

## Setting up Security in Artsystems

### Restrict Database Access with Secured Groups

#### SECURITY

The Security feature in *Artsystems* allows the database *Administrator* to setup password access to individual areas or parts of the database. This feature is broken down into **GROUPS** and their associated **USERS**. By marking and un-marking 2 check boxes, Display and Enable/Change; **GROUPS** are given either no privileges, read-only, or editing privileges to program modules and their data (Works, Transactions, etc). **USERS** are associated with and have the privileges of their groups. There is no limit to the number of groups or users created.

**NOTE:** Users may also belong to more than one group (with different passwords for each group) if company roles warrant.

#### PRELIMINARY STEPS

Backup your *Artsystems* database before starting this procedure. Consult your technical staff if you require assistance with locating your database. The default location is C:\ProgramFiles\Artsystems GalleryPro\data.asd.

**NOTE:** *Artsystems* strongly recommends regularly scheduled backups of data to an external hard drive, dvd, or online backup service. For more information on backing up data, please see: <http://artsystems.com/services/docs/backup.pdf>.

#### ADMINISTRATOR

An Administrator or Admin group should first be established. This group should have full access privileges to the database. A user must be a member of the Administrator group to be able to create other Groups or Users and to determine their database privileges. **NOTE:** All other users must be logged out of *Artsystems* when the administrator is changing security options.

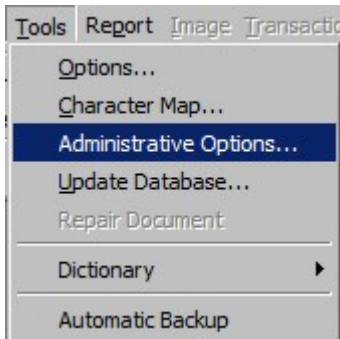
Determine what your Groups and their Users will be and what Modules (Contacts, Works, Transactions, Etc) they will be able to access.

Example Security Setup:

| Group         | User Name | Password | Database access        |
|---------------|-----------|----------|------------------------|
| Administrator | Helen     |          | All Modules            |
|               | Bob       |          | All Modules            |
| Sales         | Walter    |          | No - Financial Reports |
|               | John      |          | No - Financial Reports |

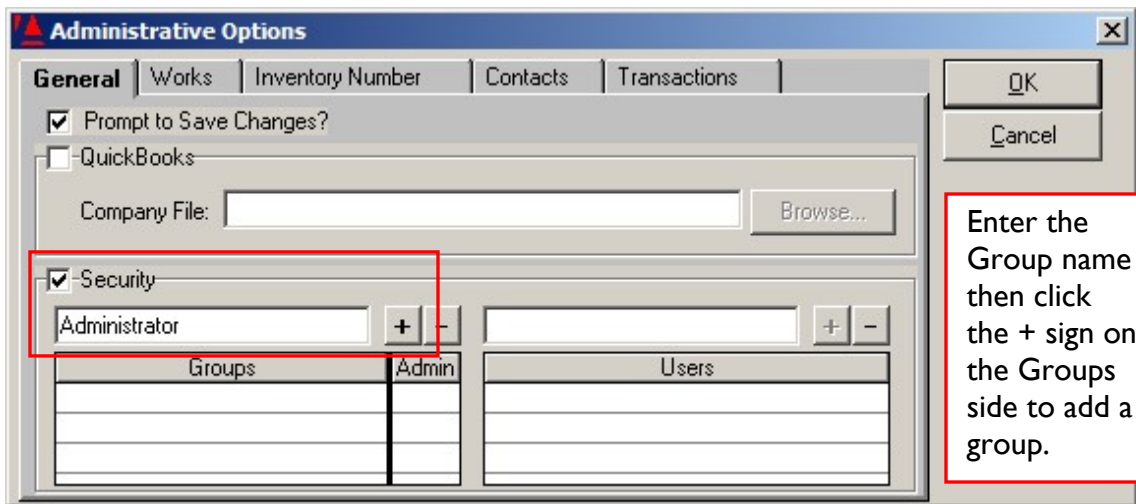
## PART I: GROUPS AND USERS:

Open Artsystems program and select *Tools* → *Admin Options*.

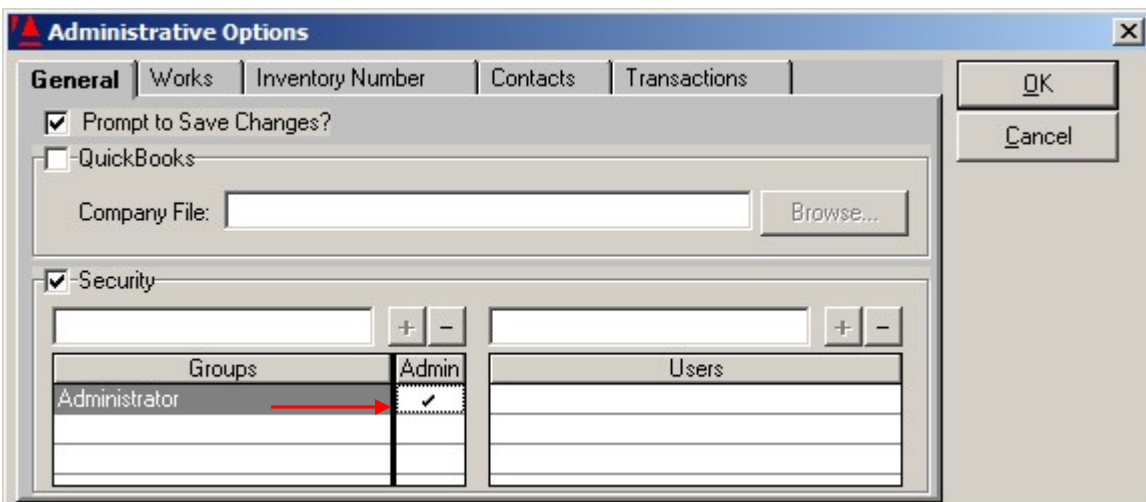


Check the Security checkbox to enable Security setup.

To add the Administrator group enter Administrator into the white text box above the column labeled Groups and click the plus (+) sign.

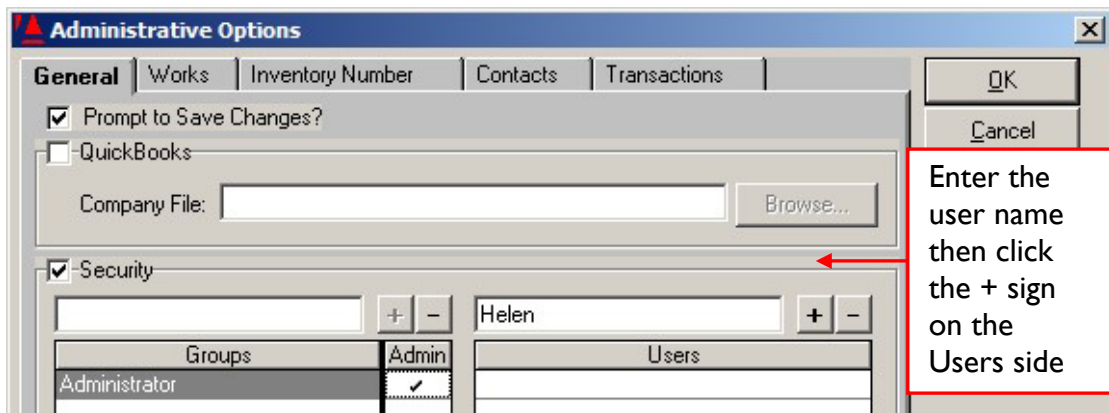


After adding the group, click the white box under the Admin column creating a checkmark. The check signifies that this group is the System Administrator for Security and will be able to access all Administrative Options in the future.



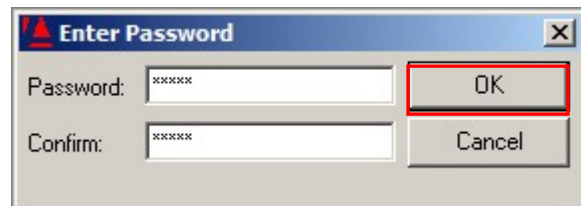
To add users to the group enter the User name into the white text box above the Users column and click the plus (+) sign.

**NOTE:** REMEMBERING THE SYSTEM ADMINISTRATOR PASSWORD IS VERY IMPORTANT. IT SHOULD NOT BE SHARED OUTSIDE OF THE ADMINISTRATOR GROUP. If you forget what it is, you must contact *Artsystems* Support for options on how to retrieve the Password. There can be more than one user who acts as an administrator.



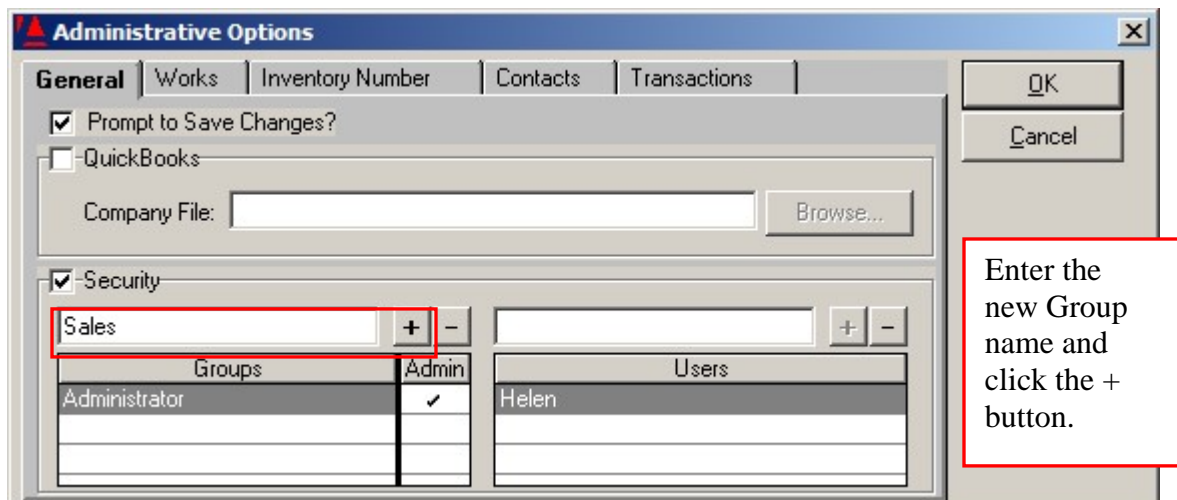
Enter the password you want to assign when the Password window opens (confirm the password choice by entering it twice) and click OK. User names and passwords are not case sensitive.

NOTE: Write down the password and User name to be given to that user.

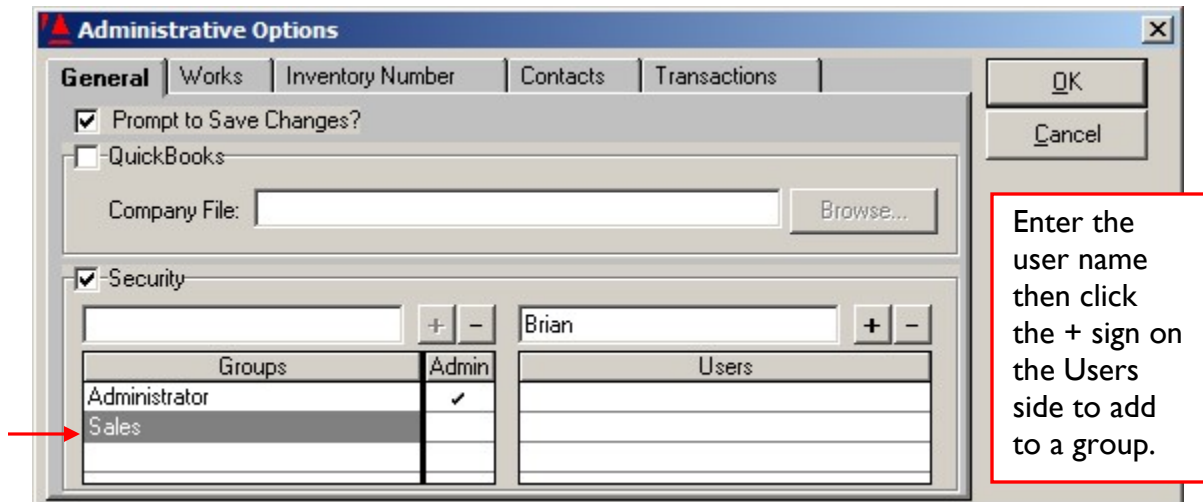


### ADDING ADDITIONAL GROUPS AND USERS

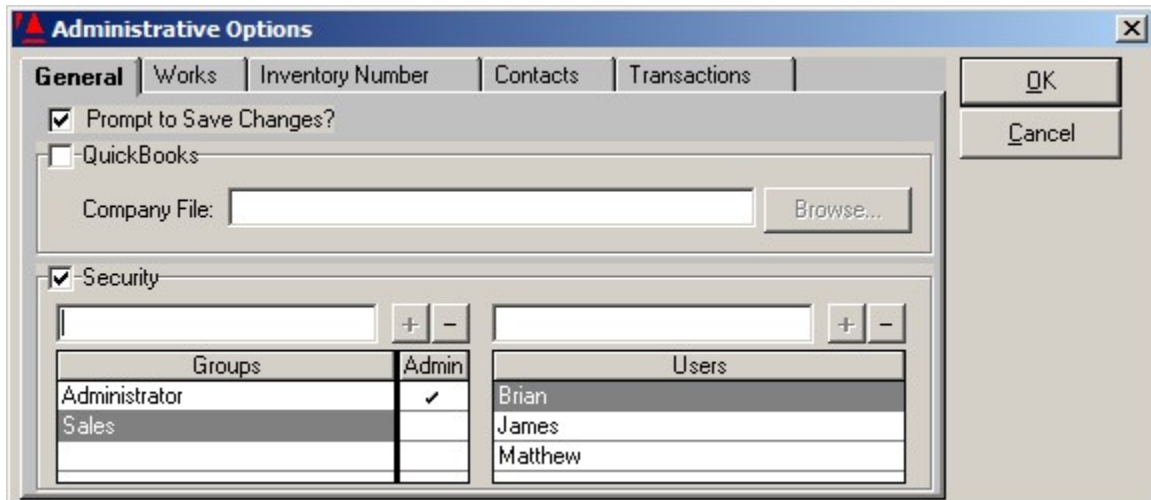
Since restrictions may be set for each group, continue adding groups under the Administrator group (ex. – Sales) with their associated users and passwords.



The new group will be added under Groups after clicking the plus [+] sign. Highlight the Group to add a User to that group, then enter the user name in the Users entry field and click the [+] sign. Enter the password when prompted.



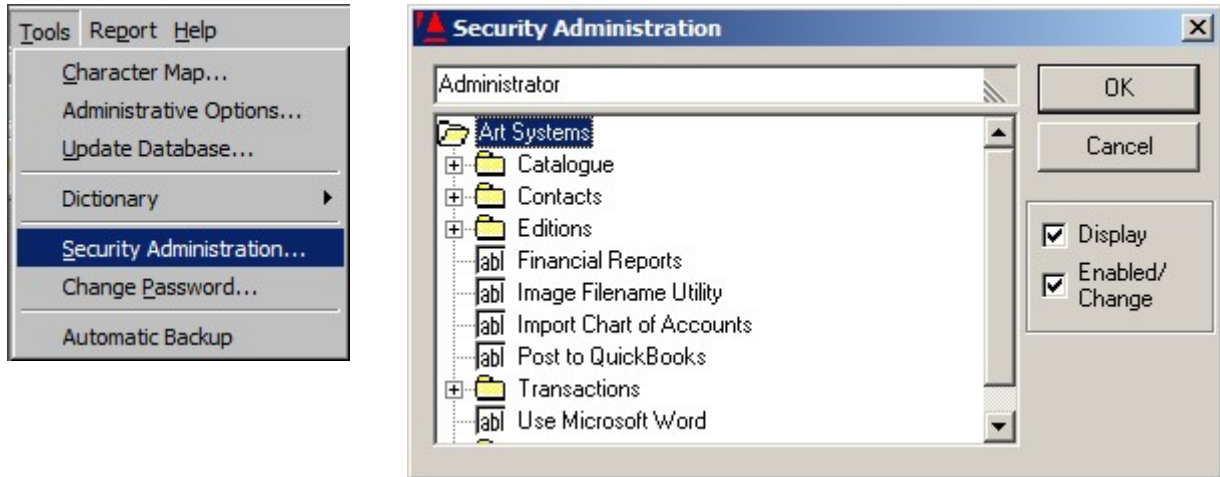
Continue adding users to a group until completed. Clicking on a Group name will display all users assigned to that group.



Once Groups and Users are properly entered with their passwords, click OK. The program may take a few moments to save the information entered.

## SETTING UP DATABASE ACCESS FOR GROUP AND ASSOCIATED USER NAMES

Once the admin and user groups have been added, select *Tools* → *Security Administration* where you will have the admin User Name active in the Security window.

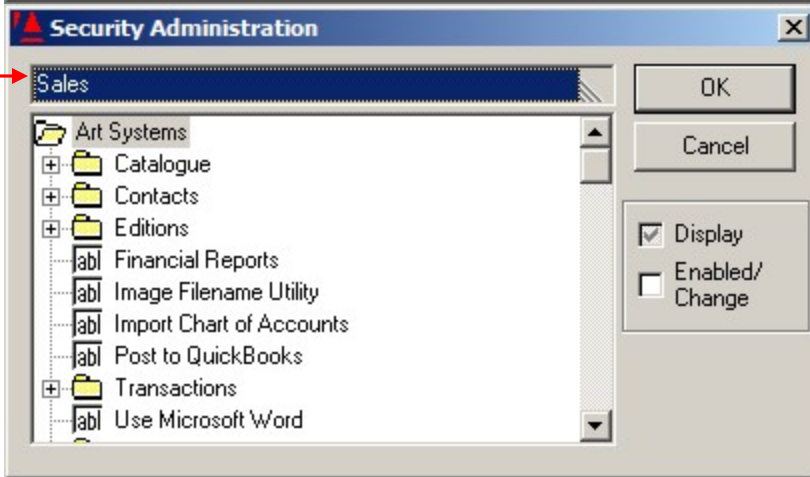
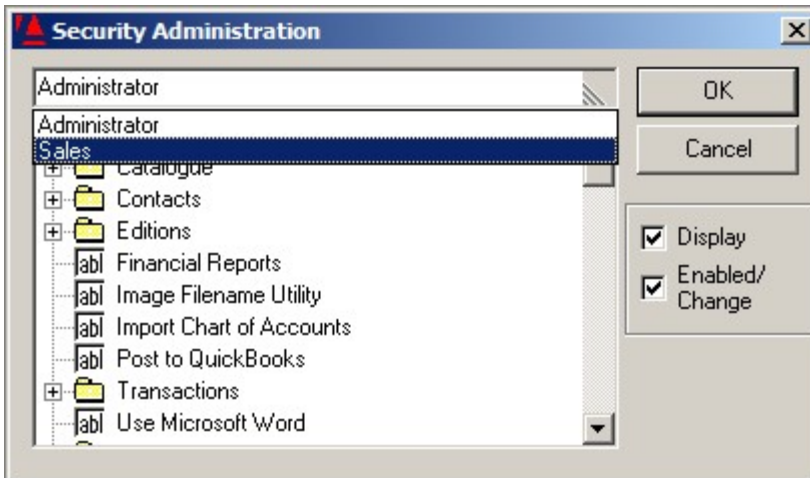


With Administrator in dropdown box, click the *Artsystems* folder once to highlight, clicking in the Enabled/Change check box sets up the Administrator group and associated username(s) for all access to all database functions.

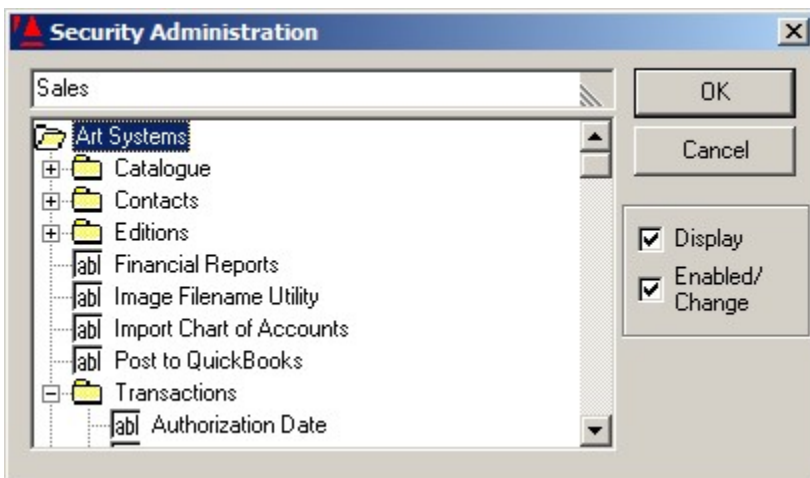
**NOTE:** On initial security setup it is good practice to disable then re-enable the Enabled/Change checkbox to be sure all permissions pass correctly to the Administrator.

**Next,** setup access for any additional groups:

Click the dropdown next to the Administrator group name to view and select additional groups. Highlight and select a group to work with. When a group is selected the name of the group will appear in the Group field. (For the purposes of this discussion the Sales group will be used.)

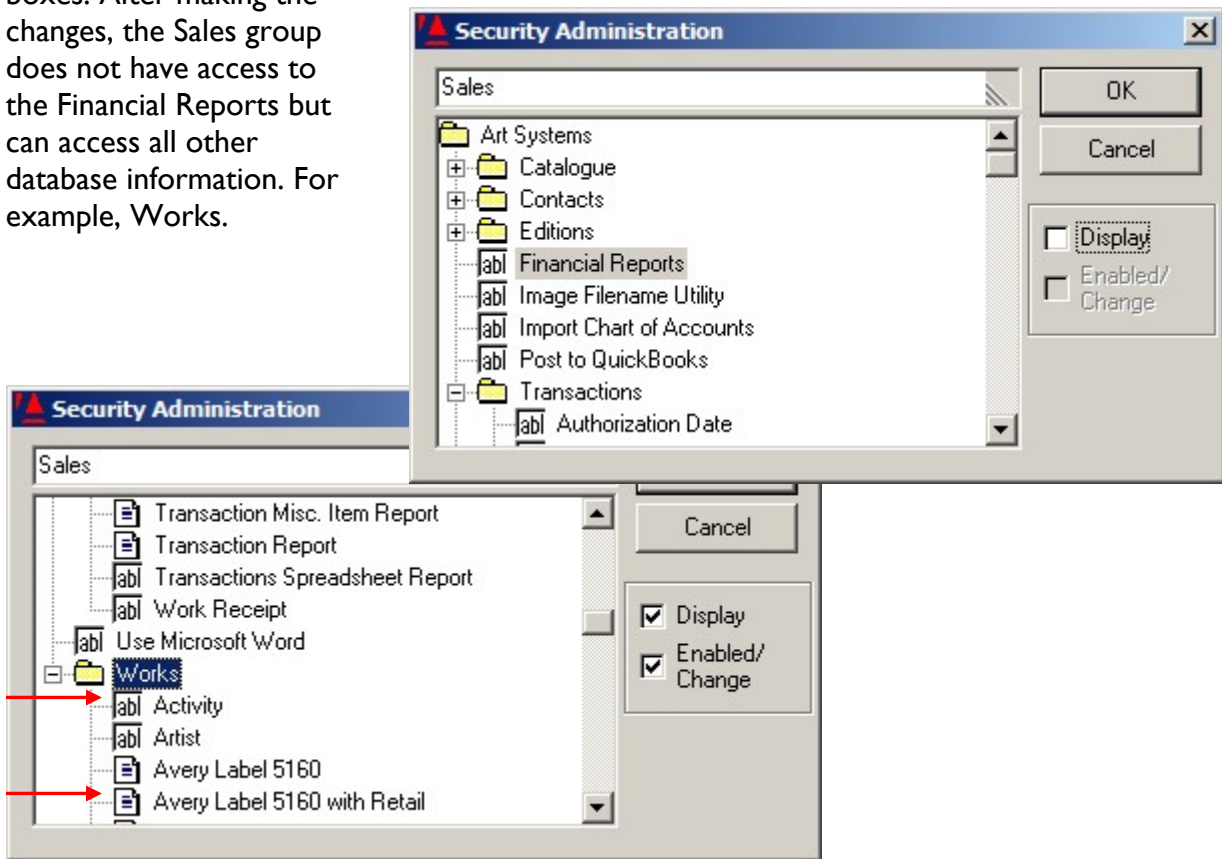


Click the Enabled/Change checkbox. This will initially grant ALL access to the Sales group.



Now begin to administer privileges for full access (Enabled/Change), read only access (Display) or no access (no check marks).

Choose the module, view, field or report you wish to deny access to, in this example it is the Financial Reports under Editions, and uncheck the display and enabled/change boxes. After making the changes, the Sales group does not have access to the Financial Reports but can access all other database information. For example, Works.

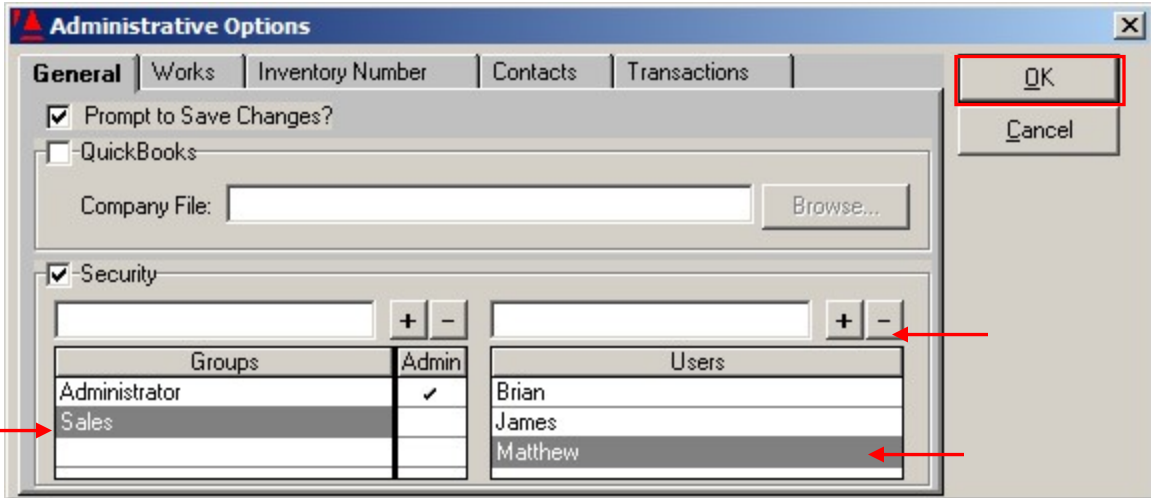


NOTE: Rights can be granted for an entire module, or for individual fields, views or reports within a module by selecting each individual object.

TIP! – [abl] refers to a label or field within the database, whereas the document symbol refers to a report.

### DELETING A USER FROM A GROUP

From the menu bar select *Tools* → *Administrative Options*. Click on the Group to which the user belongs. This will display all the users in the group. Click on the User to be deleted and click the minus (-) sign. The program then asks for confirmation of the operation. Click *OK* to delete.



**If further assistance is needed, please contact Artsystems Support.**  
**Artsystems Support 212-620-5500 x 2**  
<mailto:Support@artsystems.com>