

# Chapter A6: Security

**This chapter is aimed at BankLink Administrators**

BankLink Practice implements security at four levels:

## **User security**

You can control access to BankLink Practice by setting up users with passwords. You can also control access to the **System** menu by selecting the user type (System, Normal, or Restricted) when setting up the user profile. Users with **System** menu access must have passwords.

## **Client files and bank accounts**

You can attach a password to a client file that all users must enter before they can open, delete or edit the file. Similarly, you can attach a password to a bank account to prevent it from being attached to another client file. Even a user with Administrator rights (**System** menu access) needs to know the password on a client file or bank account to open it.

## **Security settings in the INI file**

In addition, you can change some settings in the INI file that restrict access to certain functions in BankLink Practice.

## **BankLink Secure**

In order to download data using BankLink Secure you must be a BankLink Administrator and set a separate download password.

## User security

When users log in to BankLink Practice, they normally enter a User Name and an (optional) password. If you are concerned about the security of your data, then you can use passwords to restrict access to the BankLink Practice database.

By default, if a user's windows login matches a BankLink Practice User Name, provided they don't have a password, they are logged in to BankLink Practice automatically. You can force a login to appear by changing the BankLink Practice INI file (see INI file settings).

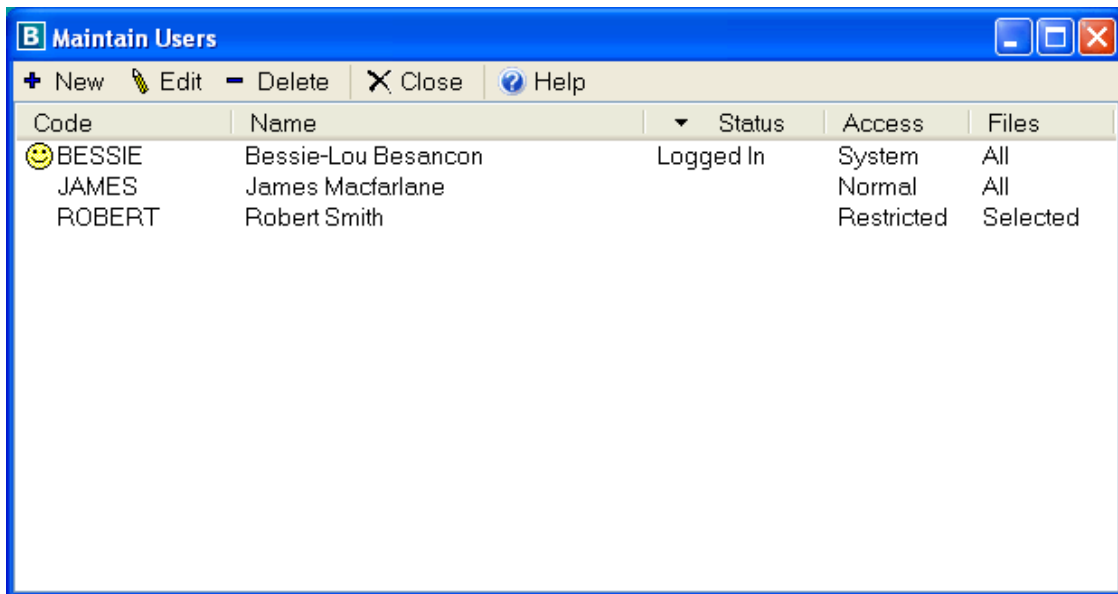
## Administrator rights

Any user with Administrator rights (System Menu access) can delete clients and bank accounts or change other user's passwords, so restricting System menu access is a sensible precaution against accidental or deliberate loss of data. A minimum number of users should have Administrator rights, probably yourself and one other. BankLink Practice forces users with Administrator rights to have a password attached to their User Name.

### To see what access rights users have:

- Click **System, Users**

BankLink Practice displays the **Maintain Users** window



These are the user types:

Access	Password required	Access Levels	Master Memorisations	File Access
System	Yes	Full access to all menu items	Yes or No as per the check box	All files
Normal	No, but may be used for added security	May access client files but cannot access the System menu, and check in/out BankLink Practice files	Yes or No as per the check box	All files or selected files only
Restricted	No, but may be used for added security	May access client files but prevented from performing tasks which rely on access to the network's file system, for example: Save As, Print To File etc.	No	Selected files only

## ***Limiting a User to Selected Client Files***

You can set up Normal and Restricted users with file access limited to selected client files, for example: your staff may have their file access limited to only the clients for which they are responsible.

### ***Restricted access for your clients***

If remote access to your network is available, you may allow your clients to dial in and work in BankLink Practice.

If you decide to do this, set up your clients as Restricted users with access limited to their file(s). It is important to set up your clients as Restricted users to prevent them from accessing your network's file system from within BankLink Practice.

When you create a Restricted user you can choose to show your practice logo when they are in their file, as you can for Books or Notes users. It is set up differently however. You can also suppress report headers and footers so that when they produce reports, they don't carry your practice look and feel.

See **Adding and maintaining users** in Chapter A1: Installing BankLink Practice.

## ***Client files and bank accounts***

### ***Protecting client files***

This is the highest security level in BankLink Practice. Even a user with System Menu access cannot open a password protected client file or attach a password protected bank account without knowing the password.

#### **To protect a client file:**

- 1 Open the client file to which you want to attach a password
- 2 **Click Other Functions, Client Details**
- 3 Enter a password up to 8 alphanumeric characters (passwords are case-sensitive) in the **Password** and **Confirm Password** fields. All users have to enter this password before anyone is able to open the file - passwords are up to 8 alphanumeric characters and are case-sensitive. We recommend attaching a password to any file you want to send using e-mail
- 4 Click **OK**

### ***Protecting bank accounts***

In BankLink Practice, a bank account can be attached to several different client files. To prevent a user from attaching a bank account to a client file you must attach a password to that bank account.

Once you protect a bank account by setting a password, you have to enter the password to edit it, or to attach the bank account to a client file.

#### **To protect a bank account:**

- 1 Click **System, Bank Accounts**
- 2 Click on the bank account you want to attach a password to and click **Edit (Enter)**
- 3 Enter a password up to 8 alphanumeric characters (passwords are case-sensitive) in the **Password** and **Confirm Password** fields. All users have to enter this password before anyone is able to open the account
- 4 Click **OK**

## INI file settings

### BK5PRAC.INI

You can control access to some BankLink Practice functions for all users by setting parameters in the BK5PRAC.INI file.



All users should be logged out of BankLink Practice prior to saving changes to the .INI file.

#### To edit the BK5PRAC.INI file:

- 1 In Windows Explorer go to your BankLink Practice directory (click **Help, About** if you are not sure what this is)
- 2 Double click on the **bk5prac.ini** file
- 3 Edit any of the following options
- 4 Click **File, Exit** and **Save** any changes

#### Access to Send To, Check In and Check Out functions

By default, only users with Administrator rights have access to the Send To, Check In and Check Out functions. If you want Normal users to access the Send To, Check In and Check Out functions without giving them Administrator rights you can amend the OSAdminOnly setting to 0. Access to Restricted users is still prevented.

#### To enable Send To, Check In and Check Out functions for Normal users:

- 1 Using Windows Explorer double-click on the **bk5prac.ini** file in the BankLink Practice directory
- 2 Change the **OSAdminOnly** setting from **1** to **0** to grant Normal users access to these functions
- 3 Click **File, Exit** and **Save** any changes

#### Printing grand totals on coding reports

By default, BankLink Practice does not print grand totals at the end of a Coding Report when a client has more than one bank account. If you want the grand total of all transactions to be printed on each coding report, you set the Grand Total setting to 1.

#### To print grand totals on coding reports:

- 1 Using Windows Explorer double-click on the **bk5prac.ini** file in the BankLink Practice directory
- 2 In the **[Printing]** section, change **GrandTotal=0** entry to **GrandTotal=1**
- 3 Click **File, Exit** and **Save** any changes

## **BankLink Secure**

We implement security with BankLink Secure by using a password. When you sign up for BankLink Secure, you supply a password that you want to use to access your BankLink data electronically. This password is encrypted.

When you log in to BankLink Secure the first time, you are asked for a password - this is a separate password to your BankLink Practice login password. The login program encrypts your password and compares it with your encrypted password on our computer. If these match, then the BankLink data is downloaded to your BankLink Practice system.

BankLink also uses https web-site security and 128-bit encryption to keep the data secure - you require a PIN which we provide to decrypt the data.

For BankLink Books with BankLink Secure clients, you need to complete the BankLink Books with BankLink Secure Order Form (copied onto your practice letterhead). Once we have received and processed the form, BankLink Support contacts your practice to inform you that your client has been registered and advise you of your client's PIN and their BankLink Secure code.