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# Security and Control

*For Aura 6.3*

# Contents



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# Aura Security Setup

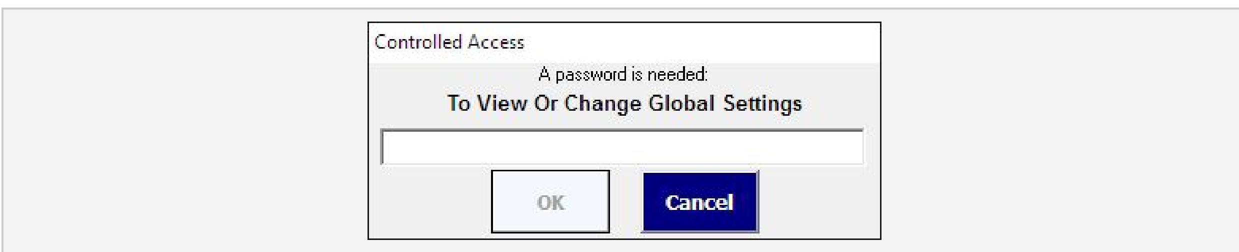
For any store owner, and in fact with any software system that deals with financial data, a good security policy is extremely important. Due to the fact that many people in a store environment will need to use the Aura system, it's important to be able to control access to information and abilities, and then be able to review user activity and adjust the system accordingly.

The Aura point of sale system provides the tools to be able to do this effectively for your store. This guide will take you through the steps of a recommended security setup, and explains how to review and analyse user activity. Please note that this is a general recommendation, please feel free to modify it based on your needs, and be sure to consult the Aura product manuals for more detailed information on these different areas and reports.

## Access Permissions

The first step in creating a security policy is assigning different levels of access to each category of employee that uses Aura. This way you can make sure that the cashier has access to make sales but not access Backoffice, and that managers have access to what they need to do their jobs while keeping sensitive information private. Permissions are assigned by category instead of each employee individually.

Every action in Aura that requires a user password (or a fingerprint if fingerprint scanners are used) is known as an **Access Permission**. The bolded text is the name of the permission that requires the password.




In this example, **To View or Change Global Settings** is the name of this particular permission, and the name that will appear in the *Access Permissions* screen and Activity reports.

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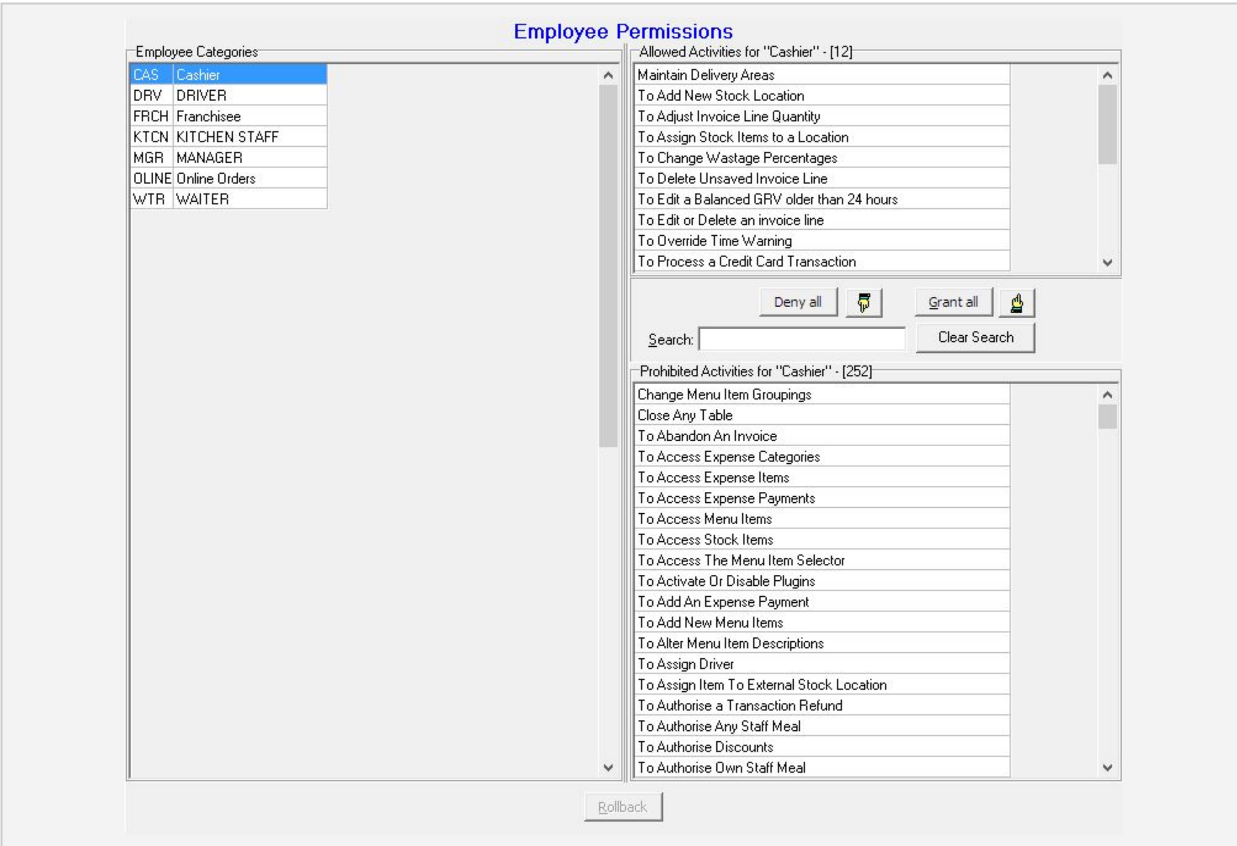
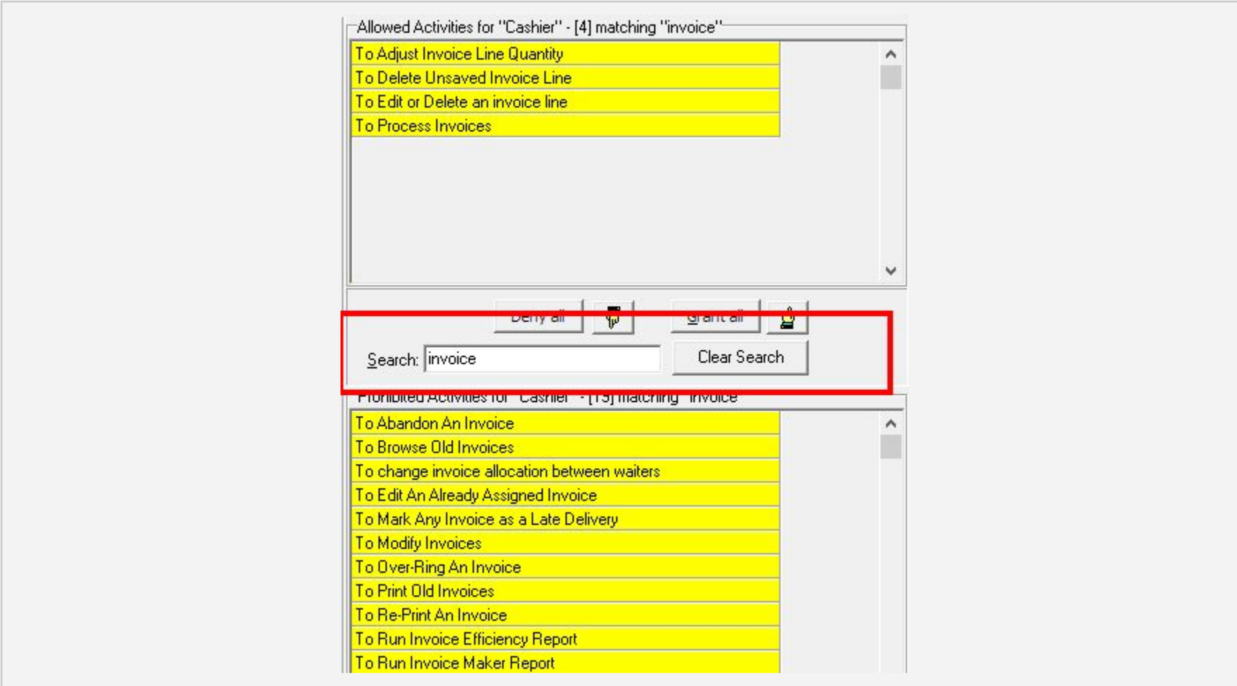
## Access Permissions setup

To configure your access permissions, open **Backoffice**, and click *Preferences* > *Access Permissions*.

To assign an access permission, select the Category you want to edit in the left window. On the right, the permissions are divided into **Allowed** and **Prohibited**.




1. Select the category you want to edit the permissions for
2. If you want to deny a permission, select it from the **Allowed** (top) window and click the **Deny** button  to move it down to **Prohibited** (DO NOT use Deny All).
3. If you want to allow a permission, select it from the **Prohibited** (bottom) window and click the **Grant** button  to move it up to **Allowed** (DO NOT use Grant All).
4. The list of permissions can be filtered using the **Search** bar to find permissions regarding the same topic.




5. These groups can be added individually as above or the entire group can be allowed or denied using **Deny all** or **Grant all**.
6. Any errors that are made can be undone using the **Rollback** button at the bottom of the screen to revert the changes to the point they were at when the screen was first opened.

Below is a list of recommended access levels for each category.

## Recommended Minimum Access Levels

Below is a list of access permissions that is recommended as a minimum for most stores. This is only a guide, and permissions should be tweaked to allow for the best efficiency of work in the store while still retaining security.

For more detail on what each access permission controls, see the *Aura Backoffice Manual*, under the **List of Access Permissions** on Page 193.

### Driver

Drivers should only ever be able to assign orders to themselves, as that will be their only interaction with the Aura system:

| |
|---|
| *To Assign Driver* |

### Cashier

The cashier's permissions allow them to process orders, and give them the ability to edit the invoice before receiving payment only. They can assign orders to drivers, and they have no control over how shifts are started or cashed up.

| |
|---|
| *To Access The Menu Item Selector* |
| *To Adjust Invoice Line Quantity* |
| *To Assign Driver* |
| *To Process a Credit Card Transaction* |
| *To Process Invoices* |
| *To Adjust Invoice Line Quantity* |
| *To Delete Unsaved Invoice Line* |

### Waiter

Waiters are only able to process their own table orders. They have the ability to modify invoices after they've been saved. They have no control over how shifts are started or cashed up.

| | |
|---|---|
| *To Access The Menu Item Selector* | *To Close A Table* |
| *To Adjust Invoice Line Quantity* | *To Edit An Already Assigned Table* |
| *To Process a Credit Card Transaction* | *To Modify Invoices* |
| *To Process Invoices* | *To Void An Invoice Line* |
| *To Adjust Invoice Line Quantity* | *To Split or Group an Invoice* |
| *To Delete Unsaved Invoice Line* | |

### Manager

Managers have the ability to control shifts and cashup on Invoicing. They have access to Backoffice, it's stock recording pages, employee management and reports. They do not have access to system settings, access control or to change set menu and stock items.

| | |
|---|---|
| *To Access The Menu Item Selector* | *To Lock A Till Shift* |
| *To Adjust Invoice Line Quantity* | *To Maintain Employee Details* |
| *To Assign Driver* | *To Maintain Employee Passwords* |
| *To Process a Credit Card Transaction* | *To Manufacture Stock* |
| *To Process Invoices* | *To Mark Any Invoice as a Late Delivery* |
| *To Adjust Invoice Line Quantity* | *To Modify Cashup Entries* |

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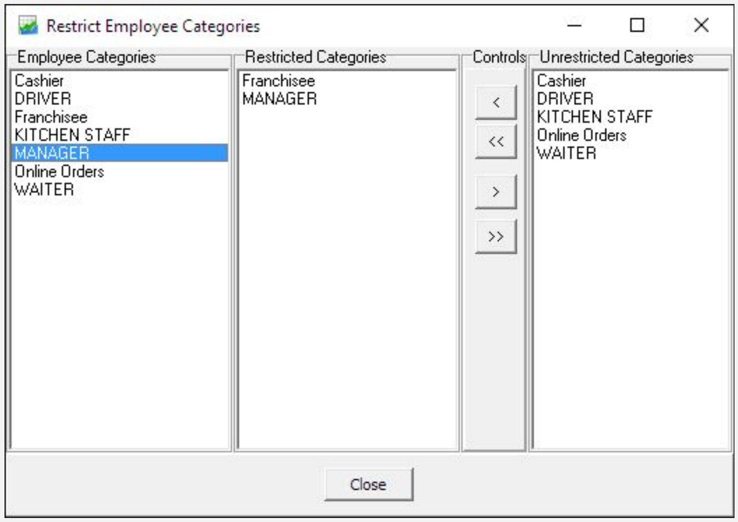
| | |
|---|---|
| *To Delete Unsaved Invoice Line* | *To Modify Credit Card Cashup Entries* |
| *To Close A Table* | *To Monitor Activity* |
| *To Edit An Already Assigned Table* | *To Monitor Daily Sales* |
| *To Modify Invoices* | *To Monitor Staff Attendance* |
| *To Void An Invoice Line* | *To Monitor Staff Performance* |
| *Close Any Table* | *To Monitor Staff Statistics* |
| *To Abandon An Invoice* | *To Open The Till* |
| *To Access Expense Payments* | *To Open The Till for Inactive Shift* |
| *To Access Menu Items* | *To Over-Ring An Invoice* |
| *To Access Stock Items* | *To Override Price in an External Stock Transfer* |
| *To Add An Expense Payment* | *To Override Time Warning* |
| *To Authorise a Transaction Refund* | *To Partially Pay From Till* |
| *To Authorise Any Staff Meal* | *To Perform A Backup* |
| *To Authorise Discounts* | *To Perform A Stock Take* |
| *To Browse Old Invoices* | *To Pickup All Tables* |
| *To Browse Shop Cashup Data* | *To Post a Till Cashup* |
| *To Cashup a Waiter* | *To Post Shop Cashup* |
| *To Change Invoice Allocation Between Waiters* | *To Print Old Invoices* |
| *To Change Reports Favourites* | *To Print Stock Manufacture Slip* |
| *To Close Off Someone Else's Till Shift* | *To Process a Food Refund* |
| *To Confirm Credit Card Override* | *To Process A Staff Meal Discount* |
| *To Convert Collect Order To Delivery* | *To Process Grvs* |
| *To Convert Delivery Order To Collect* | *To Re-Print An Invoice* |
| *To Delete A Customer Record* | *To Reprint A Credit Card Slip* |
| *To Discard Stock* | *To Reprint A Stock Manufacture Slip* |
| *To Do a Partial Quantity Adjustment* | *To Run Backoffice* |
| *To Edit An Already Assigned Invoice* | *To Run GUI Designer* |
| *To Edit or Delete an invoice line* | *To Run Order Manager* |
| *To Edit Stock Take within 24 hours of posting* | *To Run Street Sweeper* |
| *To End A Till Shift* | *To Split or Group an Invoice* |
| *To Exit GUI View* | *To Transfer Stock* |

! The above permissions do not include report permissions. When looking through the access permissions in BackOffice, reports related permissions will be seen in a format such as "*To Run <name> Report*". For example: "*To Run Gross Profit Report*", "*To Run Stock Variance Report*", etc. These report permissions should for the most part be granted to the manager category. You may choose what reports are appropriate to deny or grant.

## Restricted Employee Categories

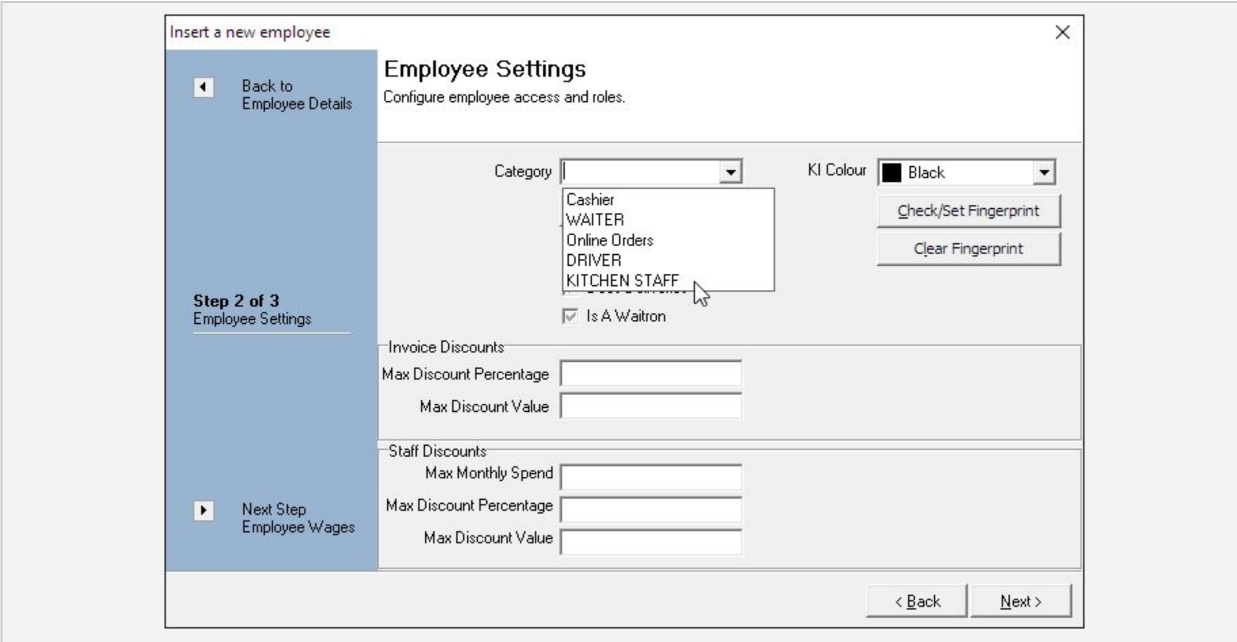
After assigning permissions, it's important to be able to prevent an employee from simply editing or changing their category to allow them more access under the **Employee** screen. To do this we have created the ability to restrict the access to some categories from others. In Backoffice, click *Preferences* > *Restricted Employee Categories.*




1. Select the category you want to apply restrictions to (*i.e Manager*)
2. By default, all other categories will be listed under **Unrestricted**. Click [**<**] to move the categories to **Restricted** (*i.e For our Manager we have made the categories* Fanchisee *and* Manager *restricted*)
3. Click **Close** to save the changes.

Now if anyone in that category tries to modify the employee settings of an employee of the restricted category, they will see the following alert:

If someone from a category in which categories are restricted tries to create a new employee, they will only have unrestricted categories available to them:

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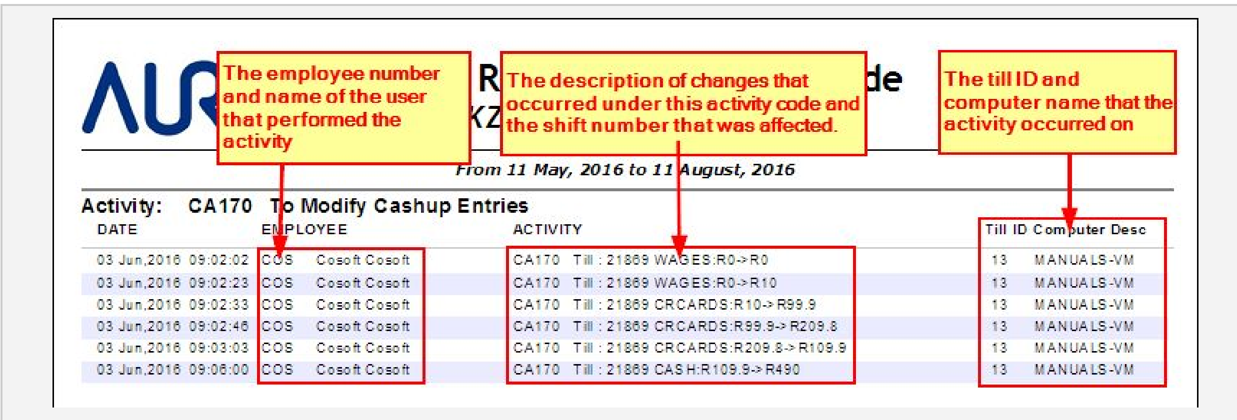
## Activity Reports

Activity reports are one of the best ways to keep track of user behaviour on the Aura system. Every action that is performed in Aura that uses an access permission or alters data is recorded to Aura's **Activity Log**. This activity can be reviewed using the Activity Reports under *Reports > Activity*.

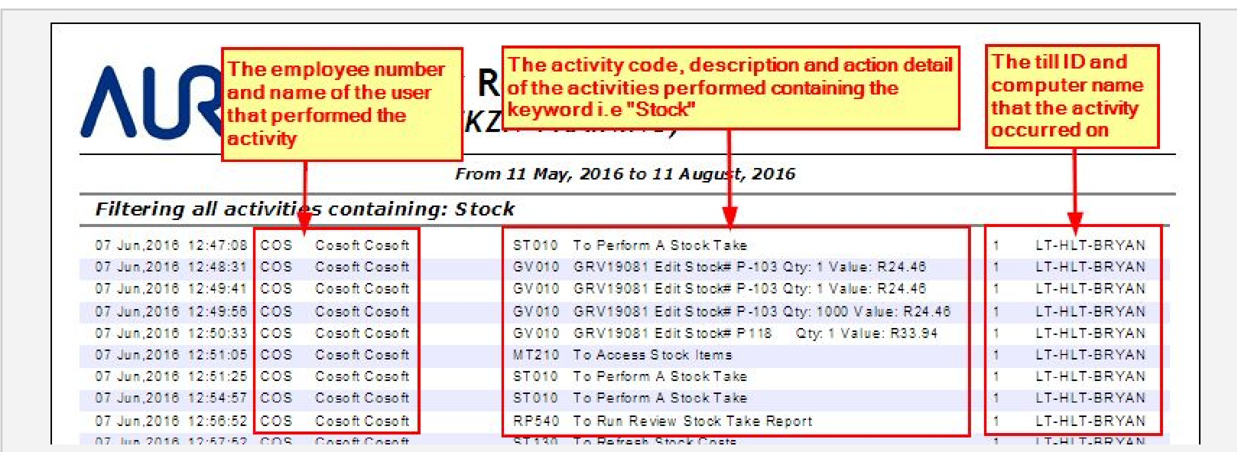
### Report Types

There are three types of activity reports:

- **Activity Report by Activity Code:** This report will group activities by the activity itself. This is very useful to identify which user has been making a particular action i.e modifying cashup entries.




- **Activity Report by Activity Filter:** This report will filter activity history by the keyword you type in. If you type in "Stock", for example, it will give you results from multiple activities such as "*To Perform a Stock Take"* and "*To Discard Stock"*. This is useful if you're trying to identify activity in a more general area.

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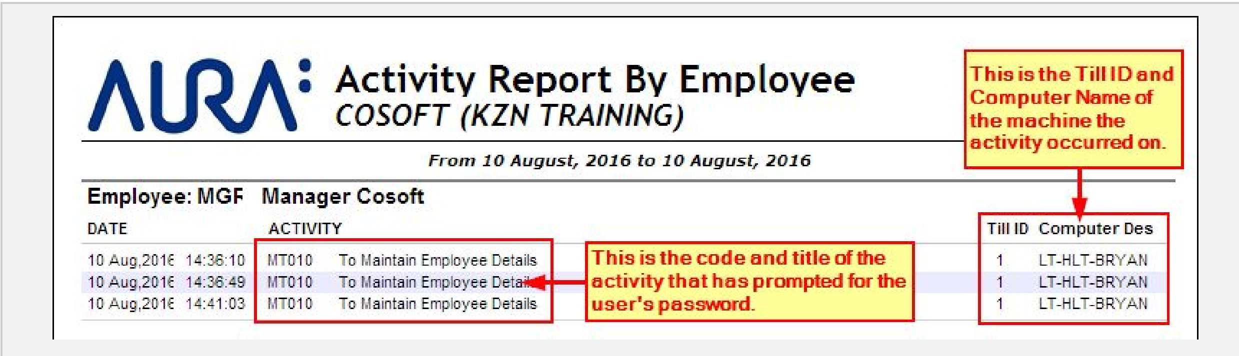
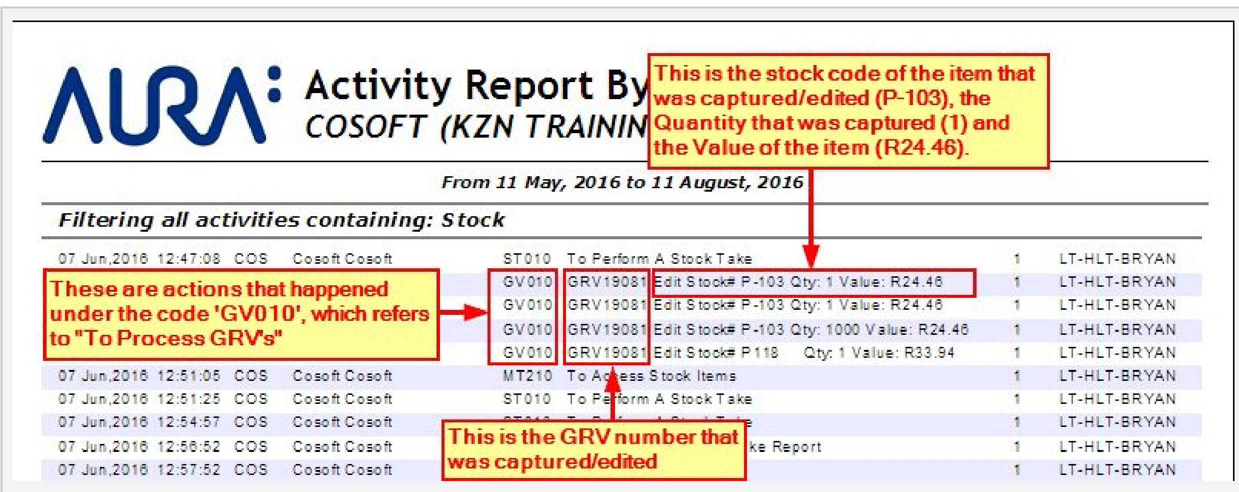
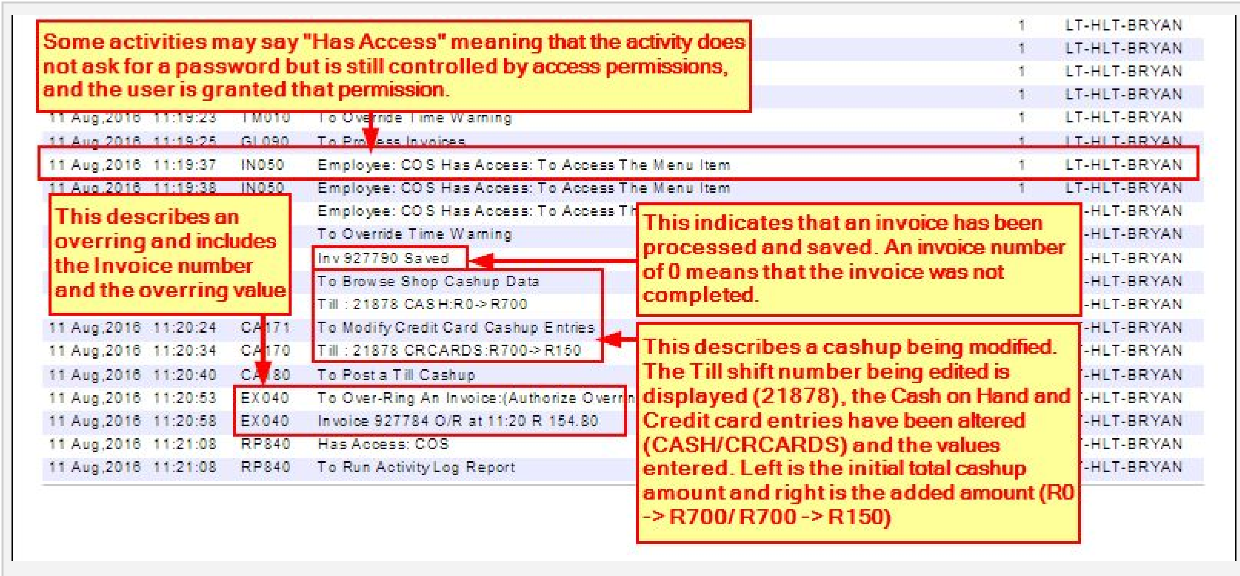
- **Activity Report by Employee**: This will group activities by employee. Activities will be listed in chronological order. This report is good for investigating the actions of a particular user and identifying patterns of behaviour by that user over time.




## Analysing Activity Reports

It’s important to be able to interpret the information that the reports display correctly. Due to the volume of information that is displayed on the reports, some of the data may be abbreviated. Look at the following breakdown of some activity reports to see the way in which the information is presented:



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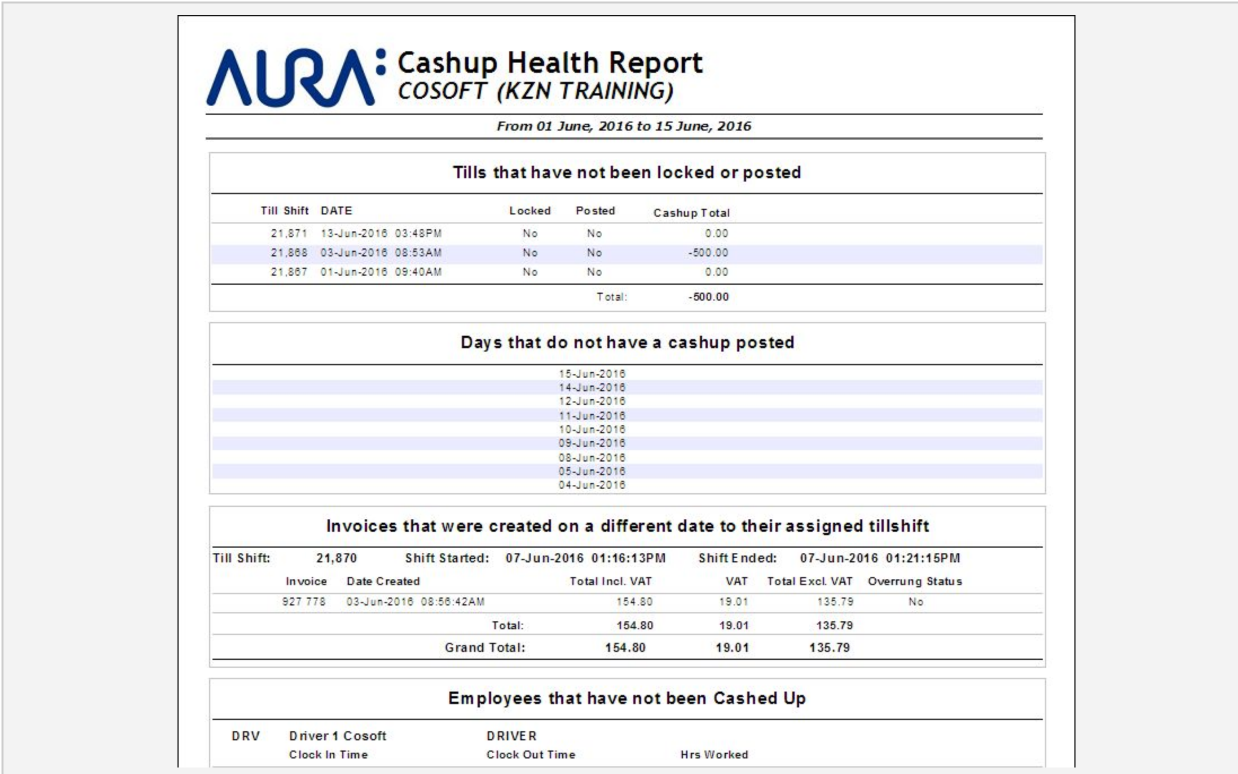
## System Health Reports

The **System Health** reports have been designed to assist store owners and managers to detect potential problems in the store by analysing information and displaying results that are out of the norm, or that may significantly affect particular areas of the system.

For this document we'll only be looking at the reports that could highlight problems with system security.

### Report Types

- **Cashup Health Report**: This report identifies incorrect or incomplete cashups. If there are problems here, it's recommended to rectify them and then checking on your **Cashup Settings** to prevent these problems from occurring again.



## AURA: Cashup Health Report
COSOFT (KZN TRAINING)

*From 01 June, 2016 to 15 June, 2016*

**Tills that have not been locked or posted**

| Till Shift | DATE | Locked | Posted | Cashup Total |
|---|---|---|---|---|
| 21,871 | 13-Jun-2016 03:48PM | No | No | 0.00 |
| 21,868 | 03-Jun-2016 08:53AM | No | No | -500.00 |
| 21,867 | 01-Jun-2016 09:40AM | No | No | 0.00 |
| | | | Total: | **-500.00** |

**Days that do not have a cashup posted**

15-Jun-2016
14-Jun-2016
12-Jun-2016
11-Jun-2016
10-Jun-2016
09-Jun-2016
08-Jun-2016
05-Jun-2016
04-Jun-2016

**Invoices that were created on a different date to their assigned tillshift**

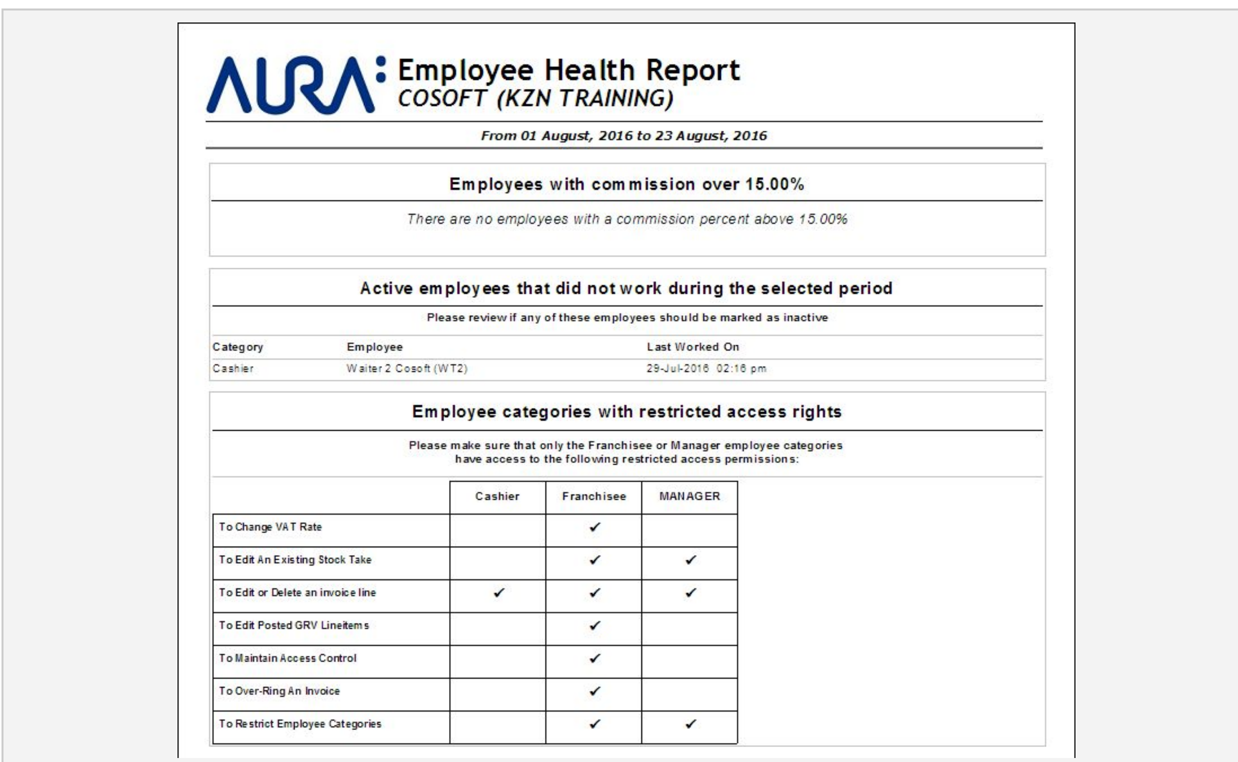
Till Shift: 21,870 Shift Started: 07-Jun-2016 01:16:13PM Shift Ended: 07-Jun-2016 01:21:15PM

| Invoice | Date Created | Total Incl. VAT | VAT | Total Excl. VAT | Overrung Status |
|---|---|---|---|---|---|
| 927 778 | 03-Jun-2016 08:56:42AM | 154.80 | 19.01 | 135.79 | No |
| | Total: | **154.80** | **19.01** | **135.79** | |
| | Grand Total: | **154.80** | **19.01** | **135.79** | |

**Employees that have not been Cashed Up**

| DRV | Driver 1 Cosoft | DRIVER | |
|---|---|---|---|
| | Clock In Time | Clock Out Time | Hrs Worked |

- **Employee Health Report**: This report highlights potential security problems with employees, such as high commissions, and what categories have restricted access to sensitive information.



## AURA: Employee Health Report
COSOFT (KZN TRAINING)

*From 01 August, 2016 to 23 August, 2016*

**Employees with commission over 15.00%**

*There are no employees with a commission percent above 15.00%*

**Active employees that did not work during the selected period**

Please review if any of these employees should be marked as inactive

| Category | Employee | Last Worked On |
|---|---|---|
| Cashier | Waiter 2 Cosoft (WT2) | 29-Jul-2016 02:16 pm |

**Employee categories with restricted access rights**

Please make sure that only the Franchisee or Manager employee categories have access to the following restricted access permissions:

| | Cashier | Franchisee | MANAGER |
|---|---|---|---|
| To Change VAT Rate | | ✔ | |
| To Edit An Existing Stock Take | | ✔ | ✔ |
| To Edit or Delete an invoice line | ✔ | ✔ | ✔ |
| To Edit Posted GRV Lineitems | | ✔ | |
| To Maintain Access Control | | ✔ | |
| To Over-Ring An Invoice | | ✔ | |
| To Restrict Employee Categories | | ✔ | ✔ |

- **Stock Health Report**: This reports looks for a number of important stock control information, such as Days missing a stock take and Stock Takes and GRV's edited more than 24 hours after their posting.

AURA: Stock Health Report
*COSOFT (KZN TRAINING)*

*From 01 August, 2015 to 23 August, 2015*

**Stock recipes with outdated unit costs**

*There are no stock recipes with outdated unit costs*

**Days missing a stock take**

*There are no days missing stock takes*

**Stock takes last edited more than 24-Hours of their posting**

*There are no stock takes last edited more than 24-hours of their posting*

**Stock price changes**

Note: For a more detail please run the Stock Purchase Exceptions or the Stock Price Fluctuations reports

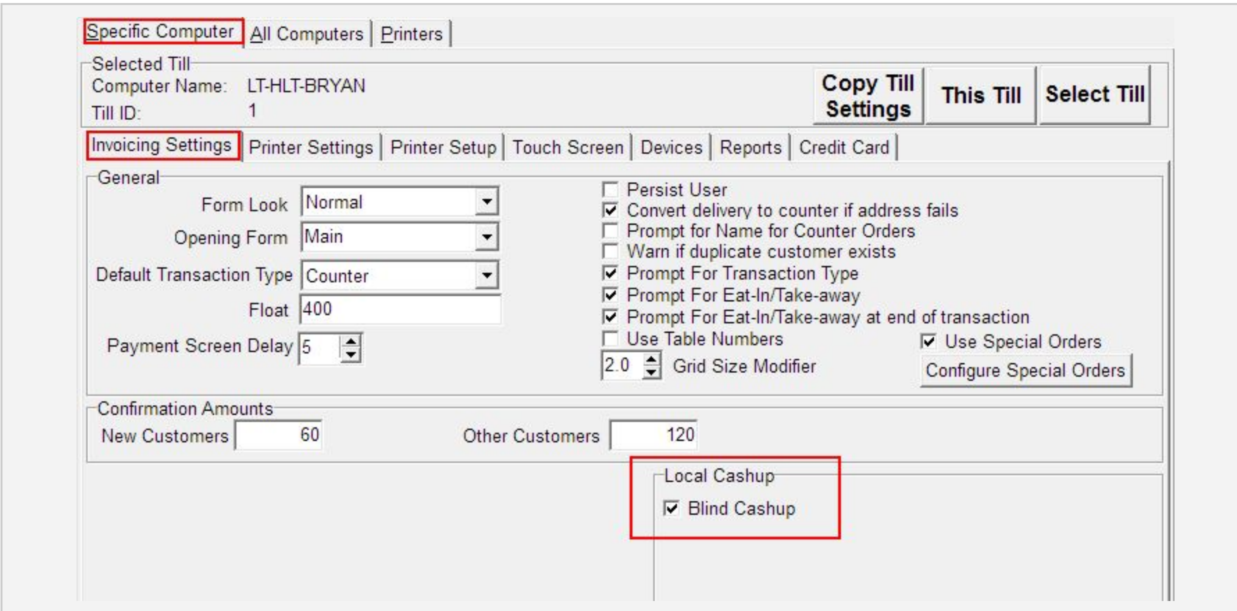
| Category | Stock Code | Stock Item | Minimum Price | Maximum Price | Variance |
|---|---|---|---|---|---|
| CHEESE | C-DCC | CREAM CHEESE | 60.58 | 66.08 | 5.50 |
| CHEESE | C-GCC | CHEDDAR CHEESE | 67.47 | 71.83 | 4.36 |
| CLEANING | CL010 | TIDY WIPE 1500M | 140.82 | 140.87 | 0.05 |
| MEAT | D-DCG | CHEESE GRILLER | 52.79 | 55.77 | 2.98 |

# Important Security Settings

Aura has a number of settings relating to access and security on the system. These can be accessed in Invoicing under *Settings*, or in Backoffice under *Preferences > System Settings.* As with Access Permissions, most of these settings will be dependant on the measure of access that the store wants to allow the employees. However it is still important to know that these settings exist and what effect they have.

## Blind Cashup

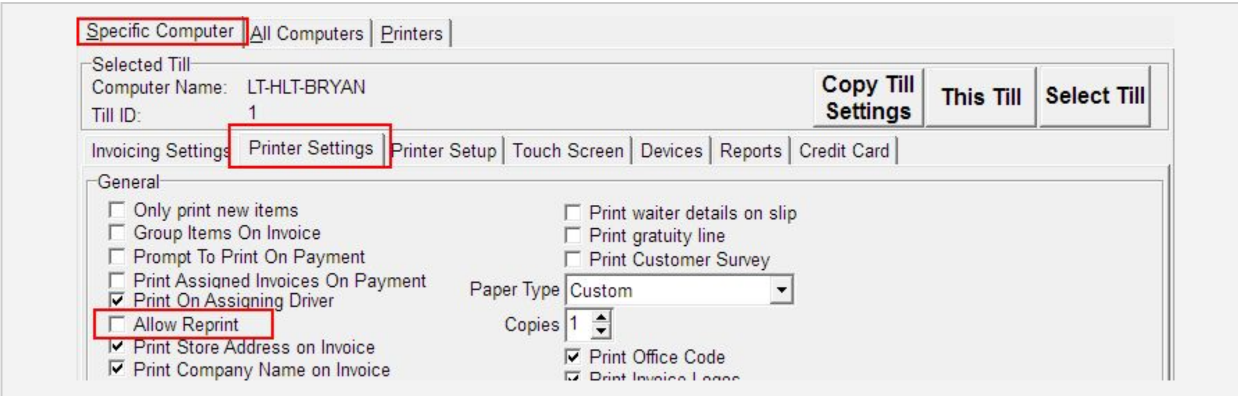
*Specific Computer > Invoicing Settings*: Prevents the cashup screen from showing the Net Sales, Gross Sales, Credit Cards, GRVs paid from till, or whether the till is over / under. Essentially, the cashier doing the cashup on their own till will enter their cash on hand, their credit cards, and any petty cash payments. This can be set per till.




Cashups on tills with Blind Cashup enabled will look like this:

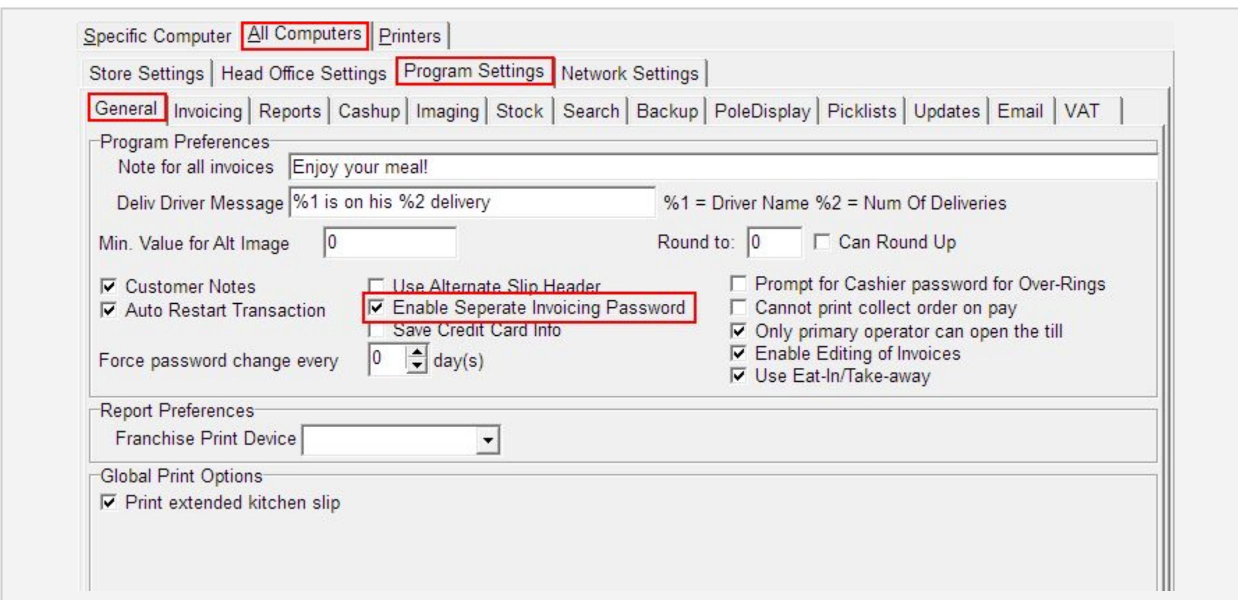
## Allow Reprint

*Specific Computer* > *Printer Settings*: With this option disabled, Aura Invoicing will prevent anyone from re-printing any order's customer and production slip from the current day despite their access level.

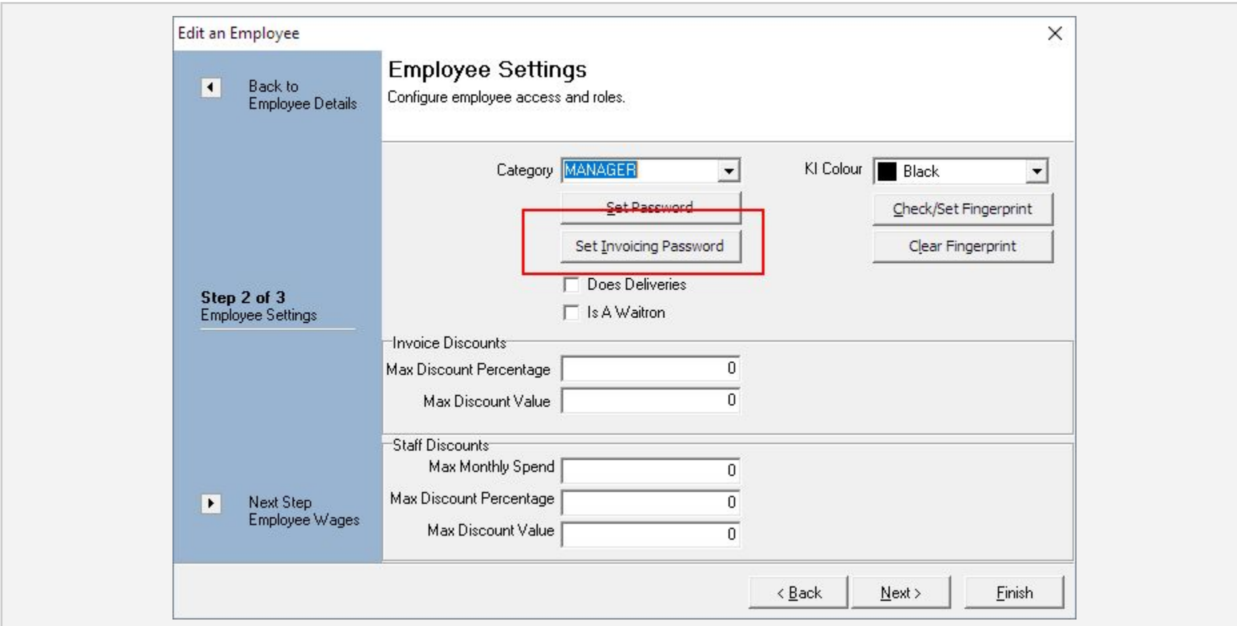



## Separate Invoicing Passwords

*All Computers* > *Program Settings* > *General:* Allows an employee of manager level or higher to have two separate passwords, one for general use, and a second for Invoicing only. This is useful in a scenario where a manager or franchisee's password may be seen during front of house use and used to access settings or Backoffice.

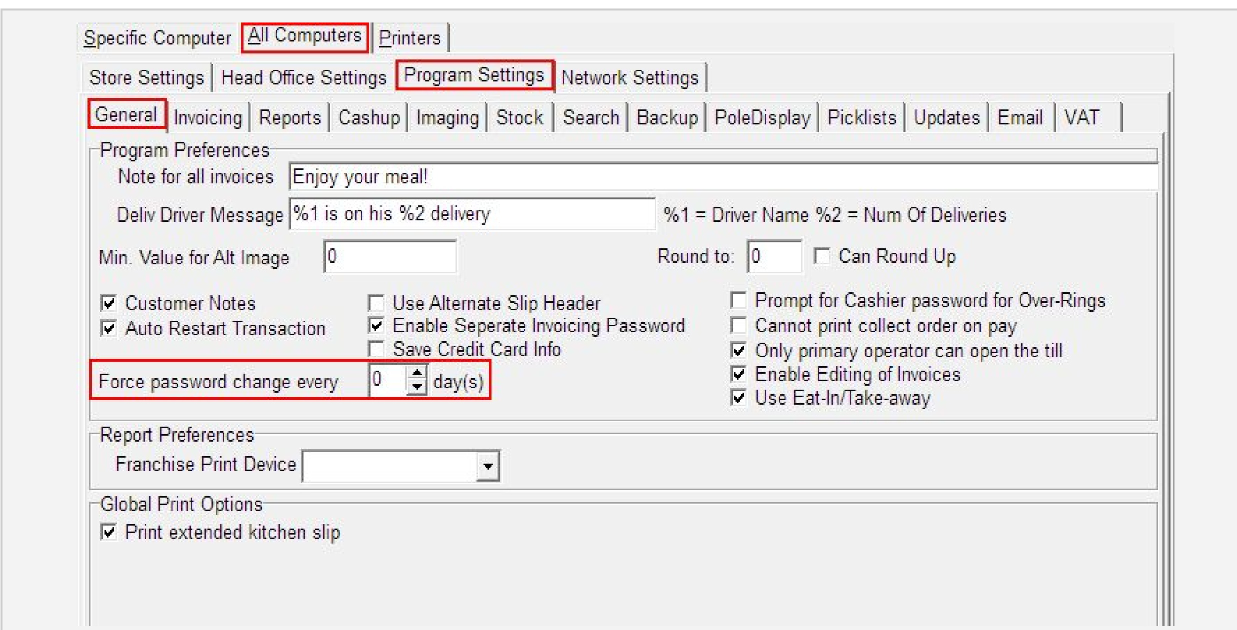


The new invoicing password can be set by employee on Page 2 of their employee settings in *Lists > Employee > Employee*:




## Force password change every [x] day(s)

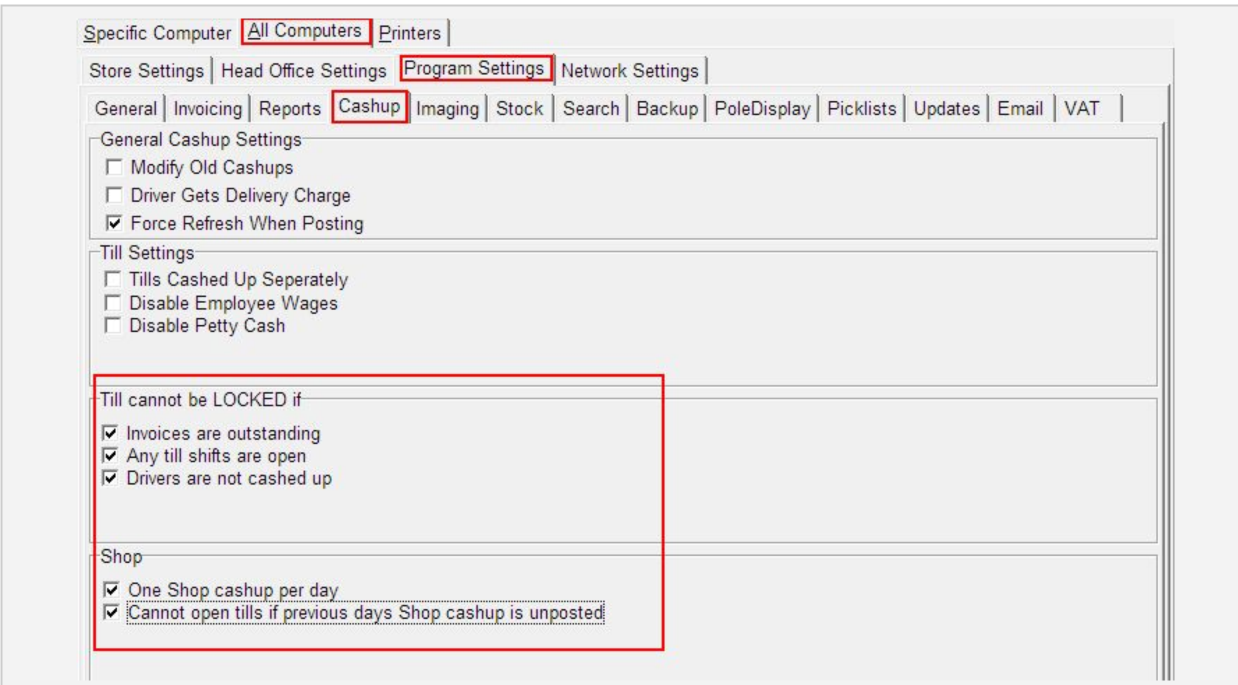
*All Computers > Program Settings > General:* Forces all employees passwords to expire after the set number of days, asking them at that point to enter their current password, and select a new password in order to continue. This is useful as it reduces the likelihood of stolen passwords.



## Cashup Settings

*All Computers > Program Settings > Cashup:* This settings page controls how cashups are handled. The settings under the heading **Tills cannot be LOCKED if** set conditions that must be met before cashups can be completed. It's highly recommended to have these settings always enabled to make sure that your cashups are done properly.

- **Invoices are outstanding -** Check for any orders that have not been paid.
- **Any till shifts are open -** Checks to see if any till shifts are not ended and posted.
- **Drivers are not cashed up -** Checks for any drivers that have not yet been cashed up (posted into an active till shift).
- **One Shop cashup per day -** This ensures that tills cannot be started again once the shop is posted.
- **Cannot open tills if previous days Shop cashup is unposted** - This ensures that the previous day's cashup is properly addressed before new shifts can be started.




These settings can be disabled if necessary as a temporary workaround to cashup issues, but it's always highly recommended that they be enabled again as soon as the cashup problems are resolved.

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# Useful Control Tools

Through the use of our **SMS Agent** and **Report Scheduler** applications, Aura provides you with a way to keep track of activity of your store without being on site, either by sending SMSes when particular activities happen, or by sending reports to your email address at scheduled intervals.

## SMSAgent

SMS Agent is an auxiliary service to the Aura POS that uses pre-configured **Agents** to send SMSes with relevant information under certain conditions, such as when a particular activity occurs, or at set times. If you plan to use SMS Agent, it's highly recommended to read through the product manual available **Here** or on the Aura website.

SMS Agent comes with default agents that you can configure quickly to alert you for **Discount** and **Overring** activities. Consult the manual or contact the Aura helpdesk to for assistance in how to set them up.

## Report Scheduler

Report Scheduler is a service that allows you to generate and send Aura reports to your email address according to a specific schedule. You can use this to get daily updates from the Discount Summary or Overring Summary reports, or to monitor daily activity, or even get the daily stock variance.

Creating schedules to your needs is a once-off process per store. Consult the Report Scheduler product manual **Here** or on the Aura website or contact the Aura helpdesk to for assistance in how to set them up.

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## Office Contact Details

Aura Helpdesk

0860 994 155

support@cosoft.co.za

www.cosoft.co.za/support

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### Aura Helpdesk Hours

6:00am to 11:00pm, 7 days a week

In order to ensure that all calls taken have been logged and are treated with the importance and urgency each one rightfully deserves, please keep the following points in mind when consulting with our helpdesk:

- Ensure that the technician you are speaking to knows which store you are calling from, and that you get the name of the technician you speak to.
- Be clear and concise with what the problem is and when it started appearing. The more information you can provide, the better.
- If the technician does not offer you a reference number for your call, you should ask them for one. Not only does this makes it easier to follow up on the status of the issue later, but also ensures that your call is logged in our system and is being / has been attended to properly.
- Most importantly, please keep in mind that CoSoft provide the Aura Point of Sales Suite; for any other problems such as your email, internet, anti-virus software and the like, please contact the software distributor or supporter related to that application. These contact details can generally be found under the application's *Help > About* or *Help > Contact Us* options.

*Guide Author: Bryan Alborough*
*balborough@cosoft.co.za*

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