view the permissions for this selected security group.
3. Select the correct "*Module*" in the dropdown to view the module-specific permissions for the selected security group.
4. Use the checkboxes to update the appropriate permissions for the selected security group and module.
 - a. *View* allows a user in this security group to view items and records.
 - b. *Add* allows a user in this security group to add new items and records.
 - c. *Modify* allows a user in this security group to edit existing items and records.
 - d. *Delete* allows a user in this security group to delete existing items and records.

Creating User Accounts

The final step is to create user accounts for your employees, or any external parties that you want to have access to your system.

Note: If you have accidentally created the wrong email address for your employee, do not create a new one. Please contact Paymate Support to change or delete the incorrect user account that you have created.

1. Navigate to Security > User.
2. Click "**Add**" to add a new user account.
3. Enter all the required fields.
4. Click the save icon to save the user account. Please note that you will no longer have access to the user account's password and you cannot modify the username for the user account.