

GoldMine User Security

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GoldMine User Security

About User Properties

Control of a user's security access in GoldMine is set through the User Properties. These settings are defined in the Users' Master File accessed via **File>>Configure>>Users' Settings**, and can only be accessed by a user with Master rights. Selecting **New** will allow creation of a new user. To edit an existing user, highlight the user and click **Properties**.

The Profile Tab

The Profile tab allows you to edit or create users and to define basic user information such as user name and password, set up initial security, and set force log out.

1. Type the user's Full Name.
2. In the *Security* area you can configure the following settings:
 - *Master Rights*: Select Master Rights only if you want the user to have unrestricted access to all parts of GoldMine.
 - *Password*: Type the password assigned to the user. You need to provide the username and password you created to the user so they can log into GoldMine.
 - *Valid for days*: From the drop-down list, select the number of days the user's password is valid, or leave as Always.
 - *Next change*: If you change the Valid for days field, you can select the date the password becomes invalid and the user will not be able to launch GoldMine.
 - *Ownership*: Displays the New Record Ownership dialog box. Ownership allows you to specify whether the new Contact Records the user adds to the database are public records or are owned by a specific user or user group.
3. In the *Forced log out* area, you have the following options:
 - *Forced log out time*: Select the time of day to automatically log the user out of GoldMine.
 - *When idle for: x minutes*: Select the period of inactivity for a user before they are automatically logged out of GoldMine.



Tip: For an administrator, the Force log out options are important if you are managing a limited number of licenses. Also, there are many maintenance functions you can perform only if all the users are logged out of GoldMine.

4. Click **OK** to save the user's Profile settings without configuring the detailed user security settings, or click the Membership tab to continue configuring the user's properties.

The Membership Tab

Users can belong to several groups, allowing them access to the group's contacts and allowing collaboration. Groups must be created before you can assign a user to a user group. If user groups have not been created, click **User Groups Setup** to add the user to a group or to create a group or groups.

To Set Up a User in a Group:

1. The *Member of Groups* list indicates the groups to which the user already belongs. The *Excluded from* indicates groups to which the user does not belong. To quickly change the user's membership, double-click on the user name to move them from one column to the other.
2. To create user groups or refine the membership, click **User Groups Setup**.
3. On the *User Groups Setup* dialog box, highlight the group to which you are adding the user.
4. Click **Member Setup** to launch the *Group Membership Setup* dialog box.
5. Double-click the user's name in the *Users' List* box to add the user to the *Group Members* list.
6. If you want to add the user to other groups, return to the *User Groups Setup* dialog box and highlight the new group. Click **Member Setup** to launch the *Group Membership Setup* dialog box and double-click on the user's name in the *Users' List* box.

Note: You can create User Groups while you are adding the user to a group. On the **User Groups Setup** dialog box, click **New** and follow the steps for creating a user group.

7. Click **OK** to close the **Group Membership Setup** dialog box.
8. Click **Close** to exit the **User Groups Setup** dialog box.
9. The **Member of Groups** list now displays the groups of which the user is a member.
10. Click **OK** to return to the **Users' Master File**, or select the **Access tab** to continue configuring the user's properties.

The Access Tab

The **Access** tab allows you to configure a user's access rights on Contact Records, access to the information of other users, and miscellaneous general access rights. If an item is selected, the user can perform the action in GoldMine. If it is not selected, the user will not be able to perform that action through the menu options.

To Set Up User Access

1. Select **File>>Configure>>Users' Settings**. Select the user's name and click **Properties**.
2. Select the **Access** tab.

3. In the *Contact Record* area, users can perform the following actions if the option is selected:

- *Add New*: Add a new contact record.
- *Edit Fields*: Edit all fields in the top half of the Contact Record, the user-defined fields in the Fields tab, and the Notes tab.

Note: If users do not have Edit Fields rights, they will not be able to edit fields on any Contact Records, including the records they own.

- *Delete*: Delete Contact Records.
- *Assign Owner*: Assign Contact Record ownership to other users.
- *Edit Tab Folders*: Edit data in the tabs.

Note: If users do not have Edit Tab folders rights, they will not be able to edit tab folders on any contact records, including the records they own.

4. In the *General Access* area, users can perform the following actions if the option is selected:

- *Build Groups*: Build their own groups of Contact records in the *Filters and Groups* dialog box.
- *'Output to' menu*: Use the Output to option in the local menus in GoldMine. Output to options include Printer, Word, Excel, and Clipboard.
- *Issue SQL Queries*: Write and send SQL queries to retrieve data for display.
- *Toolbar settings*: Add and remove icons from the toolbar.
- *Net-Update connections*: Run a version update on the live system using the Internet.

IMPORTANT: This option should be very carefully controlled by the GoldMine administrator.

- *Real-Time Tab*: View the *Real-Time tab* in the **Activity List**. The *Real-Time tab* displays all users' completed activities.
- *SQL Logon name and SQL Password*: If you are using GoldMine with an SQL database and you assigned the user an individual or group logon name and password in SQL, type the information in the text boxes. This allows the user to launch GoldMine without requiring the SQL logon name and password each time.

5. In the *Access to Others* area, if you select the options the user can access the following for all users or for a user group selected in the drop-down list :

- *Calendar*: View other users' activities in the *Calendar and Activity List*, and edit activities scheduled to other users in the *Pending tab*.
- *History*: View other users' completed activities in the *Closed or Filed tab* of the Activity List, edit or delete history records in the *History tab* on the Contact Record

or the *Real-Time tab* in the Activity List, build contact groups based on another users' completed activities, view other users' completed sales activities in the *Completed Activities Analysis* dialog box.

- *Forecast*: Select other users to be included in a *Forecasted Sales Analysis*.
- *Links*: Access and launch other users' linked documents.
- *Groups*: Access other users' groups of contacts.
- *Reports*: Access other users' reports.
- *Template*: Access other users' templates in the *Document Management Center*.
- *Filters*: Access other users' Contact record filters.

6. Click **OK** to return to the *Users' Master File*, or select the *Menu* tab to continue configuring the user's properties.

The Menu Tab

The Menu tab allows you to configure the specific menu options available to users. This is another way of setting security and controlling user access to features. You can also create templates of menu options that you can apply to users as you create their properties.

To Set Up User Menus:

1. Select **File>>Configure>>Users' Settings**. Highlight the user and click *Properties*.
2. Select the *Menu tab* in the *User Properties* dialog box. To use a menu, you can do one of the following:
 - Apply a menu template you created by selecting the template name from the drop-down list.
 - Click **Expand** to display all the menu options.
3. If you expanded the menu display, click on the icon next to each option to change the status. When the icon is red, the option is not available to the user. When the icon is green, the option is available to the user.



Tip: If the *Resize* menu option, located under **Edit>>Record Details>>Resize**, is restricted, the custom screens in the *Fields tab* display as GoldMine menu options.

4. Click **OK** to save the Menu configuration and return to the *Users' Master File*.

The Time Clock Tab

The **Time Clock** tab is a management tool rather than a configuration option. You can view the user's activities in GoldMine.

- *Date*: Date of the logged activity by the selected user.
- *Login*: Time that the user logged into GoldMine.

- *Logout*: Time that the user logged out of GoldMine.
- *Logged*: Total amount of time the user was logged into GoldMine, including any time logged away.
- *In*: Total number of times the user logged into GoldMine.
- *Keys*: Number of keystrokes pressed by the user while working in GoldMine.
- *Clicks*: Number of mouse clicks performed by the user while working in GoldMine.
- *CRC*: Indicates whether or not the data in the user log has been modified outside of GoldMine. This column displays **ok** for every log entry that is free of tampering, that is, external modification.