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Users and Security

Ensuring that the ACS users in your organization have adequate security rights is a very important task. In Users and Security, you can assign usernames and passwords for ACS, along with each ACS user's security rights for the different modules. In some cases, users can only perform functions on data they have entered. For example, in Contributions, a user can only post transactions that they have entered into ACS.

Security in ACS is assigned per user. Users are granted rights for each module in ACS. Rights determine whether a user has access to different areas of the software. For example, a user who does not have rights to Add/Edit Chart of Accounts in General Ledger cannot add a new account or edit an existing account.

If you use the Windows 2000 Professional, Windows XP, or Windows Vista operating systems, or the network version of ACS, see the topic ACS and Network Rights and Permissions for information about file level rights and permissions.

ACS and Network Rights and Permissions

Most network operating systems, as well as advanced workstation operating systems like Windows 2000 Professional, Windows XP, and Windows Vista allow an administrator to set security settings at the file and/or directory level. Often, a network administrator restricts certain users to read-only access to certain files and no access to others for security purposes.

This restriction to files presents a conflict with ACS. ACS routinely writes temporary files into the various ACS directories on both the server and workstation. Because of this, users need full access to the \acsnet directory and all of its sub-directories on the server. On workstations that use Windows XP, 2000, or Vista, users need full access to the \winacs directory and all of its sub-directories. Please note that this is full access and not administrative rights.

Many network administrators and church officers are concerned that this allows uncontrolled access to sensitive data. ACS data files cannot be read in a text editor. These files must be read with special database software. Any files with sensitive information that can be easily discerned are password protected.

For information on how to set network rights and permissions, check your network operating system documentation, or contact your network administrator.

Managing ACS Users

On the **Users** tab of the Add/Edit Users window, you can manage your organization's ACS users and their security rights.

Your first step is adding a user record for anyone in your church or organization who will use ACS. Then, you can set up security options for both ACS People Suite and ACS Financial Suite. If someone in your organization needs additional rights, you can edit the user record to assign those rights, or you can delete or deactivate records if an employee or volunteer leaves your organization.

You can also mass assign security settings, which lets you update security settings for all or several user names at once. This is helpful after installing an ACS upgrade or revision that may have new security features.

Adding ACS User Records

Before someone in your church or organization can use ACS, he or she must have a user record. You can set up a user record, including the individual's username, password, and security permissions, in Add/Edit Users.

To add a user record

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. In the Add/Edit Users window, click **Add**.
4. Enter a **User Name**, **First Name**, **Last Name**, and **Description** (such as a job description). All user names and passwords must be at least 3 characters in length.
5. If you want the user to to be automatically logged into ACS when he/she logs into the network, enter a **Network Login Name.** This allows the user to skip the login window.
6. In the **Password** and **Confirm Password** fields, enter and confirm the user's password, then click Next.
7. Enter the user's **Address** and **Phone/E-mail** information, then click **Next**.
8. To limit the user's access in the People Suite, select the area you want to limit and click **Select** to choose the individual restrictions for the area.
9. To limit the user's access in the Financial Suite, select the area you want to limit and click **Select** to choose the individual restrictions for the area.
10. Under **Set Security**, select one of the following options:
    - **Add/Edit Users** — If the user is the primary user or system administrator, select this option. ACS Technologies suggests that you select this feature for at least one user to always make sure you can access the ACS system, since selecting this feature prevents deletion of the user's profile.
    - **Copy From Template** — To copy security settings for the user from an existing template, select this option. Select the template to use from the drop-down list.
    - **Copy From Another User** — To copy security settings for the user from another user, select this option. Select the user to copy security settings from in the drop-down list.
    - **Set to None** — To set all security settings for the user to **None**, select this option.
11. Click **Finish**.

Editing ACS User Records

You can change or update existing user accounts in Add/Edit Users.

To edit a user's record

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. From the drop-down list, select **Add/Edit Users** and click **Go** .
3. Select the user whose information you want to edit, then click **Edit**.
4. On the **User Name** and **Password** pane, make any needed edits to the User Name, Password, and Network Login Name.
5. On the **Information** pane, make any needed edits to the user's First Name, Last Name, and Description.
6. On the **Information**, **Security**, and **Contact Information** tabs, change the user's profile, security rights, address, or contact information, as needed.
7. When finished, click **Apply**, then **OK**.

Deleting and Deactivating ACS User Records

You can delete or deactivate ACS user records. Deleting a record removes the record from ACS completely, but if there's a chance you may need to update or use the record again in the future, you can deactivate it.

> **Info**
>
> If you delete an ACS user, then add the user back, you can access that user's saved searches and reports. This is helpful if a staff member leaves the church or organization and you need to access these. However, all user settings in grids and windows are lost when you delete a user.

To delete a user record

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go** .
3. Select the user you want to delete, then click **Delete**.
4. When the confirmation message displays, click **Yes**, then **OK**.

To deactivate a user record

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. From the drop-down list, select **Add/Edit Users** and click **Go** .
3. Select the user you want to deactivate, then click **Edit**.
4. Under **User Name and Password**, select **Inactive**.
5. Click **Apply**, then **OK**.

Mass Assigning User Security Settings

If you want to update security settings for all or several user names at once, using the Mass Assign option can save you time and help avoid making errors. Since you select the security bit only once, you eliminate the risk of selecting a wrong security bit for a user.

An ideal time to use the Mass Assign expert is after installing an ACS upgrade with new features that require additional security settings. Once you determine your users who need the new security setting and the access you want to give them, use the following procedure to assign the security rights.

To update security settings with the Mass Assign expert

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go** .
3. Click **Mass Assign**.
4. Make your selections in the first window of the expert, then click **Next**.
5. To update the security limits for the People or Financial Suites, make your selections in the second window of the expert, then click **Next**.
6. In the third window of the expert, select the users to which you want to assign the new security settings.
7. To update your security templates, select the templates that you want to update.
8. Click **Finish**, then **OK**.

Additional Field Information

First Window

- **Add/Edit Users** — Select the security setting in the drop-down list you want to assign to users.
- **Security** — A list of each module in the Financial and People Suites. Expand the module name to display the options that require security rights.
- **Access** — Displays the security rights assigned to the option. Double-click the security access to change it to your choice.

Second Window

- **Retain Current** — No change is made to the current setting. To make a change to the setting, clear the check box.
- **Limit Comments** — To restrict the comment types a user can view, clear the **Retain Current** check box. Select **Limit Comments**, then click **Select** and choose the comment types you do not want the user to view.
- **Limit Groups** — To restrict the master groups a user can access, clear the **Retain Current** check box. Select **Limit Groups**, then click **Select** and choose the master groups you want the user to access.
- **Limit Contact Types** — To restrict the contact types a user can access, clear the **Retain Current** check box. Select **Limit Contact Types**, then click **Select** and choose the contact types you do not want the user to access.
- **Limit Reservation Activities** — To restrict the reservation activities a user can access, clear the **Retain Current** check box. Select **Limit Reservation Activities**, then click **Select** and choose the reservation activities you want the user to access.
- **Limit Departmental Fields** — To restrict the departmental fields a user can access, select the appropriate checkbox under **View Access** to grant the user viewing rights to a departmental field. To restrict a user from editing a departmental field, clear the appropriate checkbox under **Edit Access**.
- **Limit Datasets** — To restrict the datasets a user can access, clear the **Retain Current** check box. Select **Limit Datasets**, then click **Select** and choose the datasets you want the user to access.
- **Limit G/L Inquiry** — To restrict the general ledger account codes a user can access in Inquiry, clear the **Retain Current** check box. Select **Limit G/L Inquiry**, then click **Select**. Select the correct dataset, then select the areas to which you want to give the user access.

Third Window

- **Assign?** — Select the check box for each user to whom you want to assign the new security settings.
- **User** — Displays the ACS user name or template name.
- **Name** — Displays the first and last name of the user, if available.
- **Description** — Displays the label or name of the user name or template, if available.

Resetting ACS User Logins

If a user is unable to properly log out of ACS, the program may not let him or her log in, or an error displays saying that the user is already logged in. If this occurs, you can reset that user's login.

To reset a user's login

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go** .
3. Select the user whose username you need to reset.
4. Click **Clear Login**.

Logging In as Another ACS User

In Admin Utilities, you can log into ACS with another username and password. This is helpful if someone else needs to log into ACS on your computer, as you do not have to exit and restart the program. It's also helpful if you want to verify security rights when setting them up.

To log into ACS as another user

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Login as...** and click **Go** .
3. Enter the username and password, then click **OK** to log in.

Working with Users and Security Templates

Templates identify the type of ACS user and assign default security rights.

For example, if your organization has several staff personnel who are responsible for tracking youth oriented activities, you can create a template called Youth. Then, you can enter these people as ACS users and apply the Youth template to assign the appropriate security access levels.

If you use a template, you are not limited to the default rights assigned by that template. You can edit the individual user's rights at any time. Editing or deleting a template does not affect the user rights of any user whose security was set up using the template.

To add a template

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go**  .
3. Click the **Templates** tab, then click **Add**.
4. In the **Template** field, enter a name for the template.
5. In the **Description** field, enter a description for the template.
6. **Optional:** Assign the user **All**, **View**, or **None**rights to all areas within the selected module using one of the following methods:
    - Type **A**, **V**, or **N** to set the security to **All**, **View**, or **None** respectively.
    - Right-click on the module field and select the security setting you want.
7. **Optional:** Double-click on a module. The available security fields for the module display.
8. **Optional:**Assign the user All, View, or None rights to a specific area within the selected module using one of the following methods:
    - Type **A**, **V**, or **N** to set the security to **All**, **View**, or **None** respectively.
    - Right-click on the field and select the security setting you want.
    - Double-click the field until the security setting you want displays.
9. Click **OK**.

To edit a template

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go**  .
3. On the **Templates** tab, select the template you want to edit, then click **Edit**.
4. **Optional:** Assign the user **All**, **View**, or **None**rights to all areas within the selected module using the following methods:
    - Typing **A**, **V**, or **N** to set the security to **All**, **View**, or **None** respectively.
    - Right-click on the module field and select the security setting you want.
5. **Optional:** Double-click on a module. The available security fields for the module display.

6. **Optional:** Assign the user **All**, **View**, or **None**rights to a specific area within the selected module using the following methods:
    - Typing **A**, **V**, or **N** to set the security to **All**, **View**, or **None** respectively.
    - Right-click on the field and select the security setting you want.
    - Double-click the field until the security setting you want displays.
7. Click **Apply**, then **OK**.

To delete a template

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go** .
3. Select the template you want to delete and click **Delete**.
4. Click **Yes**, then **OK**.

Working with the User Log

When **Enable Log Tracking** is active, the **User Log** tab displays the login and logout times for all users who have accessed the People Suite, Financial Suite, or Utility Manager.

To enable the user log

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go** .
3. On the **User Log** tab, click **Enable Log Tracking**. To disable this option, click **Disable Log Tracking**.

To print the User Log Activity report

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go** .
3. On the **User Log** tab, click **Print**.
4. When the report displays, click **Print Report** .

Viewing User Security Settings

The View User Security tab displays ACS users and their security settings in a grid view. You can sort and filter the grid, plus print several reports.

Filtering and Sorting Information

You can sort the information in the grid in a variety of ways. For example, you may want to see all modules and all areas that one of your users has access to, or you may want to know who has rights to the Promotion option in Attendance. You can:

- **Group by item within a column** — Highlight an item in a column (such as a user name, module, or security option) and click the item heading.
- **Group by Heading** — Drag a column heading into the gray area above to group information by the heading. Expand the groupings to view additional information.
- **Sort column in ascending or descending order** — Click a heading then click the small gray up or down arrows in the heading bar.
- **Select multiple columns to sort** — Press Shift and select the columns you want to sort.

To filter the grid, you must select **Enable Filtering**.

To filter the grid

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go** .
3. On the **View User Security** tab, highlight a column heading.
4. Click in the heading.
5. Choose the filter you want to use.

Printing the User Profile Report

You can also print the User Profile report, which includes each user and their permissions for each module. Select Print Limits on User Profile (in the right-click list) before printing if you want each user's limits included in the report. These limits include comment and contact types, and Master Groups, Reservation activity, financial dataset, and GL Inquiry limits.

To print the User Profile Report

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go** .
3. Click on the **View User Security** tab.

4. Under **User Name**, select the user whose profile you want to print.
5. Inside the grid, right-click and select **Print**.
6. When the report displays, click **Print Report** .

Setting People Suite Security Rights

On the **Security** tab, you can set an ACS user's security rights in the People Suite.

When setting up security rights, remember it's easier to give more clearance as you go than take away access. It's also a good idea to make sure all employees and volunteers in your organization have access to what they need. To verify security rights, you can log in as another ACS user.

To set an ACS user's People Suite security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go** .
3. On the **Users** tab, select the ACS user whose security rights you want to edit, then click **Edit**. If the user does not have an ACS username, see Adding ACS User Records to learn how to set one up.
4. In the Edit User window, click on the **Security** tab.
5. Expand the name of the module you want to edit security rights for.
6. Use one of the following methods to assign the user All, View, or None rights to a specific area:
   - Type **A**, **V**, or **N** to set the security to **All**, **View**, or **None** respectively.
   - Right-click on the field and select the security setting you want.
   - Double-click the field until the security setting you want displays.
7. When finished, click **Apply**, then **OK**.

Attendance Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the Attendance module.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Attendance**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
   - **All** allows the user to add and edit information.
   - **None** denies the user all access to the information.
   - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Add/Edit Individual Classes
Determines whether the user can add an individual to an Attendance class.

Change Group's Parent
Determines whether or not the user can edit a groups' parent.

Enter/Post Attendance
Determines whether the user can record attendance.

Graphs
Determines whether the user can view or print graphs.

Inquiry
Determines whether the user can view individual or group Attendance markings.

Mark Non-Enrolled
Determines whether the user can mark attendance as non-enrolled.

Promotion
Determines whether the user can promote whole classes at one time.

Reports
Determines whether the user can print or preview Attendance reports.

Searches
Determines whether the user can perform searches on attendance data.

Setup
Determines whether the user can add, edit, delete, or configure Attendance classes.

View/Edit Group Classes
Determines whether the user can set up class rosters.

Checkpoint Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the Checkpoint module.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Checkpoint**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
    - **All** allows the user to add and edit information.
    - **None** denies the user all access to the information.
    - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK.** Your changes take effect the next time the user logs into ACS.

Additional Field Information

Add/Edit Badge Design
Determines whether the user can add, edit, or delete a badge design.

Add/Edit Checkpoint Defaults
Determines whether a user can add or edit Checkpoint defaults.

Add/Edit Individuals
Determines whether a user can add, edit, or delete individual information in Checkpoint.

Add/Edit Sessions
Determines whether the user can add, edit, or delete Checkpoint sessions.

Add/Edit Templates
Determines whether the user can add, edit, or delete Checkpoint templates.

Check In/Out
Determines whether the user can access the Check In/Out and Express Check In/Out menus.

Edit Add People Defaults
Determines whether the user can modify the defaults for new individual records added in Checkpoint.

Edit Name Options
Determines whether the user can modify name option defaults in Checkpoint.

Off-Site Synchronization
Determines whether the user can import/export data to/from an off-site network.

Reports
Determines whether the user can print or preview reports.

Session Statistics
Determines whether the user can access or modify the Session Statistics window.

Church Growth Tools Security Rights

You can grant rights to Reports in the the Church Growth Tools module.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Church Growth Tools**.
6. Select **Reports**, then right-click to select the appropriate access level.
   - **All** allows the user to add and edit information.
   - **None** denies the user all access to the information.
   - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Connections Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the Connections module.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Connections**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
   - **All** allows the user to add and edit information.
   - **None** denies the user all access to the information.
   - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Add/Edit Contacts
Determines whether the user can add new contacts, schedule contacts, assign contacts, add special instructions for the connections team, record connections by prospects to your church, print the Connections Profile, and schedule future actions.

Allow Contact Completion
Determines whether the user can complete a contact.

Define Lists
Determines whether the user can rename the Assignment Team and Age Group lists, add elements to the Age Group list, add classifications and responses, assign responses, add and edit templates, add teams, and assign members to teams.

Edit Cards
Determines whether the user can create new connections cards, edit existing cards, and delete old cards.

Graphs
Determines whether the user can view or print graphs.

Inquiry
Determines whether the user can view Connections information.

Mass Add
Determines whether a user can add a contact to several Connections records at one time using the Mass Add function.

Mass Change
Determines whether the user can use Mass Change to update multiple records at the same time.

Reports
Determines whether the user can print or preview reports and cards from Connections.

Searches
Determines whether the user can perform searches on contacts and responses.

Contributions Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the Contributions module.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Contributions**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
    - **All** allows the user to add and edit information.
    - **None** denies the user all access to the information.
    - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Add/Edit Fund Codes
Determines whether the user can add new funds, change the accounts associated with a contributions fund , or set up a giving plan for a fund.

Add/Edit Pledges
Determines whether the user can add a new pledge for an individual, change an existing pledge, delete a pledge record, or copy a group of pledges from one year to another.

Edit All Users Transactions
Select to allow the user to edit and delete contributions gifts entered by all users.

Enter All Funds
This option applies only to multi-campus users and the user has limited campus rights. Select to allow the user to enter a gift to another campus's fund. Once the gift is posted, the user no longer sees the gift. This situation happens when a contributor visits a campus other than their home campus and makes a contribution, but wants their gift applied to their home campus.

Enter Transactions Contributions
Determines whether the user can enter contributions transactions.

Graphs
Determines whether the user can view or print graphs.

Inquiry By Fund Codes
Determines whether the user can view transactions for each fund.

Inquiry By Individual
Determines whether the user can view an individual's giving record.

Post All Users Batches

Determines whether the user can post batches of gifts entered by other users, or only batches the user has entered.

Post Transactions

Determines whether the user can post gifts he/she entered.

Reports

Determines whether the user can print or preview Contributions reports, including statements listed on the Reports menu.

Searches

Determines whether the user can perform searches on contributions gifts and pledges.

Setup

Determines whether the user can configure Contributions, update a contributor's checking account information, set up bank account information for use with direct withdrawal, and reassign envelope numbers for a group of contributors.

Setup Vanco Accounts

Determines whether the user can setup Vanco Services Accounts for the Vanco Gift Import.

Statements

Determines whether the user can print or preview Contributions statements listed on the Statements menu. This does not affect statements on the Reports menu.

Summarize Data

Determines whether the user can summarize Contributions data.

DataShare Security Rights

Before using DataShare, you need to set up security rights in Add/Edit Users. The security options you select depend on the data you will send and receive.

For example, if your church or organization needs to send records to a denominational office, organization, or diocese, you need access to **Send Changes to DataShare**. If the denominational office or diocese changes records that also need to be updated in your database, you need access to **Get Changes from DataShare**.

Or, suppose you are a denominational office, organization, or diocese that needs to get updated records from various churches. You need access to **Get Changes from DataShare**. If you will send updated information to those churches, you also need access to **Send Changes to DataShare**.

In addition, you may not want volunteers in your church or organization to send and receive updated information in DataShare. For these users, select **None** to restrict access to DataShare. Users who do not have access to DataShare still see updated records after changes are received.

To grant or restrict DataShare access

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. Select **Add/Edit Users** and click **Go** .
3. On the **Users** tab, select the user whose DataShare security options you want to grant or restrict, then click **Edit**.
4. In the Edit User window, on the **Security** tab, expand **DataShare**.
5. If granting access to DataShare, under **Access**, select **All** for **Get Changes from DataShare** or **Send Changes to DataShare**.
6. If restricting access, select **None** for **Get Changes from DataShare** or **Send Changes to DataShare**.
7. Click **OK**.

Organizations Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of ACS Organizations.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Organizations**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
    - **All** allows the user to add and edit information.
    - **None** denies the user all access to the information.
    - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Add Organizations
Determines whether the user can add a new organization.

Add/Edit Organization Activities
Determines whether the user can add or edit organization activities.

Add/Edit Staff

Determines whether the user can add or edit an individual.

Add/Edit Statistics
Determines whether the user can add or edit statistics.

Comments
Determines whether the user can add, edit, view, or delete Organization's comments.

Configure Statistics
Determines whether the user can configure statistics.

Define Lists
Determines whether the user can set up organization levels, check whether pin numbers and envelope numbers are the same, set up user-defined fields, and define staff positions.

Define Statistics Views
Determines whether the user can define the view of statistics reports.

Delete Organizations
Determines whether the user can delete organizations.

Edit Organizations
Determines whether the user can view an organization's record, edit an organization's record, access the Organizations Library, and enter statistics.

Mass Change
Determines whether the user can perform mass change functions.

Reports
Determines whether the user can print or preview Organizations reports.

Searches
Determines whether the user can perform searches.

Setup
Determines whether the user can access Organizations setup options.

Staff Maintenance
Determines whether the user can copy staff and statistical records from one year to another.

People Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the People module.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **People**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
    - **All** allows the user to add and edit information.
    - **None** denies the user all access to the information.
    - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Activities Setup
Determines whether the user can create new activity groups and add, edit, or delete activity group elements.

Add Family/Individual
Determines whether the user can add new families and individuals.

Add/Edit Individual Activities
Determines whether the user can add an individual to an activity group.

Background Checks
Determines whether the user can request a background check on an individual.

Change Family Unit
Determines whether the user can move an individual from one family to another, start a new family with an individual who is already a member of a family, and change an individual's family position.

Comments
Determines whether the user can add, edit, view, or delete family and individual comments.

Constant Contact
Determines whether the user can access Constant Contact when sending e-mail.

Date of Birth
Determines whether the user can access Date of Birth records.

Define Lists
Determines whether the user can add, edit, or delete address types, phone types, or comment types and whether the user can define user-defined fields, lists, and dates.

Delete Family/Individual
Determines whether the user can delete organizations, families, and individuals.

Document Library
Determines whether the user can view, edit, copy, or delete files in the library.

Edit Family/Individual
Determines whether the user can edit or view existing user records.

Exports
Determines whether the user can create extracts, including the Phone Tree, which is found on the Reports menu. By selecting View, a user can run an extract, but cannot create a new extract or edit an existing extract.

Graphs
Determines whether the user can view or print graphs.

Labels
Determines whether the user can create and print labels. By selecting View, a user can print labels, but cannot create or edit the layout.

Mass Change
Determines whether the user can use Mass Change to update multiple records at the same time.

Mass Create Safeguard Tasks
Determines whether the user can access this option to create a task for multiple people at one time. The option also adds the task to each person's record.

Mass Delete
Determines whether the user can use Mass Delete to delete multiple records at the same time.

Member Status
Determines whether the user can add and edit or only view an individual's Member Status.

Merge Records
Determines whether the user can merge records.

Multi-Campus Setup

Determines whether the user can add, edit, and delete campuses. Besides adding, editing, and deleting campuses, the user can also select service times and the Contributions fund codes used by each campus.

Pictures
Determines whether the user can add, view, or remove pictures.

Quick View Setup
Determines whether the user can access Setup to configure Quick View.

Reports
Determines whether the user can print or preview People reports.

Safeguard Comments
Determines whether the user can view, add, edit, or delete comments on the Safeguard tab.

Safeguard Tasks
Determines whether the user can view, add, edit, or delete tasks on the Safeguard tab.

Searches
Determines whether the user can perform searches on individual information, families, addresses, phone numbers, e-mail addresses, activities, and comments.

Send Mass Email
Determines whether the user can send a mass e-mail.

Setup
Determines whether the user can access People setup options.

Setup Departmental Fields
Determines whether the user can set up departments and fields.

Small Groups
Determines whether the user can use the Small Groups option.

Social Security Number
Determines whether the user can access Social Security Number records.

Upload Records to Access ACS
Determines whether the user can upload ACS records into Access ACS.

View/Edit Group Activities
Determines whether the user can view or edit an activity group.

View/Edit Department Fields
Determines whether the user can view or edit department fields.

Reservations Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the Reservations module.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Reservations**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
    - **All** allows the user to add and edit information.
    - **None** denies the user all access to the information.
    - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Add/Edit Reservations
Determines whether the user can add reservations to an activity or event, edit or delete a reservation, and enter payments.

Refresh
Determines whether the user can refresh Reservations information.

Reports
Determines whether the user can print or preview Reservations reports.

Setup
Determines whether the user can add new activities, edit an existing activity's properties, or delete an activity.

Special Mailings Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the Special Mailings module.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Special Mailing**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
    - **All** allows the user to add and edit information.
    - **None** denies the user all access to the information.
    - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Add/Edit Groups
Determines whether the user can add individuals to a mailing group, copy a mailing group's membership to another mailing group, move a mailing group's membership to another mailing group, and remove a group of individuals from a mailing group.

Add/Edit Individuals
Determines whether the user can add new individuals, edit an existing individual's record, delete an individual, and add an individual to a mailing group.

Define Group Lists
Determines whether the user can add new mailing groups, rename an existing mailing group, and delete a mailing group.

Reports
Determines whether the user can print or preview reports and labels from Special Mailings.

Setting Financial Suite Security Rights

On the **Security** tab, you can set an ACS user's security rights in the Financial Suite.

When setting up security rights, remember it's easier to give more clearance as you go than take away access. It's also a good idea to make sure all employees and volunteers in your organization have access to what they need. To verify security rights, you can log in as another user.

To set an ACS user's Financial Suite security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go** .
3. On the **Users** tab, select the ACS user whose security rights you want to edit, then click **Edit**. If the user does not have an ACS username, see Adding ACS User Records to learn how to set one up.
4. In the Edit User window, click on the **Security** tab.
5. Expand the name of the module you want to edit security rights for.
6. Use one of the following methods to assign the user All, View, or None rights to a specific area:
   - Type **A**, **V**, or **N** to set the security to **All**, **View**, or **None** respectively.
   - Right-click on the field and select the security setting you want.
   - Double-click the field until the security setting you want displays.
7. When finished, click **Apply**, then **OK**.

Accounts Payable Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the Accounts Payable module.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Accounts Payable**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
   - **All** allows the user to add and edit information.
   - **None** denies the user all access to the information.
   - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

1099 Adjustments
Determines whether the user can enter dollar amounts that are reflected in year-to-date totals and 1099 statements, but are not posted to the General Ledger.

Add/Edit Vendors
Determines whether the user can add, edit, or delete vendors in Accounts Payable.

Define Lists
Determines whether the user can add, edit, or delete vendor types and invoice frequencies in Accounts Payable.

Edit All Users Invoices
Determines whether or not the user can modify all other users' invoices.

Enter Invoices
Determines whether the user can add and edit invoices.

Inquiry
Determines whether the user can view checks and invoices for vendors.

Period End Reports
Determines whether the user can print or preview Period End Reports.

Post All Users Invoices
Determines whether the user can post invoices for all users.

Post Invoices
Determines whether the user can post invoices.

Print/Post Checks
Determines whether the user can issue checks, print checks, and post checks to the general ledger.

Reports
Determines whether the user can print or preview reports in Accounts Payable.

Setup
Determines whether the user can configure Accounts Payable and design custom checks.

Accounts Receivable Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the Accounts Receivable module.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Accounts Receivable**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
    - **All** allows the user to add and edit information.
    - **None** denies the user all access to the information.
    - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Add/Edit Customers
Determines whether the user can add new customers, edit a customer's record, or delete customers.

Define Lists
Determines whether the user can add, edit, or delete billing codes, payment codes, revenue centers, discount types, grades, and user-defined lists.

Edit All Users Transactions
Determines whether the user can edit all users' transactions.

Enter Invoices
Determines whether the user can add and edit invoices.

Enter Payments
Determines whether the user can add and edit payments.

Inquiry
Determines whether a user can view invoices and payments for customers.

Mass Assign Assistant
Determines whether the user has access to the mass assign assistant.

Post All Users Invoices
Determines whether a user can post all users' invoices.

Post All Users Payments
Determines whether a user can post all users' payments.

Post Invoices
Determines whether the user can post invoices.

Post Payments
Determines whether the user can post payments.

Reports
Determines whether the user can print or preview reports.

Setup
Determines whether the user can configure Accounts Receivable.

Fixed Assets Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the Fixed Assets module.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Fixed Assets**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
   - **All** allows the user to add and edit information.
   - **None** denies the user all access to the information.
   - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Add/Edit Fixed Assets
Determines whether the user can add new assets, change the properties of an existing asset, set an asset's depreciation properties, delete an asset, or update an asset's maintenance records.

Define Lists
Determines whether the user can add, edit, or delete asset categories, asset conditions, tax districts, and depreciation methods.

Enter/Post Depreciation
Determines whether the user can calculate depreciation for the month or year, print the Depreciation Journal, post depreciation to the General Ledger, and close the month.

Import
Determines whether the user can import information into Fixed Assets.

Reports
Determines whether the user can print or preview Fixed Assets reports.

Setup
Determines whether the user can set the beginning posting month and year, and set the default General Ledger source for depreciation.

General Ledger Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the General Ledger module.

Note

If you own the Accounts Payable module, the Add/Edit Vendors option in General Ledger controls the ability to add vendors through the Enter Checks option only. If you do not own the Accounts Payable module, the Add/Edit Vendors option in General Ledger controls all vendor information.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **General Ledger**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
    - **All** allows the user to add and edit information.
    - **None** denies the user all access to the information.
    - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Account Inquiry
Determines whether the user can view transactions and balance information for specific accounts, groups of accounts, bank accounts, and payees.

Add/Edit Budgets
Determines whether the user can enter or change budget information.

Add/Edit Chart of Accounts
Determines whether the user can add new accounts, add new account headings, move accounts, change account information, and delete accounts.

Add/Edit Vendors
Determines whether the user can add, edit, or delete payees.

Bank Reconciliation
Determines whether the user can reconcile bank accounts or close the current month.

Define Lists
Determines whether the user can add, edit, or delete funds, departments, committees, areas, projects, sources, and bank account lists.

Define Lists - Other
Determines whether the user can add, edit, or view Other options in Define Lists.

Display/Merge Names
Determines whether or not the user can merge names in the Global name list.

Edit All Users Transactions
Determines whether or not the user can modify all other users' transactions.

Enter Transactions
Determines whether the user can add and edit transactions.

Post All Users Transactions
Determines whether the user can post all users' transactions.

Post Transactions
Determines whether the user can post transactions.

Reports
Determines whether the user can print or preview reports.

Reprint Checks
Determines whether the user can reprint checks.

Setup
Determines whether the user can set the default fund principal account, set the account number format, customize transaction options, and design custom checks.

Social Security Number
Determines whether the user can view or change the social security number of a customer or employee.

Year End Procedures
Determines whether the user can perform year-end procedures.

Parochial Report Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the Parochial Report.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Parochial Report**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
    - **All** allows the user to add and edit information.
    - **None** denies the user all access to the information.
    - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Archive Reports
Determines if users can archive the parochial report.

Certification
Determines if users can complete the certification page of the report.

Define Lists
Determines if users can add or edit user-defined fields.

Membership, Attendance and Services (Page 2)
Determines if users can generate the Membership, Attendance and Services page of the report.

Services Register
Determines if users can add or edit information in the services register.

Setup for Membership, Attendance and Services (Page 2)
Determines if users can enter information in the Setup window for Membership, Attendance and Services (Page 2).

Setup for Stewardship and Financial (Page 3)
Determines if users can enter information in the Setup window for Stewardship and Financial (Page 3).

Stewardship and Financial (Page 3)
Determines if users can generate the Stewardship and Financial page of the report.

Payroll Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the Payroll module.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go**  .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Payroll**.

6. Choose the security option you wish to change, then right-click to select the appropriate access level.
   - **All** allows the user to add and edit information.
   - **None** denies the user all access to the information.
   - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Add/Edit Employees
Determines whether the user can add a new employee, edit an existing employee's payroll record, deactivate an employee, and delete an employee.

Add/Edit Lists
Determines whether the user can add, edit, or delete pay types, adjustments, cost centers, and worker's compensation lists.

Add/Edit W2 Totals
Determines whether a user can enter or edit W-2 information.

Enter/Post Payroll
Determines whether the user can enter time sheets, process payroll, issue payroll checks, print payroll checks, void payroll checks, post payroll to the general ledger, print the payroll journal, and close the month.

Inquiry
Determines whether a user can view an employee's payroll history.

Period End Reports
Determines whether a user can print or preview period end Reports.

Reports
Determines whether the user can print or preview reports.

Setup
Determines whether the user can configure Payroll options.

Purchase Orders Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the Purchase Orders module.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Purchase Orders**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
    - **All** allows the user to add and edit information.
    - **None** denies the user all access to the information.
    - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Approve Purchase Orders

Determines whether a user is authorized to approve purchase orders.

Create A/P Invoices

Determines whether the user can create invoices in Accounts Payable from previously entered purchase orders that have been received.

Define Lists

Determines whether the user can add, edit, or delete buyers and terms.

Edit All Users Purchase Orders

Determines whether or not the user can modify all other users' purchase orders.

Enter Purchase Orders

Determines whether the user can enter new purchase orders.

Post All Users Purchase Orders

Determines whether a user is authorized to post all users' purchase orders.

Post Purchase Orders

Determines whether the user can enter post purchase orders.

Reports

Determines whether the user can print Purchase Orders reports.

Setup

Determines whether the user can set Purchase Orders options.

Report Designer Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of the Report Designer.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click the **Security** tab.
5. Expand **Report Designer**.
6. Choose the security option you wish to change, then right-click to select the appropriate access level.
   - **All** allows the user to add and edit information.
   - **None** denies the user all access to the information.
   - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

Financial Direct Datasource
Determines whether a user can access Financial Suite data for building reports.

People Direct Datasource
Determines whether a user can access People Suite data for building reports.

Report Designer
Determines whether a user can access the Report Designer program.

Utilities Security Rights

You can grant rights to your users that allow them to have complete, limited, or no access to view or edit the different portions of Utilities.

To edit a user's security rights

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .
3. Select a user in the grid and click **Edit**.
4. If it is not already selected, click on the **Security** tab.
5. Expand **Utilities**.

6. Choose the security option you wish to change, then right-click to select the appropriate access level.
    - **All** allows the user to add and edit information.
    - **None** denies the user all access to the information.
    - **View** allows the user to view information without editing it.
7. Click **Apply**, then **OK**. Your changes take effect the next time the user logs into ACS.

Additional Field Information

ACS Table Maintenance
Determines whether the user can view or access ACS table information.

Add/Edit SMTP Settings
Determines whether a user can add or edit an SMTP address.

Add/Edit ZIP Codes
Determines whether the user can add, edit, or delete ZIP codes.

Backup Data
Determines whether the user can create an ACS backup file.

Clear User Logins
Determines whether the user can clear individual or all user logins.

Edit Tax Tables
Determines whether the user can make changes to the payroll tax tables.

Maintenance Utilities
Determines whether the user can access the People or Financial Maintenance Utilities.

My Preferences
Determines whether current users can change their settings, grids, and menu style. Administrators can select settings for all users.

Report Maintenance
Determines whether the user can delete saved reports.

Restore Data
Determines whether the user can restore an ACS backup file.

Site Information/Financial Dataset Setup
Determines whether the user can create a new financial dataset, edit an existing financial dataset's address and tax numbers, delete an existing financial dataset, and switch between datasets. By selecting View, a user can switch between datasets, but cannot add, edit, or delete datasets.

Support Utilities
Determines whether the user can access the Support Utility program.

Year End Utilities
Determines whether a user can access Year End Utilities.