Users and Security

Document #:	3019	Product:	CenterPoint®

Security can be setup in CenterPoint that will allow you to password protect databases (Database Security) setup additional users and track transactions entered by each user (Users), and limit access to menu selection(Security Policies). All security is set up and maintained by the Administrator.

Step A: Set Up Database Security

Step B: Select Password Security Options

Step C: Create Database Users

Step D: Create User Groups

Step E: Create Security Policies

Step F: Set Report Level Security for User Groups

Frequently Asked Questions

Step A: Set Up Database Security:

To password protect a database, the Database Security preference must be selected.

1. On the **File** menu, select **Preferences**.



2. Select **Security > Database Security**.
3. Click the **Database** tab.
4. Under **Database Security Settings**, select the **Use Database Security** check box to require a user name and password when the database is opened.

Note: The default user name will be Administrator.

5. Click **Set Administrator Password**.
    - In the **Old Password** box, leave the box blank if this is the first time you are setting up the administrator password.
    - In the **New Password** box, enter the password that you want to be assigned to the administrator user.
    - In the **Confirm Password** box, enter the same password you entered in Step 7.
    - Click **OK**.
6. Select the **Require user to change password when set by an Administrator** box if applicable.
7. Click **Save**.
8. Select **File > Close**.
9. Select **File > Open** and then select the database you just set an Administrator Password for.
    - In the **User Name** box should default to Administrator, if not, enter Administrator.
    - In the **Password** box, enter the password you set in Step 7.
    - Click **OK**.

Step B: Select Password Security Options

Among other things, the password security options allow you to customize how long a password must be, the characters that must be included in the password to be valid, and how often it must be changed. If your organization doesn't have any requirements regarding the password, this step can be skipped.

1. Select **File > Security > Password Security Options**.
2. Select **Enable Password Security Options**, which will then make all other fields on the screen accessible.

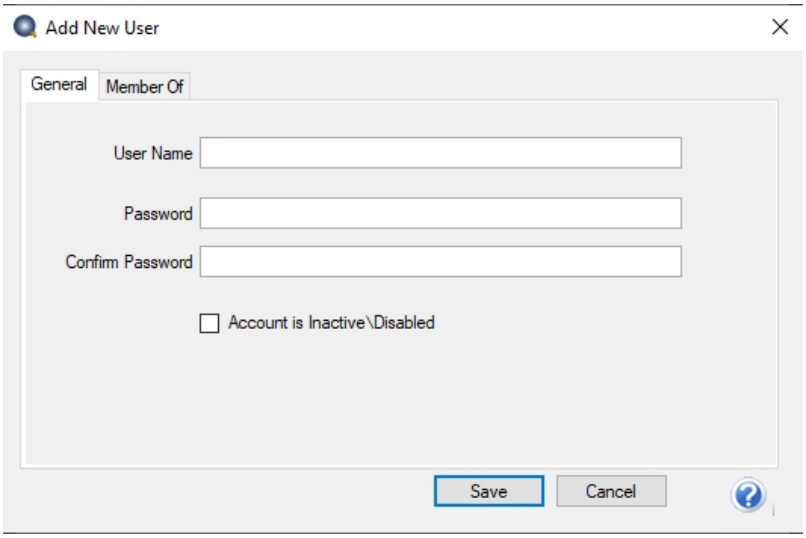


3. Select the options that are applicable to your organization. These selections can be changed at anytime. If selections are changed and a users password no longer meets the new requirements, they will be prompted to change their password on the next login.
4. Click **OK** to save the selections.

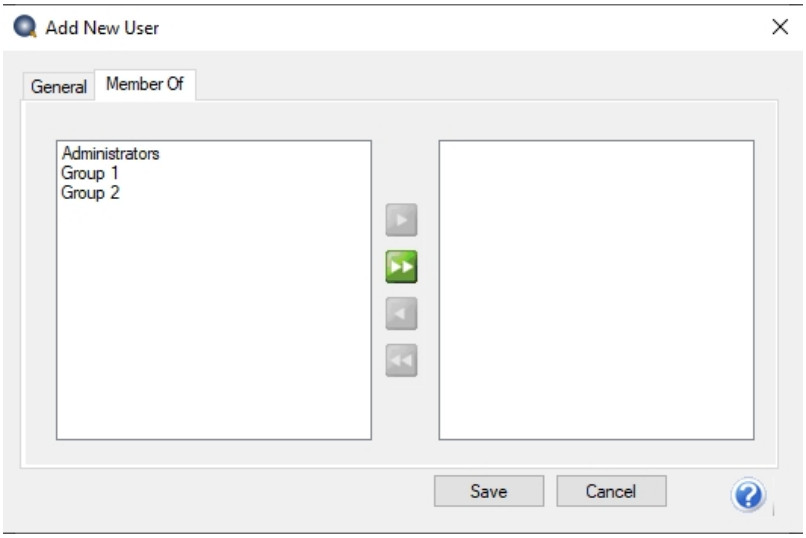
Step C: Create Database Users

Setting up database users allows CenterPoint to track the transactions entered or modified by each user and authorize which processes they can access. CenterPoint will display the user currently logged in at the bottom of the screen in the left corner.

1. Select **File > Security > Database Users**.
2. Click on the **Add User** button.



3. Type a **User Name** and **Password** for the new user.
4. In the **Confirm Password** box, type the same password you typed in the **Password** box.
5. To inactivate/disable a user, select the **Account is Inactive\Disabled** check box.
6. If you have existing User Groups that this user should belong to, select the **Member Of** tab, select the groups that have access to the functions for this user, and click the right-arrow icon to move the users from the left-side of the screen to the right-side of the screen. Multiple users can be selected by holding the Ctrl key at the same time a user is selected.

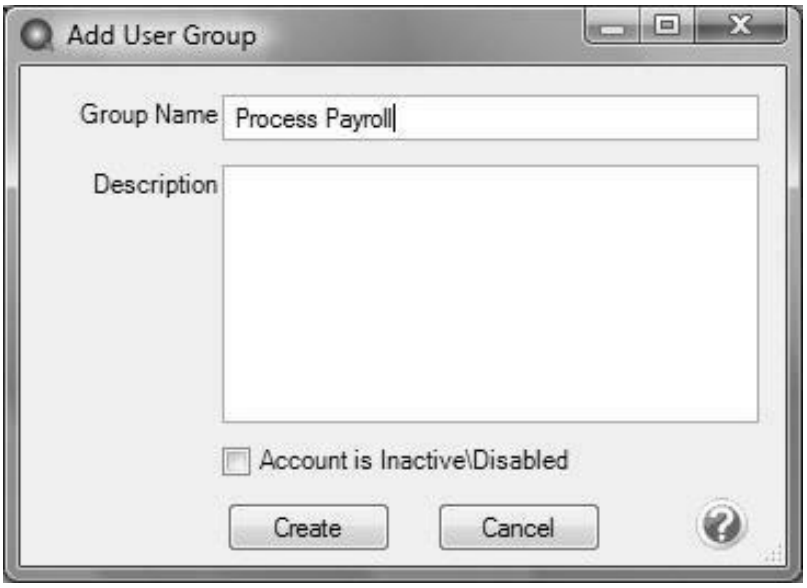


7. Click **Save**. If Password Security Options are enabled on this database (step B), then the system will verify that the password meets those requirements. If it doesn't meet the requirements, a message will be displayed that explains what needs to change on the password before it can be saved.
8. Repeat steps 2-7 for each user needed.

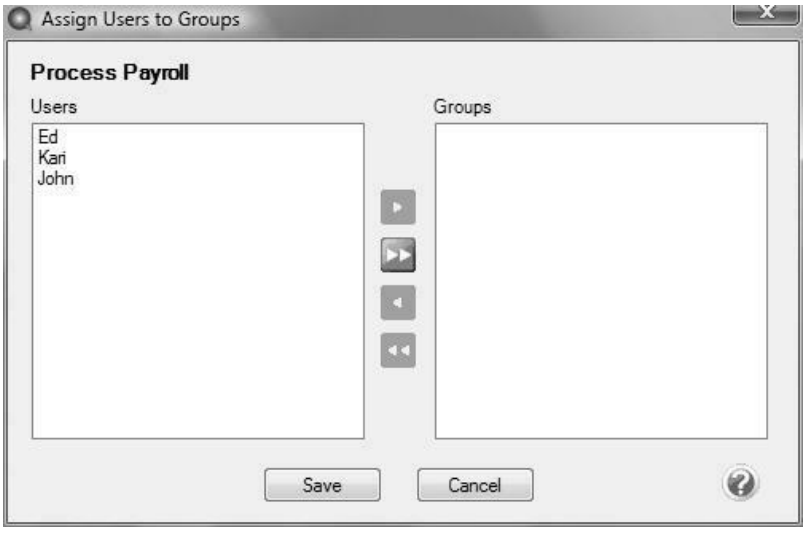
Step D: Create User Groups

Users can be assigned to user groups that then are given access to specific menu selections (security policies) in CenterPoint.

1. Select **File > Security > User Groups**. The main **User Groups** screen will be displayed.
2. Click on **Add Group**.



3. In the **Group Name** box, enter a description for the type of group you are creating, for example "Enter Time Sheets or Process Payroll".
4. In the **Description** box, type a description of this group. The Description is optional.
5. Click **Create**.
6. At the **User Groups** screen, click on the **Assign Users** button.

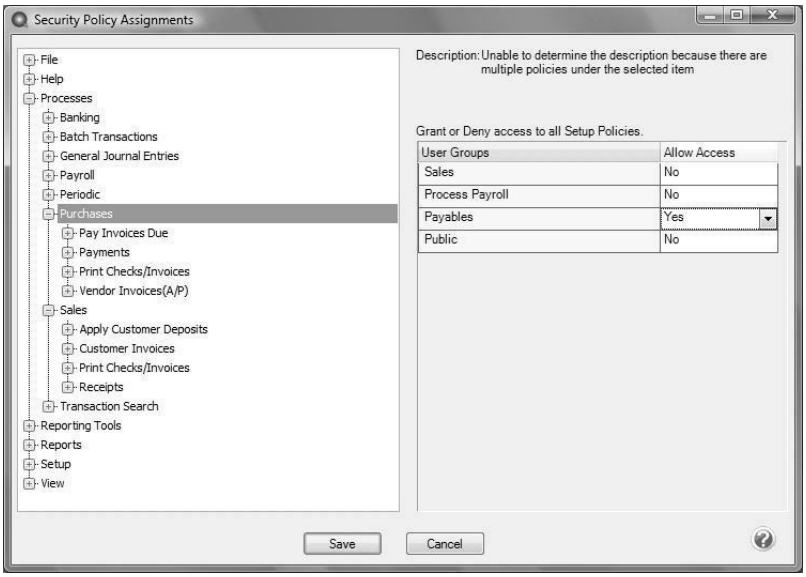


7. In the **Assign Users to Groups** screen, select the users that will have access to the functions for this group and click the right-arrow icon to move the users from the left-side of the screen to the right-side of the screen. Multiple users can be selected by holding the Ctrl key at the same time a user is selected.
8. Click **Save**.
9. Repeat steps 1-8 for each group needed.

Step E: Create Security Policies

Security Policy assignments are used to grant or deny access to user groups. Every user automatically belongs to the Public User Group. The Administrator user group has full access rights which cannot be taken away.

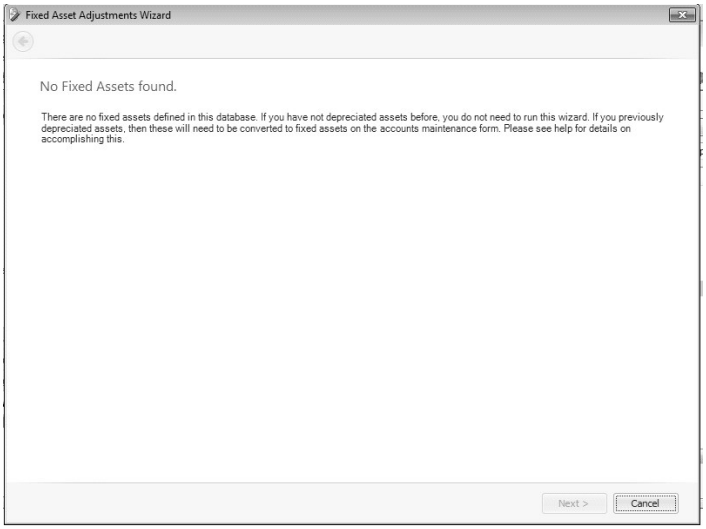
1. Select **File > Security > Security Policies**.



2. Select the menu selection and function from the left-side of the **Security Policy Assignment** screen.
3. For All**User Groups** on the right-side of the **Security Policy Assignment** screen, under **Allow Access** select **Yes** to grant access or select **No** to deny access.

Note: If all items in a menu group will have the same access rights, set the access rights on the highest level (for example; Purchases). If the access rights within a menu group will differ, set the rights on each specific menu (for example, Pay Invoices Due, Payments, etc). If you restrict the access rights for sub-items differently or you have not set the access rights for the main menu group, the main menu group will display as undetermined.

4. Some menu groups allow you to specify add/delete/edit/view/void, etc. security policies. For ALL **User Groups** on the right-side of the **Security Policy Assignment** screen, under **Allow Access** select **Yes** to grant access or select **No** to deny access.



This documentation is for informational purposes only. For specific accounting guidance, please contact your accountant.

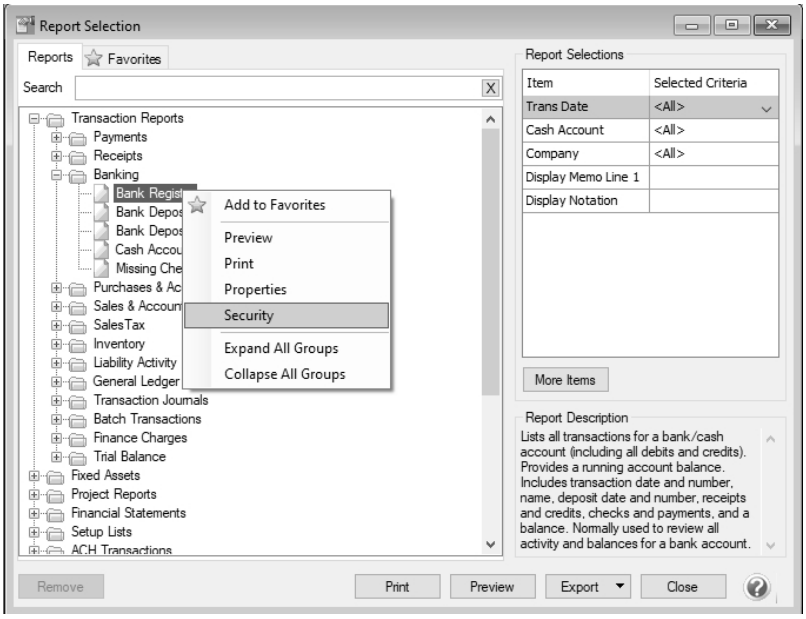
5. Click **Save** after all security policy assignments have been set.

Step F: Set Report-level Security for User Groups

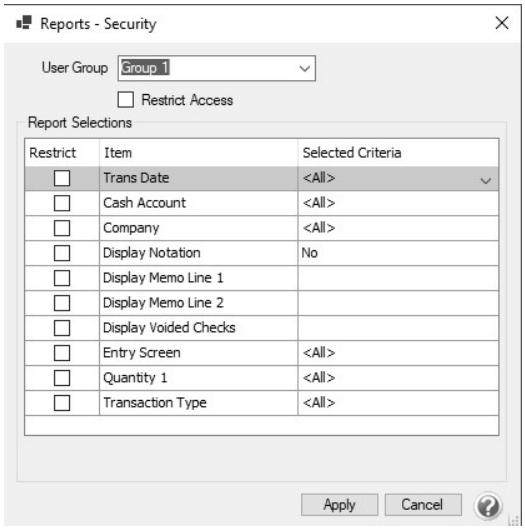
This option allows Administrators to configure report-level security by user group for the report selections criteria for a report or prevent access to the report.

When setting report-level security for report selections, the Administrator can set a default value for specific criteria for the report when the user group prints/previews a report. When the default is set, it cannot be changed when the user group prints/previews the report.

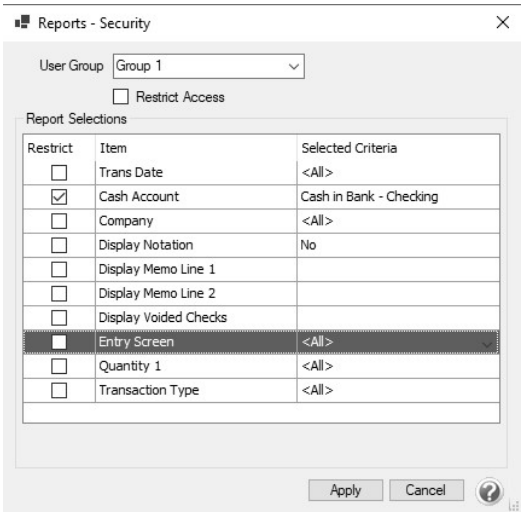
1. Log into a CenterPoint database as an Administrator.
2. Select **Reports** > **Reports** and select the report you want to set report-level security for. The example below will use the Bank Register report.
3. Right-click on the report and select **Security**. This menu is only available when logged in as an Administrator.



4. The Reports - Security screen displays with all of the available Report Selections for the selected report. Select the **User Group** this report-level security setting applies to.



5. This screen allows you to set the following report-level security for the selected User Group.
   - To prevent access to the report for the specified User Group, select the **Restrict Access** check box.
   - To set a default value for a Report Selection, click the drop-down arrow in the **Selected Criteria** column, and then select the default reporting criteria. For example, you may want to set a default Cash Account for a Bank Register report.
   - To prevent access to changing the default value for the selected Report Selection, select the **Restrict** check box. For example, if you want to prevent users in a User Group to be able to change the default Cash Account for a Bank Register when printing/previewing a Bank Register report.



6. Click **Apply**.
7. Click **OK**.
8. Close the Reports - Security screen.

Frequently Asked Questions

Q: Can a user change their own password?

A: Yes. Select **File** > **Security** > **Change Password**. Then specify the old and new password. If Password Security Options have been setup, the password will be validated when saved. The user will be notified if the password does not meet the requirements.

Q: A user tried to login multiple times with the wrong password and now their account is disabled/locked. Is there a way to enable it again?

A: Yes. Login as the Administrator. Then select **File** > **Security** > **Database Users**. Right-click on the locked user and select **Enable User**.

Q: Is there a way to see when a user last changed their password?

A: Yes, we have a report available that species password changes. Select **Reports** > **Reports** > **Audit Reports** > **Passwords Changed**.

Q: If a user forgot their password, how can I reset it?

A: Yes. Login as the Administrator. Then select **File** > **Security** > **Database Users**. Right-click on the locked user and select **Set Password**.