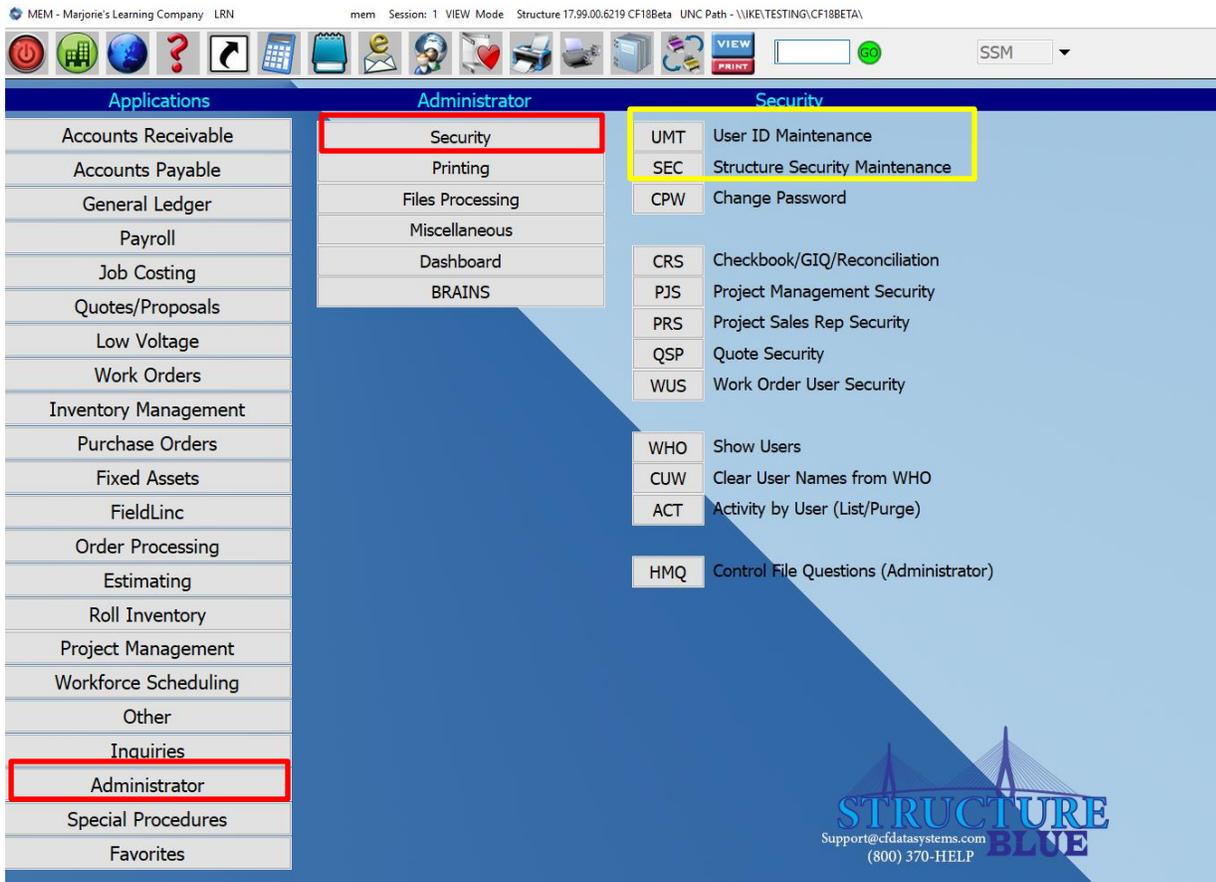


How To: Setup Security

From the Administrator application, select Security. The System will display the Security menu:



MEM - Marjorie's Learning Company LRN mem Session: 1 VIEW Mode Structure 17.99.00.6219 CF18Beta UNC Path - \\IKEL\TESTING\CF18BETA

Applications	Administrator	Security
Accounts Receivable	Security	UMT User ID Maintenance
Accounts Payable	Printing	SEC Structure Security Maintenance
General Ledger	Files Processing	CPW Change Password
Payroll	Miscellaneous	
Job Costing	Dashboard	CRS Checkbook/GIQ/Reconciliation
Quotes/Proposals	BRAINS	PJS Project Management Security
Low Voltage		PRS Project Sales Rep Security
Work Orders		QSP Quote Security
Inventory Management		WUS Work Order User Security
Purchase Orders		WHO Show Users
Fixed Assets		CUW Clear User Names from WHO
FieldLinc		ACT Activity by User (List/Purge)
Order Processing		
Estimating		HMQ Control File Questions (Administrator)
Roll Inventory		
Project Management		
Workforce Scheduling		
Other		
Inquiries		
Administrator		
Special Procedures		
Favorites		


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Use the following PROCs to set up a user and their restrictions under Security:

1. **UMT** (*User ID Maintenance*) – to set up login names for users.
2. **SEC** (*Structure Security Maintenance*) – use to determine what PROCs a user does or does not have access to.

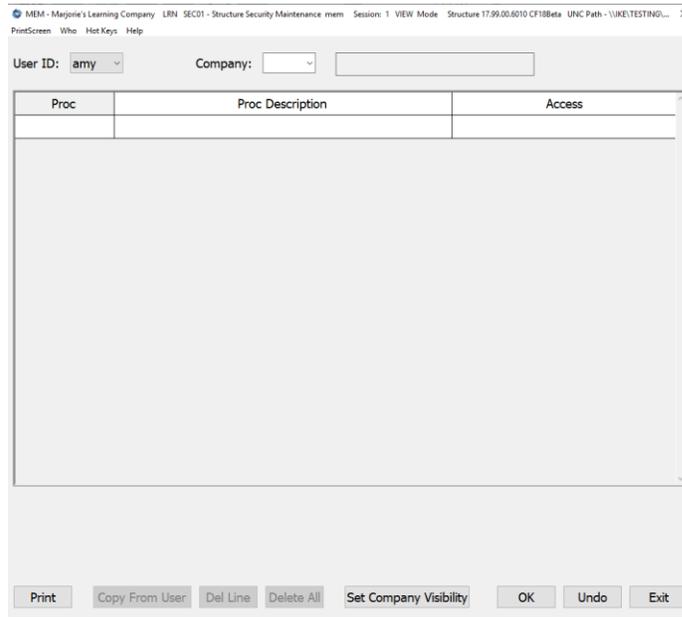
Once you setup a new User in **UMT**, they will have access to all applications unless you set up restrictions in **SEC**. Make note of your menu and the applications you have listed. (This example has all Applications available.)

NOTE: In addition to **SEC**, there are additional modules in Structure that allow a Structure Admin to place restrictions on what a user can view, access or change within that application. These include: General Ledger (**CRS**), Project Management (**PJS & PRS**), Quotes/Proposals (**QSP**) and Work Orders (**WUS**). Information on how to use these security programs are detailed in the class workbooks for their respective modules.

How To: Setup Security (continued)

SELECT: **SEC** (*Structure Security Maintenance*)

A screen similar to the following will display. Select the user id from the drop-down menu [▼]. If you have more than one company, and the security for the user will differ by company, select the first company you want to set security for from the drop down. If the user will have the same security in all companies, leave Company: blank.



**** If nothing is entered in SEC, all users will have access to all Applications in all Companies. ****

NEXT: Enter a Proc. Below is a list of Application Procs to assist you in setting up security.

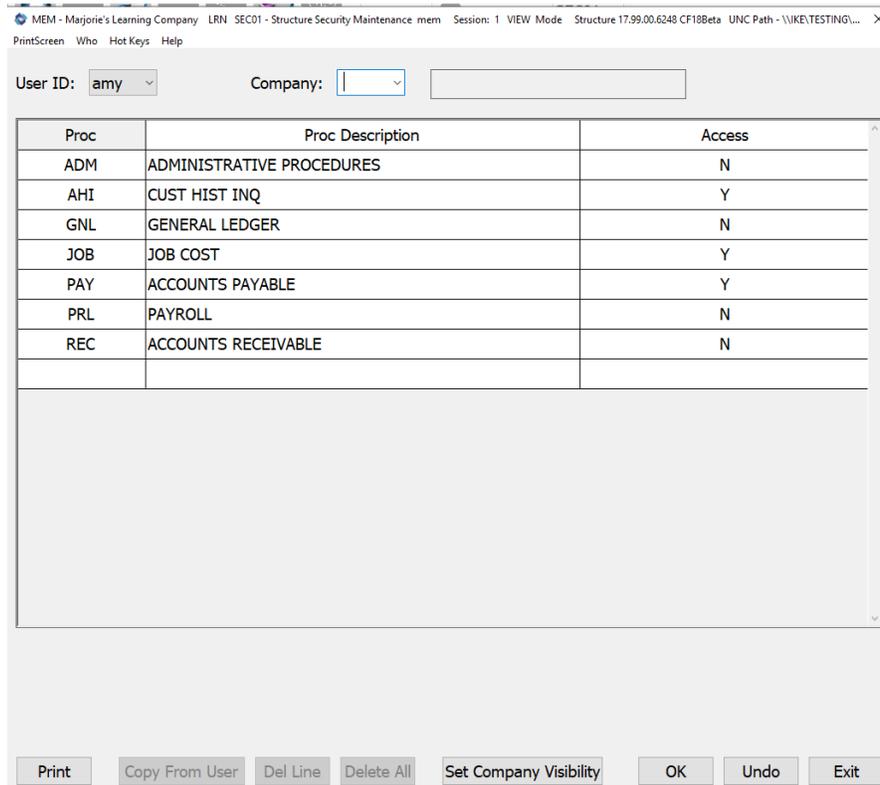
Application Proc List for Setting Up Security

The following is a list of all possible applications. Not all of these will be on your System. See your Application menu.

PAY - Accounts Payable	REC - Accounts Receivable	FAS - Fixed Assets
PRL - Payroll	GNL - General Ledger	WFC - Workforce Scheduling
JOB - Job Cost	POS - Purchase Orders	PJM - Project Management
WOS - Work Orders	ORD - Order Processing	FLK - FieldLinc
ADM - System Administrator	RIS - Roll Inventory	QPS - Quotes/Proposals
IVT - Inventory Control	EST - Estimating	SPC - Special Procedures
OTH - Other		

How To: Setup Security (continued)

Once a PROC is entered (or selected from the search screen) a screen similar to the following will display. (Default answers for **Access** display as “N.”) Note: This screen is an example of #3 below.



MEM - Majorie's Learning Company LRN SEC01 - Structure Security Maintenance mem Session: 1 VIEW Mode Structure 17.99.00.6248 CF18Beta UNC Path - \\(K)\TESTING\... X
 PrintScreen Who Hot Keys Help

User ID: amy Company: []

Proc	Proc Description	Access
ADM	ADMINISTRATIVE PROCEDURES	N
AHI	CUST HIST INQ	Y
GNL	GENERAL LEDGER	N
JOB	JOB COST	Y
PAY	ACCOUNTS PAYABLE	Y
PRL	PAYROLL	N
REC	ACCOUNTS RECEIVABLE	N

Print Copy From User Del Line Delete All Set Company Visibility OK Undo Exit

See the previous page of this document for a list of Application PROCs to assist you in setting up security.

- To restrict a User's access by Application**, type the name of the **PROC** for that application in the grid.

For example, enter **PRL** for Payroll. The default answer, “N” will appear below “Access” The User **will not** have access to any of the programs in Payroll. Enter **REC**, to restrict the user from Accounts Receivable.

- To restrict a User's access to one or more PROCs in any Application**, type the name of the individual **PROC** in the grid. Do this **for each PROC** you want to restrict.
- To give a User access to one or more PROCs in any Application that has already been Restricted** (per step 1), do the following:

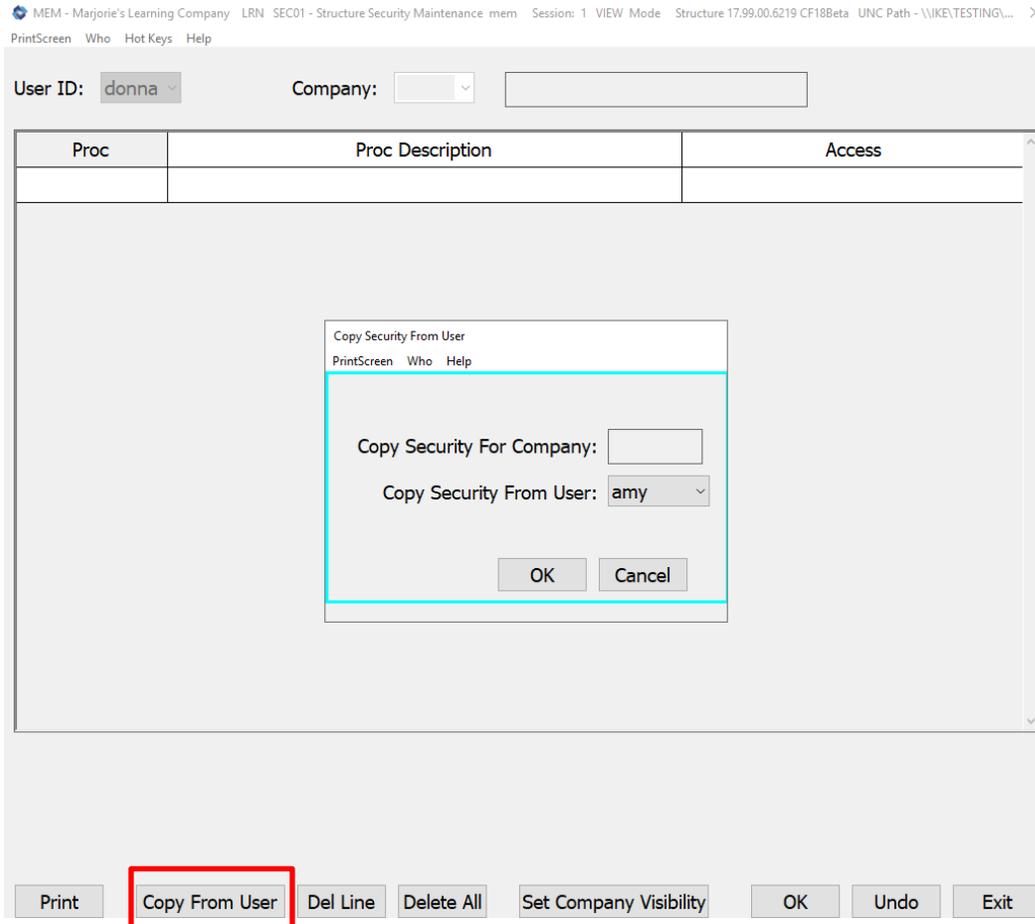
Type the **PROC** (e.g., **AHI**) and change the “N” below **Access** to “Y” The User **will have** access to this program and be able to view its reports. The User **will not have** access to anything else in Accounts Receivable, if **REC** was the application restricted in step 1.

How To: Setup Security (continued)

4. Copy from User – To copy another user's security settings:

Select a new user (and company if different by company).

When in the PROC field [Copy From User] becomes available.



MEM - Marjorie's Learning Company LRN SEC01 - Structure Security Maintenance mem Session: 1 VIEW Mode Structure 17.99.00.6219 CF18Beta UNC Path - \\NIKE\TESTING\... X
 PrintScreen Who Hot Keys Help

User ID: donna Company: [] []

Proc	Proc Description	Access

Copy Security From User
 PrintScreen Who Help

Copy Security For Company: []

Copy Security From User: amy [v]

OK Cancel

Print Copy From User Del Line Delete All Set Company Visibility OK Undo Exit

Select the user whose security settings you want to copy. Click the **OK** button.

In this example amy's restrictions will be copied to donna (for all companies).

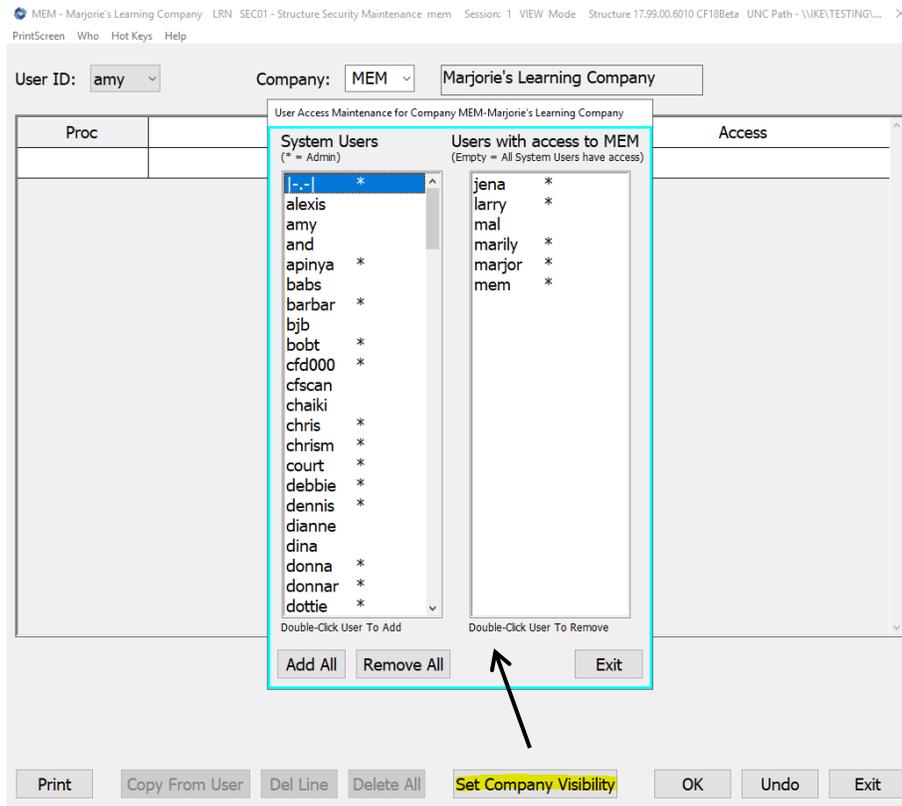
Note: You can only copy security settings within the same company (or from blank company to blank company).

You cannot copy a user's security for the UGC company to another user's security for the ECA company.

How To: Setup Security (continued)

If you need to restrict access to certain companies, use [Set Company Visibility].

First, select a company from the Company drop down. Then select [Set Company Visibility] to select which users you want to have access to this company.



- If the box on the right hand side is empty, all users will have access to this company.
- To restrict access to this company, double-click user names from the list of System Users on the left hand side to move them to the list of Users with access to the selected company on the right hand side, giving them access to this company.
- Once names have been added to the list on the right hand side, any user that is not on that list will not have access to that company.