BUILDING FOR THE FUTURE
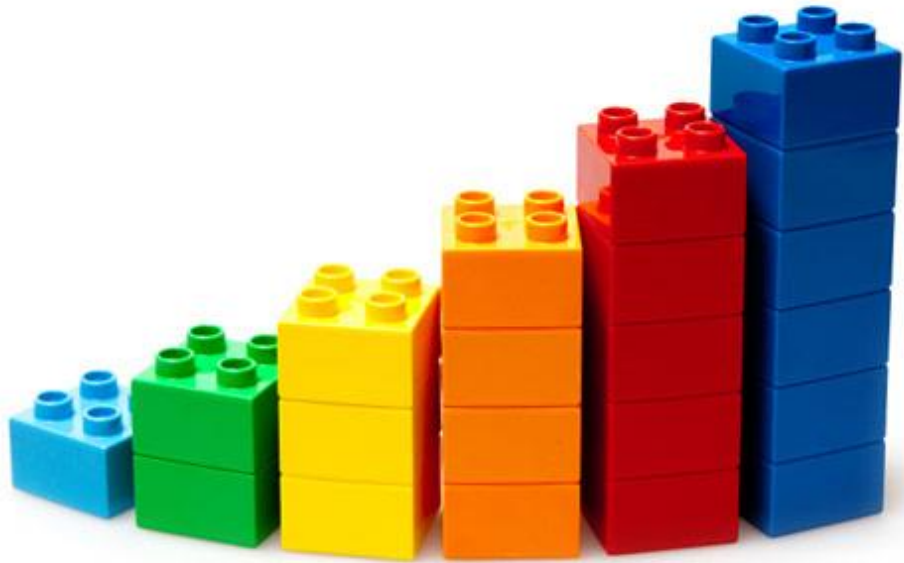
giving your employees the tools to develop and grow

Building Security

2016 DDI User Group Conference

DDI™

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

Area	Description	Job Function: Processor			Job Function: <Fill In>>			Job Function: <Fill In>>			Job Function: <Fill In>>			Job Function: <Fill In>>		
		INQ Only	Read/Write	No Access	INQ Only	Read/Write	No Access	INQ Only	Read/Write	No Access	INQ Only	Read/Write	No Access	INQ Only	Read/Write	No Access
CRM:																
CRM: Name Address	Menu															
CRM: Utilites	Menu															
CRM: Reports	Menu															
CRM: Setup	Menu															
Other CRM Specific Security:																
NAACCTUPD	Update account master records															
NAAIUPD	Update New AI Codes Table															
NAALTUPD	Edit alternate id's															
NACD	Edit code records															
NACD0009	Edit AI codes															
NACD0010	Edit State Codes															
NACHACCT	Change constituent's account type															
NACHINQ	View church data															
NACHUPD	Edit church data															
NACODESUPD	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															
NAINQ	General Name/Address Inquiry															
NAMAILINQ	Ability to view mailing history															
NAMAILRL	Remove mail / pin list															
NAMAILUPD	Edit Mailing List data															
NAMEDEL	Delete a constituent															
NAMEMRG	Merge constituents															
NANAMEMO	Name/Address memos access															
NANEW	Add new name records															
NAOFFINQ	View officer records															
NAOFFUPD	Update officer records															

What do you do next?

- ## Step 2
  - Enter the information from step 1 into DDI-Connect™

Security Function Maintenance

Module: Accounts Payable ▼

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

File   Window   Help

Select org | New | Edit | Delete | History | Exit

Security Function Maintenance

Module: Cash Receipting ▼

Function	Description	Groups
CR	Basic access to cash receipting	CR/2
CRAPPR	Credit memo approval	CR/8
CRMEMOINQ	View credit memos	CR/2
CRMEMOMAN	Enter manual checks for creidt memos	CR/5
CRMEMOONL	Create online checks for credit memos	CR/5
CRMEMOUPD	Update credit memos	CR/5
CRSETUP	Change Cash Receipts settings	ADMN/5
CRSTAGE2	Process cash receipt batches	CR/5

Building the user Profiles

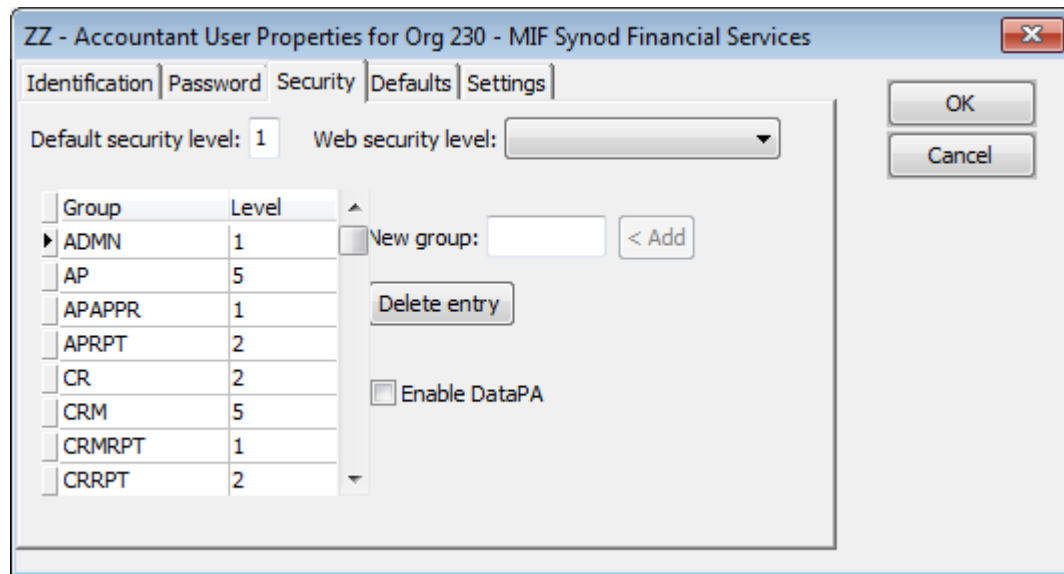- Why are the profiles important?
- What can you do with the profiles?

Building the uses profiles 2
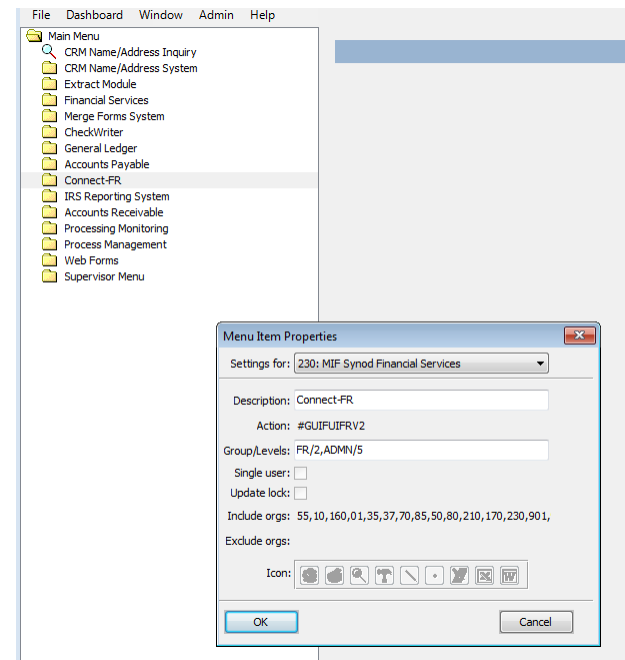
- Adding security to the users profiles

What's next?

- Apply the security to the actual users

Applying Security to the Menu

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

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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