Security Feature

Security Overview: Automation Premium allows you to set different access permissions for each user; on first installation the security feature is inactive. This feature is used in two ways.

Firstly, as a way of securing sensitive information i.e.: you may not wish your technicians to be able to view your chart of accounts, banking functions or financial reports. You would however give permission to your office staff to perform bill payments, make deposits and create client credits. Automation allows you to set the permissions for each employee, who is then assigned a unique log in and password. When operating on a network it is possible to have different users logged onto the terminals with only the permissions for the terminal operator being applied.

Secondly, as a management tool for the in-built task manager, using security allows you to set-up appointments and tasks by user or user group. When logged in a user will only be able to view that individual's appointments and tasks. Security permissions also allow you to establish whether the user is able to enter tasks or appointments for other users.

If you wish to use the security function it will have to be enabled from the configuration screen.

	Security C Enable sec Auto-logou	urity 🔔 Users It when idle for	mins	Secu then	rity, Enabling: Point a click the users button	and click on the enable option n.
1	UserDetailsF	form				—
	Username	Peter			New password	
	Туре	Manager	- 🗆 Ir	nactive	Re-type password	
	Access perr	Manager Office n Technician	R.		Report permissions	*

Next you need to enter the user's name (this will be their unique log in), set the user type, establish the permissions and enter a password. The password can be in text, numbers or a combination; the password field is case sensitive so if you enter a letter in capitals, it must be typed in the same way for the user to be logged on. Note that when entering your password, you are asked to confirm by re-typing, if the combination does not match the original entry a message is displayed. Simply re-key correctly.



Next point and click on each function you wish to give the user access to. Report permissions allow the user to print or not print all reports in the group selected.

The allow all and block all buttons are a quick way to set or secure access to all functions, you can use this as a short cut, then simply edit the selections you wish to change.

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Note: It is important that you retain your password in a SAFE place as loss can cause operational problems. It is also suggested that you limit your password to a maximum of 6 characters so it is easy to remember. Security, Log On:

Once security is set you will need to log on to use the program, on start up a log in message is displayed, type the user's name or select from the drop-down list, enter the password and press enter or select OK.

Automatio	n login
AA AUTON	IOTIVES
Username	~
Password	
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If a user attempts to access functions that have not been selected in the security profile an access denied message is displayed. It is however possible to change a user's access at any time by selecting File / Settings / Configuration / Manage Users.

It is of course suggested that only the manager has access to the setting option to prevent unauthorized use of the program.

File	Activities	Admin	L		
	Site settings				
	Printer settings				
	Integrity check				
	Logout				
Change database					
	Exit				

Security, Log Out: To log out of Automation select file / logout, this procedure will log you out of the program displaying the log in message for the next user to sign back in. If security is a concern, it is suggested that you log out whenever you leave the terminal and log back in when you return.

Security
Enable security
Log Out When Idle: This option allows the operator to set an auto log out period when the terminal is inactive. Enter the minute value into the field provided, once this period is exceeded you will be

Date Lock

Provides the operator with the ability to lock records prior to a nominated date, to enable go to File – Site Settings – Database Settings – Date Lock, point and click in the check box then select the button to the right of the date field, from the calendar select the lock date by double clicking in the grid, save your settings, you will not be able to edit any records prior to the selected date. It is however possible to change your settings or disable the feature at any time.

required to log back into the system.