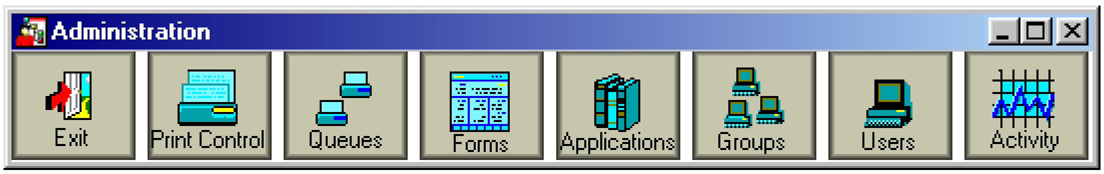
SETTING UP SECURITY IN DPHS 6.3

Data Plus offers tremendous flexibility in setting up security on individual users. You can limit a user's access to any task, group of tasks, or entire applications. Moreover, once you create security for one user you can easily copy the same access settings to other users.

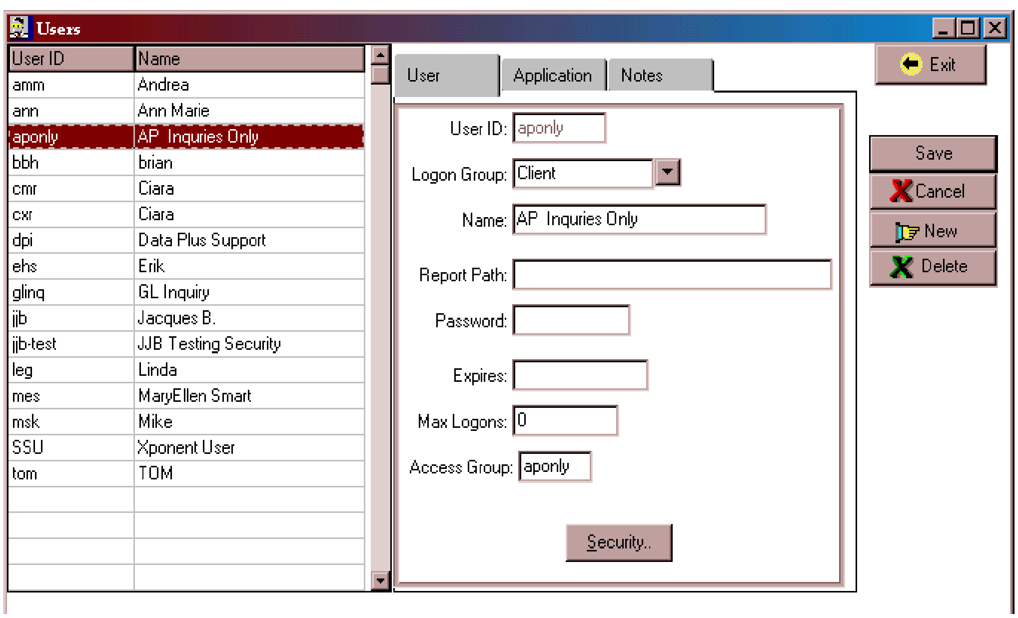
The security feature is part of user setup. It displays a list of every application and function in Data Plus. You simply click and choose the tasks to which a user should have access.

Setting Up Security

1. Go to **Administration** — **Administration**. The following toolbar appears:



2. Click on the **Users** button and the **Users** screen appears:



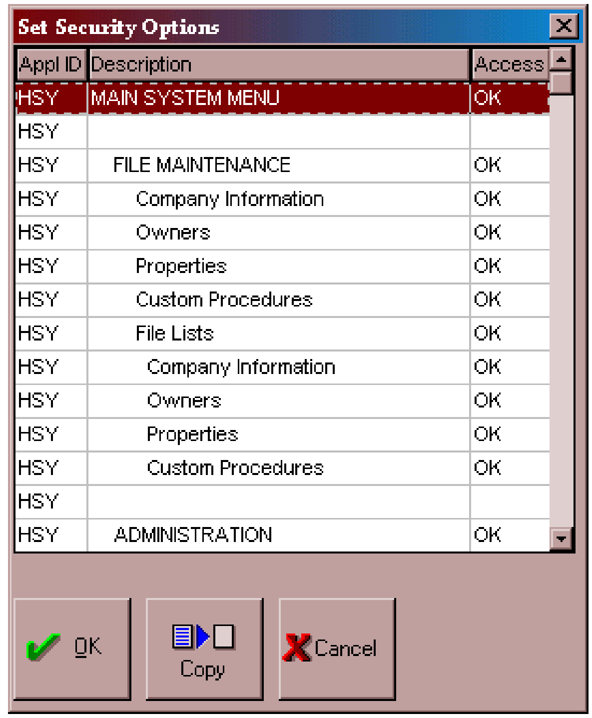
3. Select a user from the list on the left or create a new user (see Tech Note #99-Adding/Deleting a User). User information will appear on the right side of the screen. Click on the **Security** button on the bottom of the screen and the **Set Security Options** screen appears (see following page).

4. This screen shows a list of functions in Data Plus. The **Appl ID** column contains a three letter code for the function's application. The code is:

    HSY – System Options
    HGL – General Ledger
    HAP – Accounts Payable
    HAR – Accounts Receivable
    HPA – Payroll
    HPM – Project Management
    HPN – Personnel

    The **Description** column shows the name of the program or function. CAPITAL letters designate main headings that appear on the Data Plus screens. Indentations indicate groupings of categories. For example, "**Company Information**" is a sub-category of "**FILE MAINTENANCE**."

    Under the **Access** Column, if there is an "**OK**", then the user has access to that screen or function. If it is blank, then the user is denied access to that screen.

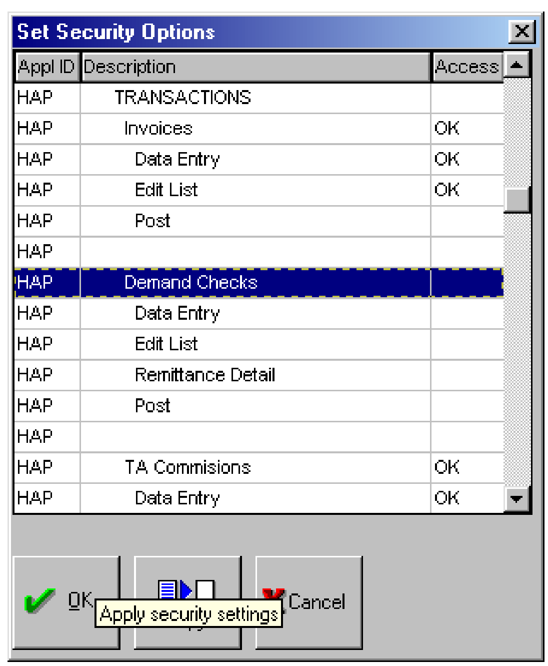


5. To allow or disallow access to a function, simply double click anywhere on that row. (From the keyboard: select a row and press <**ENTER**>.) "**OK**" appears in the **Access** column if you want to enable access or "**OK**" disappears from the **Access** column if you want to disable access.

Example:
Situation: A user is only allowed to enter invoices and check the edit list for errors in Accounts Payable. He/She is not allowed to post invoices.

How to change security: Go to **Set Security Options** for that user,

- Find "**HAP**" under the **Appl ID** column.
- Then find "**Invoices**" under "**TRANSACTIONS**" in the **Descriptions** column.
- Double click on the "**Post**" row until the **Access** column is blank (see sample screen on right).
- Click the **OK** button on the bottom to return to the **Users** screen. Click on **Save** to keep changes.



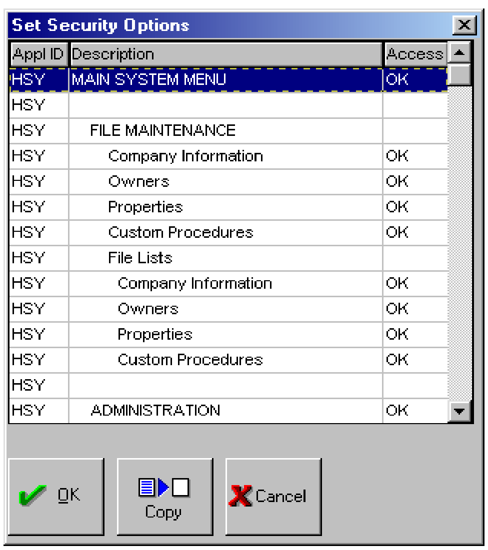
Entire categories can have security placed on them. For example, a user has access to Accounts Payble but cannot create demand checks. To disable access for that user, simply double click on the **Description** labeled "**Demand Checks**" until "**OK**" disappears under **Access**. By doing this, it also erases "**OK**" for all related functions underneath it (see sample screen above).

Categories are defined by indentations. Descriptions closer to the left side include more items. Descriptions with more indentations include fewer items. Therefore, double clicking on the description "**ACCOUNTS PAYABLE**" allows or disallows access to all of accounts payable. Then, double clicking on "**TRANSACTIONS**" allows or disallows access to any transaction process (such as "**Invoices**" or "**Demand Checks**"), but does not affect access rights to other sub-categories (such as "**FILE MAINTENANCE**" or "**REPORTS AND INQUIRIES**").

6. After clicking the **OK** button to save the security information, the user administration screen appears. In the **Access Group** field, the user's ID appears.

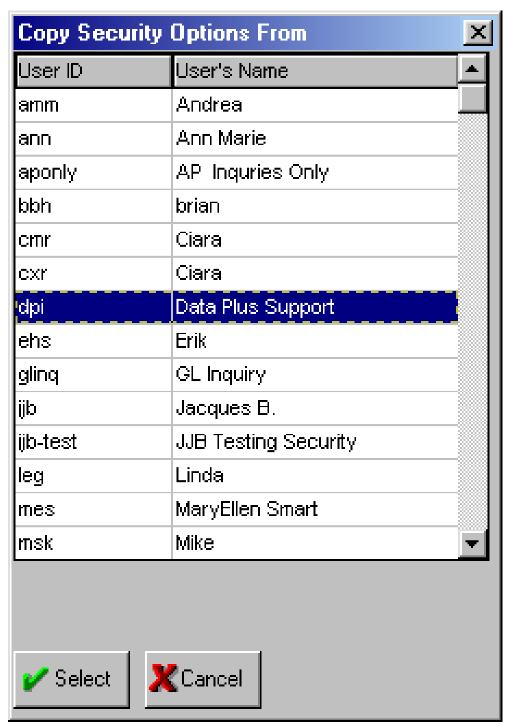
Copying Security Settings from User to User

Once a security is set up for one user, it can be copied to other users who need the same access rights.



1. Choose the user you want to copy the security to, and click the **Security** button. The screen at left appears.

2. Click on the **Copy** button. The screen below appears.



3. From the **Copy Security Options From** screen choose the user that you want to copy from. Click **Select** and the access rights will be copied over. Click **OK** and **SAVE** to save.

Important Notes

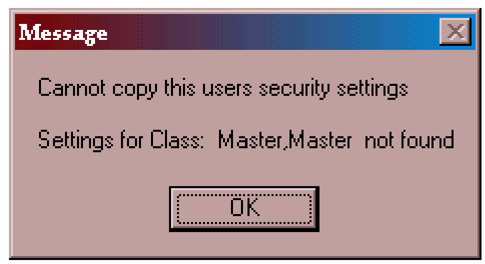
1. To give a user access to every task in Data Plus double click on the first row, **"MAIN SYSTEM MENU,"** such that "**OK**" appears in the **Access** column.

2. Only users with a **supervisory** level of access should have rights to the first two categories: "**FILE MAINTENANCE**" and "**ADMINISTRATION**."

3. Even if a user only has access to a lower level task, he/she still needs to have access to the main login screens. For example, a user who can only post invoices in Accounts Payable still needs access to the following two screens:
   MAIN SYSTEM MENU
   ACCOUNTS PAYABLE

4. If your system has been upgraded from a version that did not have this security feature:
   a) The system will keep all of the previous security settings until you manually change and save new settings. For most users, this means they will have "Master" access, or access to all functions in Data Plus.

   b) You will need to set up at least one user's security rights before you can use the "**Copy**" option. If you try to copy security options from a user who has not had security set up yet, an error similar to the example at right appears:



   In this event, simply return to the "**Set Security Options**" screen and manually select or deselect the applications and tasks to which this user should have access.