



Introduction

VeriCentre v2.2.1 and later provide a means of separating Terminal data into groups called Portfolios and allow controlling access to these groups through VeriCentre user login.

After Portfolios have been created and set up, users who log in to VeriCentre Terminal Manager can access only Terminals belonging to Portfolios to which they have been granted privileges.

This feature allows VeriCentre administrators to provide selective views into the VeriCentre Terminal data thereby facilitating support of multiple small groups of users who should not see each others data.

Please note that Portfolio Management feature is turned off by default in VeriCentre. You need to enable the feature by following instructions in the installation manuals.

Functionality

Portfolio Management extends the concept of Terminal grouping called Clusters already available in VeriCentre by allowing further grouping of Clusters into Portfolios. These Portfolios are secured by assigning VeriCentre Users or User groups.

Following are the operational details:

- Combine Clusters into Portfolios. A Cluster can exist in multiple Portfolios.
- The regular VeriCentre Users and Groups are assigned access to these Portfolios.
- A VeriCentre user logged in to Terminal Manager will see only the Clusters from the Portfolios he or she has access to.

Features

- Portfolios and User access can be configured using an intuitive configuration screen which has the familiar VeriCentre User Manager look and feel.

- Rolling out Portfolio Management does not involve any re-training of VeriCentre users and is completely transparent to end-users.
- VeriCentre administrators who may need access to the complete data can easily achieve that by adding them to all Portfolios.
- Portfolio Manager is implemented at the database level facilitating 3rd party applications such as upcoming VeriCentre web-console to take advantage of the feature.

Caveats

- Portfolio Manager's functionality is restricted only to Terminal Manager and grouping of Terminals. Other modules such as Monitor, Export, Reports, etc., will still show data from all Clusters irrespective of user login.
- There is no data separation or access control at Applications level. This causes all users to view and access all Applications even in Terminal Manager when adding a new Terminal or editing an existing Terminal. Access control to Applications is planned to be added in a future version of VeriCentre.