CONTROLLING ACCESS TO LAKESHORE

Security is a hot topic today.   We hear about hackers getting into someone's computer and stealing data almost every day.   In addition, you may want to control which of your users will be able to access parts of your Lakeshore system such functions that deal with your accounting data.

This newsletter discusses several aspects of security and access to your server and to the Lakeshore system.

Access from Outside your Office

You will want to prevent unauthorized users from getting into your network. Here's some of the ways that can be done.

Router

The first line of defense between the outside world, i.e the Internet, and your server is the **router**. Some routers can be programmed to only allow certain IP addresses into your network.   For example, you can set the router to allow users coming from Lakeshore into your system. There is also a firewall program on the server that can be set up to allow only certain IP addresses in.

That works well if the person you're allowing in has a "static" address, one that stays the same all the time.   Lakeshore's address is like this.

However, some users have a "dynamic" IP address which means it changes periodically. You will normally have a dynamic ID if you are accessing your server from your house where you might have a cable modem.

Depending on the range of numbers that an Internet provider has available, you may be able to restrict access to a range of IP addresses that would include any you might be assigned.

Most Internet providers will have a name associated with their addresses. For example, one popular local provider, Cox Communications, uses "br.br.cox.net". For these types of IP addresses, we can tell the router "allow any addresses coming from br.br.cox.net ".

Either of these methods will eliminate foreign IP addresses which are the ones most commonly used by hackers.

Another solution is to set up a virtual private network (VPN).   Every person who accesses the network will have to have some VPN software to allow them to connect to the network.   After they are connected, they appear as part of the local network.   This type of solution is a bit more sophisticated and would normally require assistance from a local IT company. Be sure to provide Lakeshore with access information so we can continue to log on to your computer to give you support.

Passwords

The second line of defense is a strong **password** policy for your logins.   Having a login of "kaye" and a password of "kaye" is easy to remember. But it is like saying to hackers "Please hack me".   Passwords should be more complicated.   Here's some suggestions:

♦ Use several characters, 5 or more

♦ Use something other that your name, like your pet's name or your street

♦ Use combinations of upper and lower case

♦ Include special characters like $ or @

♦ Include numbers like digits from your birthday, your children's birthday or your street address

You can still come up with a password that is easy for YOU to remember but wouldn't be easily hacked.   Here's some examples:

Superi0r	Zero instead of letter "o"; Upper case "S"
kaye@2347	Special character; mix of letters and numbers
kk!1974	Another mix of special characters, letters and numbers
fred2347	Combination of my dog's name and my street number

Access from Inside your Office

Here's some guidelines for inside the office:

Individual Logins

Each user should have his or her own login and password.   Many of the functions that assign access within Lakeshore are based on user login.

Each login will also have a set up of options assigned to him or her. This include whether or not that login can see cost (useful if you have a workstation in a public area) or whether or not that login's orders should be reviewed (useful for new employees or if you let salesmen enter their own orders but want a second review).   These options are updated by going to

        Utility Functions
                Set up user options

Individual menus

The easiest way to keep a particular user out of functions he or she should not be using is to give each user an individual menu.   It also simplifies the menu structure if the user only has access to the specific functions needed.

To set up a user's menu, go to

        Utility Functions
                Set up user menu

You will be prompted for the user's login.   Once you set up one login, you can copy that login's menu choices to another user if you wish.   This makes the process go much faster.

On the second screen, you will see all the functions available in Lakeshore.   Initially, if you start with the default menu, everything will be checked.   You need to uncheck the functions you do NOT want this user to have.   If the user will only have a few functions, there is an "uncheck all" link at the top.   Sometimes it is easier to take everything off, then just add what you want the user to have.

☑	☐	Generate Order from Estimate
☑		Quotations *Uncheck this module* *Check this module*
☑	☐	Update Quote
☑	☐	Quick Textile Estimate
☑	☐	Enter Quote Notes
☑	☐	Enter Quote Pop Up Notes
☑	☐	Display/Print Quotes on File
☑	☐	Display Availability/Price
☑	☐	Send Quote to Customer
☑	☐	Send Quote (RFQ) to vendor
☑	☐	Print Quote Notes
☑	☐	Complete Quote/Generate Order
☑		Order Processing *Uncheck this module* *Check this module*
☑		Add/Update Orders
☑	☐	Update Order File
☑	☐	Update Master Order
☑	☑	Enter Wearables Order
☑	☐	Salesman order form
☐	☐	Enter Short Order
☐	☐	Enter Quick Order
☐	☐	Generate Orders for Inventory Stock
☐	☐	Assign order number

Uncheck to take off menu.

Check to include.

Check the box in the 2nd column to make the function one of this user's Favorites

Be sure to leave checked the header lines for all the detail functions you include.   For example, in the example above, you would want to leave the "Order Processing" header and the "Add/Update Orders" heading.

If you want to take out all the functions within a Lakeshore module like Financial Statements, you can click on the "Uncheck this module" to take ALL the functions in that module off the user's menu.

This function is also where you can assign that particular user's "Favorites".

Module-Level Passwords

You can assign a password to individual modules such as Accounts Payable or Inventory.

You can use this approach if you would prefer not to set up individual menus for each user.

You might also want to do this feature if you want to give everyone access to Create-A-Report but only want to let them manipulate certain types of data.

Or, you may just want an extra level of security.

Once you enter the password for a specific module during a session, you won't have to reenter it until you log off and log back in for a new session.

To set up these types of passwords, go to

      Reference Information
           Miscellaneous codes, group 2
                Passwords (general)

Function-Level Passwords

You can assign a password to specific functions such as one that deletes data.   For example, you may not want to assign a password to Order Processing but you might want to have one for the "Update order status" function.

Not only does this type of password control access but it can also be a protection against accidentally picking the wrong function since it makes you take an extra step to access it.

To set up these types of passwords, go to

      Reference Information
            Miscellaneous codes, group 2
                  Passwords (specific function)

We **strongly** suggest you use this feature to assign a password to ANY function that accesses credit cards.   You will be prompted for a "program name" to update this information. Here are the program names you will need for the credit-card related functions:

wborccard	Update credit card information on the order
wborccprt	Print credit card information from day's orders
wbinvccard	Update credit card information on the invoice
wbcstcc	Enter credit card information for a customer

Unlike the module-level passwords, you have to enter this password each time you use the function.

Restricting salesman access to any data other than his/her own

If you want to restrict a salesman so that he or she only sees his or her own data, you can do that by entering that salesman's login in the salesman set up.

The salesman will only be able to see customers, orders, etc. assigned specifically to him or her.

In addition, when the salesman logs on, the Salesman Overview for his or her master salesman number will be displayed automatically.