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# Security for Govern OpenForms

## Overview

This section runs through the procedures for setting up security on the administrative forms, the user forms, and the batch processes.

These are described under the following headings:

- Prerequisites on page 98
- Allowing Cash Collection on an A/R Subsystem on page 98
- Defining Security for Administrative Forms on page 101
- Defining Security for Batch Processes on page 102
- Defining Security for the A/R User Forms on page 104
- Defining Security on the A/R Entities on page 106

## Prerequisites

In order to set up security for A/R in Govern OpenForms:

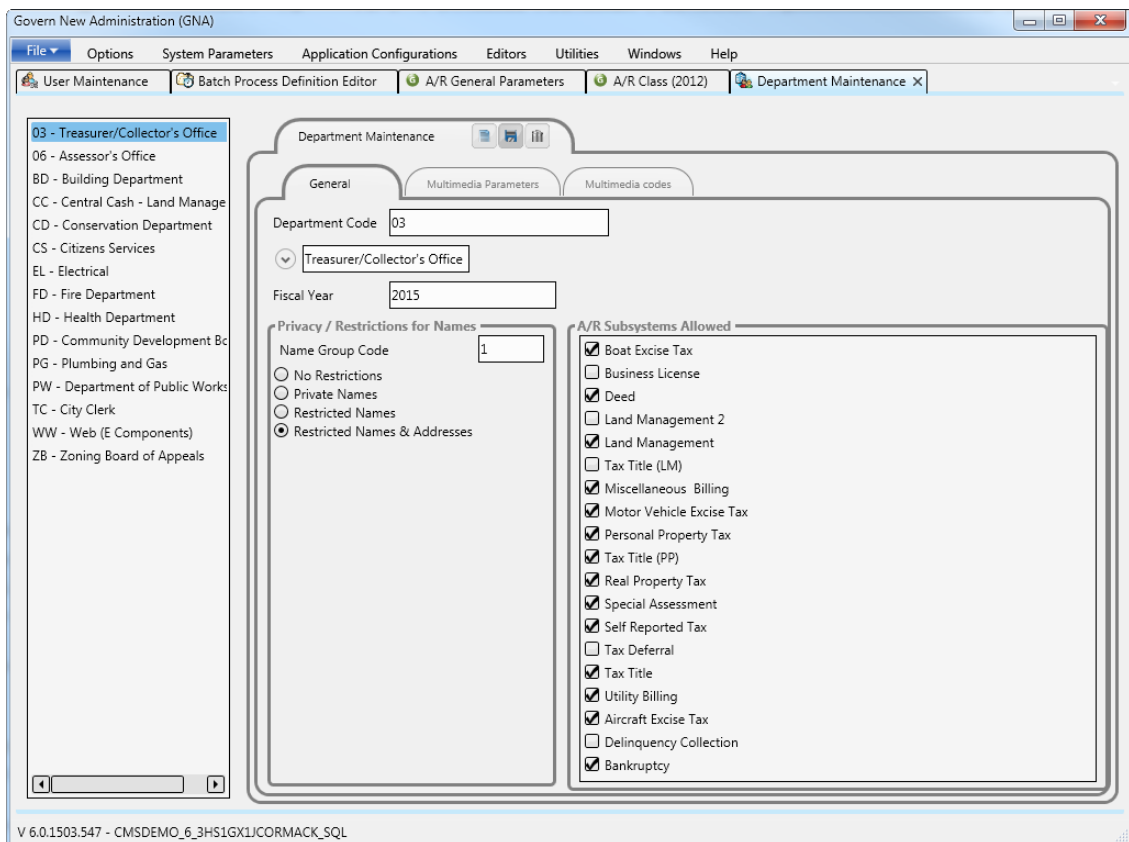
- Access to the following applications:
  - Govern Security Manager (GSM)
  - Govern OpenForms Designer (OFD)
  - Govern New Administration (GNA)
  - Govern v6
- The required user forms must be set up in the OFD and added to Profile through GNA.
- Access to GNA Department Maintenance for the A/R Subsystems Allowed.

## Allowing Cash Collection on an A/R Subsystem

The *Department Maintenance* form includes a setting called **A/R Subsystems Allowed**. When this option is selected, cash collection is permitted for the subsystem. Users and roles with access to a Profile that is linked to the subsystem can perform cash collection on that subsystem.

To allow cash collection on a subsystem:

1. Launch GNA.
2. Select **System Parameters > Department Maintenance**.
3. Select the department that you want to modify or create a new one.
4. Select the **General** tab.



Govern New Administration (GNA)

File Options System Parameters Application Configurations Editors Utilities Windows Help

User Maintenance Batch Process Definition Editor A/R General Parameters A/R Class (2012) Department Maintenance X

03 - Treasurer/Collector's Office  
 06 - Assessor's Office  
 BD - Building Department  
 CC - Central Cash - Land Manage  
 CD - Conservation Department  
 CS - Citizens Services  
 EL - Electrical  
 FD - Fire Department  
 HD - Health Department  
 PD - Community Development Bc  
 PG - Plumbing and Gas  
 PW - Department of Public Works  
 TC - City Clerk  
 WW - Web (E Components)  
 ZB - Zoning Board of Appeals

Department Maintenance

General Multimedia Parameters Multimedia codes

Department Code 03

Treasurer/Collector's Office

Fiscal Year 2015

Privacy / Restrictions for Names

Name Group Code 1

☐ No Restrictions  
☐ Private Names  
☐ Restricted Names  
☒ Restricted Names & Addresses

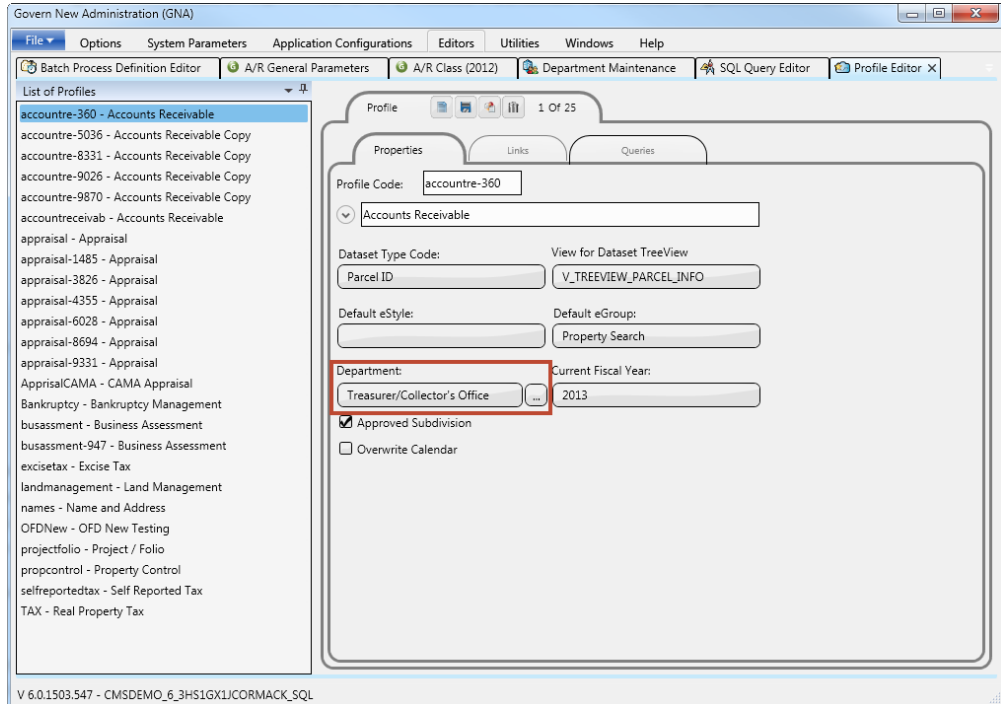
A/R Subsystems Allowed

☒ Boat Excise Tax  
☐ Business License  
☒ Deed  
☐ Land Management 2  
☒ Land Management  
☐ Tax Title (LM)  
☒ Miscellaneous Billing  
☒ Motor Vehicle Excise Tax  
☒ Personal Property Tax  
☒ Tax Title (PP)  
☒ Real Property Tax  
☒ Special Assessment  
☒ Self Reported Tax  
☐ Tax Deferral  
☒ Tax Title  
☒ Utility Billing  
☒ Aircraft Excise Tax  
☐ Delinquency Collection  
☒ Bankruptcy

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5. Select the subsystems on which you want to grant cash collection rights.
6. Click **Save**.
7. Open the Profile Editor.
8. Select the Profile that you want to modify or create a new one.

## Accounts Receivable



Govern New Administration (GNA)

File Options System Parameters Application Configurations Editors Utilities Windows Help

Batch Process Definition Editor A/R General Parameters A/R Class (2012) Department Maintenance SQL Query Editor Profile Editor X

List of Profiles

- accounttre-360 - Accounts Receivable
- accounttre-5036 - Accounts Receivable Copy
- accounttre-8331 - Accounts Receivable Copy
- accounttre-9026 - Accounts Receivable Copy
- accounttre-9870 - Accounts Receivable Copy
- accountreceivab - Accounts Receivable
- appraisal - Appraisal
- appraisal-1485 - Appraisal
- appraisal-3826 - Appraisal
- appraisal-4355 - Appraisal
- appraisal-6028 - Appraisal
- appraisal-8694 - Appraisal
- appraisal-9331 - Appraisal
- AppraisalCAMA - CAMA Appraisal
- Bankruptcy - Bankruptcy Management
- busassment - Business Assessment
- busassment-947 - Business Assessment
- excisetax - Excise Tax
- landmanagement - Land Management
- names - Name and Address
- OFDNew - OFD New Testing
- projectfolio - Project / Folio
- propcontrol - Property Control
- selfreportedtax - Self Reported Tax
- TAX - Real Property Tax

Profile 1 Of 25

Properties Links Queries

Profile Code: accounttre-360

Accounts Receivable

Dataset Type Code: Parcel ID View for Dataset TreeView V\_TREEVIEW\_PARCEL\_INFO

Default eStyle: Default eGroup: Property Search

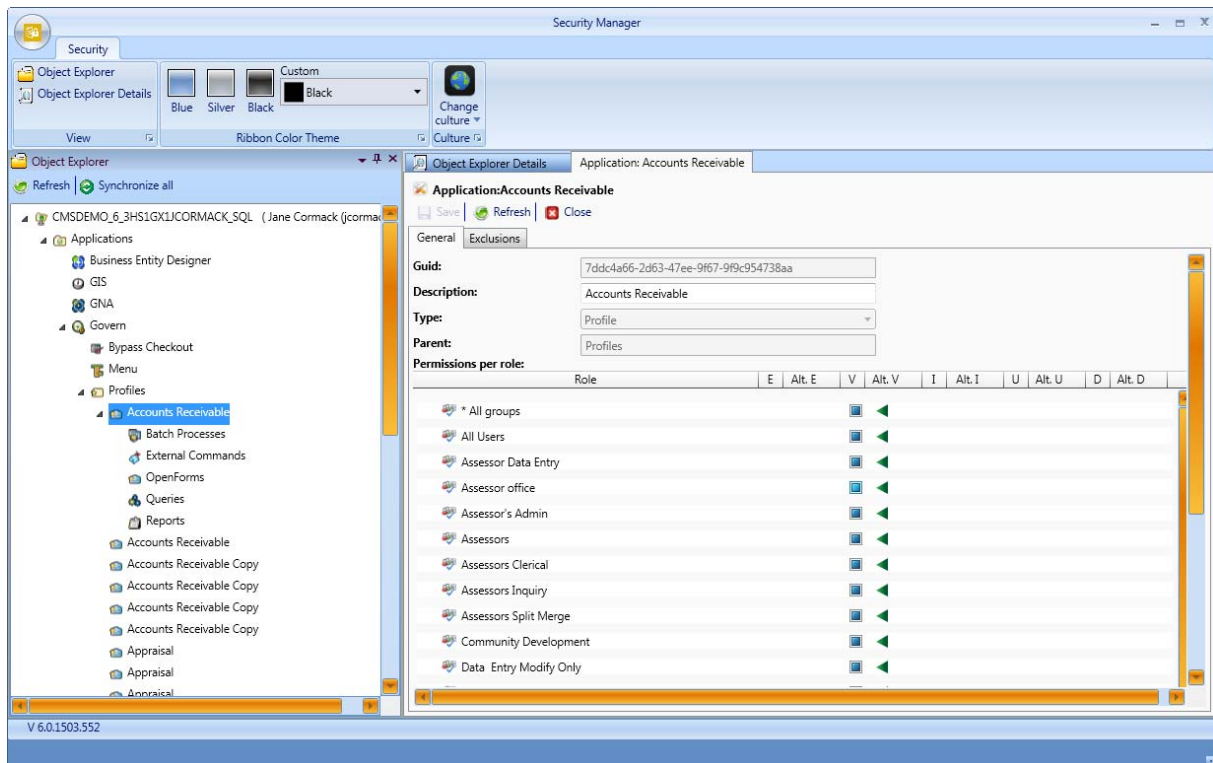
Department: Treasurer/Collector's Office Current Fiscal Year: 2013

☒ Approved Subdivision

☐ Overwrite Calendar

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9. Select the department you updated from the **Department** drop-down list.
10. Click **Save**.
11. Launch the Govern Security Manger (GSM).



12. Expand **Applications > Govern > Profiles**.

13. Right-click on the Profile that you have updated.

14. Provide access to the Roles and users as required.

15. Click **Save**.

## Defining Security for Administrative Forms

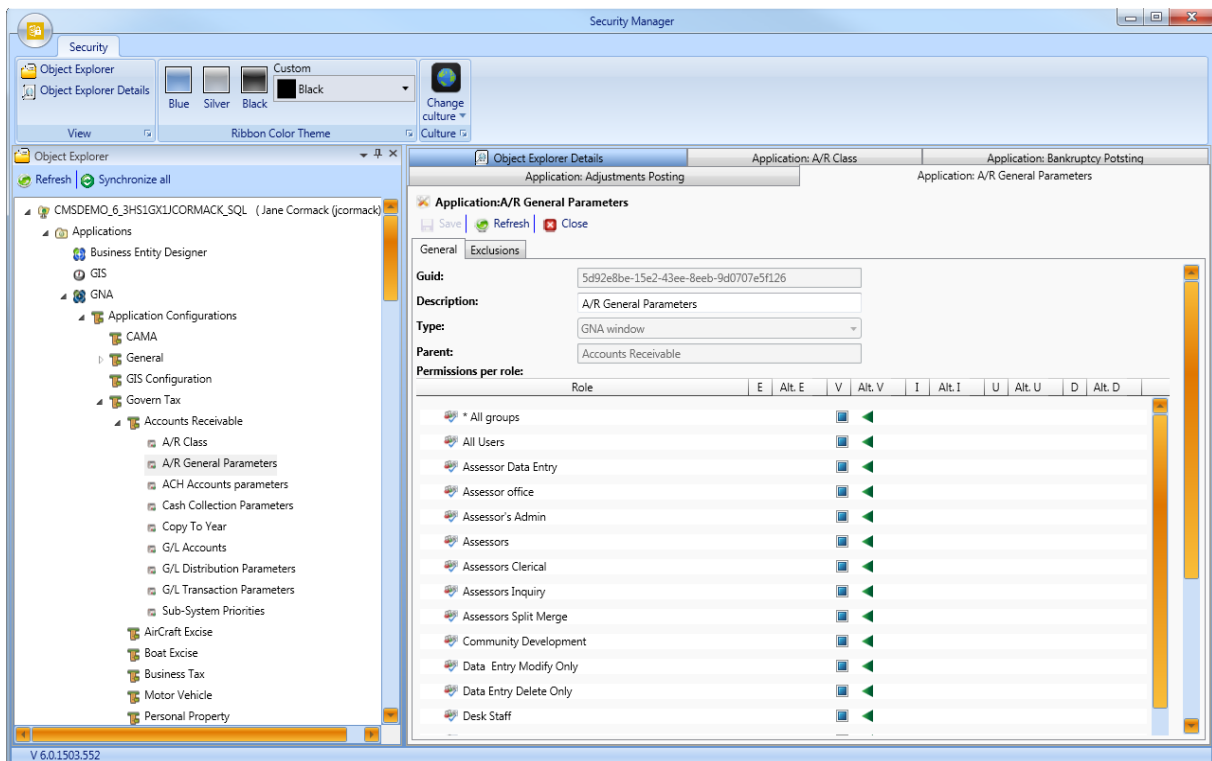
Security for the A/R administrative forms can be defined at multiple levels:

- **Application:** Set the security for all of GNA.
- **Application Configurations:** Set security for all application configuration forms.
- **Govern Tax:** The A/R configuration forms are grouped under Govern Tax along with Real Property, Personal Property, and the Excise Tax forms. You can set security on this group.
- **Accounts Receivable:** Set security on all the A/R forms as a group or on each of the following forms separately:
  - A/R Class

## Accounts Receivable

- A/R General Parameters
- ACH Accounts Parameters
- Cash Collection Parameters
- Copy to Year
- G/L Accounts
- G/L Distribution Parameters
- G/L Transaction Parameters
- Subsystem Priority Parameters

**Note:** Security is set on the form. It cannot be set on the individual parameters on the form.

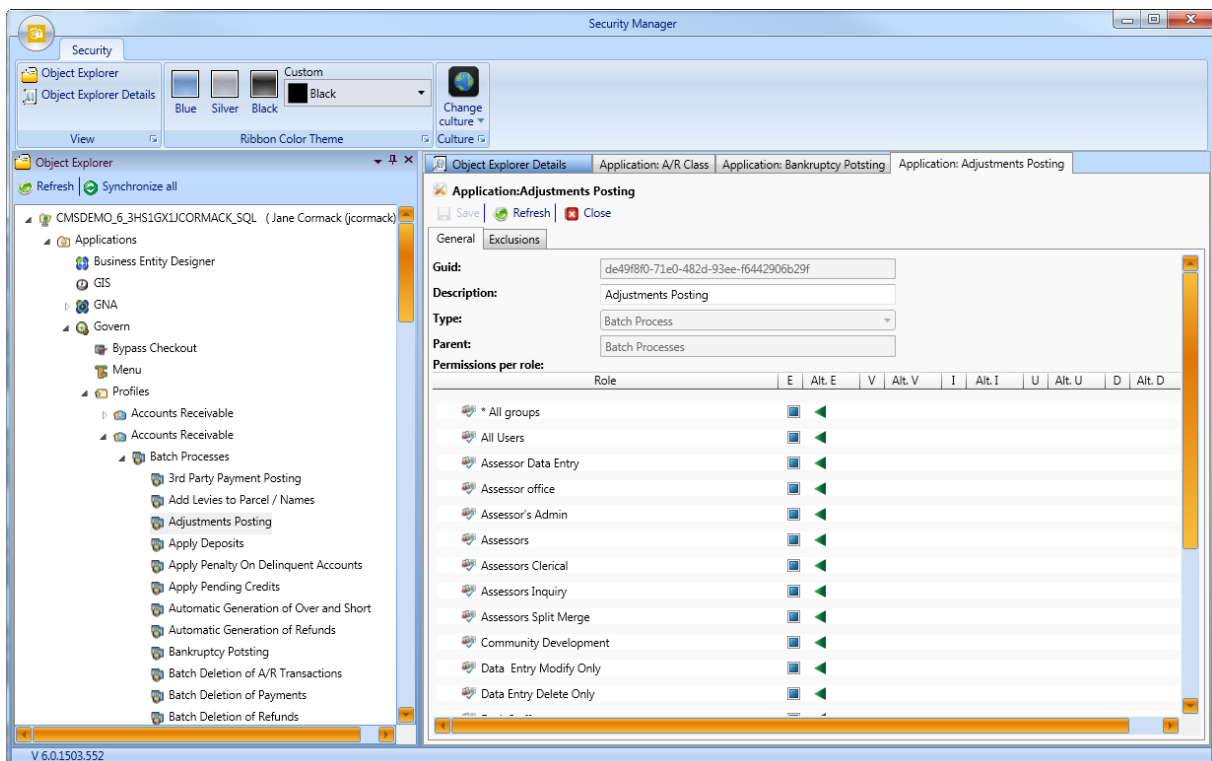


## Defining Security for Batch Processes

In Govern OpenForms, version 6 and above, batch processes are defined by Profile. Security on batch processes can be defined at the following levels, in the Govern Security Manager (GSM):

- **Applications:** You can set the security on all applications at once.

- **Single Application:** You can set the security for GNA, Govern, or any one of the applications in the Govern OpenForms product suite, separately.
- **All Profiles:** You can assign user and role permissions to all Profiles at once.
- **A/R Profile:** You can also assign user and role permissions to each Profile separately.
- **Govern OpenForms:** Under the Profile menu, you can set security on all Govern user data forms at the same time.
- **Any Govern user form:** Under the Profile menu, you can set security on an individual Govern form. This gives the initial security to access the form. Security to view and access the entities and elements on the form is set in the OpenForms Designer (OFD).
- **Batch Processes:** you can set security on all batch processes at the same time.
- **Any Batch Process:** You can set security on any single batch process.



*Refer to the Govern Security Manager (GSM) guide for further details on security permissions and restrictions.*

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## Defining Security for the A/R User Forms

The A/R module includes the following data entry forms:

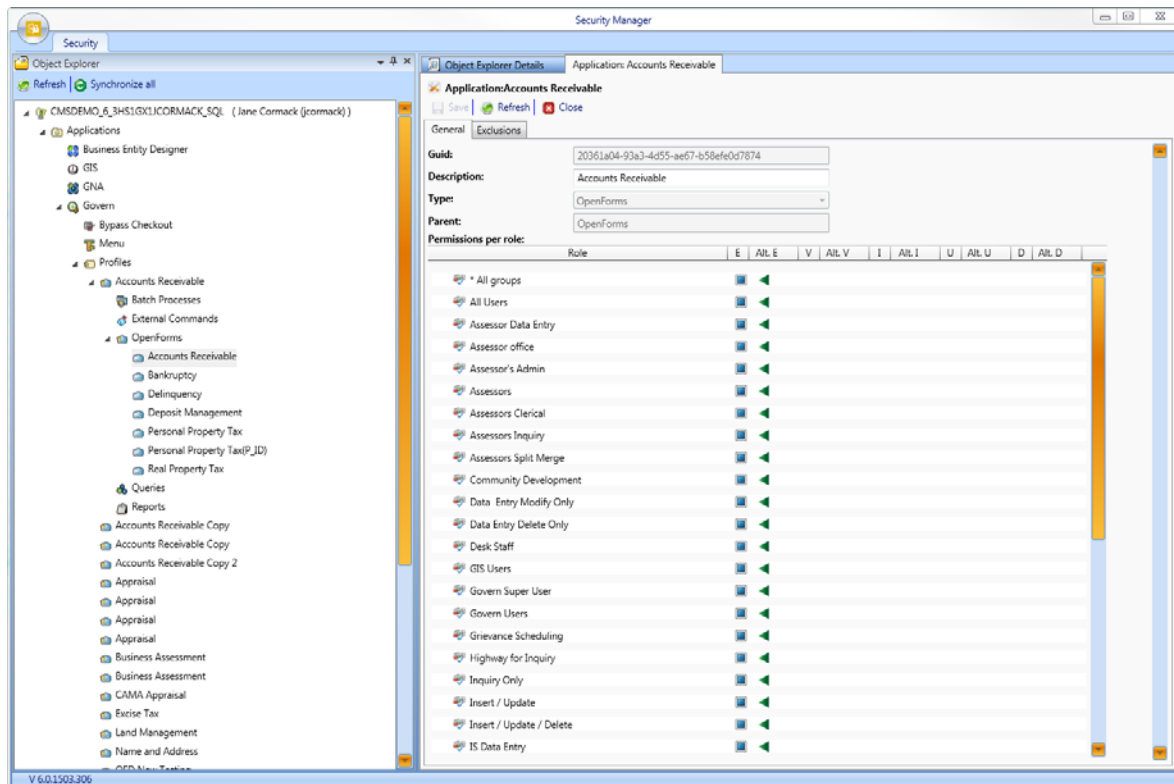
- A/R Inquiry
- Deposit Management

The initial security to execute the user forms is defined in the Govern Security Manager (GSM). The security on each entity (or divider) within the form and all the text fields and other items on each divider is defined in the Govern OpenForms Designer (OFD).

### Setting Permissions to Execute a Form

To set the initial security to execute a form:

1. Launch the Govern Security Manager (GSM).
2. Expand the datasource.
3. Select **Applications > Govern > Profiles**.
4. Expand a Profile that contains the A/R user forms.



5. Right-click on one of the user forms and select **Edit**.
6. Set the security for each role.
7. Right-click on the item again and select **Exclusions**.
8. Select the **Add User** to drop-down list to select the users under the role who have different security permissions.
9. Define those permissions.
10. Click the **Save** icon.
11. Repeat the procedure for each Profile that contains the form

*Refer to the Govern Security Manager (GSM) guide for further details on security permissions and restrictions.*

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## Defining Security on the A/R Entities

In Govern OpenForms, security on the entities and attributes is set up in the Govern Open Forms Designer (OFD). The security for Accounts Receivable and other forms that are created from Custom Controls is handled differently from the standard forms.

The following steps are required to set up the security on the A/R entities:

- Verify the prerequisites.
- Hide the root entity.
- Define security on the A/R Inquiry entity.
- Define security on the A/R Information entity.

### Verifying the Prerequisites


Before completing the procedures, ensure that the prerequisites are met:

- Security to execute the form is set in the Govern Security Manager (GSM), as described under *Setting Permissions to Execute a Form* on page 104.

### Hiding the Root Entity

A root entity is required for each user form. If there is only one entity in the form, that entity is the root. If there are multiple entities in the form, all other entities are linked to the root. Typically, the root entity opens when a user opens the form. Because A/R Inquiry is created from a custom control, it cannot be the root entity. It must be associated with another entity that is defined as the root. For this reason, A/R Root is added to the form. However, it has no other functionality, and in order to make the form user-friendly, it is necessary to hide it from view.

To hide the root entity:

1. Launch the OpenForms Designer (OFD).
2. Open the Accounts Receivable form (AR008).
3. Select the A/R Root entity.
4. Select the **Security** icon .
5. Select **Normal** under **Type**.

By default, the Alternative Type is the same as the Normal Type. It is recommended to define the Normal security and then define the exceptions for the Alternative security.




6. Select the required Profile under **Profile**.
7. Select **By Role** and select the required Role.
8. Select the **Show / Hide** icon to hide the visibility.
9. Click **Save**.
10. Repeat the procedure for the Alternative type, for all Profiles that contain the form, and for all roles and users accessing the form.

## Defining Security on A/R Inquiry

A/R Inquiry is created from a custom control. For this reason, the fields are not visible when the entity is selected in the OFD. They cannot be modified and expressions cannot be added. Also, the security on the fields is set differently from other forms.

## Setting View Permissions on the A/R Inquiry Entity

To set permissions for viewing the A/R Inquiry entity:



1. Launch the OFD.
2. Open the Accounts Receivable form (AR008).
3. Select the **Security** icon .
4. Select the A/R Inquiry entity.
5. Select the required type, profile, and role as described under *Hiding the Root Entity* on page 106.
6. Select the **Show / Hide** icon  on the tab to hide the visibility .
7. Click **Save**.
8. Repeat the procedure as required for all types, profiles, roles, and users.

## Setting Permissions on the A/R Inquiry Transaction Forms

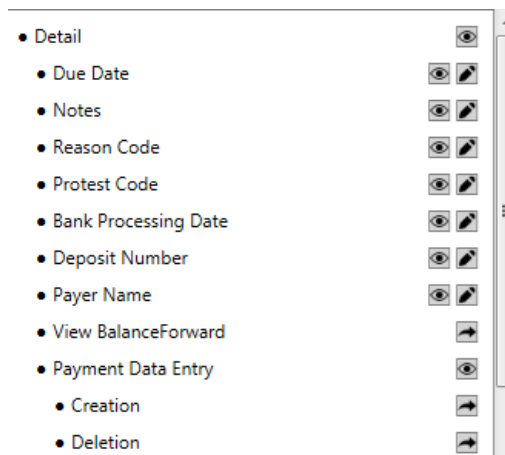
To set permissions on the transaction forms:

1. Launch the OFD.
2. Open the Accounts Receivable form (AR008).

## Accounts Receivable




3. Select the **Security** icon .
4. Select the A/R Inquiry entity.
5. Select the type, profile, and role as described under *Hiding the Root Entity* on page 106.
6. Select the drop-down arrow on the tab to hide the visibility .

This expands the list of transaction functions on which you can set the security.






7. Click **Save**, after defining permissions.
8. Repeat the procedure as required for all types, profiles, roles, and users.

The items that are displayed on the transaction forms, such as the user data entry fields, the group boxes that contain them, and the actions buttons, are listed. Icons are displayed beside each of these. There are three states for the icons:


Icon	States
	Granted
	Not Granted
	Not Explicitly Set (Is Granted)



The following icons are displayed.

Icon	Setting and Result
 View	<p><b>Granted:</b> The item, such as a group box or text field, is visible.</p> <p><b>Not Granted:</b> The item is not visible.</p> <p><b>Not explicitly set:</b> The default applies. For the Normal type, the item is visible. For alternative, it is the same as Normal. For a user, it is the same as the Role.</p>
 Update (Edit)	<p><b>Granted:</b> The text field can be edited or updated.</p> <p><b>Not Granted:</b> The item can be edited or updated.</p> <p><b>Not explicitly set:</b> The default applies. For the Normal type, the permission is granted. For alternative, it is the same as Normal. For a user, it is the same as the Role.</p>
 Action	<p><b>Granted:</b> The icon is enabled and the user can perform the action.</p> <p><b>Not Granted:</b> The icon is visible but disabled in Govern. The user cannot perform the action.</p> <p><b>Not explicitly set:</b> The default applies. For the Normal type, the permission is granted. For alternative, it is the same as Normal. For a user, it is the same as the Role.</p>

The fields and action buttons for the A/R Detail are listed first. These are followed by the fields and action buttons for all A/R transaction forms, such as adjustment, abatement, and payment transfer are listed.

Most transaction forms are divided into General Information, Detail, and Comment sections. These sections can be invisible. The text fields and combo boxes can be made invisible or read-only. The action buttons can be disabled.

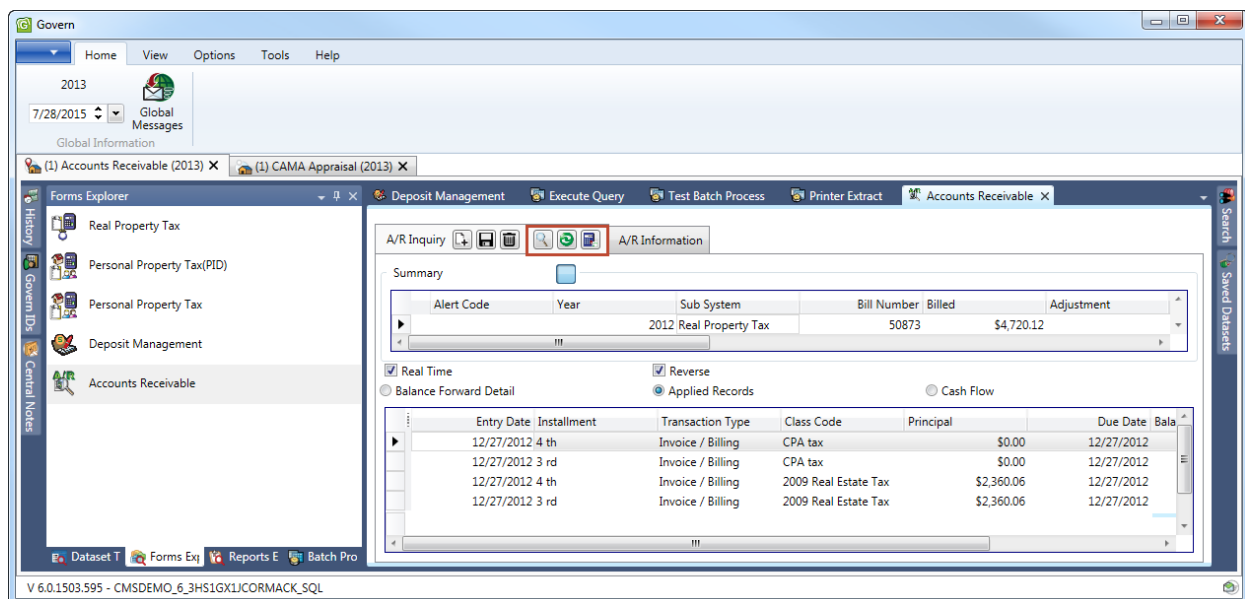
You can grant or restrict the following permissions on the action buttons. In the default state  all users and roles can perform the actions:

- Update: Set the icon to Not Granted  to disable the Save and Cancel button and all fields.
- Deletion: Set the icon to Not Granted  to disable the Delete button an abatement record.

# Accounts Receivable

## A/R Inquiry Action Buttons

The Search, Reapply, and Refresh action buttons appear on the tab at the top of the A/R Inquiry form:



**Search:** Users with access to this action button can launch the A/R Inquiry search.

**Reapply:** Users with access to this action button can reapply or reset all A/R data. This must be used with caution. It is recommended that only administrators have access to this button.

**Refresh:** Users with access to this action button can refresh the A/R Inquiry form. This button adds the latest A/R Inquiry transactions and data to the form.

## Detail

The following parameters are used for the Detail grid on the A/R Inquiry form.

## A/R Details Parameters

- Detail
  - Due Date
  - Notes
  - Reason Code
  - Protest Code
  - Bank Processing Date
  - Deposit Number
  - Payer Name
  - View BalanceForward
  - Payment Data Entry
    - Creation
    - Deletion

## A/R Detail Grid

<input checked="" type="checkbox"/> Real Time		<input checked="" type="checkbox"/> Reverse							
<input checked="" type="radio"/> Balance Forward Detail		<input type="radio"/> Applied Records		<input type="radio"/> Cash Flow					
	Entry Date	Installment	Transaction Type	Class Code	Amount	Balance Due	Amount Billed	Posted	Posting Stamp
	12/27/2012	4 th	Invoice / Billing	CPA tax	\$0.00	\$0.00	Yes	12/27/2012 9:43:30...	
	12/27/2012	3 rd	Invoice / Billing	CPA tax	\$0.00	\$0.00	Yes	12/27/2012 9:43:30...	
	12/27/2012	4 th	Invoice / Billing	2009 Real Estate Tax	\$0.00	\$0.00	Yes	12/27/2012 9:43:30...	
	12/27/2012	3 rd	Invoice / Billing	2009 Real Estate Tax	\$0.00	\$0.00	Yes	12/27/2012 9:43:30...	

# Accounts Receivable

## Abatement

- Abatement
- Invoice No
- Class Code
- From Installment
- To Installment
- General Information Section
- Detail Section
- Transaction Date
- Effective Date
- Amount
- Comment Section
- Justification Code
- Deposit Number
- Notes
- Creation
- Update
- Deletion



**Accounts Receivable - Abatement / exemption**

Detail

Transaction Type Abatement / Exemption

General Information

Subsystem	Year	Bill Number	Invoice No.	Cycle Code
Real Property Tax	2013	50321	2015-06445645	

Detail

Date	Effective On	Amount
6/18/2015	6/18/2015	987.00

Class Code

Class Code	From Install	To
Other Districts	01	04

Comment

Justification Code

Bankruptcy

Deposit Number

151 (151-RE)

Notes

Add notes or comments in this space

Cancel Save Exit

## Adjustment

- Adjustment
- Due Date
- Discount Date
- Invoice No
- Class Code
- From Installment
- To Installment
- General Information Section
- Detail Section
- Transaction Date
- Effective Date
- Amount
- Comment Section
- Justification Code
- Deposit Number
- Notes
- Creation
- Update
- Deletion



**Accounts Receivable - Adjustment**

Detail

Transaction Type Adjustment

General Information

Subsystem	Year	Bill Number	Invoice No.	Cycle Code
Real Property Tax	2010	50312	564646	

Detail

Date	Effective On	Amount
6/25/2015		0

Class Code

Class Code	From Install	To	Due Date	Discount Date
Real Estate Tax	01	04	6/25/2015	6/1/2015

Comment

Justification Code

Open Cash Credit

Deposit Number

151 (151-RE)

Notes

Cancel Save Exit

## Charge

- Charge
- Invoice No
- Class Code
- From Installment
- To Installment
- General Information Section
- Detail Section
- Transaction Date
- Effective Date
- Amount
- Comment Section
- Justification Code
- Deposit Number
- Notes
- Creation
- Update
- Deletion



Accounts Receivable - Transaction

Detail

Transaction Type: Charge

General Information

Subsystem	Year	Bill Number	Invoice No.	Cycle Code
Real Property Tax	2010	50312	4744558	

Detail

Date: 6/25/2015 Effective On: Amount: 0

Class Code: Real Estate Tax From Instal: 01 To: 04

Comment

Justification Code: Credit Memo Deposit Number: 151 (151-RE)

Notes

Cancel Save Exit

## Demand

- Demand
- Invoice No
- Class Code
- From Installment
- To Installment
- General Information Section
- Detail Section
- Transaction Date
- Effective Date
- Amount
- Comment Section
- Justification Code
- Deposit Number
- Notes
- Creation
- Update
- Deletion



Accounts Receivable - Transaction

Detail

Transaction Type: Charge

General Information

Subsystem	Year	Bill Number	Invoice No.	Cycle Code
Real Property Tax	2010	50312	4744558	

Detail

Date: 6/25/2015 Effective On: Amount: 0

Class Code: Real Estate Tax From Instal: 01 To: 04

Comment

Justification Code: Credit Memo Deposit Number: 151 (151-RE)

Notes

Cancel Save Exit

# Accounts Receivable

## Fee

- Fee
- Invoice No
- Class Code
- From Installment
- To Installment
- General Information Section
- Detail Section
- Transaction Date
- Effective Date
- Amount
- Comment Section
- Justification Code
- Deposit Number
- Notes
- Creation
- Update
- Deletion



**Accounts Receivable - Interest**

Detail

Transaction Type Interest

General Information

Subsystem	Year	Bill Number	Invoice No.	Cycle Code
Real Property Tax	2010	50312	78778644	

Detail

Date 6/26/2015 Effective On 6/26/2015 Amount 500

Class Code Real Estate Tax From Instal 01 To 04

Comment

Justification Code DelinquencyColl Deposit Number 151 (151-RE)

Notes

Add notes and comments

Cancel Save Exit

## Interest

- Interest
- Invoice No
- Class Code
- From Installment
- To Installment
- General Information Section
- Detail Section
- Transaction Date
- Effective Date
- Amount
- Comment Section
- Justification Code
- Deposit Number
- Notes
- Creation
- Update
- Deletion



**Accounts Receivable - Interest**

Detail

Transaction Type Interest

General Information

Subsystem	Year	Bill Number	Invoice No.	Cycle Code
Real Property Tax	2010	50312	78778644	

Detail

Date 6/26/2015 Effective On 6/26/2015 Amount 500

Class Code Real Estate Tax From Instal 01 To 04

Comment

Justification Code DelinquencyColl Deposit Number 151 (151-RE)

Notes

Add notes and comments.

Cancel Save Exit

## Penalty

- Penalty
  - Invoice No
  - Class Code
  - From Installment
  - To Installment
  - General Information Section
  - Detail Section
  - Transaction Date
  - Effective Date
  - Amount
  - Comment Section
  - Justification Code
  - Deposit Number
  - Notes
  - Creation
  - Update
  - Deletion



Accounts Receivable - Penalty

Detail

Transaction Type    Penalty

General Information

Subsystem	Year	Bill Number	Invoice No.	Cycle Code
Real Property Tax	2009	50316	448446464	

Detail

Date	Effective On	Amount
6/26/2015	6/26/2015	500

Class Code

Class Code	From Instal	To
Real Estate Tax	01	04

Comment

Justification Code	Deposit Number
Lein to Tax	151 (151-RE)

Notes

Cancel

Save

Exit

# Accounts Receivable

## Refund

- Refund
- Invoice No
- Check No
- Interest
- Total
- Class Code
- From Installment
- Due Date
- Discount Date
- Payor Information Section
- Letter Code
- Payor Name
- Change Payor Name
- Remove Payor Name
- General Information Section
- Detail Section
- Transaction Date
- Effective Date
- Amount
- Comment Section
- Justification Code
- Deposit Number
- Notes
- Creation
- Update
- Deletion



Accounts Receivable - Refunds

Detail

Receipt # jco00000006

General Information

Subsystem	Year	Bill Number	Invoice No.	Check No.	Cycle Code
Real Property Tax	2010	50312	7797844	527-89546	

Detail

Date	Effective On	Amount	Interest	Total to Refund
6/26/2015	6/26/2015	\$50.00	\$0.00	\$50.00

Class Code	From Instal	Due Date	Discount Date
Real Estate Tax	t	6/26/2015	6/26/2015

Comment

Justification Code	Deposit Number
Duplicate Payment Total	154 (154-jcormack)

Notes

Add notes and comments in this field.

Payer Information

Letter Code
Returned Check

Payer Name

Bertha Giacalone  
25 Crest Rd E  
N Merrick, NY 11566

R C

Cancel Save Exit

## Payment Reversal

- Payment Reversal
  - Do not Reverse Interest
  - Full Payment Reversal
  - Payor Information Section
  - Letter Code
  - Payor Name
  - Change Payor Name
  - Remove Payor Name
  - General Information Section
  - Detail Section
  - Transaction Date
  - Effective Date
  - Amount
  - Comment Section
  - Justification Code
  - Deposit Number
  - Notes
  - Creation
  - Update
  - Deletion



Accounts Receivable - Payment Reversal

Detail

Receipt #

General Information

Subsystem	Year	Bill Number	Cycle Code
Real Property Tax	2010	50312	

Detail

Date: 6/26/2015 Effective On: 6/26/2015 Amount: 500 ☐ Full Payment Reversal

Comment

Justification Code: Credit Memo Deposit Number:

Notes

Add notes and comments in this field.

Payer Information

Letter Code:

Returned Check:

Payer Name: Jane Cormack

Cancel Save Exit

## Transaction

- Transaction
  - Due Date
  - Discount Date
  - Invoice No
  - Class Code
  - From Installment
  - To Installment
  - General Information Section
  - Detail Section
  - Transaction Date
  - Effective Date
  - Amount
  - Comment Section
  - Justification Code
  - Deposit Number
  - Notes
  - Creation
  - Update
  - Deletion



Accounts Receivable - Transaction

Detail

Transaction Type:

General Information

Subsystem	Year	Bill Number	Invoice No.	Cycle Code
Real Property Tax	2009	50316	7565542	

Detail

Date: 6/26/2015 Effective On: 6/26/2015 Amount: 500

Class Code: Real Estate Tax From Installment:  To:

Comment

Justification Code: - (0) fees will be charged Deposit Number: 151 (151-RE)

Notes

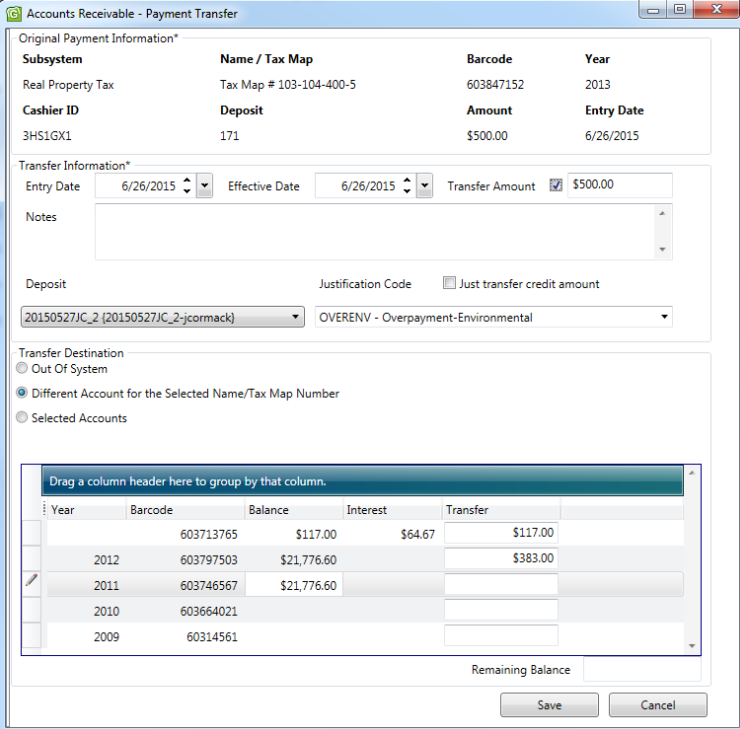
Add notes and comments.

Cancel Save Exit

## Accounts Receivable

### Payment Transfer

- Payment Transfer
- Creation
- Deletion



**Original Payment Information\***

Subsystem	Name / Tax Map	Barcode	Year
Real Property Tax	Tax Map # 103-104-400-5	603847152	2013

**Cashier ID** 3HS1GX1 **Deposit** 171 **Amount** \$500.00 **Entry Date** 6/26/2015

**Transfer Information\***

**Entry Date** 6/26/2015 **Effective Date** 6/26/2015 **Transfer Amount** ☒ \$500.00

**Notes**

**Deposit** **Justification Code** ☐ Just transfer credit amount

**20150527/JC\_2 (20150527/JC\_2-jcormack)** **OVERENV - Overpayment-Environmental**

**Transfer Destination**

☐ Out Of System

☒ Different Account for the Selected Name/Tax Map Number

☐ Selected Accounts

Year	Barcode	Balance	Interest	Transfer
	603713765	\$117.00	\$64.67	\$117.00
2012	603797503	\$21,776.60		\$383.00
2011	603746567	\$21,776.60		
2010	603664021			
2009	60314561			


Remaining Balance

**Save** **Cancel**

### Define Security on the A/R Information Entity

The A/R Information entity is a standard entity. Expressions can be added and the security can be set on this entity as for any other standard entity.

To set the security on the A/R entities:

1. Launch the OpenForms Designer (OFD).
2. Open the Accounts Receivable form (AR008).
3. Select the A/R Root entity.
4. Select the **Security** icon .
5. Grant and restrict permissions to all items as described in the *Govern OpenForms Designer guide*. Alternatively, you can create expressions to show and hide items according to specific conditions.
6. Click **Save**.


## Defining Security for Deposit Management

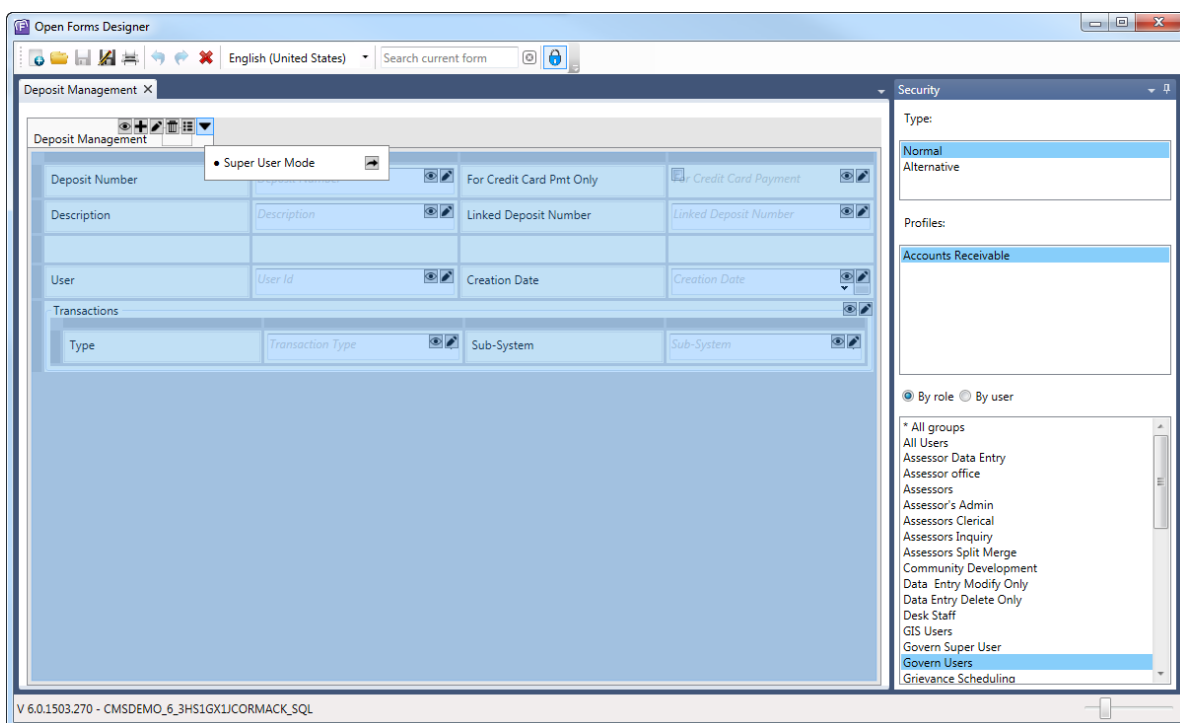
### Access to All Deposit Numbers

Typically, users need to view and edit their own deposit numbers only. If required, you can give any user or administrator access to all deposit numbers.

### Granting Access to All Deposit Numbers

To grant access to all deposit numbers:

1. Launch the OpenForms Designer (OFD).
2. Open the Deposit Management form.
3. Click the **Security** icon  to access the security settings.

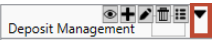


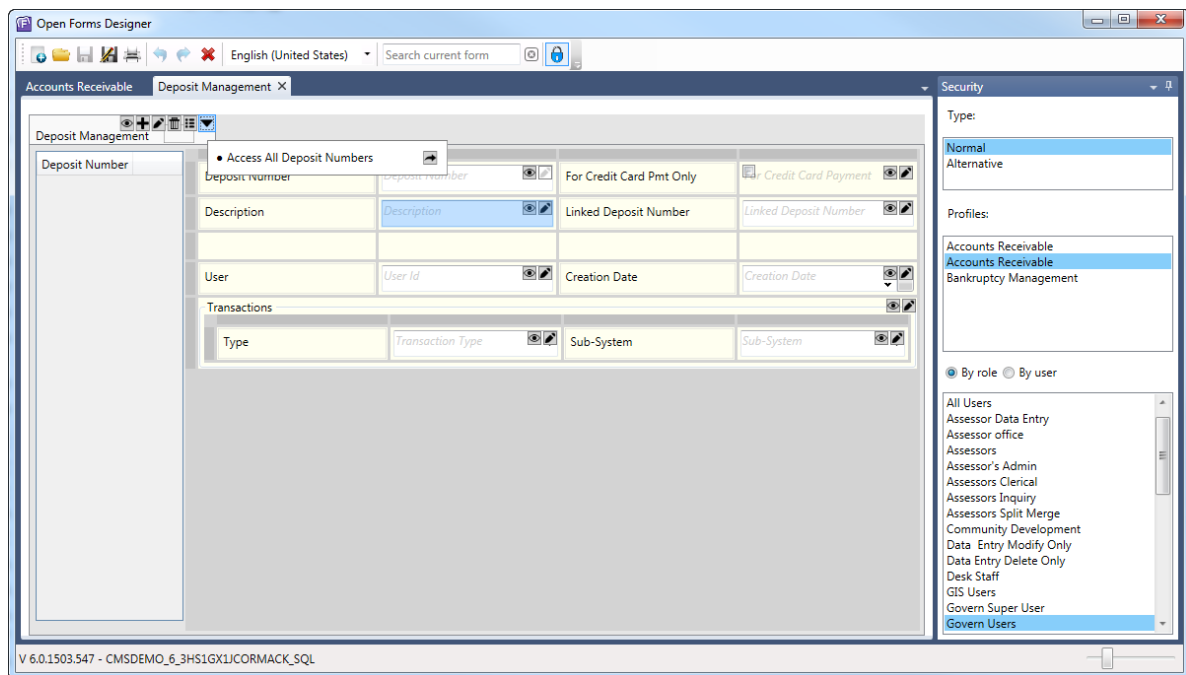
4. Select **Normal** or **Alternative** under **Type**.
5. Select the Profile under **Profile**.

## Accounts Receivable

6. Select **By role** and select the applicable role.
7. Select **By user** and select the applicable users if there are any exceptions under the role.



The security icons are enabled when you select an item in each section.


8. Select the drop-down arrow  to the right of the icons in the entity tab.



The **Access All Deposit Numbers** permission setting is displayed.

By default, users are granted access to all deposit numbers, to all command buttons, and to all fields on the form. Disable the arrow to grant users access to their own deposit numbers only. The following table shows the differences in the icon for the enabled and disabled state.

<ul style="list-style-type: none"> <li>Access All Deposit Numbers </li> </ul>	<ul style="list-style-type: none"> <li>Access All Deposit Numbers </li> </ul>
Enabled: Access to All Deposit Numbers	Disabled: Access to Own Deposit Numbers Only

9. Grant viewing and editing rights to text fields and to all items on the form.
10. Click **Save** .