

Timeslips Hidden Treasure #11 – Database Security

Whether you are using Timeslips on one computer or many, your business depends on the reliability of the valuable data contained in your Timeslips database. Regular backups are important but aren't enough to ensure dependable access to your records. Recognizing that secure data has never been more important than it is today, Timeslips provides security features that, by establishing password access for each timekeeper and database, will protect your data from unauthorized access.

We recommend that a master Supervisor password be set up so that only your Timeslips administrator can access your Timeslips security system. Keep this password in a safe place but know that, because **Integrated Visions** is Data Repair Certified, one of the services we provide our clients is that we can unlock your system if the password is lost or forgotten.

There are three elements to the Timeslips security features, all found in the **Setup/Security** menu option:

-Global – Allows you to establish the Supervisor password, activate the login prompt and set usage options.

-Profiles – Allows you to establish templates or profiles for providing specific access rights to groups of timekeepers.

-Timekeeper rights – Allows you to assign a password and profile to the timekeeper and override profile rights when needed.

Instructions for setting up each security element follows. Be sure to perform all three (3) steps. If you require assistance, contact the **Integrated Visions** Help Desk at (858) 724-0044.

STEP 1 - Setting Global Security Options to enable security:

1.1 Select **Setup/Security/Global** from the Timeslips menu bar.

1.2 Create and enter whatever **Security Supervisor's Password** you want to assign. After step 1.7, below, this password will be required to access all security options, so be sure to keep it in a safe place or give it to **Integrated Visions** for safekeeping.

1.3 Select the option **Require login and activate security** by clicking a checkmark in its box. Without selecting this option, login names will appear but no security will be enforced.

1.4 Select the option named **Password required to log in**. This will ensure proper security is in place.

1.5 Change **Default Profile for a new Timekeeper** to the desired profile. You will have to come back to this option once the profiles are established in the next step.

1.6 Change **Guests log in without a password using** field to **None**. This prevents unauthorized use of Timeslips.

1.7 Select **OK** to save the Global settings.

STEP 2 - Establishing Security Profiles for groups of timekeepers:

2.1 Decide how you want to establish your firm's timekeeper profiles . For example, you might want to set up separate profiles for Administrator, Managers and Staff.

2.2 Select **Setup/Security/Profiles** from the Timeslips menu bar.

2.3 Select the **New** button to create a new profile. If appropriate, you may copy an existing profile by selecting the **Duplicate** button.

2.4 Type a **Profile Name** such as Administrator, Manager or Staff.

2.5 Choose the access rights by clicking the down arrow next to the **Area** field. Specific security access rights can be established for Slips, Accounts Receivable, Client Funds, etc. Most types of data will accept restrictions that prevent users from viewing other timekeeper entries, adding clients, or viewing confidential financial reports. Be sure to view each rights area and assign the appropriate security options.

2.6 Remove checkmarks for rights you **do not** want the user to have.

2.7 When you are done, select **OK** to save the Profile settings.

2.8 Repeat steps 3-7 for each timekeeper group you wish to create.

2.9 Return to **Setup/Security/Global** in the Timeslips menu bar and assign the **Default Profile for a new Timekeeper** to the desired profile. This will automatically assign the same security profile to each new timekeeper you add to Timeslips. Typically the profile assigned to new timekeepers is the Staff level which has limited access to the database.

STEP 3 - Assign Timekeeper access rights:

3.1 Decide which profile created in Step #2 above (**Establishing Security Profiles for groups of timekeepers**) will be assigned to which timekeeper.

3.2 Select **Setup/Security/Timekeeper Rights** from the Timeslips menu bar to display all timekeepers with an Open classification.

3.3 Highlight a timekeeper and click **Open** to open the Timekeeper Security Settings dialog box.

3.4 Create and enter whatever **Password** you want to assign to the timekeeper.

3.5 Assign the desired **Profile** for this timekeeper by clicking the down arrow and choosing from the profiles created above in Step 2.4.

3.6 If one of your Timekeepers is an exception to the group rights you assigned above, in step # 2.9 you can customize the rights for any particular profile by clicking its field in

the **Profile** column. My recommendation, however, is to simply create a new profile for that Timekeeper.

3.7 Select **OK** to save the Timekeeper Access Rights settings.

Once all three of the above steps are performed, exit and reopen Timeslips to activate the security settings. You will see a login screen listing each Open timekeeper's name. Choose the desired name from the list, enter the password and select **OK** to open the database. Security is now active. Timeslips indicates the fields, or areas of the program, that are restricted for that timekeeper by removing or graying out the field or by simply displaying a message stating they don't have access to this area of the database.

If you are uncomfortable performing the above steps, one of our consultants is available on **Visions'** Timeslips Help Desk at (858)724-0044 to assist you. Telephone support calls are billed at your normal hourly rate in 10-minute increments or, if you are on a **Visions** Support Plan, there is no additional charge for telephone support.

We know that some of the most useful features of any software program are often not intuitive and hope you find this Timeslips Hidden Treasure useful in your business. Please contact me with suggestions for future "Hidden Treasures" topics or if you are interested in receiving previous issues:

- Hidden Treasure #01 – Right-Click Menu options
- Hidden Treasure #02 – Time Entry Shortcuts
- Hidden Treasure #03 – Credits on Bills
- Hidden Treasure #04 – Client Hold (putting billing activity on hold)
- Hidden Treasure #05 – Unapplied Payments
- Hidden Treasure #06 – Billing Assistant
- Hidden Treasure #07 – Closing Slips
- Hidden Treasure #08 – Proof Stage: Clear or Revision?
- Hidden Treasure #09 – Deleting Temporary Files
- Hidden Treasure #10 – Fixing Balances

We encourage you to forward this e-mail to friends who would find it valuable. Thank you for your interest and support.

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The Time Tracking Experts

#1 Worldwide Timeslips Certified Consultant 2000-2001.

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