



Application security tutorial

Introduction

Most organizations have a variety of people who use CharityMaster. You may not want some users to have access to some of CharityMaster's functions. For example, you may not want volunteers to see the donation data or you might not want an employee to be able to change any of the system setup tables. CharityMaster comes with a robust and easy to use Application Security system that is highly customizable: *you* can change who has access to what.

Of course, you can decide not to worry about restricting user access in any way. Simply add users and assign everyone to the Administrators group. See below for instructions.

The CharityMaster security system has three main components:

- Users (names and passwords)
- Groups and
- Permissions / restrictions

The system ships with just one user: "Admin." The password for this user is "admin" and we recommend that you change this password as soon as possible. You can change this user name (and related password) at any time. You can add users, change their user names, reset passwords, and make users inactive. (You cannot delete users.)

CharityMaster comes with a pre-defined set of *permissions / restrictions*. One example is "Allow access to accounting reports." Unless a user belongs to a group which has this "permission" assigned to it, they will not be able to access the Accounting screen (on the File menu.) Since there is coding involved, you cannot add new permissions / restrictions nor can you change what they do. (Of course if you wish to have something special for your organization, we can accommodate changes with custom coding – generally without any cost to you.)

Permissions / restrictions are assigned to groups. You can add groups (but you cannot delete them) and you can add or delete the permissions that are assigned to each group.

Users can become members of one or more groups and all **users must belong to at least one group**. Note that you cannot assign permissions / restrictions directly to a user. If a user belongs to more than one group, the most restrictive permissions are applied. For example, if the user belongs to a group which has the "Allow access to accounting reports" permission and also to another group which does NOT have this permission, that user will not have access to any of the accounting reports. To reduce confusion, it is best to assign users to just one group.

One of the groups included in the standard CharityMaster setup is the "Administrators" group. There are no permissions / restrictions assigned to this group and you cannot add any. In other words, members of this group can do and see everything in CharityMaster.

Security Setup

The **Security Setup** Screen is accessed from the **Application Security** selection on the **File** menu. You can see what options are available. There are two special permissions that are applicable to this screen:

1. "Edit security." Unless a user is a member of the Administrators group or of a group which has this permission, they cannot access any of the functions on this screen – other than opening the **Sign On** form.
2. "Edit security users." Users that are members of the Administrators group or of a group that has this permission can: add users, reset passwords and assign users to groups. They can also remove users from groups. (Note that they cannot change the group(s) to which they, themselves, belong.)

Make sure that at least one user (it could be yourself) belongs to the "Admins" group or has the "Administer" or "Edit Security" permission/restriction.



Users

A user cannot access the system until they have been added to the list of users. You can access the users list from the Security Setup screen. From this screen you can:

- Add a new user.
- Change their user name.
- Change their full name.
- Make the user inactive. This means that the user will no longer be able to sign-in. (You cannot delete users.)
- Assign the user to a new group and / or remove the user from a group.
- Reset a user's password. When you click the **Reset password** button, the user's password and password reminder are deleted. The next time the user signs in he /she must enter a new password and password reminder.



When you add a new user, you must enter both a password and a password reminder. The password reminder can be displayed whenever the user signs in. Be sure to tell users not to put their actual password into the password reminder field.

A common format for user names is to use the first initial plus the full last name of the user.

Whenever you add a new user, *be sure to add them to at least one group*. They will not be able to sign in until this is done.

Groups

CharityMaster is installed with five groups:

1. Administrators. The "Administrator" group is a special group. Users belonging to this group have administrator permissions and are not limited by CharityMaster permissions/restrictions.
2. Power users. Members of this group have access to all aspects of CharityMaster with the exception that they cannot make changes to the key system setup tables. They CAN add users to the system, assign them to groups and reset passwords.
3. Data entry. Users assigned to this group can do most data entry functions. They have no access to accounting data but can see all donations. They *can* generate letters and e-mails.
4. Restricted. These users:
 - a. Cannot access or enter:
 - i. Donation data or credit card data
 - ii. Store management or store sales transactions
 - iii. Membership management or dues payments
 - iv. Volunteer management / data
 - b. Cannot access:
 - i. Auction module
 - ii. Event planning functions (seating and tournament planning)
 - iii. E-mail Wizard
 - iv. Any important system setup tables
 - c. Cannot delete names from the database.
 - d. Cannot add, delete or edit any Word templates.
5. IT specialists. Members of this group have very limited access to CharityMaster. They cannot edit the data on any form. They can, however, operate the Import Data Wizard and use the F12 key to 'point' CharityMaster to a different location or name of the back end data store.

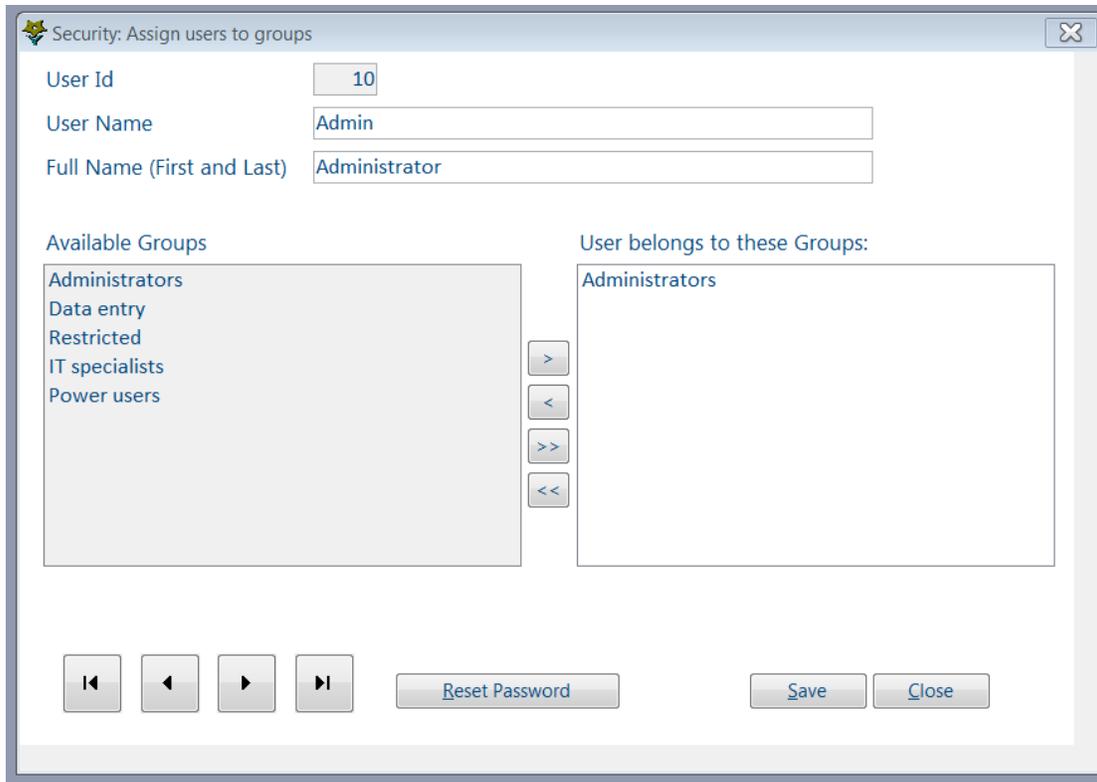
You can add a new group but you cannot delete a groups. You can, however, change the name of a group.

To add a new group, click the **View / edit groups** button on the Security Setup screen. On the Security Groups screen you can:

1. Change the name of the group
2. View or change the description of what members of the group can and cannot do. (Double click on the name of the group to see its description.)

Assign users to groups

You can get to the **Assign Users to Groups** screen from the **View/edit users** screen (see above) or by clicking on the button on the **Security Setup** screen.



Use the navigation buttons in the lower left corner of the screen to move to the user you want to edit then use the > and < buttons as follows:

- > Add the selected Group to the list of Groups that this user belongs to.
- < Remove the selected Group from the list of Groups the user belongs to.
- >> Add all Groups to the list of Groups the user belongs to.
- << Remove all Groups from the list of Groups the user belongs to.

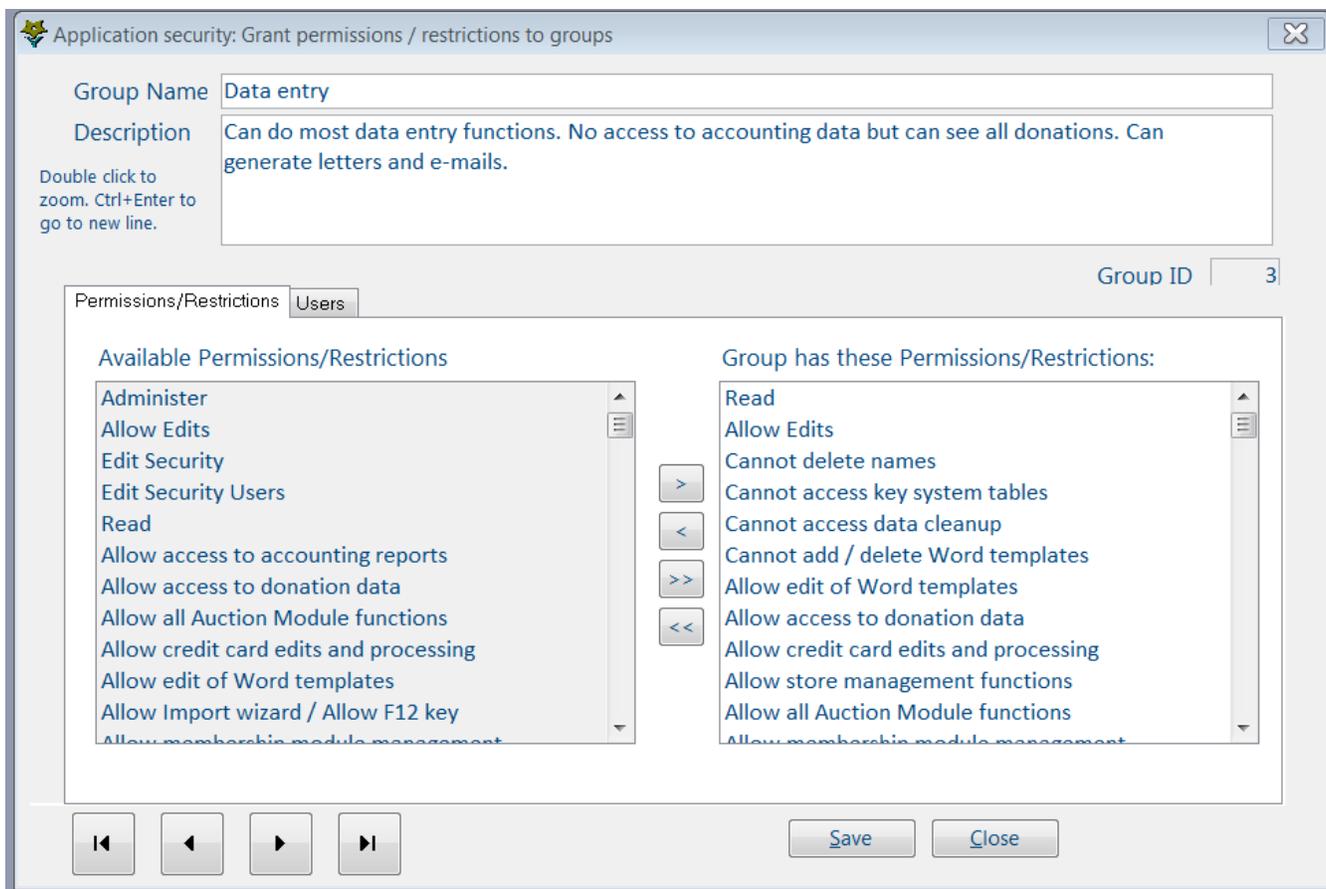
Permissions / restrictions

CharityMaster comes with a set of permissions / restrictions that should be adequate for most organizations. Before we discuss how to modify the permissions restrictions that are assigned to each group, you should display the **Permissions / Restrictions** screen by clicking the appropriate button on the **Security Setup** screen. On this screen you will see a list of all of the permissions / restrictions that are installed with CharityMaster. You cannot change the name of any of these restrictions but if you click a permission and then click the **View permission description** you can see a brief outline of what that permission / restriction affects.

Note that if a group does not have the “Read” permission, there are very few areas of CharityMaster to which members of that group will have access.

Grant permissions / restrictions to groups

On the **Security Setup** screen, click on the **Grant permissions / restrictions to groups** button to see the screen where you can modify the permissions / restrictions for each group.



Use the navigation buttons in the lower left corner of the screen to move to the group or user you want to edit then use the > and < buttons as follows:

- > Add the selected permission/restriction to the list of granted permissions/restrictions.
- < Remove the selected permission/restriction from the list of granted permissions/restrictions.
- >> Add all existing permissions/restrictions to the list of granted permissions/restrictions.
- << Remove all permissions/restrictions from the list of granted permissions/restrictions.

Note the **Users** tab on this screen. If you click on this tab, you can assign / un-assign users to groups just the same as on the **Assign users to groups** screen.

Trying it out

Now let's try out what you have learned.

1. Open the **Security Setup** screen.
2. Add a new user with user name "Shifty" and password "trusty." Enter a password reminder as appropriate. (You could also use an existing user provided you first remove them from all groups.)
3. Assign this user to the "Restricted" group only.
4. Press the F6 key to sign on as "Shifty."
5. On the **Maintain names** screen, click on the **Sponsorships** button which is on the toolbar at the top of the screen. You will get a message saying that access to that screen is prohibited.
6. Press F6 again and sign on as "Admin."

7. Open the Grant Permissions / Restrictions to Groups screen.
8. Navigate to the “Restricted” group and add the “Allow access to donation data” permission to that group. Close the screen.
9. Press F6 again and sign on again as “Shifty”
10. On the **Maintain names screen**, click on the Sponsorships button. Note that “Shifty” can now enter new donations and see the donation history for each name.
11. Press F6 again and sign on as “Admin.”
12. Open the CharityMaster **Users screen** and either change the “Shifty” user name to a real user’s name or make the “Shifty” user inactive.

We hope you enjoyed this tutorial. All of this information is also available in the CharityMaster help system. Press the F1 key on any screen to get the information you need.