

Configuring and Using the PaymentMate Security Features



PaymentMate allows you to restrict access to specific functions of the software by requiring user names or passwords. Nearly any button that can be clicked can also be configured to require a user name or password. For example, if you have enabled security in order to enter the software configuration, a user will be prompted to enter a user name, or a user name and a password, when she clicks the Configure button. PaymentMate also gives you the option of configuring a security journal to automatically log successful and failed attempts to access specific functions of the software. After configuring the journal, you can view it to see what users attempted to access these functions and the date and time when they did so.

Adding Employees and Configuring Security

Configuring PaymentMate security options is a three step process: (1) add employees, giving them user names and passwords they will enter; (2) add security requirements to specific functions of the software, requiring user names or user names and passwords be entered for those functions; and (3) set up the security journal to log attempts to use specific functions of the software.

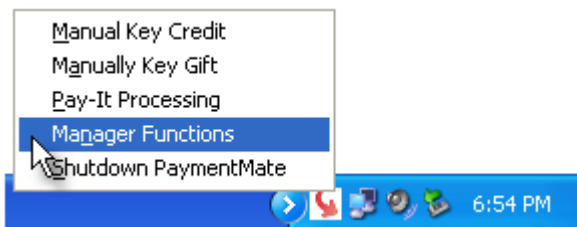
Adding Employees

Before you add your employees, staff, or other users of PaymentMate you should decide what user name you want to give each, and to what groups you want each to belong. Each user name should be one the person will easily remember, but also unique. The groups to which you assign users should most closely match their job duties. These groups to which they belong determine what PaymentMate will allow them to do. To add your employees to PaymentMate:

1. If you do not see the PaymentMate icon,  click the arrow  next to the Notification Area (also called the System Tray) on the Windows taskbar to unhide the icon. Double-click it to maximize the PaymentMate virtual terminal.

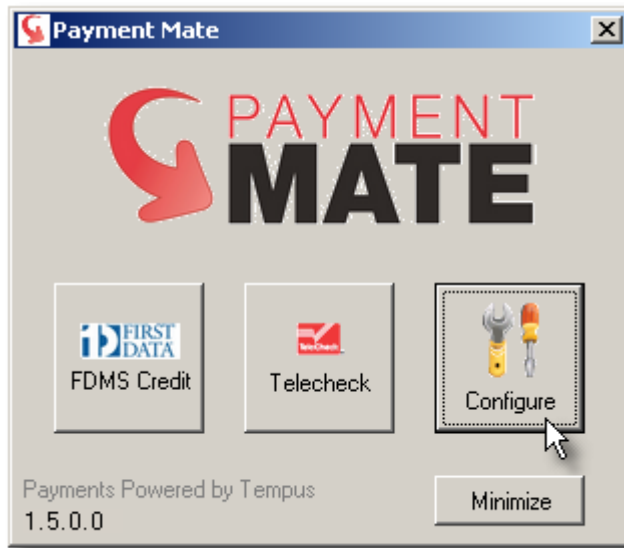



2. You can also maximize the program by right-clicking the icon and selecting **Manager Functions** on the shortcut menu.

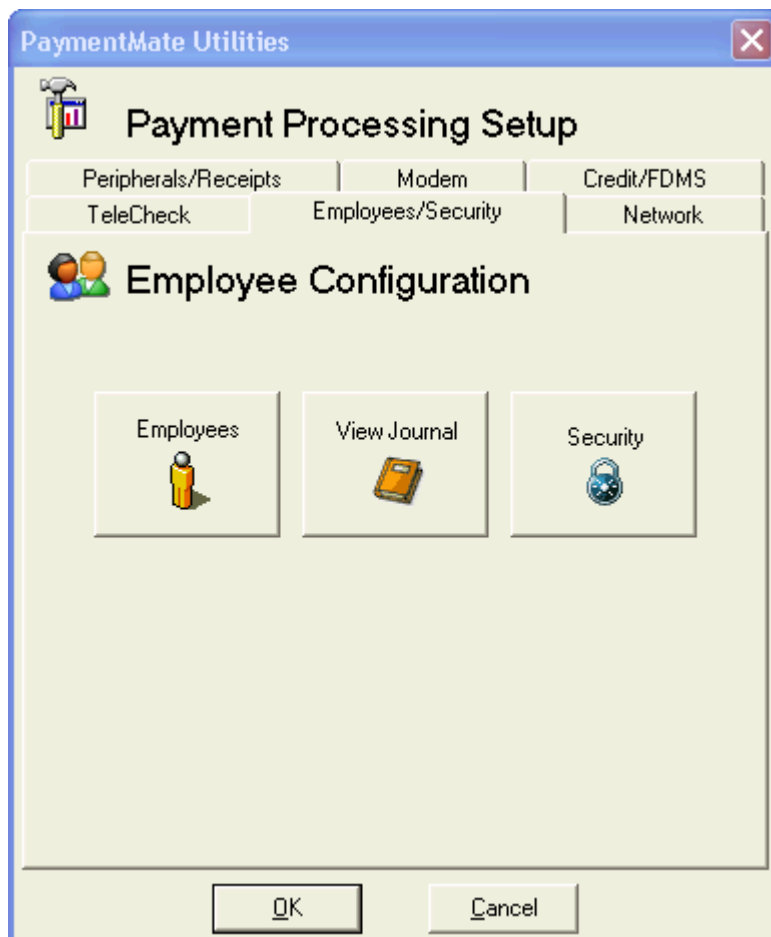


3. Click the Windows **Start** button, and on the Windows Start menu point to **All Programs** (or **Programs** in Windows 2000), point to **PaymentMate**, and select **PaymentMate Virtual Terminal** on the submenu.

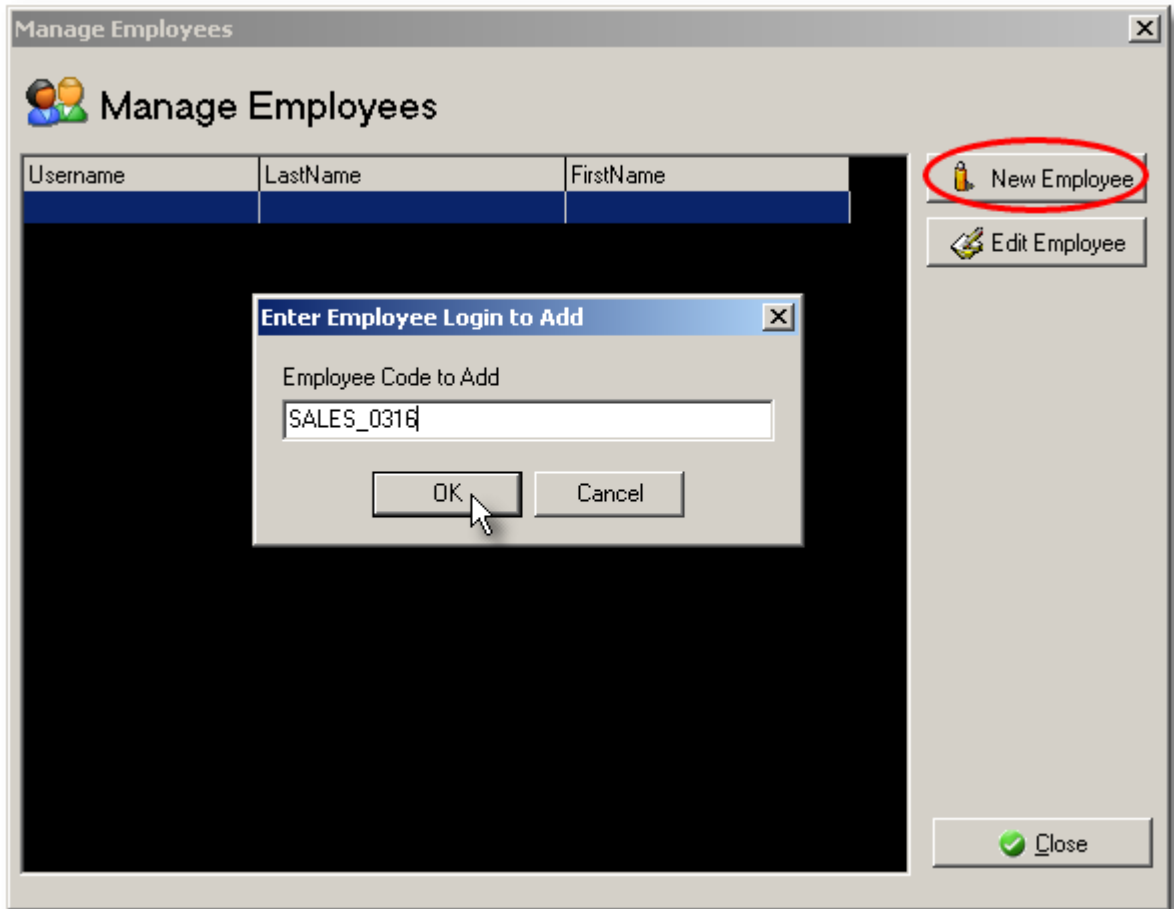
- In the **PaymentMate** virtual terminal that opens, click the **Configure** button.




- In the **PaymentMate Utilities** dialog box, click the **Employees/Security** tab.
- Click the **Employees** button. 



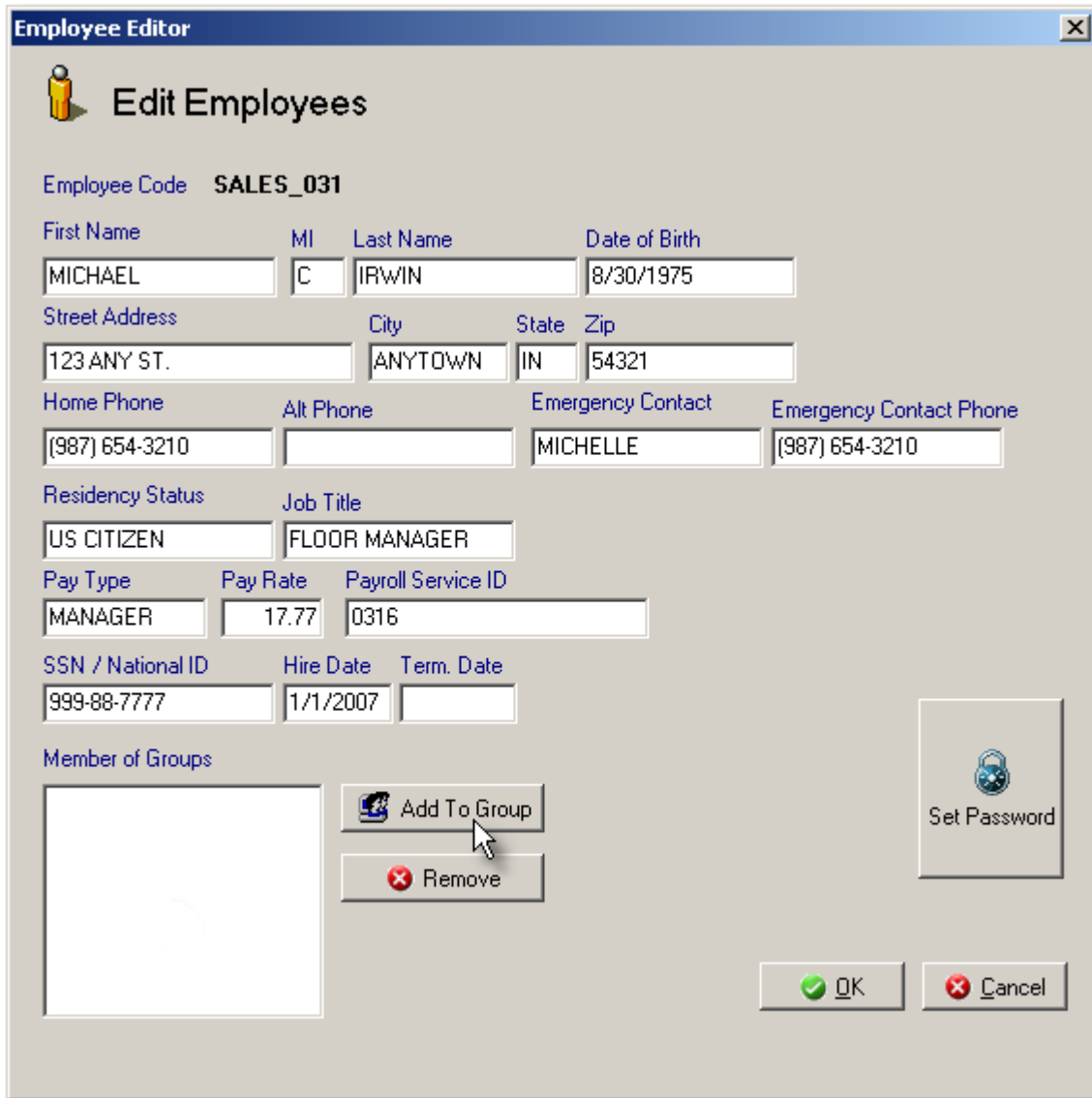
7. In the Manage Employees dialog box, click New Employee.
8. Enter the employee's user name in the Enter Employee Login to Add dialog box.



9. In the Employee Editor, enter the pertinent information for the employee.

 **Caution:** Remember to add your own user account to at least the Administrators group so that you can give yourself permission to access every feature of the software.

10. Click the Add to Group button.



Employee Editor

Edit Employees

Employee Code **SALES_031**

First Name: MICHAEL MI: C Last Name: IRWIN Date of Birth: 8/30/1975

Street Address: 123 ANY ST. City: ANYTOWN State: IN Zip: 54321

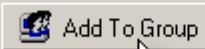
Home Phone: (987) 654-3210 Alt Phone: Emergency Contact: MICHELLE Emergency Contact Phone: (987) 654-3210

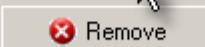
Residency Status: US CITIZEN Job Title: FLOOR MANAGER


Pay Type: MANAGER Pay Rate: 17.77 Payroll Service ID: 0316

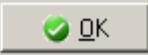

SSN / National ID: 999-88-7777 Hire Date: 1/1/2007 Term. Date:

Member of Groups

 Add To Group

 Remove

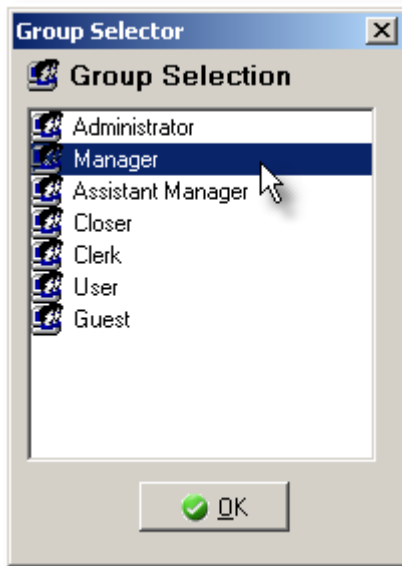
 Set Password


 OK  Cancel



Tip: You should add employees to groups according to their responsibilities, as you will allow or deny access to certain features of PaymentMate based on the groups to which they belong.

11. In the **Group Selector** dialog box, click the first group to which you want the employee to belong and click **OK**.



12. To add the employee to additional groups, complete the previous steps as many times as needed.
13. Click the **Set Password** button  to open the **Set Password** dialog box.
14. Make sure you do not have the Caps Lock on (if you do, press the Caps Lock key to turn it off).
15. Enter the employee's password in both the **Password** box and **Reenter** box.




Caution: It's important to use strong, complex passwords with at least seven characters and with letters and numbers. Also, advise your employees to never share their passwords with each other.

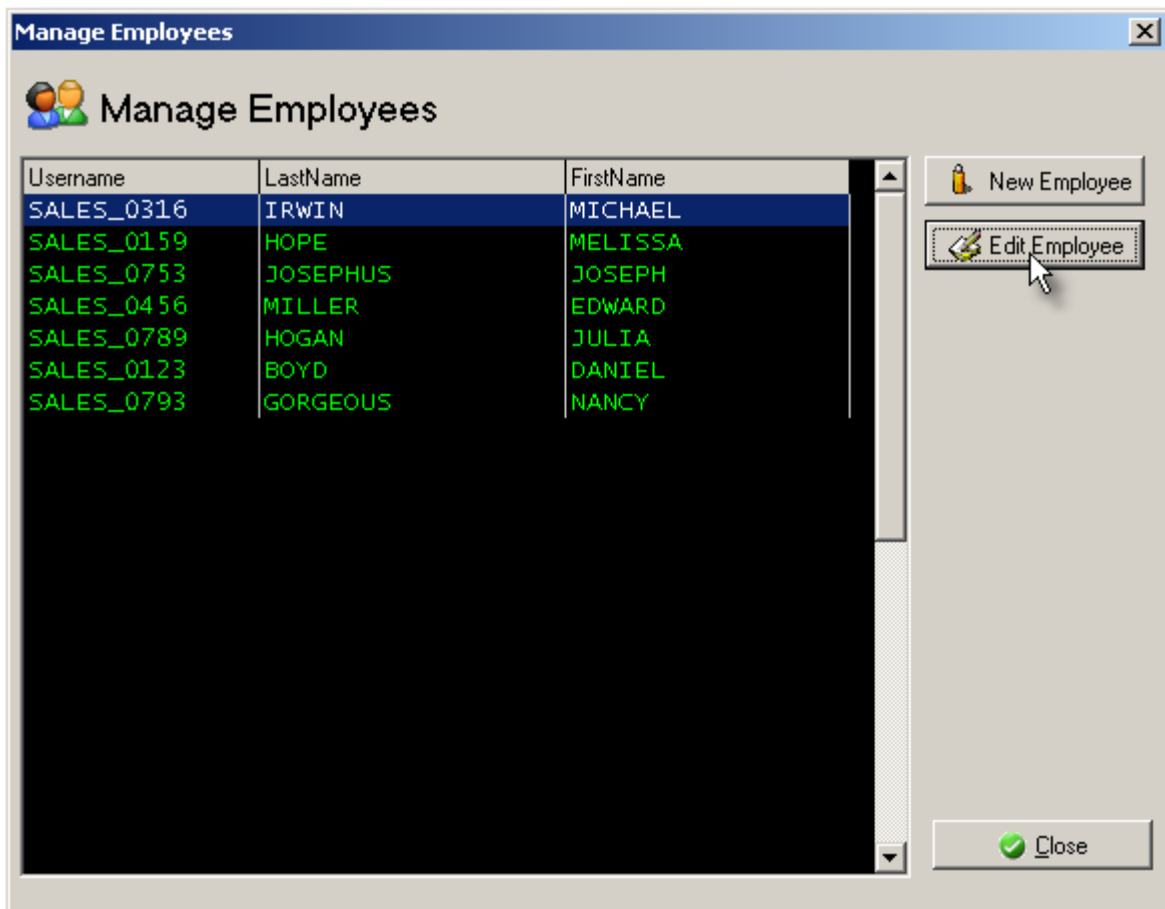
16. Click **OK** to save the password, or **Cancel** to not save the password.

17. Click OK to save the employee record or Cancel to not save the employee record.

Editing Employees

You can edit an employee's record, change an employee's password, and remove an employee from (or add an employee to) groups using the Employee Editor dialog box. For example, you might use the dialog box if you have promoted an employee to manager and want to add her to the Managers group. You might also edit the record of a discharged employee to remove him from all groups so that he cannot access the password-protected features of the program. To edit an employee's record:

1. In the **PaymentMate Utilities** dialog box, click the **Employees/Security** tab.
2. Click the **Employees** button.
3. In the **Manage Employees** dialog box, click **Edit Employee**. 



4. In the **Employee Editor** dialog box, change the employee's record as desired.

The screenshot shows the 'Employee Editor' dialog box with the following fields and values:


Employee Code	SALES_031		
First Name	MI	Last Name	Date of Birth
MICHAEL	C	IRWIN	8/30/1975
Street Address	City	State	Zip
123 ANY ST.	ANYTOWN	IN	54321
Home Phone	Alt Phone	Emergency Contact	Emergency Contact Phone
(987) 654-3210		MICHELLE	(987) 654-3210
Residency Status	Job Title		
US CITIZEN	FLOOR MANAGER		
Pay Type	Pay Rate	Payroll Service ID	
MANAGER	17.77	0316	
SSN / National ID	Hire Date	Term. Date	
999-88-7777	1/1/2007		

Member of Groups:

- Administrator
- Manager
- Closer

Buttons: Add To Group, Remove, Set Password, OK, Cancel.

5. To remove the employee from a group, select the group from which you want to remove him and click **Remove**.

 **Caution:** Do not remove all groups from an employee unless you want to deny him access to any feature of the software that requires a user name or password.

6. To add the employee to another group, click **Add To Group**, select the group to which you want to add him, and click **OK**.

7. To change the password for the employee, click **Set Password** and enter the new password in the **Set Password** dialog box.



Info: For reasons of enhanced security, PaymentMate will not allow you to reuse a password until you have changed the password at least four times.

8. Click **OK** to save the changes or **Cancel** to not save the changes.



Tip: Clicking **Cancel** will remove the changes you made to the employee's record but will not restore the groups you removed or reset the password to what it was prior to opening the dialog box.

Adding Security to Specific Functions

After you add your employees to PaymentMate and add those employees to different groups, you can configure the security options for the groups to which the employees belong. Using the **Security Setup** dialog box, you can set security options for individual features of PaymentMate and restrict access to certain functions of the software. For example, if you want only your managers to be able to change the configuration of the software, you can set up security for this function of the program by only allowing members of the **Managers** group to access this feature. When a member of the **Clerks** group attempts to enter the software configuration, a message will indicate she does not have permission to do so.

Some other recommended security options are to configure PaymentMate to:


- Allow only Administrators to change the Security configuration.
- Allow Administrators and Managers to add new employees and change employee passwords
- Allow Administrators and Managers to issue credit refunds to credit cards and debit cards.
- Allow Administrators, Managers and Closers to close the current check, credit and debit batches.

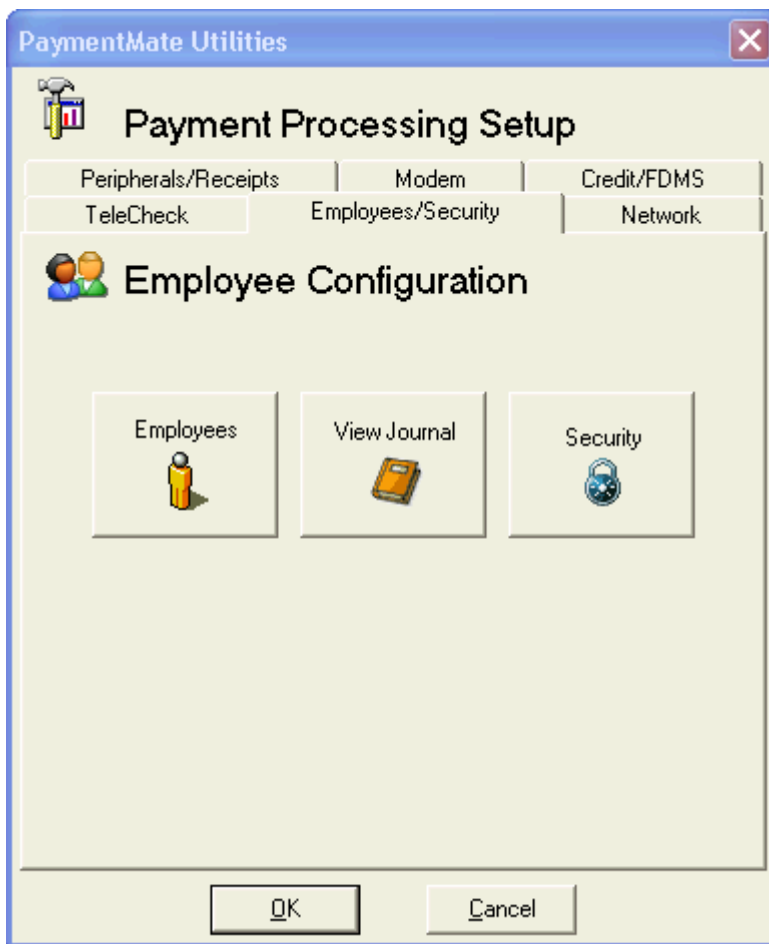


Tip: It is a good idea to add your own user name to the **Administrators** group and add the **Administrators** group to every security option that requires a user name and password. This ensures that you will be able to access these features. You then add the **Managers** group and other groups to each of the security options as desired.

To add security options to PaymentMate:

1. In the **PaymentMate Utilities** dialog box, select the **Employees/Security** tab.

2. Click the Security button. 

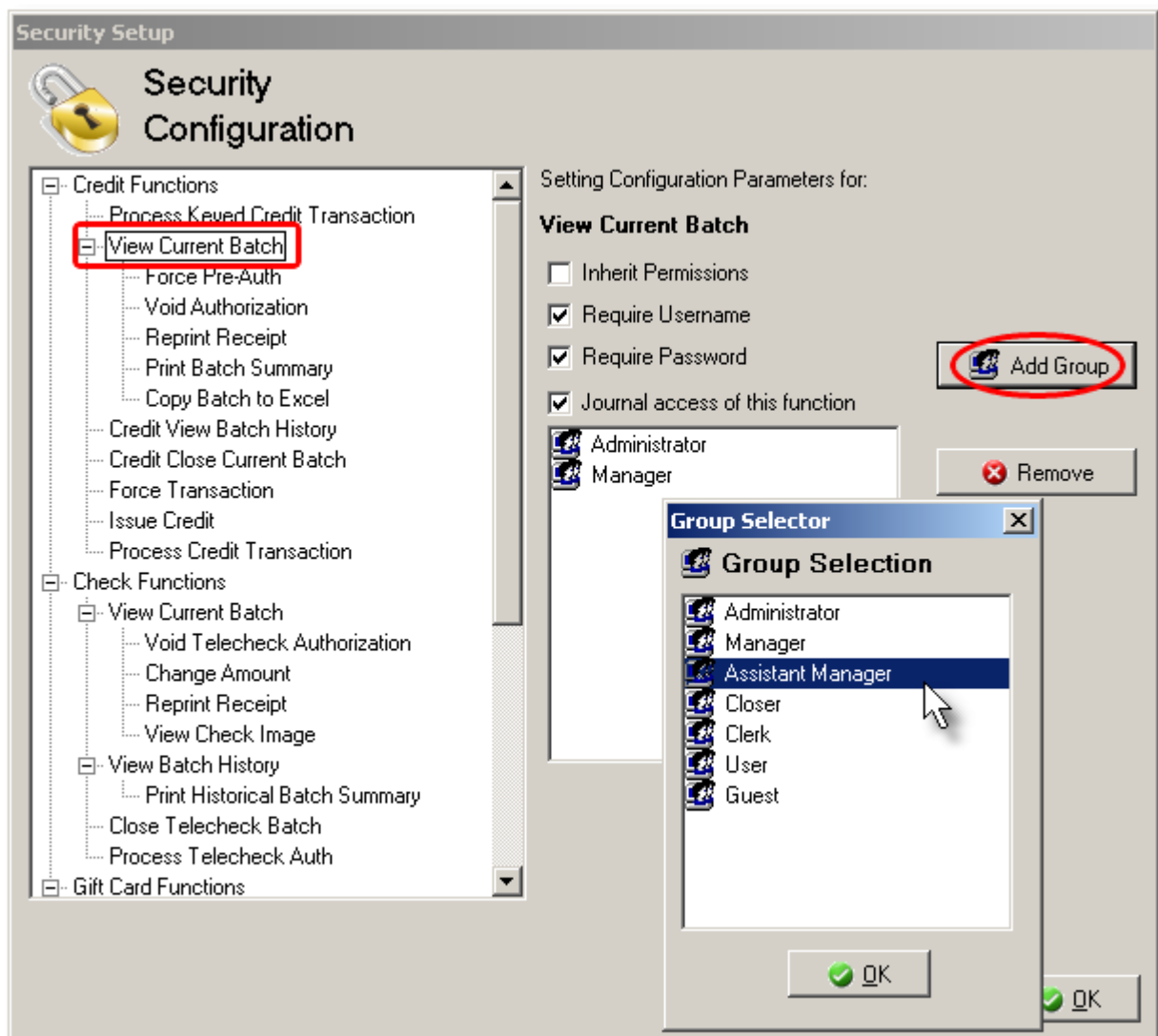


3. In the Security Configuration box of the Security Setup dialog box, select the first feature of the program for which you want to configure security options.
4. Under Setting Configuration Parameters For, select the check boxes for the security options you want to add to the selected program feature. You can select:
 - Inherit Permissions to add the user name, password and journal options of the program feature listed directly above the selected feature in the Security Configuration box.
 - Require Username to have PaymentMate prompt employees to provide their user names before they can use the selected feature.
 - Require Password to have the program require employees to provide their passwords before they can use the feature.
 - Journal Access of This Function to have the program keep a record of which employees access the program feature.

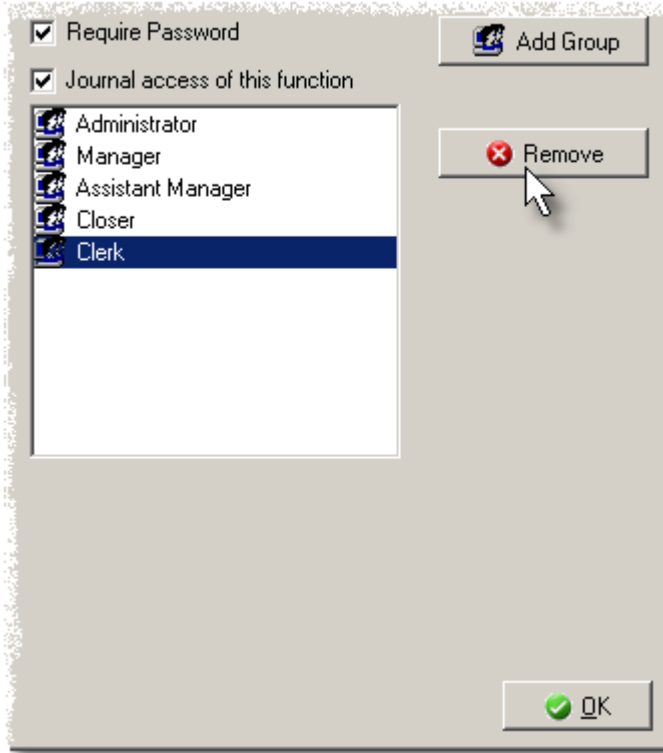


Tip: If you select the Inherit Permissions check box, you do not have to select any of the other check boxes. PaymentMate will automatically configure the same security options for the feature in the list immediately proceeding the feature for which you are configuring security options. (For example, if you configure the View Current Batch feature to require a user name and password and you want the Force Pre-authorization feature immediately below it to also require a user name and password, you select Force Pre-Auth in the Security Configuration box and select the Inherit Permissions check box.)


5. Click the **Add Group** button.
6. In the **Group Selector** dialog box, select the first group you want to have the ability to use the security option and click **OK**.



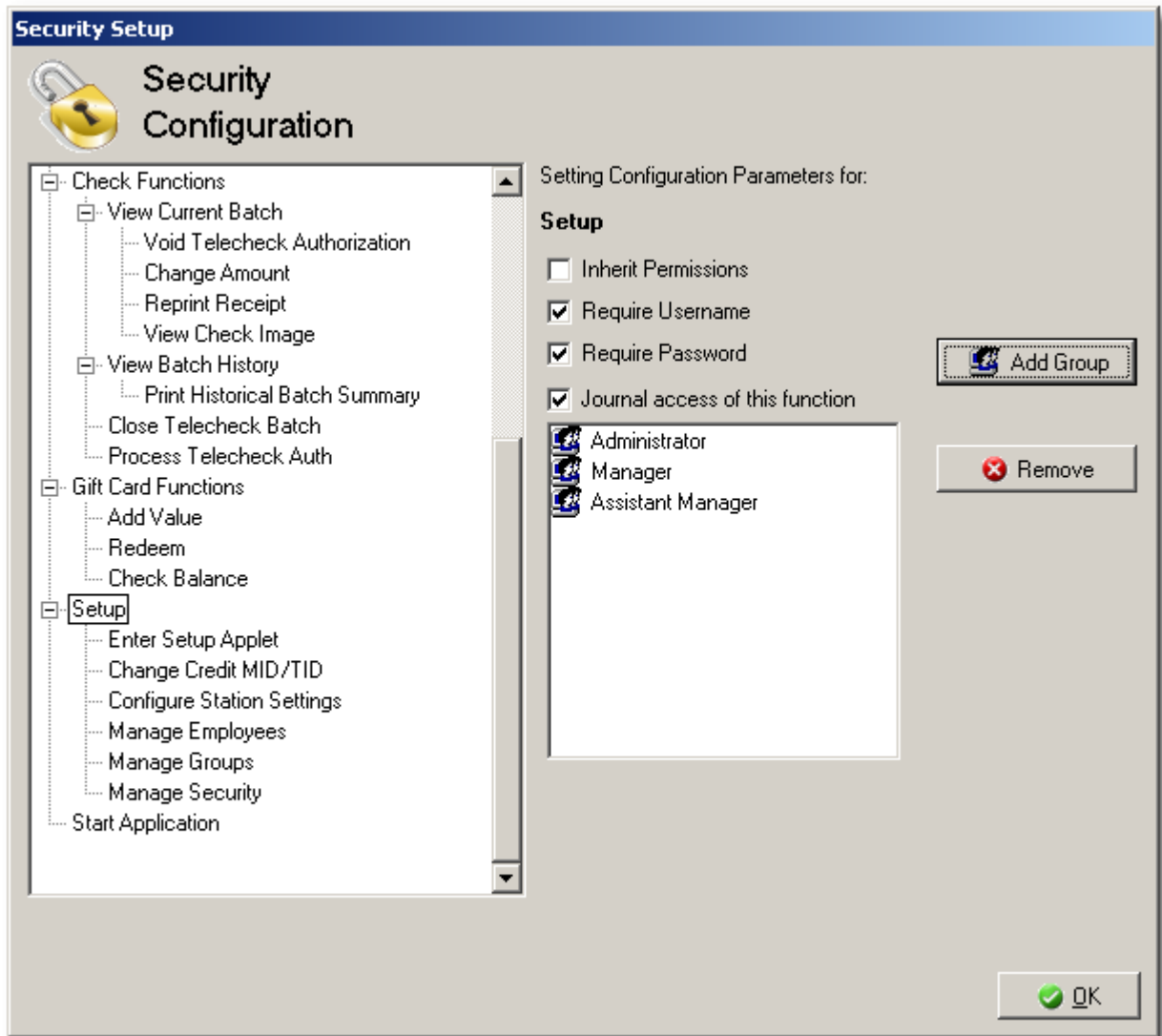
7. Follow the previous two steps to add as many other groups as you want to have access to the security feature.
8. To remove a group you added to the **Set Configuration Parameters For** box, click the group and click **Remove**.



9. Select the next feature for which you want to set up security options in the **Security Configuration** box and follow the previous steps to add the groups and security parameters to that function, as well.

 **Caution:** Remember to add at least the Administrator group to the Manage Security feature if you choose to require a user name and password for that feature. If you require a password but do not add a group, you might lock yourself out of the program. If this does occur, have the owner of the software call the Tempus Technologies, Inc. Customer Support Services help line at 1-800-225-8979, extension 4.

10. Continue the previous steps until you have configured the security options for each of the program feature you want to secure.



11. To remove the security options from a feature of the program, select that item in the Security Configuration box and then clear all of the check boxes.

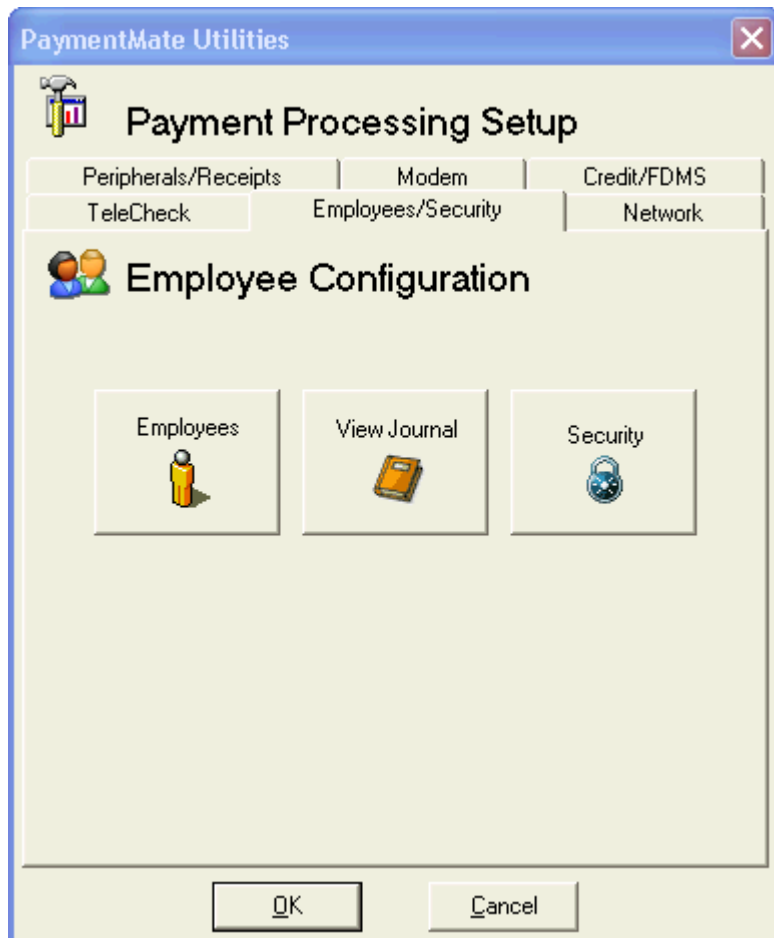
Setting Up the Security Journal

The Security Journal is designed to record the activities of your employees, managers, staff members, or other users of PaymentMate. If you want to journal attempts to use certain functions of the software, all you have to do is select the appropriate check boxes in the Security Setup dialog box.

When you select the Journal Access of this Function check boxes, PaymentMate will log each attempt to access to the software functions for which you have enabled logging to the PaymentMate security journal.

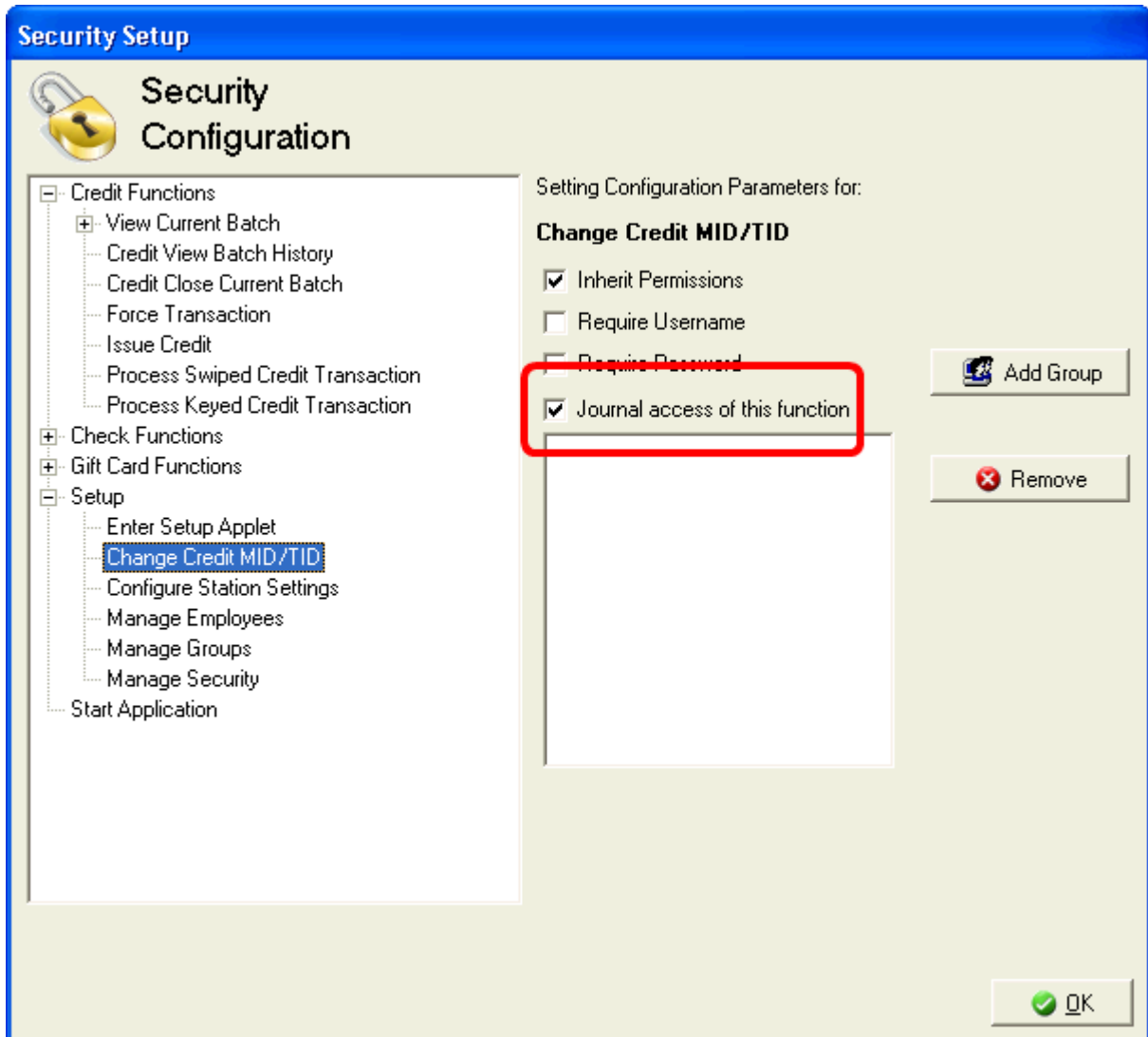
To enable security journal logging:

1. In the PaymentMate Utilities dialog box, select the Employees/Security tab.
2. Click the View Journal button. 



3. In the Security Setup dialog box under Security Configuration select the software function for which you want to enable security to highlight it.

- Under Setting Configuration Parameters for select the Journal Access of this Function check box.



- Continue the previous steps for each function of the software for which you want to enable security.
- To disable security journal logging, follow the previous steps and then clear the Journal Access to this Function check boxes of the functions for which you want to disable logging.
- To disable all security journal logins, clear all of the Journal Access to this Function check boxes.
- Click OK and OK and then close and open the PaymentMate software. PaymentMate will now begin logging access attempts in the security journal.

Using PaymentMate with Security Enabled

PaymentMate allows you to restrict access to specific functions of the program by requiring user names or passwords. Nearly any button that can be clicked in the software can also be configured to require a user name, or a user name and a password.

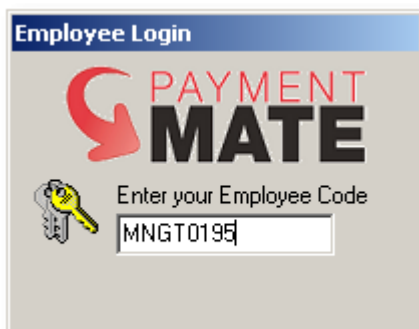
For example, if you have enabled such security in order to enter the software configuration, a user will be prompted to enter a user name, or a user name and a password when she clicks the Configure button. If the user name entered is a member of a group for which you have not granted permission to access the software configuration, PaymentMate will display a message indicating the user is not allowed to access. If the user enters an incorrect password, PaymentMate will prompt the user to enter the password again. If an incorrect password is entered three times, PaymentMate will not allow the user to access.

If you have enabled the security journal to log access to a specific function of the software, the program will make an entry in the journal for every attempt to access the feature for which you have enabled journaling. In the previous example, if journaling was enabled for the software configuration, PaymentMate would record the user name and each failed attempt to enter a correct password made by the user entering that user name.

Entering User Names and Passwords

What follows is a typical example of how to enter user names and passwords when you have enabled security in the PaymentMate.

1. When you click on a button for which you have configured the program to require a user name and password, the **Employee Login** dialog box appears with the most recently used user name displayed.
2. Press the Enter key on your keyboard to login using the displayed user name, or enter a different user name in the **Enter Your Employee Code** box and press Enter to log in using that user name instead, or press the Esc key to not log in.

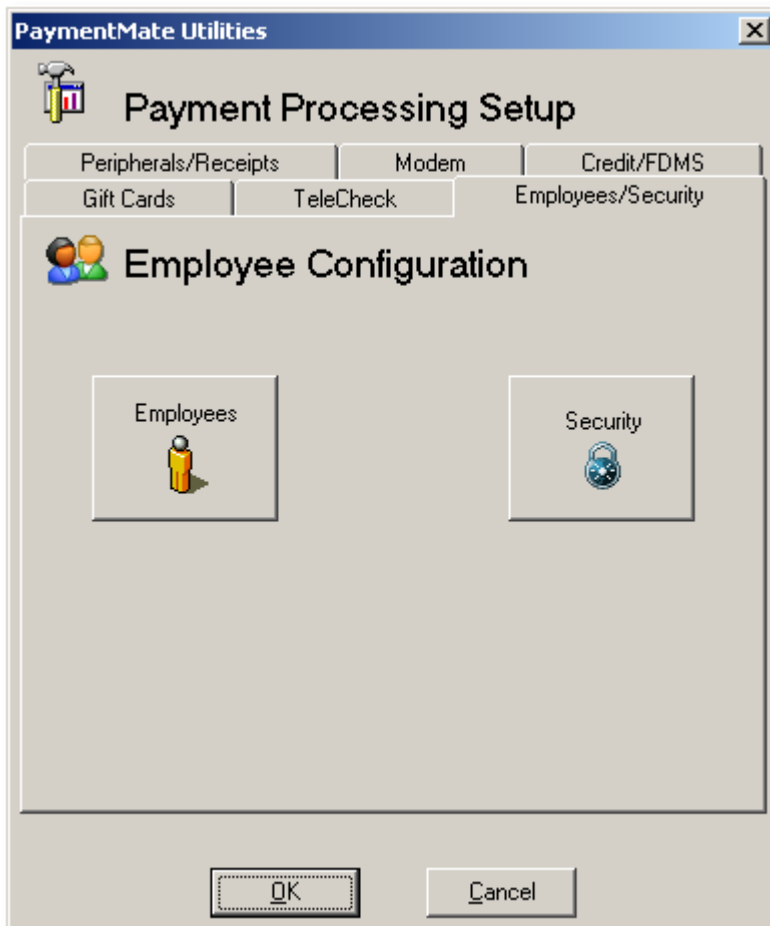


3. If you entered an incorrect user name, PaymentMate does not allow you to log in. Enter a correct user name and press the Enter key to log in, or press the Esc key to not log in.
4. If you enter a correct user name, but one that is not a member of a group that has access to the feature of the software you are trying to use, a message indicates this. Click **OK** to the message to continue.
5. If you enter a correct user name that has access to the feature of the software you are trying to use, and you also configured the software to require a password, the **Employee Password** dialog box appears.

6. Enter the correct password for the user name in the **Enter Your Password** dialog box and press the Enter key to submit the password or the Esc key to cancel.



7. If you entered an incorrect password, the PaymentMate removes the password you entered from the **Enter Your Password** box so you can enter a correct password.
8. After you enter a correct password for the user name with which you are logging in, PaymentMate displays the feature for which you have gained access.

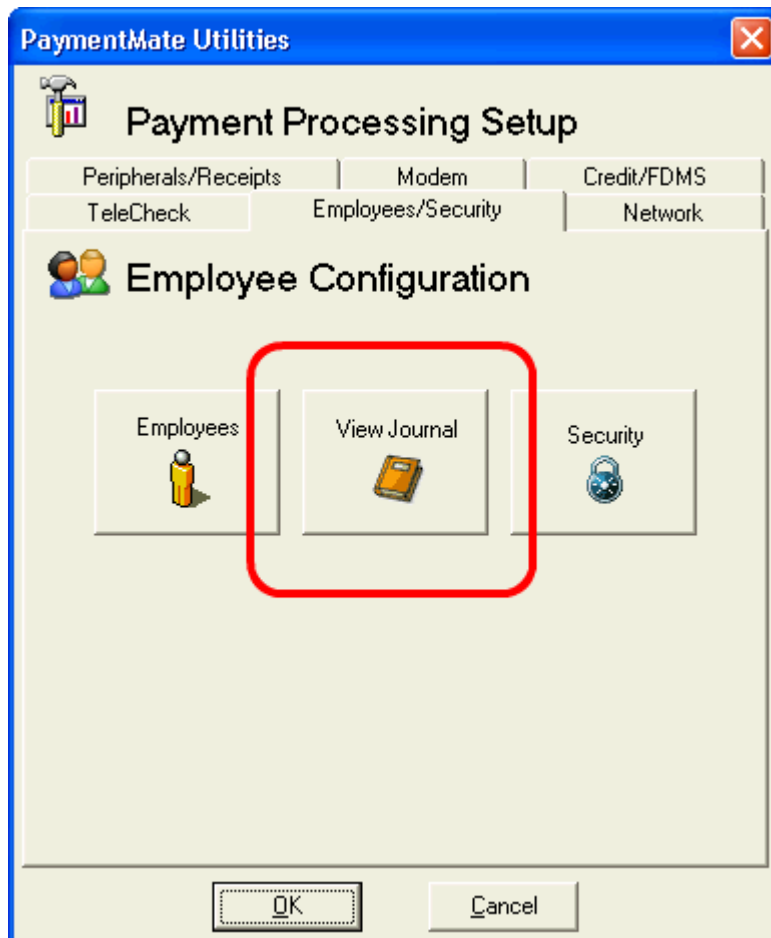


9. Continue using the software, providing user names and passwords as required.

Viewing the Security Journal

You can view the security journal on each computer by opening the Journal Viewer. This security journal shows all access attempts to those functions of the software for which you have enabled logging. The Journal Viewer displays all access attempts for which you have enabled security logging and for the date ranges you specify. The Journal Viewer displays each time an attempt was made to access a function of the software for which you have enabled logging and displays information for each attempt. To view the Journal Viewer:

1. In the PaymentMate Utilities dialog box, select the Employees/Security tab.
2. Click View Journal to open the Journal Viewer.

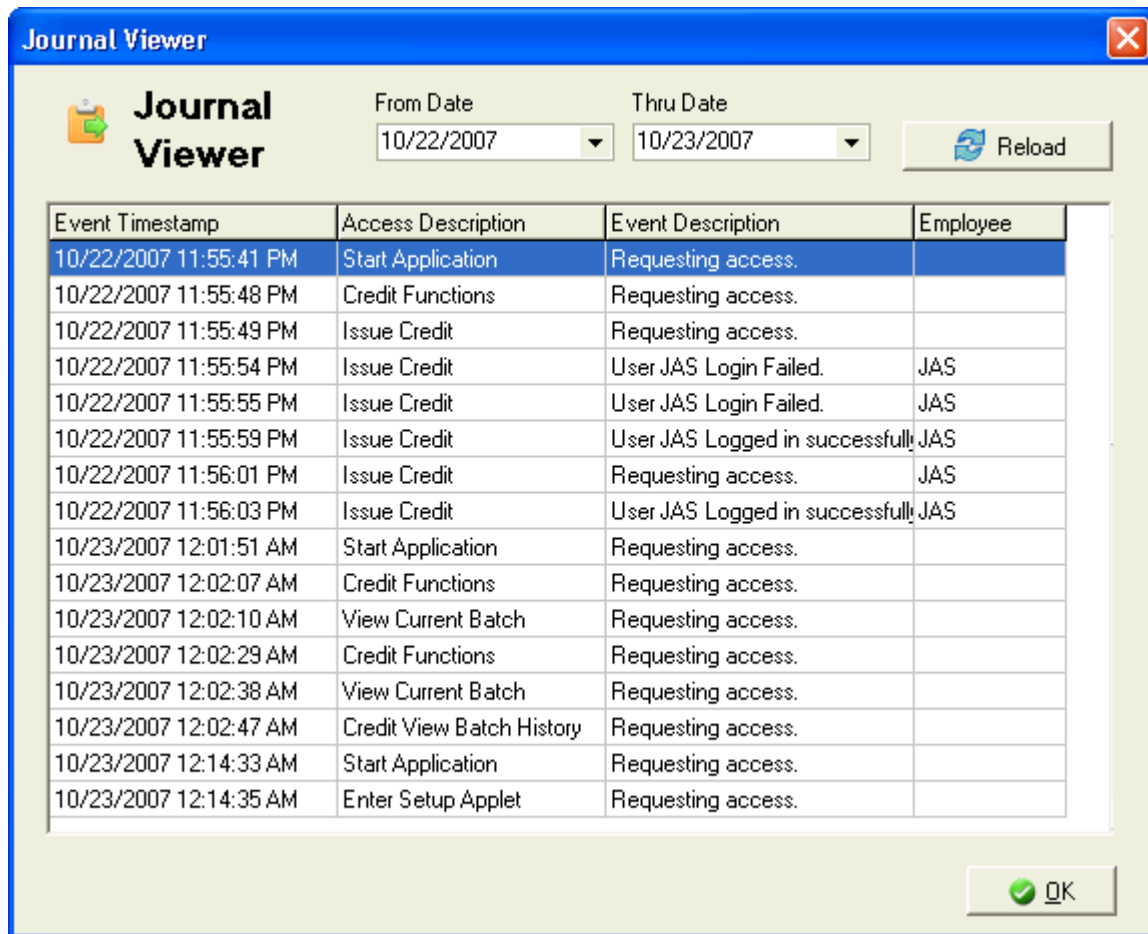


3. In the Journal Viewer, enter the date range for which you wish to search in the From Date and Through Date boxes and click Reload.



Tip: If you want to prevent unauthorized users from viewing the security journal, you should configure PaymentMate to required a user name or password or both to access the Journal Viewer. Enabling user name and password protection is done in the Security Configuration dialog box, as explained previously in this document.

4. To display access attempts for a different date range, enter the dates in the From Date and Through Date boxes and click Reload. (The Journal Viewer displays the results for the new date range.)



The Journal Viewer displays all access attempts for the date range you entered. The Event Timestamp column shows the date and time when the access attempt was made. The Access Description column displays for what function of the program the accessed attempt was made. The Employee column displays the user name of the user who tried to access the function of the software. The Event Description column explains the result of the access attempt. Descriptions of the events follow.

- Requesting Access. A user tried to access a function for which you have enabled logging.
- Login Failed. A user trying to log in with the user name indicated failed to enter the required user name, or the required password, or both.
- Logged in successfully. A user logging in with the user name indicated successfully entered the required user name, or required password, or both.