

Using Passwords in CLIP

Passwords in *CLIP* are used for three main purposes.

1. Security - giving permission to only those users (employees) you wish to have access to certain information in *CLIP*.
2. Identifying a user (an employee).
3. Assigning a task to a user (an employee).

If you use the Contact Management System in *CLIP Pro*, you will quickly realize why *CLIP* needs to know who is the current user. As you assign tasks to users or enter comments for them to read later, they will have to identify themselves to *CLIP* to retrieve those activities and notes.

You can also limit the user to certain areas of the program. This way you can allow your foreman and crew members the ability to get into *CLIP* without being able to see certain pieces of information. For example, you can allow a user to get into *CLIP* but not see customer information but still allow them to record work as done but not see the amount that is being charged to the customer.

You can also allow a user to enter debits into the system but not credits.

Specifications:

There is only one "Level 1" user in *CLIP*. The "level 1" (master) can change and maintain the password system and has full access to all areas in *CLIP*. Usually "Level 1" is the owner of the company.

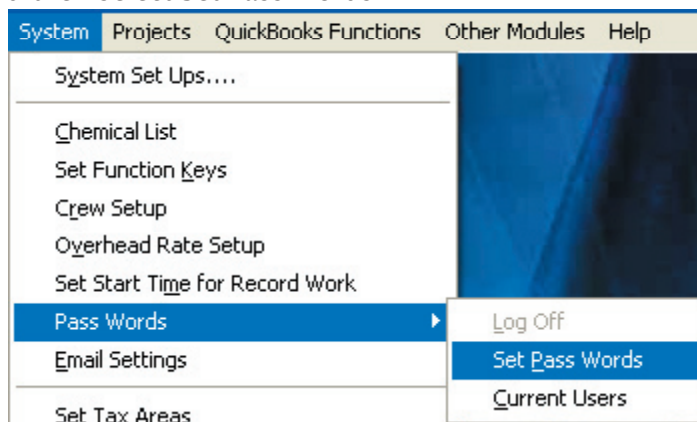
There is no limit to the number of users the system can maintain.

Password permissions are constantly being added so make sure that you keep your *CLIP* program current with the latest updates.

Note: When a new password option is added to the program is is always set to False. This means you must log in as the administrator and give the rights to the correct people for the new option.

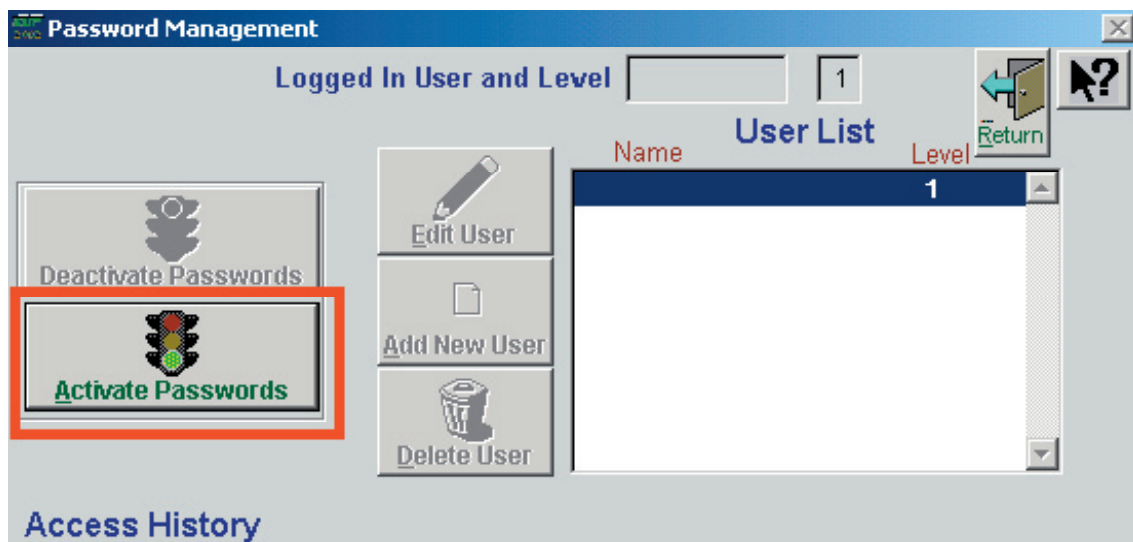
Starting the Password System

To begin, get into *CLIP* and pull down the System menu, select Pass Words and then select Set Pass Words.

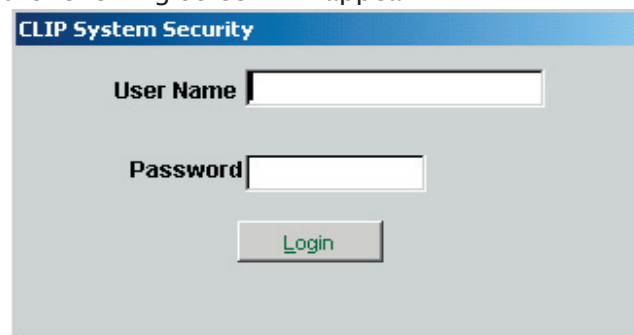


The Password Management screen will appear.

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If the password system has not been activated, anyone can enter *CLIP* and see and change any information in the system. Once the system is activated, access is controlled by the Level 1 user (master). Let's activate the password system and make *CLIP* the Level 1 user. Select the Activate Passwords button and the following screen will appear.



The Password is already set to "*CLIP*" for the Level 1 user. Type in *CLIP* for the User Name and *CLIP* for the Password and select the Login button. You will be asked Activate Password System?, select YES.

Notice that the other buttons on the screen now have been made active.



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CLIP (the user) is now in control of the system.

CLIP (the user) can now Deactivate Passwords, Edit User, Add New User, and Delete User. CLIP can Edit, Add, or Delete any password except the master password "CLIP".

The next time you open CLIP, you will be prompted for your User Name and a Password.

Next let's enter your foreman Glenn into the system. Select the Add New User button and the following screen will appear.

The screenshot shows the 'Edit User/Permissions' window. At the top, there are input fields for 'User ID' (NEWUSER), 'Level' (4), 'Password' (TEST), and 'Employee ID'. To the right of these fields are buttons for 'Add', 'Delete', 'Print', 'Save', 'Revert', and 'Return'. Below the input fields is a tabbed menu with 'File Maintenance' selected. The main area contains a list of permissions with checkboxes: 'Access File Maintenance', 'View Amounts in History', 'Edit', 'Add', 'Delete', 'Print', 'Edit Patterns (Default Customers)', 'See Employees', 'Edit History', 'Delete History', 'Access Bank Account Numbers', 'View Installments', 'Edit Installments', 'Edit Lookups', and 'Office' (with a sub-item 'Add to Outlook'). A 'Check All' button is at the bottom left.

For User ID: type in GLENN. For Password: type in GLENN. For Level: type 2. Fill in Employee ID if you use employee numbers.

Next CLIP has to decide what information Glenn can have access to under each tab. If CLIP wants him to have access to all the information on that screen, he will select the Check All button at the bottom of the screen. If CLIP wants Glenn to have limited access on that particular screen, he will check only those subjects that CLIP wants him to be able to see and use. Glenn has only been given access to Access File Maintenance, View Amounts in History, and See Employees (None of the other tabs have been activated).

Using Passwords in CLIP

Edit User/Permissions

User ID: GLENN Level: 2

Password: GLENN Employee ID

File Maintenance Jobs TimeCard Reports Tran

- Access File Maintenance
- View Amounts in History
- Edit
- Add
- Delete
- Edit Patterns (Default Customers)
- See Employees
- Edit History
- Delete History

Select the Save button, then the Return button.
Glenn has now been added to the User List.

Password Management

Logged In User and Level CLIP 1

Edit User

Name	Level
CLIP	1
GLENN	2

Return ?

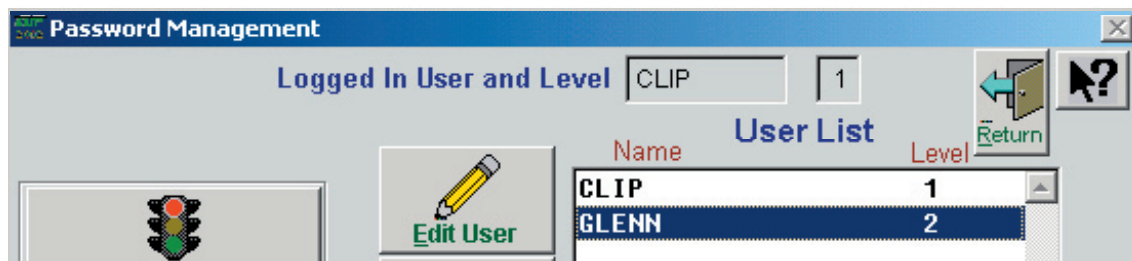
The next time Glenn uses *CLIP* and selects Files > File Maintenance and selects Jim Scully's file, he will see the information but will not be able to edit any information since most of the options have been disabled (see the following screen).

You can also know who has been using *CLIP*, on what date, and at what time by viewing the Password Management screen under Access History (System > Pass Words > Set Pass Words).

Access History			
Name	Date	Logon	Logoff
CLIP	01/01/03	19:17:05	-
GLENN	01/01/03	19:03:26	19:16:45
CLIP	01/01/03	18:32:08	19:02:02
CLIP	12/31/02	18:56:54	19:07:09
CLIP	12/31/02	18:39:03	-
CLIP	12/31/02	17:47:50	-
GLENN	12/24/02	21:19:47	21:20:32

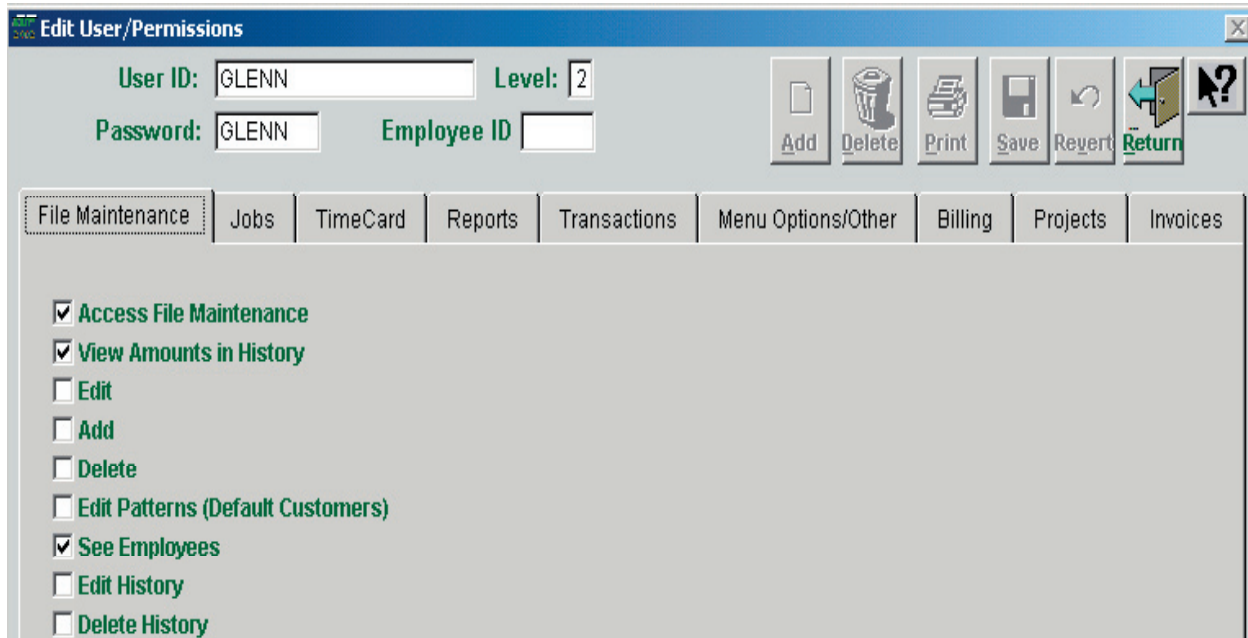
To edit Glenn's permissions, click on GLENN.

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Select the Edit User button.

You will see the permissions for Glenn (checked boxes).



If the check box is checked, Glenn has permission to perform that function. If Glenn is an employee, you can enter his Employee ID number here as well. This lets *CLIP* coordinate the Employee module with passwords.

Notice that the Tabs across the screen allow you to turn permissions on and off for the various parts of the program.

The Level field is only used for your own purposes with the exception being that at Level 1, only one Master Password is allowed (*CLIP*).

Remember that there is context sensitive help available for this and other screens.

Originally, Glenn was only able to use Access File Maintenance, View Amounts in History, and See Employees but was not allowed to do anything under the Transactions tab. This time select the Transactions tab and check all the options that are available. Select Save and Glenn now has access to all the Transactions on the screen.

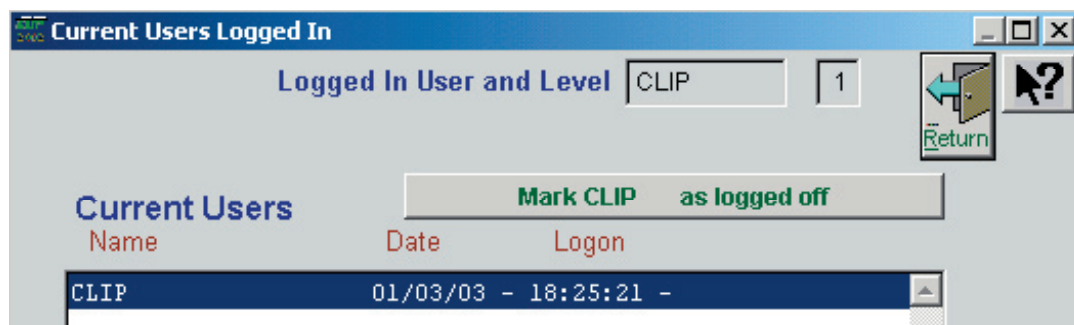
Using Passwords in *CLIP*



Remember as the Level 1 user, you can add users, delete users, edit users, and limit users access in the system.

Seeing who is on the system

CLIP Pro comes with a utility to view all of the users that are currently on the system. This is particularly useful for multi-user applications that need to have people log off so that they can do a process that requires others to be off of the system. Select System > Pass Words > Current Users.



This screen tells us that CLIP (the user) is logged into *CLIP* at this moment. The screen will refresh itself every 5-10 seconds so you will see users log on and off throughout the day.

If a user exits *CLIP* abnormally (loss of power or they reset the system), they will remain in the Logon list until the next day. To remove them from the list, use the Mark XXXX as logged off button on the screen. This button is only available to the Master Password.

If you force a log off, *CLIP* will keep the word Forced in the Access History logoff section.

