

# Security Features

### (Basic & Full Versions Only)

ezFramer has several security features built in, so that different users have different access privileges. There are two types of users: Supervisors and Operators.

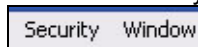
**Supervisor:** User has full access to all of ezFramer's functions and settings.

**Operator:** User may have only limited access and is restricted to basic program functions, such as taking orders and browsing the Customer History and Pending Work Orders screens.

## Create a Login/Define Users

### (Basic & Full Versions only)

1. Click on Security from the menu bar along the top of the window.



2. Select Access Privileges.



3. The new window lists the users that are defined.



4. The buttons below allow you to Insert, Change, or Delete users from the list.



5. Click Insert to create a new user.

A screenshot of a dialog box for creating a new user. The 'General' tab is active. Fields include: First Name (Danny), Surname (Manny), Login (Dan), Default Access (No Access), User Group (None), and Workgroup (0). The 'Level' section has radio buttons for Supervisor (selected), Operator, and No Access. A note next to the Login field says 'This is also the first password.' Buttons for 'OK' and 'Cancel' are at the bottom.

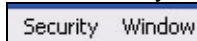
6. Enter the user's First Name in the First Name field.
7. Enter the user's Last Name in the Surname field.
8. Enter a Login name (which also doubles as a password for now).
9. Set the user's access privileges by clicking either the Supervisor or Operator radio button. (If this is the first time entering a User, your only option will be Supervisor).

10. If your user is to be an Operator, use the Default Access list box to set initial access privileges. From this list box, you may select:
  - **All Access:** Grants access to all areas of the program open to Operators,
  - **No Access:** Restricts all access to the program
  - **Operator:** Assigns access by name to use the same access privileges for the new user.
11. Click OK to save the record.

## Change a User's Password

(Basic & Full Versions only)

1. Login as the desired user when you open ezFramer.
2. Click Security along the top of the window.



3. Select Change My Password (Current User) from the menu.



4. A new window will appear where you can update the user's password.



5. Type the old password in the Old Password field.
6. Type the new password in the New Password field.
7. Confirm the new password by typing it in again in the New Password Again field.
8. Click OK to close the window.
9. The new password will take affect next time the user enters ezFramer.
10. NOTE: It is important to remember what the various passwords are for the different logins. The "Master" or Full Access login if only reserved for the Store Manager, should make sure their password and login are kept securely and privately.

## Change the Login User While ezFramer is Open

(Basic & Full Versions only)

1. Click Security from the menu bar.
2. Select Logon as Different User.
3. Enter in the new Login Name in the Login field..
4. Enter the Password in the Password field.
5. Click OK.

## Restrict Employee Access to Reporting Features

### (Full Versions or Report Add On)

If you do not want your employees to have access to run reports follow these steps:

1. Close out all windows inside ezFramer so all you see are the ezFramer icons along the top of the window.
2. Press CTRL + F8 on your keyboard.
3. A window will appear called Set User Access on top of the Work Order window.
4. Only Operators will be listed. No Supervisors will be listed.
5. Select the Operator name you are setting access for if you have more than one listed. (If no names are listed, you must assign the employee a Login and Password. See Section on Creating User Logins.)

| Operator Name | Access | Sale Report/Category | Cash & Credit |
|---------------|--------|----------------------|---------------|
| Danny Manny   | No     | No                   | No            |

6. Here you can set access to Yes or No by double clicking on the field for each column. Each column represents a report type. By default some or all of the reports may already be set to No. Change whatever you want to Yes or whatever you want to No.
7. Click OK when finished

It is recommended to check your settings to ensure they are correct. Follow these steps:

1. Click the Security menu list.
2. Select Log on as Different User.
3. Enter the Login & Password for the employee.
4. You will automatically be logged on as the employee at this point.
5. Click on Reports.
6. The report categories which are grayed out are where you had set access to NO.
7. If there is anything you want to change you can do this by logging back on as the Supervisor and repeating the above steps.

## Restrict Access to Specific Windows

### (Basic & Full Versions only)

1. Login as the Supervisor which has All Access.
2. Click on a window you want to restrict access to (i.e. pending window).
3. Press CTRL + F8 on your keyboard.
4. A window will appear named Set User Access. If no window appears, you cannot restrict access to the specified window. For example, the Customer History window is always available for anyone to access, but you can click on Edit Customer and restrict the Edit Customer Window.
5. All your users/operators will be listed along with their access levels. If no users are listed, then you will need to create logins for them. [See Section on Creating Logins.](#)
6. Allow or deny access for each feature/action listed by double clicking on the field for each column. By default some or all of the features/actions may already be set to No or Yes.

| Operator Name | Access | Print/View List | Print/View |
|---------------|--------|-----------------|------------|
| Danny Manny   | No     | No              | No         |

7. Change whatever you want to Yes or whatever you want to No.
8. Click OK when finished.
9. Close the window which you opened, and repeat the same process for any other windows you want to restrict access to.

## Test User Access Privileges

**(Basic & Full Versions only)**

It is recommended to check your settings to ensure they are correct. Follow these steps:

1. Click the Security menu list.
2. Select Log on as Different User.
3. Enter the Login & Password for the employee.
4. You will automatically be logged on as the employee at this point.
5. Click on the window you want to test for access.
6. You will receive a message that access has been restricted.
7. If there is anything you want to change, simply log back in with the Supervisor settings and repeating the above steps.