

The PrintBoss security features allow an administrator to restrict access to specified functions within the program. Accessibility can be gained through password and user disk, and each user can have a different level of access.

Windows users need FULL CONTROL of the PrintBoss directory for the PrintBoss application to function properly. If there is a need to lock down access to the program, it should be set through PrintBoss security. Security settings are not required, but are available if desired. PrintBoss will function normally if security is not activated.

Security settings only need to be defined once for all workstations when PrintBoss is installed on a network. Multiple users can access PrintBoss simultaneously from different workstations when PrintBoss is installed on a shared network drive. If the PrintBoss application is installed locally on workstations, then security settings need to be defined for each workstation.

### Setting Up Security

#### Security Access

The Administrator or Supervisor determines the restricted functions.

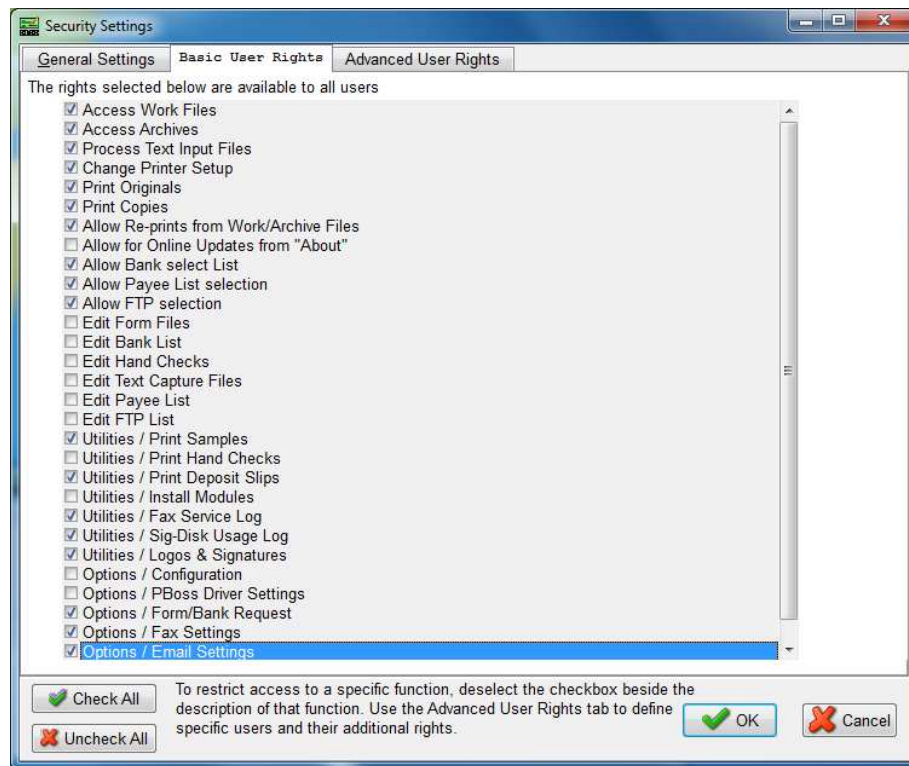
1. Open the PrintBoss Master Application.
2. Click on the **Options** menu and select **Security**. The *Security Access* window opens.
3. Enter the Master Password or insert the original registration disk shipped with your copy of PrintBoss.
  - a. Enter *ADMIN* (upper case) in the Master Password field for first time installations.
  - b. *OR* Insert the registration floppy (older installations that have updated) into the drive and enter the correct drive letter in the **Insert Distribution Disk in drive** field.
4. Click **OK**. The *Security Settings* window opens.

There are three tabs on the Security Settings window, but the Basic User Rights tab changes name and function when the Security Method on the General Settings tab is changed to Advanced. The fields on each of these tabs are explained in more detail in Appendix D of this manual.

#### Set Basic User Rights (Standard)

A set of Basic User Rights can be created that applies to all PrintBoss users. Additional rights can be assigned to individual users. These users will need to be created on the Advanced User Rights tab and assigned a password. The restricted features will only be available to the user when they Log-In to PrintBoss.

1. Open the PrintBoss Master Application.
2. Click on the **Options** menu and select **Security**.
3. Enter the Master Password.
4. Click on the **Basic User Rights** tab. This tab is available when *Standard* is selected as the *Security Method* on the *General Settings* tab.



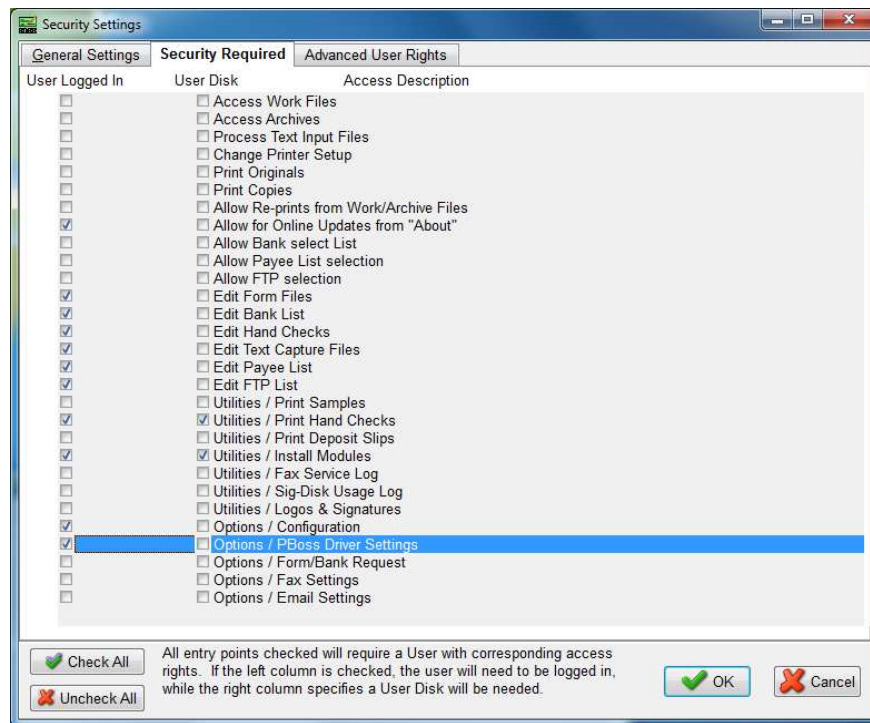
1.

5. Check only the features you want all users to access.
  - a. All features are selected by default.
  - b. Click the **Uncheck All** button to remove all checkmarks and then check only the features you want all users to access. You may also uncheck specific features you want to restrict without using the *Uncheck All* button.
6. Click **OK** when you are finished.

### Set Security Required (Advanced)

Advanced security adds another layer of security by requiring the user to insert an encoded floppy disk into the computer to access specified features. This method can only be used if the computer has a floppy disk drive.

1. Open the PrintBoss Master Application window and access Security.
2. Click on the **Security Method** drop down menu on the *General Settings* tab and choose **Advanced**.
3. Select the **Security Required** tab. This tab is only visible when the **Advanced** security method is chosen.

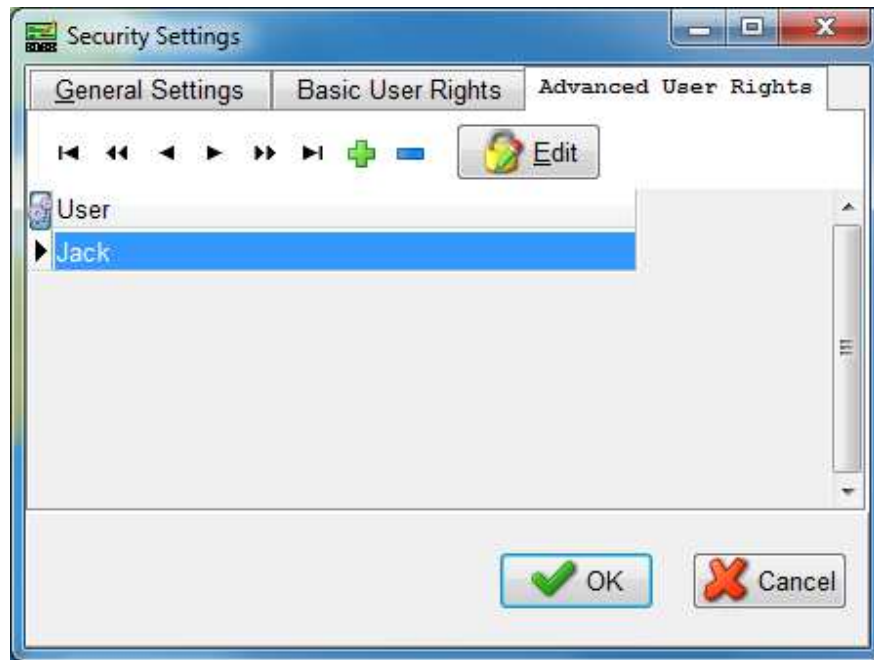


4. Check only the features you want to **restrict** from all general users.
  - a. Enter a check in the *User Logged In* column to require a login to use the feature.
  - b. Enter a check in the *User Disk* column to require the user insert an encoded floppy disk to use the feature.
  - c. A check in both columns requires both a user login and insertion of an encoded floppy disk.
  - d. Items NOT checked do not require a login or encoded floppy disk to access the feature.
5. Click **OK** when you are finished.

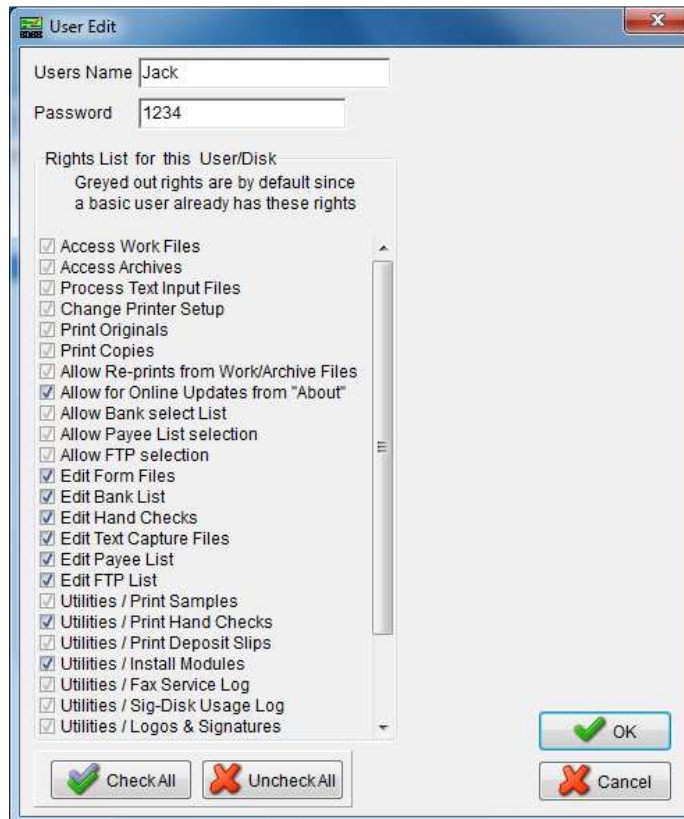
### Create User Accounts

The steps used to create user accounts are basically the same for both the Standard and Advanced security methods.

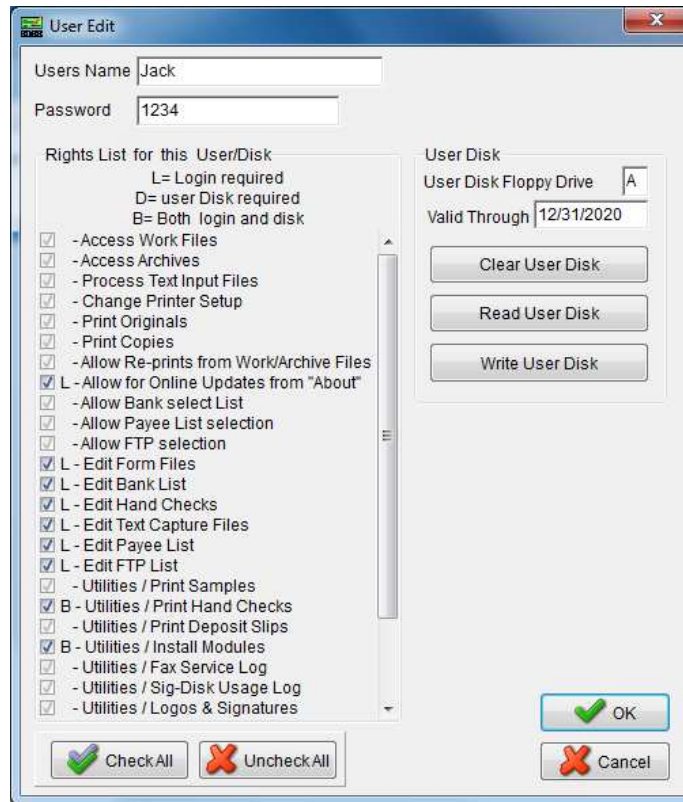
1. Open the PrintBoss Master Application window and access Security.
2. Click on the **Advanced User Rights** tab.



3. Click on the Plus sign (+). The *User Edit* window opens. The following is an example of the **Standard** security method.



2. Here is an example of the **Advanced** security method.



- 3.
4. Enter a **User Name**. Enter the user's Windows User Name if you would like to enable *Auto Login* on the *General Settings* security tab.
5. Enter a **Password** for this user. Passwords are visible to anyone who has the Master Password to access Security.
6. Check the appropriate available features to provide secure access to this user.
  - a. These features will be available to the selected user after he/she successfully logs in to PrintBoss when the **Standard** security method is selected.
  - b. The **Advanced** security method indicates how the user can access these features when they are checked.
    - i. L – Login required
    - ii. D –Disk required
    - iii. B – Both a login and distribution disk are required for access
7. **Advanced Only** – Create a user Disk if the letters B or D appear next to any of the features on the User Edit screen.
  - a. Insert a floppy drive into your computer.
  - b. Enter the drive letter for the floppy in the **User Disk Floppy Drive** field.
  - c. Enter an expiration date for the floppy in the **Valid Through** field.
  - d. Click the **Write User Disk** button to encode the floppy.
  - e. Remove the floppy when you are done.
8. Click **OK** on the User Edit window when you are done.

### Accessing Secured Areas

Once security levels and users are defined, Users must log in to access those functions. Select File / User Log-In from the main PrintBoss Master Application window. Enter your User/Operator Name. Enter the correct password. If only a disk is required, make sure it is in the correct drive before selecting OK.

### Changing Users

When one PrintBoss user is finished and a second would like to access security on the same workstation, the current user does not need to log out. The new user just logs in. Only one user is ever considered logged in to PrintBoss on the same workstation. Select File / User Log-Out when all users are finished to exit the security features.

A user is automatically logged out of PrintBoss on a workstation when the PrintBoss application is closed. No user is logged in when PrintBoss is first launched unless the option to *Auto Login Matching Windows Users* is selected from the Security / General Settings tab and there is a match in the PrintBoss *Advanced User Rights* tab.

## **Other Security Options**

Other security options can be selected on the *General Settings* tab of the Security Settings window. Brief descriptions of these options are provided in the following table.

<b>Security Option</b>	<b>Description</b>
Suppress printing signatures in Archive Reprints	Prevents a secure signature (file with the extension of .sig) on a document from printing when the document is reprinted from PrintBoss Archives (File/Open Document Archives).
Master Password	Change the Master Password the first time you use Security and anytime the Supervisor position changes.
Auto Login Matching Windows Users	PrintBoss will automatically login a user when their Windows User name matches an entry on the PrintBoss Advanced User Rights tab (Options/Security).
Display ONLY primary fields in the bank list browse	Select this option to suppress account information on the PrintBoss Bank List (Edit/Bank List) and only display Bank Code, Bank Prompt, and Bank Name.
Enable/Disable User Security in Banks	Enable or Disable the Security tab on the PrintBoss Bank Edit window (Edit/Bank List). See Chapter 8, <i>Bank Accounts – Bank Security</i> , for more information.
Signature Disk Log (Enterprise Only)	Select Logging Active and set the retention period for the log in days.

## **Text Security**

Another way to help prevent fraudulent changes is to secure the text on the document. Typically, the text that needs the most security is the amount on a check. The following features discourage or make it impossible for anyone to change the check amount once the document is printed.

### **SecureText Command**

This special text command automatically formats text (alpha or numeric) in a graphical layout. There are two types of secure text: Custom and Standard Block Numeric.

The Custom option creates a rectangle behind the text object and can be used for alpha and numeric text objects (See Below).



The Std Block-Numeric option is used for numeric text only. The words *Pay Only* are added and the numbers are formatted, shaded, and the word for each number is added. This is typically used for check amounts. (See Below).



See Chapter 9, *Form Files*, for more information on the Secure Text and Rectangle commands.

### Rectangle Command

The rectangle command can display a pattern behind a text object or signature, making it difficult for anyone to modify it once printed. This same command can be used in front of text to mask it. One example is masking or hiding the first 5 digits of the social security number on the advice of a payroll check.

White text (or negative printing) can be used with this command to make it more difficult to modify the text. The Vertical Fade or Horizontal Fade pattern should be used with negative printing.

# PRINTBOSS MANUAL

## APPENDIX D: SECURITY SETTINGS

### General Settings

#### Security Method

The recommended security is the *Standard* method. The *Advanced* method allows *User Disks* and *User Logins* to be used to access secured features. The *Advanced* method may be selected by default in older versions of PrintBoss that had security activated and then upgraded to the newer version.

#### Suppress printing signatures in Archive Reprints

Check this option to prevent a secure signature (file with the extension of .sig) on a document from printing when the document is reprinted from the Archive files.

#### Master Password

The *Master Password* is used to access the security settings within PrintBoss. The initial password is *ADMIN* and it is case sensitive beginning with PrintBoss version 5.71.3. A dialog box will confirm any changes to this field. This password is also used for duplicating signature disks. This password is NOT linked to logging in to PrintBoss as a user. It is recommended that an *administrator* user account be defined with a different password to have full access to the PrintBoss program once security has been activated.

#### Confirm Master Password

This confirmation dialog box only appears if the Master Password is changed. If the confirmation does not match the new password exactly, the security window will not close. An error message will warn that the two passwords do not match and that both must be re-entered. The password is CASE SENSITIVE.

#### Drive where user disk resides

This option is only available when the Advanced security method is selected. Indicate the system wide drive letter for user disks.

#### Auto Login Matching Windows Users

PrintBoss will automatically login a user based on their Windows User name if there is a match in the PrintBoss users list (on the *Advanced User Rights* tab) when this option is selected.

#### Display ONLY primary fields in bank list browse and Encrypt key fields in the bank list

Select this check box to only display primary bank fields (Bank Code, Bank Prompt and Bank Name) in the Bank List (EDIT / BANK LIST) and encrypt key fields so they cannot be viewed or copied.

#### Enable User Security in Banks

Access to each bank account can be controlled by the Administrator when bank security is enabled. This button will read Disable User Security in Banks when the security is enabled.

#### Signature Disk Log

##### Logging Active

Select this check box to activate a log file for your signature disk(s).

##### SigDisk Log Retention in Days

Set the retention period for the SigDisk log file.

### Basic User Rights (standard security mode)

Determine security by menu function. Check all functions you want all users to access. Functions that are not checked require specific permission assigned to a user on the *Advanced User Rights* tab. Otherwise, the function is not available to the user.



### **Security Required (advanced security mode)**

This tab is only available when Advanced is selected as the Security Mode on the General Settings tab. Select the menu functions that require security. There are two types of access – password and user disk. No security is required to access a function if there is no check in either the *User Logged In* or *User Disk* columns. Functions checked in the *User Logged In* column require the user to login to PrintBoss with a password to access the function. Otherwise, it will not be available on the menu. Functions checked in the *User Disk* column require an encoded disk be used for access. Select check boxes in both columns to require User Login along with the use of a disk.

### **Advanced User Rights (standard security mode)**

The administrator can define users on this tab and assign access to specific features not available to all users. Click the Plus (+) button to add a user. Enter the User Name and Password in the User Edit dialog box. All features that are grayed out are automatically available to all users. Select additional options to assign to the current user. The Uncheck All button will deselect all optional features (those that are bold). The Check All button selects all optional features. Click OK to save changes after selecting the appropriate features.

### **Advanced User Rights (advanced security mode)**

The administrator can define users and assign access to specific features not available to all users. The type of access (password and disk) is also defined. Click the Plus (+) button to add a user. Enter the User Name and Password in the User Edit dialog box. All features that are grayed out are automatically available to all users. Check features on the list to provide access for this user. An *L* next to a field indicates a user password is required for access. A *D* next to a field indicates a user disk is required for access. A *B* next to a field indicates BOTH a user login AND a user disk are required for access. If this user only needs a password for access, click *OK*.

#### **Write a User Disk**

If this user needs a User Disk, enter the destination drive and set the expiration date for the disk. Enter a password in the field under the User Name to password protect the disk. Place a floppy disk in the drive and Write User Disk.

#### **Reading a User Disk**

The user name and expiration date of a user disk may be verified. Open Security in PrintBoss and enter the Master Password. The security method should be set to Advanced on the General Settings tab. Select the Advanced User Rights tab and either edit a current user or add a new user by clicking on the plus symbol. Put the disk in the floppy drive and choose *Read User Disk*. The user properties will appear in the User Edit window. Click *OK* after reading the disk. You may edit the user properties or click *Cancel* to exit without saving changes.