QuickStart Guide

Financial Analysis Security

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ARKONA QuickStart Guide

Use this QuickStart Guide to help you set user security for your Financial Analysis reports.

- There are two levels of security a user must have rights to in order to use Financial Analysis:
    1. The application level. First a user must be authorized just to use the Financial Analysis application.
    2. The report level. Then they have to be authorized to each individual report they need to use.
        - **If all users authorized to the Financial Analysis application need to use a report**, it is not necessary to add all users to the report level security.
- The dealership ARKONA **security officer has update access to all reports** by virtue of being a security officer.
- Reports do not appear on the report list if you are not authorized to them.
- **To authorize a user to a report**, the dealership ARKONA security officer can take the following steps:

1. Authorize the user to use Financial Analysis.

a. Take option **7=User Security** from the System Environment menu to display the list of users.

b. Position to the user name. Type in the first few letters of the user ID and press [ENTER].

c. Take option **2=Change** by the user ID to display the security profile.

d. Take option **1=Authorize** by General Ledger to display the general ledger security options.

e. Page down 1 time and set Authorize Financial Analysis = Y.

f. Press [ENTER] twice to save and return to the list of users. Pres F3 to exit.

2. Authorize the user to a specific report.

a. Take option **1=Financial Analysis** from the General Ledger menu.

b. Take option **10=Security** by the report to display the list of users authorized to the report.

- If there are no users in the list, all users authorized to the Financial Analysis application may use this report.

c. Use function **F6=Add** to display the User Entry window.

d. Type in the user ID, hit [FIELD EXIT], select the user security level and press [ENTER] to save.
    - **0=Allow Update** – the user can make changes to the format and account routing on the report.
    - **1=Display Only** – the user may only display and print the report, not make changes to the format and account routing.

e. Repeat step 2c and 2d for each user that needs access to the report.