

eServ Security Guide

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Version 7.9.4





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1. Admin Menu

The purpose of this document is to provide the standard user with the knowledge that they will require to successfully manage the organizational security for their respective MBM Web Ordering System implementation. This document will describe in detail the flexibility and functionality provided for the purpose of managing that security.

The Security Model for the MBM Web Ordering Systems is based upon a hierarchical design, where a user can create, edit, and administer other users that have a security role less than their own. This security model also defines the accessibility and usability for each account.

1.1. Managing your Users

The User Management option of the Admin Menu provides a listing of accounts related to the user that is currently logged in. The current user can only modify existing accounts or add new accounts that have a security role lower than their own. This relationship pertains to all levels and all accounts.

From this screen the user has the ability to edit existing account details, edit the customers assigned to a specific account, or to create a new account and assign the customers for that account.



Figure 1: Admin Menu, User Management

1. Click Admin
2. Click User Management

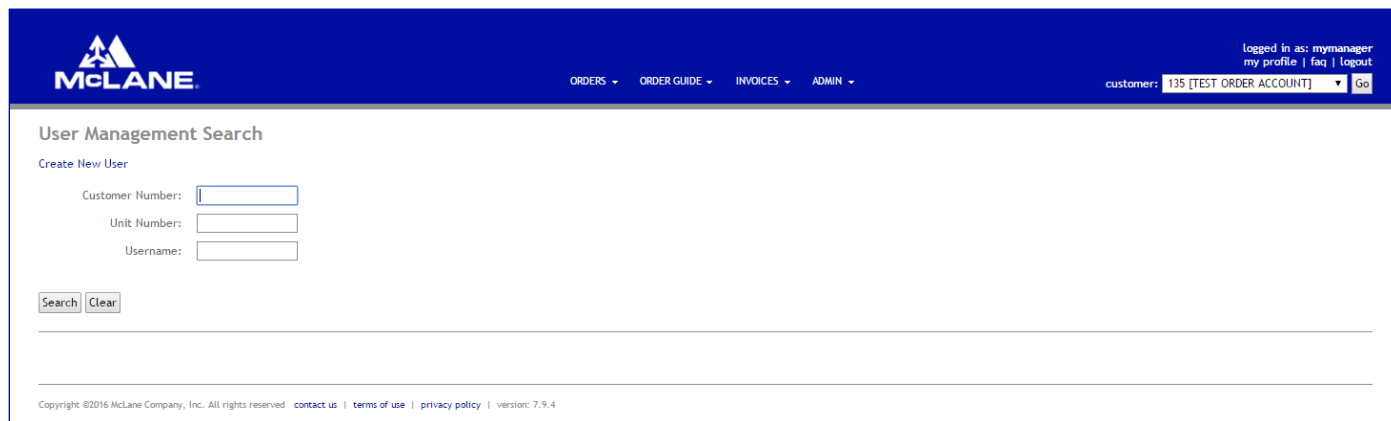


Figure 2: Admin Menu, User Management Search

1.1.1. Creating a New User ...

1. Click Admin
2. Click User Management
3. Click [Create New User](#)

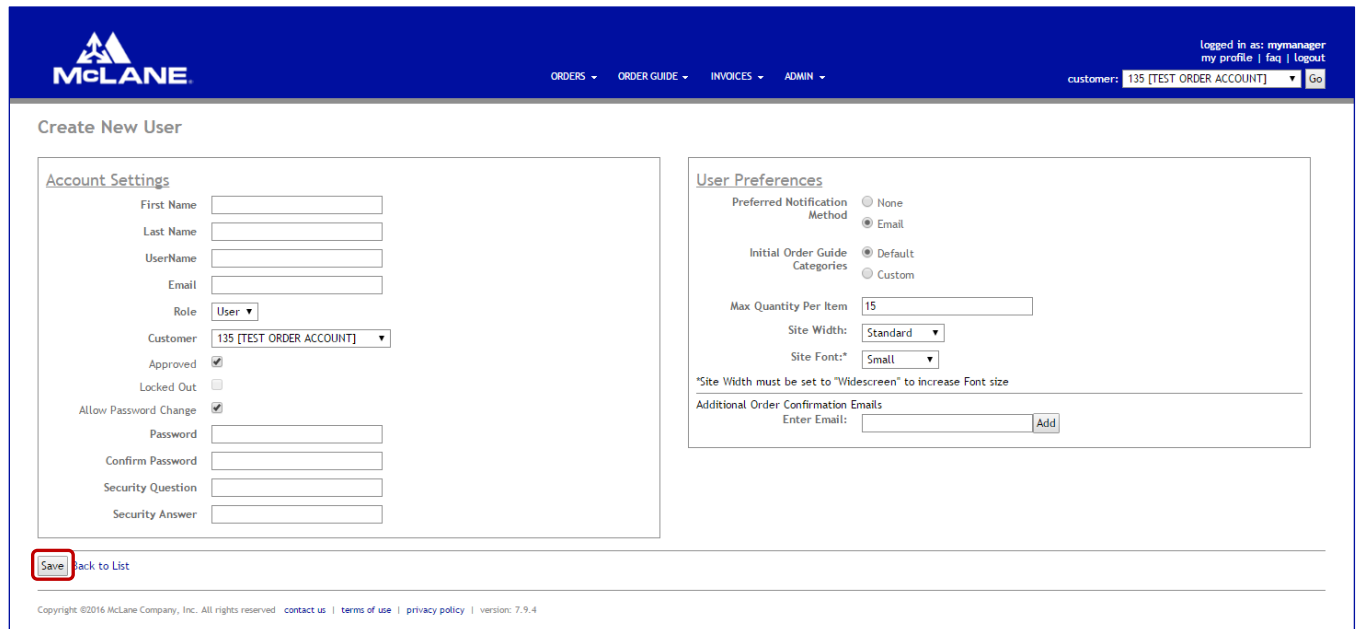


Figure 3: Create New User

4. Enter the user's First Name
5. Enter the Last Name
6. Enter the Username
7. Enter a valid email address (this can be a duplicate email address)
8. Select the user's Security Role (The available roles will be less than or equal to the current users role).
9. Enter the Password (the password must be between 8 and 16 characters in length and contain 1 number, 1 letter, and 1 special character).
10. Confirm the Password.
11. Enter the Security Question.
12. Enter the Security Answer.
13. Click the **Save** button.
14. Click [Back to List](#) to return to the User List

1.1.2. User Preferences

The User Preferences are pre-populated with default values, so user-input is not required to create a new account. If the Account Holder wishes to set different values then they will be saved to the database for all future sessions.

1. Preferred Notification Method

* **Note:** The Email Option must be selected if the User wishes to receive the Order Confirmation Emails.

Preferred Notification Method
 None
 Email

2. Initial Order Guide Categories

This Preference determines which view of the Order Guide is displayed when the User either views the Order Guide or places an Order using the Order Guide Order.

Initial Order Guide Categories
 Default
 Custom

3. Maximum Quantity Per Item

When the User is placing an Order and enters a quantity for each individual item this Preference Value is referenced to determine if the User entered a quantity that is greater than the Maximum Quantity Per Item and notifies the User that they've exceeded the set value.

Max Quantity Per Item

4. Site Width

The Site Width Preference is only displayed for members of specific Roles, providing them with the ability to adjust the displayed width of MBMeServ.

Site Width:

- Standard
- Widescreen
- Narrow

5. Site Font

The Site Font Preference is only displayed for members of specific Roles, providing them with the ability to adjust the displayed size of the system font for MBMeServ.

* **Note:** The Site Width must be set to “Widescreen” to increase the Font Size.

Site Font:*

- Small
- Medium
- Large
- ExtraSmall

6. Additional Order Confirmation Emails

This Preference allows Users to identify additional email accounts that should receive an Order Confirmation email every time a new Order is placed.

Additional Order Confirmation Emails
Enter Email:

To add additional Email(s):

- Enter a new Email Address
- Click the button.
- Repeat ...

Enter Email:

account@nc.rr.com
account@gmail.com
account@hotmail.com

✖
✖
✖

To remove additional Email(s):

- Click the ✖ next to each Email Address
- Repeat ...

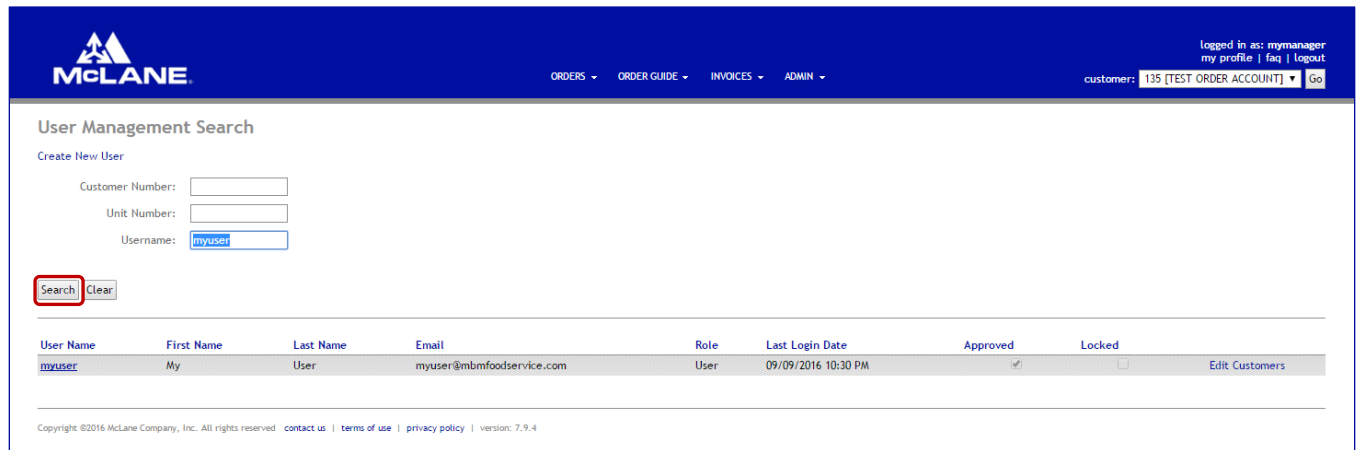
Enter Email:

account@nc.rr.com
account@gmail.com

✖

1.1.3. Editing an Existing User ...

1. Click Admin
2. Click User Management



McLANE

logged in as: mymanager
my profile | faq | logout

customer: 135 [TEST ORDER ACCOUNT] Go

ORDERS ORDER GUIDE INVOICES ADMIN

User Management Search

Create New User

Customer Number:

Unit Number:

Username:

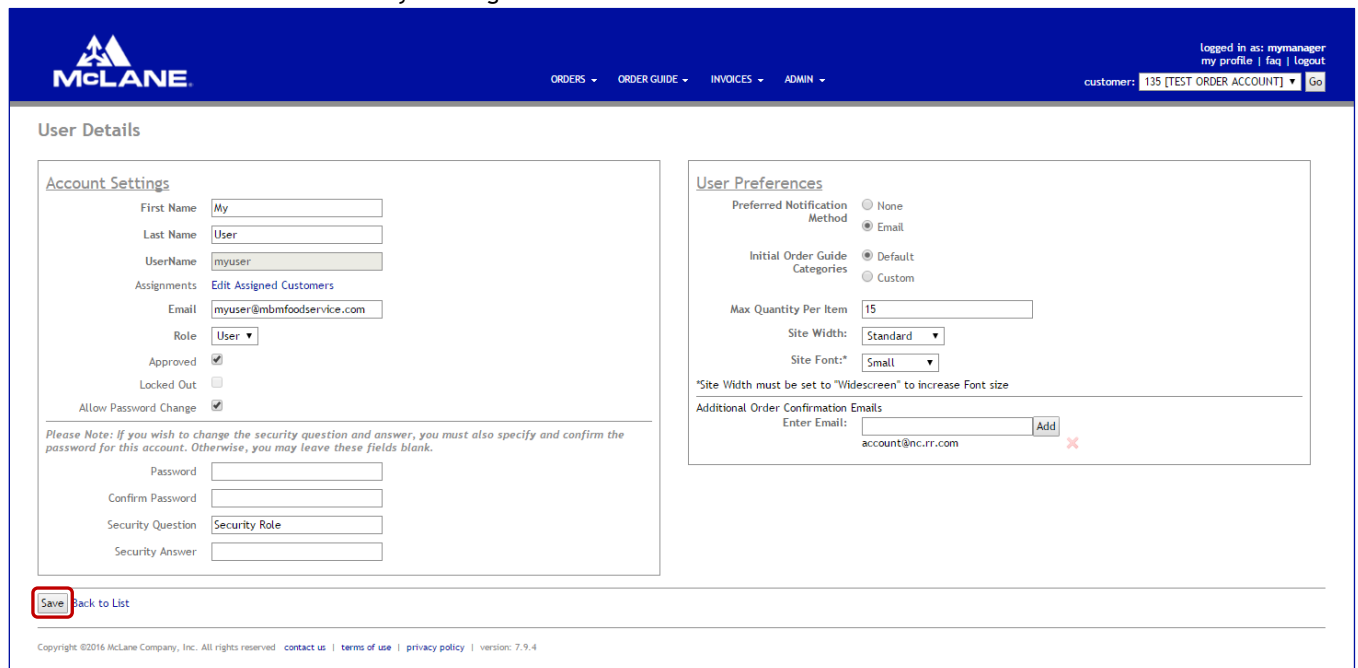
Search Clear

User Name	First Name	Last Name	Email	Role	Last Login Date	Approved	Locked	
myuser	My	User	myuser@mbmfoodservice.com	User	09/09/2016 10:30 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit Customers

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Figure 4: User Listing

3. Click the user to edit by clicking the **User Name** on the left.



McLANE

logged in as: mymanager
my profile | faq | logout

customer: 135 [TEST ORDER ACCOUNT] Go

ORDERS ORDER GUIDE INVOICES ADMIN

User Details

Account Settings

First Name:

Last Name:

UserName:

Assignments: [Edit Assigned Customers](#)

Email:

Role:

Approved:

Locked Out:

Allow Password Change:

Please Note: If you wish to change the security question and answer, you must also specify and confirm the password for this account. Otherwise, you may leave these fields blank.

Password:

Confirm Password:

Security Question:

Security Answer:

User Preferences

Preferred Notification Method: None Email

Initial Order Guide Categories: Default Custom

Max Quantity Per Item:

Site Width:

Site Font:

*Site Width must be set to "Widescreen" to increase Font size

Additional Order Confirmation Emails

Enter Email: **Add** ✖

Save Back to List

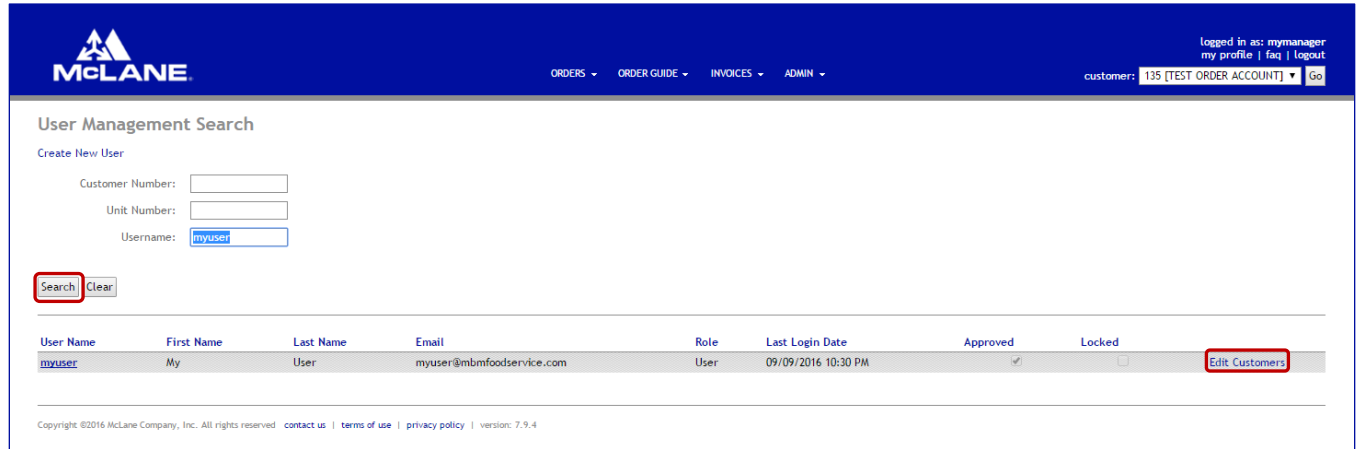
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Figure 5: View User Details

4. Edit any of the user details
5. To Save the New User account click the **Save** button.
6. Click **Back to List** to return to the User List

1.1.4. Edit User Assignments ...

1. Click Admin
2. Click User Management



McLANE

logged in as: mymanager
my profile | faq | logout

customer: 135 [TEST ORDER ACCOUNT] Go

ORDERS ORDER GUIDE INVOICES ADMIN

User Management Search

Create New User

Customer Number:

Unit Number:

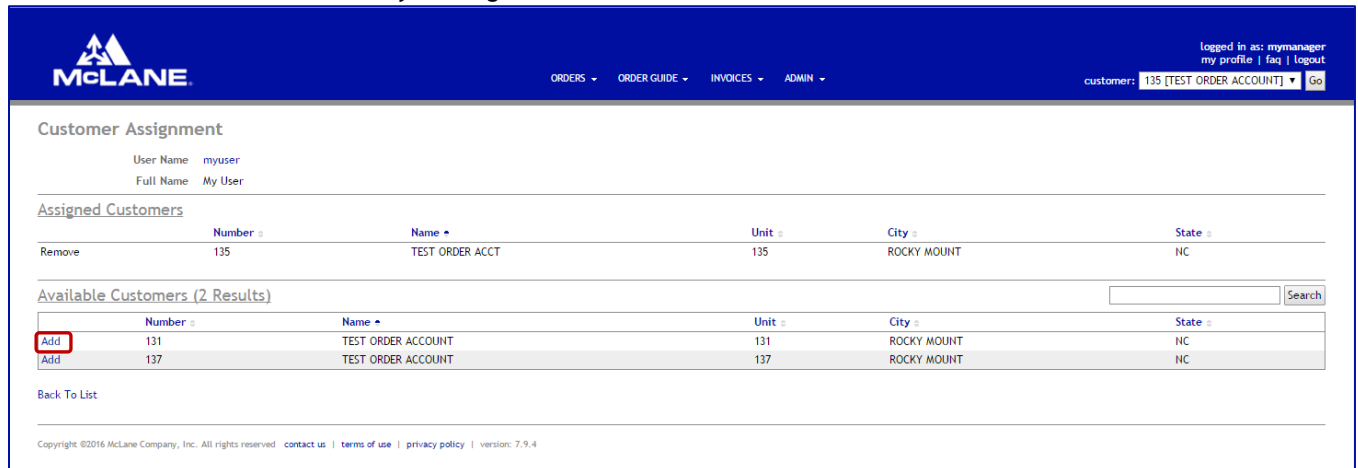
Username:

User Name	First Name	Last Name	Email	Role	Last Login Date	Approved	Locked	
myuser	My	User	myuser@mbmfoodservice.com	User	09/09/2016 10:30 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit Customers"/>

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Figure 6: User Listing

3. Click the user to edit by clicking the [Edit Customers](#) on the left.



McLANE

logged in as: mymanager
my profile | faq | logout

customer: 135 [TEST ORDER ACCOUNT] Go

ORDERS ORDER GUIDE INVOICES ADMIN

Customer Assignment

User Name myuser
Full Name My User

Assigned Customers

Remove	Number	Name	Unit	City	State
	135	TEST ORDER ACCT	135	ROCKY MOUNT	NC

Available Customers (2 Results)

	Number	Name	Unit	City	State
<input type="button" value="Add"/>	131	TEST ORDER ACCOUNT	131	ROCKY MOUNT	NC
<input type="button" value="Add"/>	137	TEST ORDER ACCOUNT	137	ROCKY MOUNT	NC

[Back To List](#)

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Figure 7: Edit Customer Assignments

4. Search for the required customer by either [Number](#) or [Name](#).
5. Click the [Add](#) button next to the required customer.
6. Click [Back to List](#) to return to the User List

1.2. Security Roles and Privileges

1.2.1. Basic Functionality

	Owner	District Manager	Manager	User
Basic Functionality				
View Landing Page	X	X	X	X
Use "forgot Password" functionality	X	X	X	X
Use "contact us" functionality	X	X	X	X
View "terms of use"	X	X	X	X
View "privacy policy"	X	X	X	X
Use "close browser" functionality	X	X	X	X
Log into MBMeServ	X	X	X	X
View "my profile"	X	X	X	X
View "faq page"	X	X	X	X
Use "logout" functionality	X	X	X	X
Enter or Select a "customer"	X	X	X	X

Figure 8: Security Matrix, Basic Functionality

1.2.2. Ordering/Order Guide Functionality

	Owner	District Manager	Manager	User
Ordering/Order Guide Functionality				
Order Guide Order	X	X	X	X
Quick Order	X	X	X	X
Order History	X	X	X	X
Entry Form	X	X	X	X
View Order Guide	X	X	X	X
Manage Order Guide	X	X	X	X
View Default Order Guide	X	X	X	X
View Custom Order Guide	X	X	X	X
Customize Order Guide	X	X	X	
Create New Build-To List	X	X	X	
Manage default build to lists	X	X	X	
Clone Custom Order Guide	X	X		
Clone Build-To List	X	X		

Figure 9: Security Matrix, Ordering/Order Guide

1.2.3. Invoices

	Owner	District Manager	Manager	User
Invoices				
View Invoices	X	X	X	
Search Invoices by Invoice Number	X	X	X	
Search Invoices by Date Range	X	X	X	
Print Invoices	X	X	X	
Export Invoices	X	X	X	
View "invoice details"	X	X	X	
Print "invoice details"	X	X	X	
Export "invoice details"	X	X	X	

Figure 10: Security Matrix, Invoices

1.2.4. Admin

	Owner	District Manager	Manager	User
Admin				
View User Management Menu Option	X	X	X	
View User Accounts With Lesser Security Role	X	X	X	
Search User Accounts With Lesser Security Role	X	X	X	
Sort User Accounts With Lesser Security Role	X	X	X	
Create New User Account With Lesser Security Role	X	X	X	
Assign Companies	X	X	X	
Assign Customers	X	X	X	
Assign Concepts	X	X	X	
Edit Existing User Account With Lesser Security Role	X	X	X	
Can Restrict Password Change	X	X	X	

Figure 11: Security Matrix, Admin/User Management