

# herbst Insight Security

- Full security log on all transactions
- Complete user rights profile
- User specific views
- Set report privileges
- Document fencing dates
- Grant rights for editing & deleting
- Restrict access
- User friendly & very flexible

Your accounting system stores unlimited and invaluable information derived from your business transactions which many people in your organisation can contribute and utilise to make gainful business decisions. However, controlling access to sensitive information and avoiding information overload or fraudulent situations can pose major concerns for most businesses, which is why Herbst Computer Software have gone to great lengths to develop a robust and comprehensive user set up and security system in Insight. Employee user profiles can be as simple or as complex as your business dictates. You have the authority to decide who has access to what.

## Security Log

With the security log and user activity tracking functionality management can monitor and control any data changes made, who they were made by and when.

Security Log				
Event Date/Tim	Object Kind	Action Kind	Object Description	User Login
31/08/2001 16:	Journal	Edit	JRL-304-000077	Jennifer
31/08/2001 16:	Journal	Edit	JRL-304-000076	Jennifer
31/08/2001 16:	Journal	Create	JRL-304-000077	Jennifer
31/08/2001 16:	Journal	Create	JRL-304-000076	Jennifer
03/09/2001 09:	Journal	Edit	JRL-304-000077	meh
31/08/2001 12:	Bank Internal T	Create	INT-304-000130	Jennifer
05/09/2001 14:	Lodgement	Create	LOG-309-000117	Administrator
31/08/2001 15:	Lodgement	Create	LOG-304-000114	Jennifer
05/09/2001 14:	Lodgement	Create	LOG-309-000116	Administrator
05/09/2001 13:	Lodgement	Create	LOG-309-000115	Administrator
05/09/2001 16:	Sales Invoice	Create	SI-2000/2001-002086	Administrator
28/08/2001 13:	Sales Invoice	Edit	SI-002012	Jennifer
03/08/2001 09:	Sales Invoice	Create	SI-2000/2001-002078	lionel
28/08/2001 13:	Sales Invoice	Edit	SI-002055	Jennifer
28/08/2001 13:	Sales Invoice	Edit	SI-002054	Jennifer
05/09/2001 16:	Sales Invoice	Create	SI-2000/2001-002091	Administrator
05/09/2001 16:	Sales Invoice	Create	SI-2000/2001-002090	Administrator
05/09/2001 16:	Sales Invoice	Create	SI-2000/2001-002089	Administrator
05/09/2001 16:	Sales Invoice	Create	SI-2000/2001-002088	Administrator

## Complete user rights profile

You may wish restrict access to certain transactions to key users, for instance you may want Joe in the accounts department to be able to raise purchase orders, but not issue payment, whereas Mary in the accounts department should be allowed to issue payments, but not create purchase orders, thereby controlling and verifying all outgoing payments.



Also a salesperson or order entry clerk could be granted read & write access to customer and sales data, read only access to product data and no access at all to purchases or nominal ledger information and limited access to reports.

## Management Control

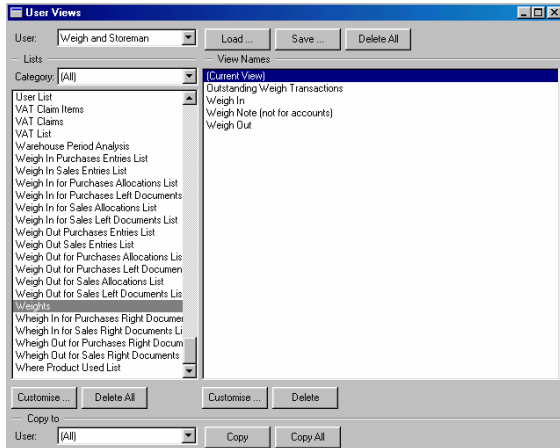
Of course management can be granted full access to all the information they need across the system and the business to comply with their managerial positions and enable them to make informed decisions

With Insight, documents can be edited or deleted which is obviously extremely convenient if there is a document entry that needs to be modified, however, the right to edit or delete a document is very powerful so again these rights can be controlled by via the user profiles so that system control is maintained as required.

	Create	Delete	Edit	Edit Notes
NL Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Trader	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Product Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Product	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bank Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## User specific views

Insight also boasts a unique grid view system, which presents the data in a familiar spreadsheet format with flexible sorting, filtering and analysis capabilities. User specific views can be created if management wish to restrict users from accessing key data or conversely to ensure that users have all the data they need to perform their job tasks properly. Users can subsequently modify and personalise their own views if granted the appropriate authority.



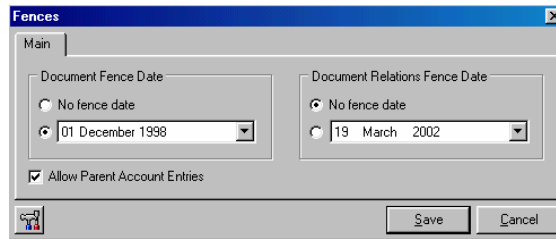
## Report Privileges

Any reports created can be assigned a user privilege level, permitting any users with that user privilege level or greater to access them or alternatively block access if their privilege level is insufficient.

Computer Customers Total Sales	Report	(none)	05/12/2001 14:19:44
Customer Stock Sales Profit	Report	Trader Account ...	05/12/2001 14:20:07
Customers Inactivity	Report	(none)	29/08/2001 02:04:00
Customers Sales	Report	(none)	05/12/2001 14:18:10
Customers Sales (Summary)	Report	(none)	06/12/2001 15:00:40
Customers Stock Sales Profit	Report	(none)	04/12/2001 02:10:00
Customers Total Sales	Report	(none)	29/11/2001 10:06:27
Farmers Custom	Report	(none)	22/10/2001 10:40:35
Machinery Cust	Report	(none)	22/10/2001 10:41:52

## Document fencing dates

Insight also has a fencing mechanism worth exploring. At the end of a year or financial period a lot of reports are created and the information from which they are derived should not be modified unless exceptional. By defining a document fence date negligent changes can be prevented as the system will prevent the editing of any documents created prior to this date. It also means that no new documents can be created with a working or post date prior to the specified fence date.

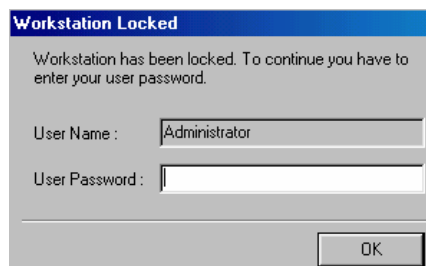


It is also possible to block the creation of document relations before a particular fence date, which may impact aged analysis reports, statements and period closing. For instance if you were to set a document relations fence date of '01 September 2001' this would prevent you from converting a sales invoice created prior to this date into a sales invoice credit note.



If these security measures are adhered to, and each user logs on as themselves, with their specific passwords, then responsibility is clearly managed thus preventing untrained users performing functions, or pre-empting "accidental" data changes in areas that are particularly sensitive to your workflow.

Each user can then forbid access to their computer when they are away, without having to log out of where they are at the moment, by using the "Lock" function. By pressing F12 on your keyboard, insight is locked and you can only enter again with your password



These are just some examples of the powerful mechanism of the security control within Insight, so, whatever your employee structure Insight user set up is extremely flexible and can be configured to match your needs.