

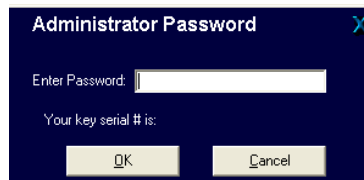
Security

Security is the area of **ADVANTAGE** where you identify your system users, establish their logins, and define what **ADVANTAGE** functions they may see or use.

- From the **ADVANTAGE** main screen, select System, then Security:

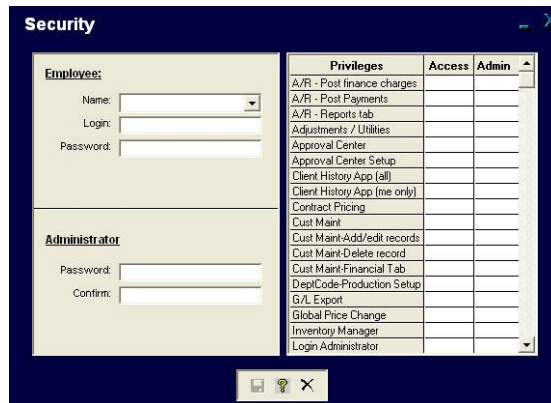


- ADVANTAGE** brings up the password window



- Enter your **Administrator Password** then click 


- ✚ **ADVANTAGE** opens the **Security** Screen:



To check or uncheck a box, just click in it.

- ✚ **Employees** – set up the employee’s basic login information

Employees must be set up in the **Human Resources** section of **ADVANTAGE** before any access or security can be defined here.

- ✚ **Name** - use the drop down  menu to select an employee
- ✚ **Login** – the *employee’s* login ID for all web-based applications, such as Inventory Manager, Shop Floor, etc. The login ID for web applications is limited to 5 characters and is case sensitive.
- ✚ **Password** – the *employee’s* password. This same password will be used in the Advantage core components as well as to log into the web-based applications.
- ✚ **Administrator** – forces the employee to enter a password to use the feature
 - ✚ **Password** – the password the employee will use to access the feature
 - ✚ **Confirm** – type the password a second time to make sure you entered it as you intended to
- ✚ **Privileges** – the **ADVANTAGE** function, screen, area, etc. that you are allowing this employee to use (see **Privileges Table** at the end of this document for an explanation of each)
- ✚ **Access** – check the box by the **ADVANTAGE** feature(s) you want this employee to be able to use
- ✚ **Admin** – check the box for the function(s) you want the employee to enter a password to use

Employees can have **Access**, **Admin**, or **both** privileges.

- ✚ Click **save**  when done



Privilege

Allows Employee to:

A/R Post Finance Charges	Post finance charges to accounts receivable
A/R – Post Payments	Post payments to accounts receivable
A/R – Reports Tab	Access the accounts receivable reports tab on the screen
Adjustments / Utilities	Use system adjustments to adjust the data on file
Approval Center	Approve the art work
Approval Center Setup	Set up Approval Center for art work approval
Client History App (all)	See customer history for all salespeople
Client History App (me only)	See customer history for this employee only
Contract Pricing	Use contract pricing
Cust Maint	Access the customer maintenance feature; must be checked for any of the following to be available to the employee
Cust Maint-Add / Edit Records	Add and/or edit customer records
Cust Maint - Delete Record	Delete customer records
Cust Maint - Financial Tab	Access the customer financial tab on the screen
Dept Code – Production Setup	Access the production setup, department tab on the screen
G/L Export	Access and use the general ledger export feature
Global Price Change	Change prices throughout the system
Inventory Manager	Access and use the inventory management feature
Login Administrator	This feature is not used
Marketing - Import / Export	Import and export customer lists
Marketing – Mail Merge	Use the marketing mail merge feature
Marketing – Print Cust / Prosp	Print the customer and prospect lists
Material – Add / Edit Products	Add and/or edit inventory material prices
Material – Print Product Lists	Print the inventory material price list

Order Entry	Access the order entry screen; must be checked for any of the following features to be available to the employee
Order Entry – Adjust AR Order	Adjust accounts receivable for an order
Order Entry – Recurring Invoices	Issue recurring invoices
Order Entry – Set Order Date	Set the order date
Order Entry – Show All Categories	See privileged categories
Order Entry – Void Estimates	Void estimates
Order Entry – WO Cost Analysis	Access the work order cost analysis
Order Entry – Adjust Orders	Adjust (make changes to) orders
Order Entry – Estimate Entry	Click the "Continue Estimate" button on the estimate screen
Order Entry – Line Item \$ Over	Enter orders over a pre-determined threshold value
Order Entry – Order Entry	Click the "Continue Order" button on the estimate screen
Order Entry – Void Order / Estimate	Void orders and estimates
PO – Close PO (even if not received)	Close a purchase order, even if the material has not been received in ADVANTAGE
PO – Create / Edit	Create and/or edit purchase orders
PO – Receiving	Receive purchase order material in ADVANTAGE
PO – Reporting	Access the purchase order reports screen
PO – View	Access the purchase order screen; must be checked, for any of the other purchase order features to be available to the employee
PO – Void	Void purchase orders
Post Order – WIP (for all)	View posted orders for all employees
Post Order – WIP (for me only)	View posted orders for this employee only
Post Order Picked Up	View orders picked up (for only those orders allowed by the previous two privileges)
Post Order	Post orders;
Post Order – Post Orders Tab	Access post orders; must be checked for any of the other post order features to be available to the employee
Print Invoice	Print invoices
Promotions	Access the promotions feature
Reports – Human Resources	Print or view human resources reports
Reports – Marketing Reports	Print or view marketing reports

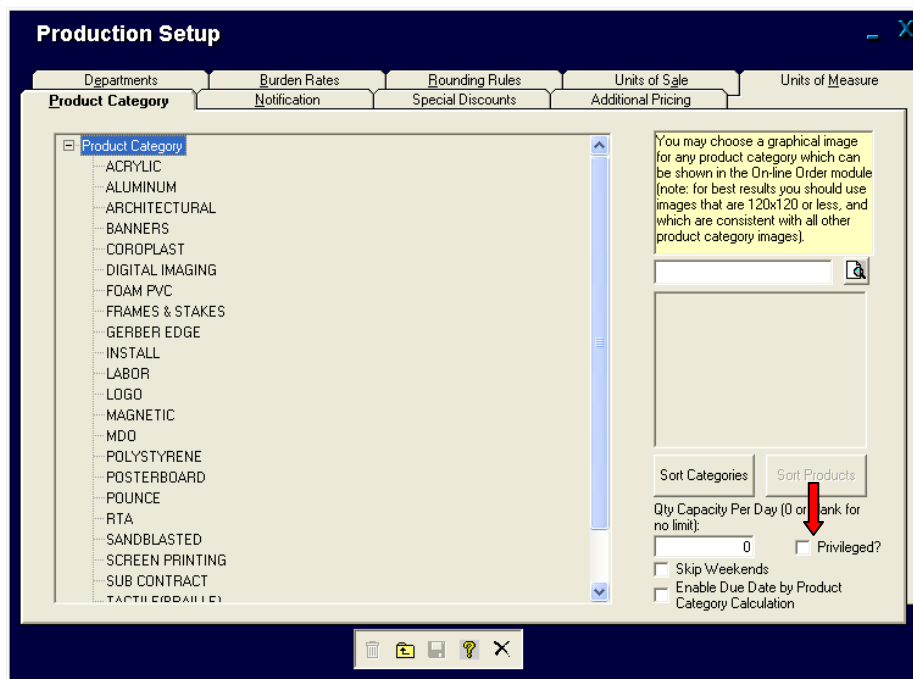


Reports – Sales Reports	Print or view sales reports
Sales Forecast	Print or view the sales forecast
SC – Admin	Access and use the service center setup screen
SC – Service Calls	Use the service center
Security	Access and use the security feature
Shop Floor – View Invoice \$	View the amounts on shop floor invoices
Shop Floor Log	Shows shop floor on the menu; must be checked for any of the other shop floor features to be available to the employee
Shop Floor Planning	Access the shop floor planning screen
Shop Floor Tracking	Access the shop floor tracking screen
Staff – Add / Edit Staff	Add and/or edit employees
System Setup	Access and use the system setup features
Throughput Utility	Obsolete; replaced by shop floor
Time Clock Adjustments	Make adjustments to other employee's time clock entries
Vendor Maintenance – Edit	Edit vendor information
Vendor Maintenance – View	View vendor information
Vendor Reports	Print and view vendor reports
VO – A/R/Salesperson	Obsolete; replaced by terminal server
VO – All A/R	Obsolete; replaced by terminal server
VO – All Clients	Obsolete; replaced by terminal server
VO – All Estimates	Obsolete; replaced by terminal server
VO – All Reports	Obsolete; replaced by terminal server
VO – All WIP	Obsolete; replaced by terminal server
VO – Calendar	Obsolete; replaced by terminal server
VO – Clients / Salesperson	Obsolete; replaced by terminal server
VO – Employees	Obsolete; replaced by terminal server
VO – Estimates – Salesperson	Obsolete; replaced by terminal server
VO – Login Advantage	Obsolete; replaced by terminal server
VO – Marketing	Obsolete; replaced by terminal server
VO – Reports / Salesperson	Obsolete; replaced by terminal server

VO – WIP Salesperson	Obsolete; replaced by terminal server
WO Gen – Add / Edit a W/O Template	Add and/or edit a work order template

New Security

A checkbox has been added to the product category setup (under Production Setup) called “privileged”. If checked it means that by default users cannot see that category or its subcategories during order entry unless specifically allowed to see them in security.



To allow users to see the privileged categories, the security setting Order Entry-Show All Categories must be checked:

