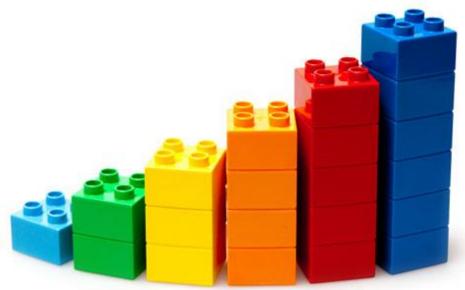
BUILDING FOR THE FUTURE

giving your employees the tools to develop and grow

Building Security

2016 DDI User Group Conference





Overview

- Overview
- User Profiles
- System Demo



Security 101

- Who is this for?
- What resources will you need?



Where do you start?

Step 1

Go through handout #1 and decide the user profiles for your organization



User Profiles

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CRM:			Read/Write													
CRM: Name Address	Menu	ing only									in q only	11200, 11112				
	Menu															
	Menu														L	<u> </u>
CRM: Setup	Menu														L	1
Other CRM Specific Security:																
NAACCTUPD	Update account master records															
	Update New Al Codes Table															
	Edit alternate id's															
	Edit code records															
	Edit Al codes															
	Edit State Codes															
	Change constituent's account type															
	View church data															
	Edit church data															
	Add new codes during data entry															
NAEMAILINQ	Ability to view email correspondence setup															
NAEMAILUPD	Ability to create and edit email correspondence setup															
NAEMPLOYEE	constituent															
NAFILEADD	Add memo file attachments															
NAFILEDEL	Delete a memo attachment															
NAFILEPRIV	View file attachments															
NAFOLLOW	Enable NA Entry follow mode on startup															
NAINDIVINQ	View individual data															
NAINDIVUPD	Edit individual data															
	General Name/Address Inquiry															
	Ability to view mailing history															
NAMAILRL	Remove mail / pin list															
	Edit Mailing List data															
NAMEDEL	Delete a constituent															
	Merge constituents															
NANAMEMO	Name/Address memos access															
NANEW	Add new name records															
NAOFFINQ	View officer records															
	Undate officer records															

What do you do next?

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• Step 2

Enter the information from step 1 into **DDI-Connect**[™] Security Function Maintenance



Module	FundWriter	•
Function	Description	Groups
CRCASHINQ	Cash Receipts Inquiry	GL/2
CRCASHUPD	Cash Receipts Add/Update	GL/5
FW	Basic FundWriter Access	GL/2
FWADMIN	Access to Administrative Tasks Menu	
FWAPPR	Document Approval	!GL/8
FWAPPROWN	Document approval for users own documents	
FWBATCHOVR	Modify journals in another user's batch	GL/5
FWCD	Edit code records	GL/8
FWCHART	Update chart of accounts	GL/8
FWCPYASN	Assign users to companies	ADMN/5
FWCPYUPD	Update companies	GL/8
FWINQ	Inquire on account balances	GL/2
FWNAADD	Add new FW Name/Address record	
FWNADEL	Delete FW Name/Address record	
FWNAUPD	Edit FW Name/Address record	
FWPPTRAN	Create prior period transactions	GL/5
FWPYTRAN	Create prior year transactions	GL/5
FWRPGEN	Special Menu security to Run Fundwriter rep	GLRPT/2
FWRPGRUN	Run FW report generator reports	GLRPT/2
FWRPGUPD	Update FW report generator reports	GLRPT/5
FWRPT	Run FundWriter reports	GLRPT/2
FWSETUP	Update FW setup information	ADMN/5
FWTRNDEL	Delete journal transactions	GL/5
FWTRNINQ	Inquire on GL transctions	GL/2
FWTRNMEMO	Update posted journal transaction memos	GL/5
FWTRNUPD	Create, update journal transactions	GL/5
FWUNPOST	Allows user to reverse posting of GL transac	GL/8
FWUPD	FundWriter Updates	ADMN/5

Security Function Maintenance

Module: Accounts Payable				
Function	Description	Groups		
AP	Basic AP Functionality	AP/2		
APAPPR APBATCHOVR APCHECK APRPT APSETUP APUPD APVCHDEL APVCHINQ APVCHINQ APVCHONL APVCHONL APVCHONL APVCHONL APVCHUPD APVENDAC APVENDDEL APVENDDEL	Voucher Approval Modify vouchers in another user's batch Create checks for vouchers Run Accounts Payable reports Update A/P setup information Update AP Delete vouchers View vouchers Enter manual checks for vouchers Create online checks for vouchers Update/Process recurring vouchers Update vouchers De-activate vendors Delete vendor information View vendor information	APAPPR/8 AP/5 APP5 APRPT/2 ADMN/5 ADMN/5 AP/5 AP/2 AP/5 AP/5 AP/5 AP/5 AP/5 AP/5 AP/5 AP/5		
APVENDINQ APVENDUPD	Update vendor information	AP/2 AP/5		

File Windo	w Help	
Select org		
Security	Function Maintenance	
Module	Cash Receipting	Groups
CR CRAPPR CRMEMOINQ CRMEMOMAN CRMEMOONL CRMEMOUPD CRSETUP CRSTAGE2	Basic access to cash receipting Credit memo approval View credit memos Enter manual checks for creidt memos Create online checks for credit memos Update credit memos Change Cash Receipts settings Process cash receipt batches	CR/2 CR/8 CR/2 CR/5 CR/5 CR/5 CR/5 ADMN/5 CR/5

Building the user Profiles

- Why are the profiles important?
- What can you do with the profiles?



······				
🖉 ZZ - Accountant	Security Role - Accountant	SESP		
🖉 ZZ - Accounting Manager	Security Role - Accounting	SFSP		
🖉 ZZ - AcctSup/RptWriter	Security Role - Acct Sup/R	SESP		
🖉 ZZ - Back Office	Security Role - Back Office	SESP		
🖉 ZZ - Call Center	Security Role - Call Center	SESP		
🖉 ZZ - Former Employee	Security Role - Former Em	SESP		
ZZ - MIF Administration	Security Role - MIF Admini	SESP		
🖉 ZZ - Report Writer	Security Role - Report Wri	SESP		
🖉 ZZ - SFS Manager	Security Role - SFS Manager	SESP		
🖉 ZZ - SFS Specialist	Security Role - SFS Specialist	SESP		
💈 ZZ - Sys Admn/Back Office	Security Role - SysAdm/B	SESP		
•	III			
DDI03 Org: 230 SFSP Entity: ECW Business dt: 04/19/2016 FY: 2016				

Building the uses profiles 2

Adding security to the users profiles

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ZZ	- Accountant U	ser Properti	es for Org 230 - MIF Synod Financial Services	— ×
Ide	entification Passv	vord Securit	y Defaults Settings	ок
De	fault security leve	el: 1 We	eb security level:	Cancel
	Group	Level	·	
Þ	ADMN	1	New group: < Add	
	AP	5		
	APAPPR	1	Delete entry	
	APRPT	2		
	CR	2	Enable DataPA	
	CRM	5		
	CRMRPT	1		
	CRRPT	2	T	

What's next?

Apply the security to the actual users



Applying Security to the Menu

File

- What can you control with this?
- What does this look?



Dashboard Window Adr	nin Help
in Menu	
CRM Name/Address Inquiry	
CRM Name/Address System	
Extract Module Financial Services	
Merge Forms System	
CheckWriter	
General Ledger	
Accounts Payable	
Connect-FR	
IRS Reporting System	
Accounts Receivable	
Processing Monitoring	
Process Management Web Forms	
Supervisor Menu	
	Menu Item Properties
	Menu Item Properties
	Settings for: 230: MIF Synod Financial Services 🔹
	Description: Connect-FR
	Action: #GUIFUIFRV2
	Group/Levels: FR/2,ADMN/5
	Single user:
	Update lock:
	Include orgs: 55,10,160,01,35,37,70,85,50,80,210,170,230,901,
	Exclude orgs:
	Icon:
	OK

Testing

- Start by setting this up in DDI-Connect[™] Client-Test or DDI-Connect[™] Test
- Test security before applying it in Production



Tips & Tricks

 Having someone to help you test is really helpful



Discussion, Questions, Comments

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