BUILDER
INFORMATION
SYSTEM

BIS®

Password Module Manual

Copyright Notice

Trademarks

Table of Content

Conventions Used In This Manual

Every effort has been used to try to make this manual as useful and informative as possible. To accomplish that goal, several conventions have been used to assist the reader.

Throughout the manual, the terms process and activity are generally used interchangeably.

⚠ **Caution**

> These boxes contain warnings about things that MUST be checked, or of items to be aware, before proceeding. In many cases, the advice is to check with the company C.P.A. or other tax advisor.

ℹ **Tip**

> Tips offer special information, considerations, or other insights when undertaking the task described.

Hyperlink

A hyperlink is shown with an underline as it is shown by default in the program. Hyperlinks may be found in screen forms or in screen previews of reports.

Access

Menu access to selected items is shown in the way available. Here are examples of access to a functional menu element:

Menu Access

Administrator | Change Password

This represents access to Change Password from the Module menu.

Here is an example to access a report:

Menu Access

Administrator | Event Logs | User Logon Status

In some instances, individual screen buttons are shown in the text, such as the Magnifying Glass 🔍 icon.

Section 1 – Overview

The BIS® Password and Security module grants up to four levels of administrative control. The Essential Edition allows creating new users with full access; if the Credit Card module (optional) is included in the license a login password is required for each user. In the Standard Edition the system administrator can grant or deny access to each module and menu choice. In the Professional Edition security is increased to the Function level, and in the Enterprise Edition the administrator can control user Field access within forms.

Security Access

Access to every part of BIS® can be controlled for each user by menu and module options (except for the Essential Edition which provides only full access). Secured access to specific functions can be established by user through user actions. Redirection of reports to specific printers can be established by user and report.

Field Level Security

If additional security is required besides Menu, Module and User Actions, BIS® Enterprise Edition provides Field Level Security. The administrator can turn off Fields, Tabs, and Commands from any form.

Password Features

- Allows multiple levels of password protection
- Permits or restricts access into any BIS® module or menu selection
- Individual passwords for each employee can restrict that employee's access to each menu, submenu, or detail menu
- Creating a master password gives administrators the ability to override any password in use without exiting the system.
- Allows customized access for each user and for each company in a multi-company installation (multi-company in BIS® Professional and Enterprise)
- Set add, edit, and delete access functionality per user (BIS® Professional and Enterprise)
- Set access per field item (BIS® Enterprise)
- Passwords are assigned to individual users

Section 2 – Change Password

This feature, a component of the Password module, enables authorized users with Administrative rights to change the password for themselves and for other users.

⚠ **Caution**

> To avoid creating a “back door” to restricted functions, it is critical that a password is used to protect the ADMIN user after creating other passwords for other users.

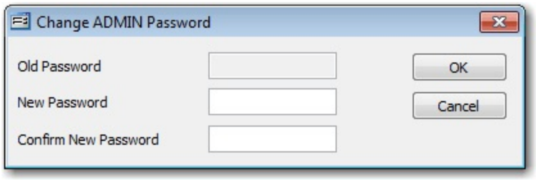
Menu Access

Administrator | Change Password

Tip

> The Change Password form can only be used if the box labeled "User can change password" is marked in the user profile.

Figure: PW-1
Change Password screen form.



To create a new password or change an existing password:

1. Go to Users on the Administrator menu, and select the correct user profile with the Find, Lookup or VCR tools.
2. Type the password in the Password field.
3. Type the password again, exactly as it was typed the first time, in the Confirm Password field.
4. Save the record.

To remove the existing password, delete the contents of the Password fields at step #2 and step #3.

If access to the Users form is restricted, follow these steps:

Select Change Password from the Administrator menu.

1. Type in the old password. (If no password currently exists, this field will be disabled.)
2. Enter the new password.
3. In the Confirm New Password field, type the new password exactly as it was typed the first time.
4. Click OK.

To remove the existing password, skip steps #2-3.

Tip

> The Change Password form can only be used if the box labeled "User can change password" is marked in the user profile.

When the record is complete or satisfactorily edited, users should either click on the OK button to save the changes, or click on the Cancel button to close the form without saving any changes.

Section 3 – Access

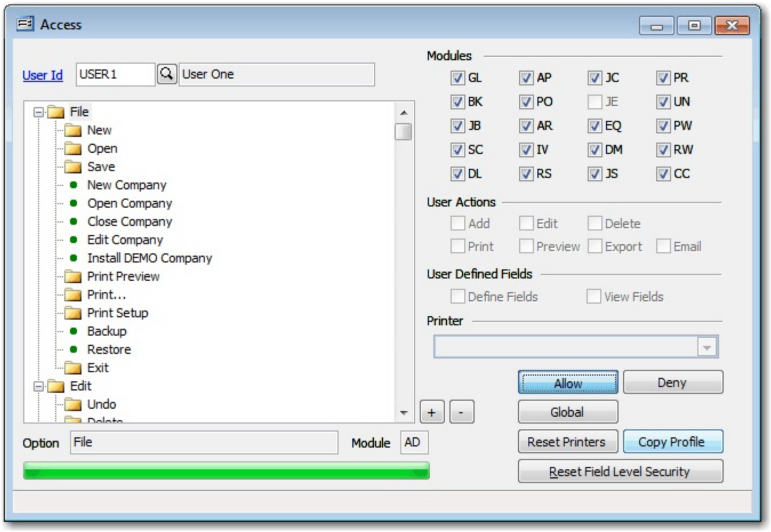
Access defines what capabilities each user will have to view and change information. Until a user's access rights are defined, the user will be denied all but the most basic BIS® capabilities. The exception is the Administrator who is granted full access to functions and modules available in this system configuration. The Administrator's rights cannot be changed.

Tip The Password function will only be available if the Password module is installed.

Menu Access

Administrator | Access

Figure: PW-2
Controlling access to BIS®
for users with passwords.


Access

User Id USER1 User One

Modules
☑ GL ☑ AP ☑ JC ☑ PR
☑ BK ☑ PO □ JE ☑ UN
☑ JB ☑ AR ☑ EQ ☑ PW
☑ SC ☑ IV ☑ DM ☑ RW
☑ DL ☑ RS ☑ JS ☑ CC

User Actions
□ Add □ Edit □ Delete
□ Print □ Preview □ Export □ Email

User Defined Fields
□ Define Fields □ View Fields

Printer

Option File Module AD

User Id

This field is used to enter the user identification number associated with this record. The User Id can be up to 5 alphanumeric characters.

Please note that the User Id title is a hyperlink field as well as the description of the information. Left-clicking on this hyperlink opens the User - New form. A user profile must be set up before access rights can be granted.

Menu Options Tree Structure

This is a graphical representation of the menu options. Branches may be expanded or collapsed as needed in order to provide select views, by clicking on the Plus (+) (expand branch) button or the Minus (-) (collapse branch) button. The menu options that appear next to a yellow folder icon are always available to all users. Menu options that are allowed to the current user appear next to a green dot, while options that are denied show a red dot. To change a user's access, use the mouse to highlight a menu option and click the Allow or Deny button to grant or restrict access to that option. Right-clicking in the tree structure section will display a menu with Allow All or Deny All buttons which opens the Global submenu option form.

Tip Some menu options may not be available because they are not included under the current BIS® license configuration or are reserved for the ADMIN user only. These options will continue to display a red dot. Refer to the module chart.

The initial listings in the main window show the same menu items shown above the toolbar at the top of the screen. To the lower right of that listing box there are Plus (+) (expand branch) button and Minus (-) (collapse branch) buttons to affect the entire tree structure.

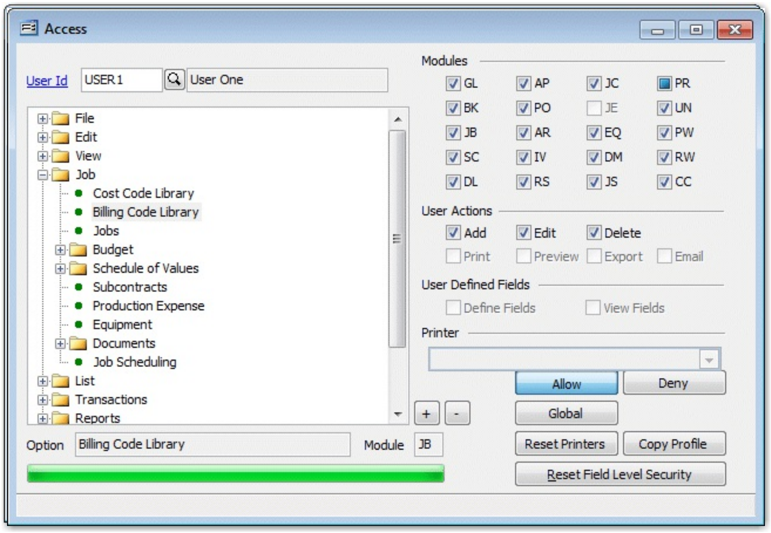
Modules

All licensed modules are shown in dark black with other unavailable modules shown in gray. Blue check marks in the boxes to the left of the Module Id indicate full user access to all elements of that module. A blue box (instead of the check mark) indicates partial access to that module for that user.

User Actions

User Actions is located in the center right of the screen form.

Figure: PW-3
Access screen form showing the User Actions components.



User Id USER1 User One

Modules
☑ GL ☑ AP ☑ JC ■ PR
☑ BK ☑ PO □ JE ☑ UN
☑ JB ☑ AR ☑ EQ ☑ PW
☑ SC ☑ IV ☑ DM ☑ RW
☑ DL ☑ RS ☑ JS ☑ CC

User Actions
☑ Add ☑ Edit ☑ Delete
□ Print □ Preview □ Export □ Email

User Defined Fields
□ Define Fields □ View Fields

Printer

Option Billing Code Library Module JB

Allow

The user's actions will remain grayed out, until a previously denied menu element is Allowed by clicking on the Allow button in the lower right hand of the screen form. A checkmark will appear in the User Actions boxes (Add, Edit, Delete). Any denied menu item can be made accessible to the user by clicking on the Allow button, and the checkmark will be added.

Deny

Any allowed user's actions will remain allowed until it is denied by clicking on the Deny button in the lower right hand of the screen form. A previous checkmark will disappear from the User Actions boxes (Add, Edit, Delete). Any allowed menu item can be made inaccessible to the user by clicking on the Deny button, and the checkmark will be removed.

Print

This functionality is only available for reports or other printing functions. The print function will remain denied until it is allowed by clicking on the Allow button in the lower right hand of the screen form. A checkmark will appear in the box. A previously allowed print function can be made inaccessible to the user by clicking on the Deny button, and the checkmark will be removed.

Preview

This functionality is only available for reports or other preview functions. The preview function will remain denied until it is allowed by clicking on the Allow button in the lower right hand of the screen form. A checkmark will appear in the box. A previously allowed preview function can be made inaccessible to the user by clicking on the Deny button, and the checkmark will be removed.

Export

This functionality is only available for reports or other export functions. The export function will remain denied until it is allowed by clicking on the Allow button in the lower right hand of the screen form. A checkmark will appear in the box. A previously allowed export function can be made inaccessible to the user by clicking on the Deny button, and the checkmark will be removed.

Email

This functionality is only available for reports or other email functions. The email function will remain denied until it is allowed by clicking on the Allow button in the lower right hand of the screen form. A checkmark will appear in the box. A previously allowed email function can be made inaccessible to the user by clicking on the Deny button, and the checkmark will be removed.

When a specific menu element is allowed, a green dot appears next to that item. When a specific menu item is denied, a red dot appears.

User Definable Fields

Like User Actions, a user's access may be limited for User Defined Fields or Udf's found on 11 different master files. Udf's can be created in the Professional and Enterprise Editions of BIS® provided the module in which they belong is included in the installation license.

Define Fields

If this box is checked the user can define User Definable Fields. If the option is grayed out, it means it is not available for the menu item.

View Fields

If this box is checked the user can view User Definable Field information. If the option is grayed out, it means it is not available for the menu item.

Printer

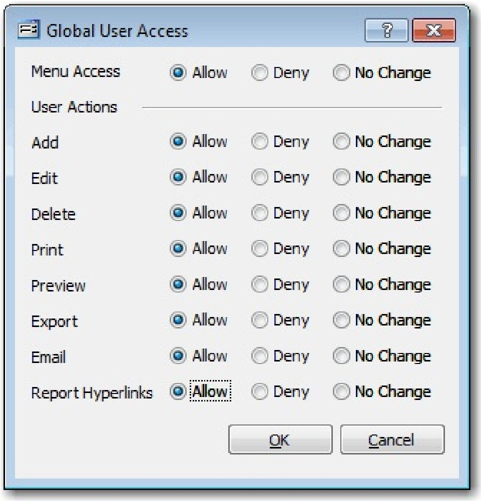
This field is used to set a particular printer accessible to the users for a selected default printing function. The field is grayed out for all functions other than for printing. However, the default printer may be changed on-the-fly when actually preparing to print.

Buttons

Global

Below the Allow and Deny buttons is a Global button. It opens a subwindow that enables more specific control of user access. For example, a user may have access to the entire system, but only be allowed to view data, but not Add or Edit, etc. However, Administrators should be aware that when they create their own User Id with full access rights, they should click on each of the Allow buttons.

Figure: PW-4
Global User Access screen form showing the three types of access control for each form of access.



Global User Access

Menu Access ● Allow ○ Deny ○ No Change

User Actions

Add ● Allow ○ Deny ○ No Change

Edit ● Allow ○ Deny ○ No Change

Delete ● Allow ○ Deny ○ No Change

Print ● Allow ○ Deny ○ No Change

Preview ● Allow ○ Deny ○ No Change

Export ● Allow ○ Deny ○ No Change

Email ● Allow ○ Deny ○ No Change

Report Hyperlinks ● Allow ○ Deny ○ No Change

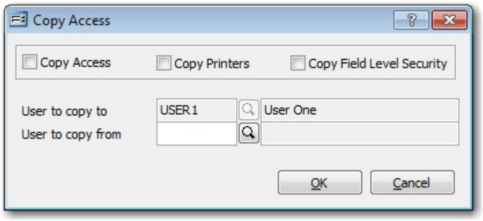
Reset

Reset Printers controls the printer access for the user.

Copy Profile

The Copy Profile button enables an administrator to create or use an access template (or another employee's access profile) to another user. Users can also copy an access profile from one user to another. Once copied, the new profile can be altered as needed.

Figure: PW-4.1
Copy Profile Copy Access screen form showing the three options and the User to copy from selection field.



□ Copy Access □ Copy Printers □ Copy Field Level Security

User to copy to	USER1	User One
User to copy from		

Enterprise Edition Access Control Features

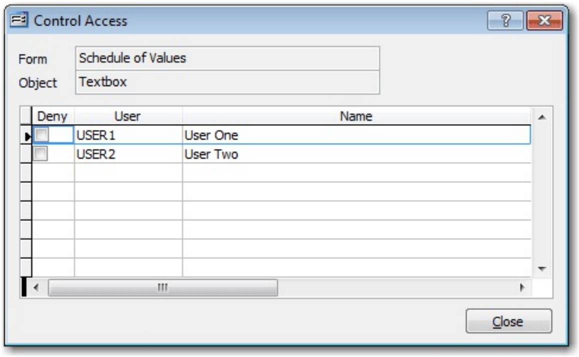
For Enterprise Edition users, the access control extends to specific fields within otherwise accessible screen forms throughout the program. However, the Administrator can modify the entire Field Level access by clicking on the Reset Field Level Security button at the lower right corner of the screen form.

Set Field Level Security

Within the BIS® Enterprise Edition, access may be controlled on a field level. An Administrator can choose which users will have access to any given field, tab, label, button, etc. To deny a user access to a specific item, simply right-click on the item while logged in as the Administrator. Left-clicking on the Control Access option will then bring up the screen form pictured below. To deny access to a specific user, place a checkmark next to the User ID in the Deny column. Press the Close button when complete. The system will ask if the changes should be saved.

Any user with a checkmark will not be able to access the item. In most cases, this means the item does not appear at all for that user. This can be particularly useful in hiding pay rate information for example. Some items such as tabs will be grayed-out instead of disappearing.

Figure: PW-5
Field Level Control Access screen form.



Form: Schedule of Values
Object: Textbox

Deny	User	Name
□	USER1	User One
□	USER2	User Two

Using Field Level Security and other security measures found in the Access screen, an administrator can effectively create a user access profile. Should an administrator want to copy a user's access, including Field Level Security options, use the Access screen's Copy Profile button.

Reset Field Level Security

Click on the Reset Field Level Security button to remove previously set limitations on access to fields.

Saving the Profile

When the record is complete or satisfactorily edited, users should either click on the Save button on the toolbar, or press Ctrl-S to save the changes. However, the system will offer an additional confirmation to save a profile.

Appendix

Users

Depending on licensing BIS® permits multiple users to access the system simultaneously. For the Essential Edition the limit is 2 users and the Standard Edition limit is 3 users. For the Professional Edition the limit is 100 users and the number is essentially unlimited (1,000) for Enterprise edition users.

Menu Access

Administrator | Users

When BIS® is first installed, the user ADMIN is automatically created. This user cannot be removed.

⚠ **Caution**

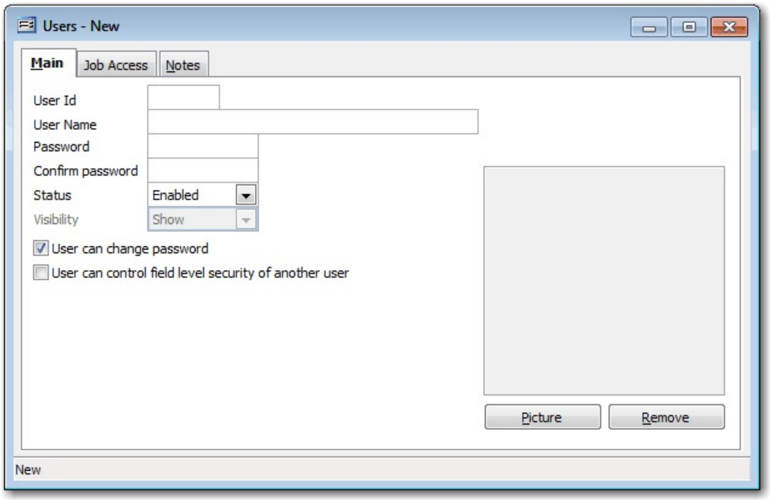
To avoid creating a "back door" to restricted functions, it is critical that a password is used to protect the ADMIN user after creating other passwords for other users.

When the record is complete or satisfactorily edited, users should either click on the Save button or press Ctrl-S to save the changes.

New Record

Initial access to Users from the menu opens the Users - New form. This form is used to enter new user information. However, access to a new form when another user record is on the screen only requires users to press Ctrl+N or use the New icon on the toolbar. Users will be asked, however, if users wish to save any changes to the record on which users were working.

Figure: PW-6
Users - New screen form.

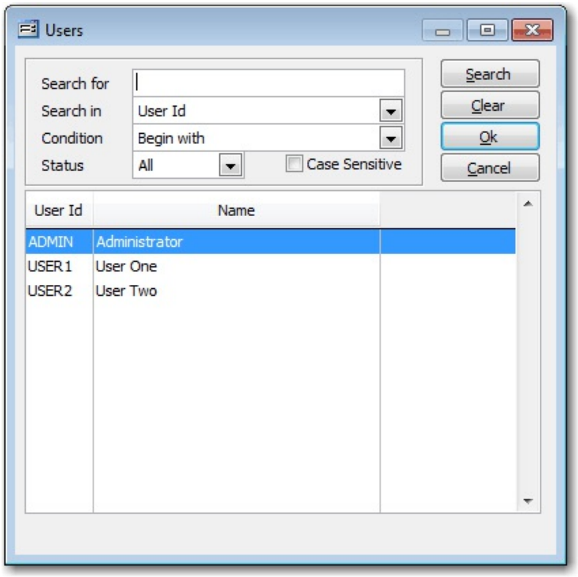


User Id
User Name
Password
Confirm password
Status: Enabled
Visibility: Show
☑ User can change password
☐ User can control field level security of another user
New

Editing an Existing Record

Users can examine the list of User codes by clicking on the Magnifying Glass icon (at the top of the screen) or pressing Ctrl+F and double clicking on the item of interest. Records can be selected for editing on the Search form by using the mouse or cursor keys.

Figure: PW-7
Users Find/Search screen.



Search for	
Search in	User Id
Condition	Begin with
Status	All

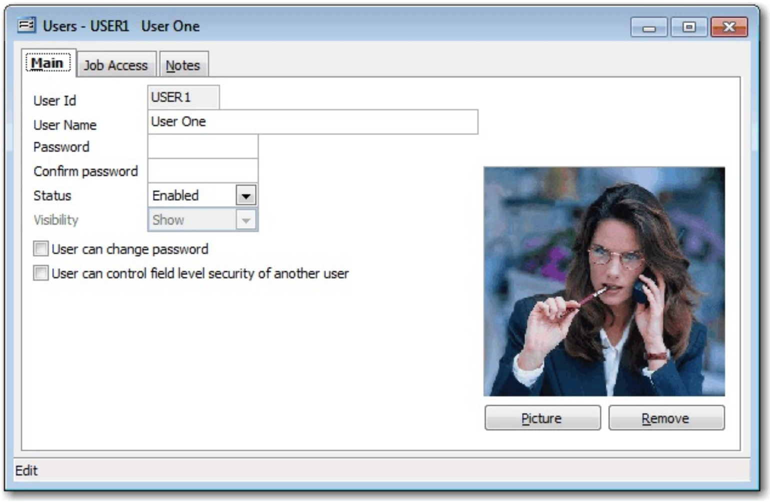
☐ Case Sensitive

User Id	Name
ADMIN	Administrator
USER1	User One
USER2	User Two

Scrolling Through User Records

Users can scroll through the user records by using the VCR buttons on the toolbar ⏮◀▶⏭ at the top of the screen. Clicking on the First icon ⏮ (at the top of the screen) will open the first record of the list according to User Id. Clicking on the Previous icon ◀ (at the top of the screen) will open the immediately previous record of the list according to User Id or Last Name. Clicking on the Next icon ▶ (at the top of the screen) will open the next record of the list. Clicking on the Last icon ⏭ (at the top of the screen) will open the last record of the list according.

Figure: PW-8
Sample Users form for editing.



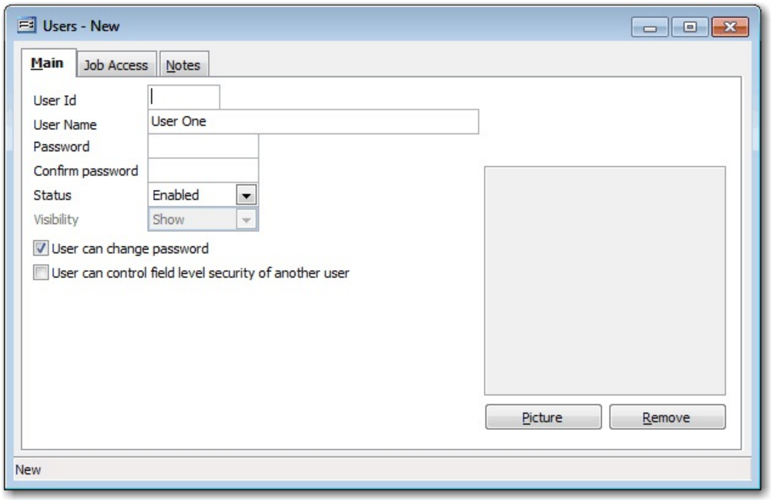
User Id	USER1
User Name	User One
Password	
Confirm password	
Status	Enabled
Visibility	Show

☐ User can change password
☐ User can control field level security of another user

Cloning an Existing Record

Once a record is selected, users can clone it to create a new record, and make modifications to the cloned record. Once the source record is brought to the screen, use the Clone Record icon on the toolbar. The system will ask, “Do you want to clone this record?” Click on the Yes button to clone it, or click on the No button to leave this process. Records can be edited as described above. However, one difference is that the cloned record will require a new User Id Code to be saved as a new record.

Figure: PW-9
Cloned record. Note that all of the initial fields, except for the User Id and Picture match the source record.



User Id:
User Name: User One
Password:
Confirm password:
Status: Enabled
Visibility: Show
☑ User can change password
☐ User can control field level security of another user

Deleting an Existing Record

Once a User Id has been saved it can be easily deleted if there are no transactions associated with it. If there are transactions created by the user BIS® will display a warning that activity exists with the user, but will allow the user's master record to be deleted. However, the activity will not be affected and reports will continue to show the deleted user as the one who initiated the transaction. BIS® will also allow changing the User Id if no activity has been associated with the user, but will not allow the User Id to be changed if it has been used in any transactions.

Once the source record is brought to the screen, use the Delete icon ☒ (at the top of the screen). The system will ask, "Do you want to delete this record?" Click on the Yes button to delete it, or click on the No button to leave this process.

Save the Changed Record

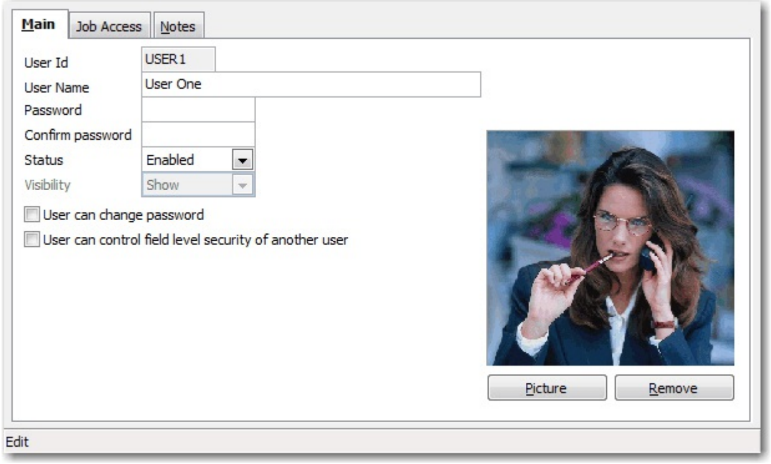
When the record is complete or satisfactorily edited, users should either click on the 💾 Save button on the tool-bar, or press Ctrl-S to save the changes.

Main Tab

User Id

A User Id can be up to 5 characters.

Figure: PW-10
Users setup form.



User Id: USER1
User Name: User One
Password:
Confirm password:
Status: Enabled
Visibility: Show
□ User can change password
□ User can control field level security of another user

User Name

The User Name can be up to 30 characters.

Password

This field is used to records an alphanumeric password, up to ten characters. Using a password is optional, however once a password is established for a user, it will be required each time the user logs into the BIS® system. Each time a password is entered, it will be masked with asterisks (*). It is important for the Administrator and User to remember the password assigned, and if necessary, write it down and put it in a safe place. For security reasons, it is recommended that the password not be commonplace, such as the user's initials or birth date, and that it be changed often.

Tip

The Password function will only be available if the Password module is installed.

Confirm Password

The password will have to be re-entered to confirm it.

Status

For effective audit trail needs, users that have been using BIS® should not be removed. However, a drop-down tool enables the Administrator to choose whether the User Id is Enabled or Disabled. The Disabled option is the equivalent to deleting a User Id after that user has been active in the system.

Visibility

The Visibility option is only available if the Status has been set to Disabled. The drop-down tool enables the Administrator to allow the User Id and name to appear in the list of users visible when using the Find tool.

User can change password

The Administrator can allow or disallow the user to change his or her own password by checking or unchecking this option.

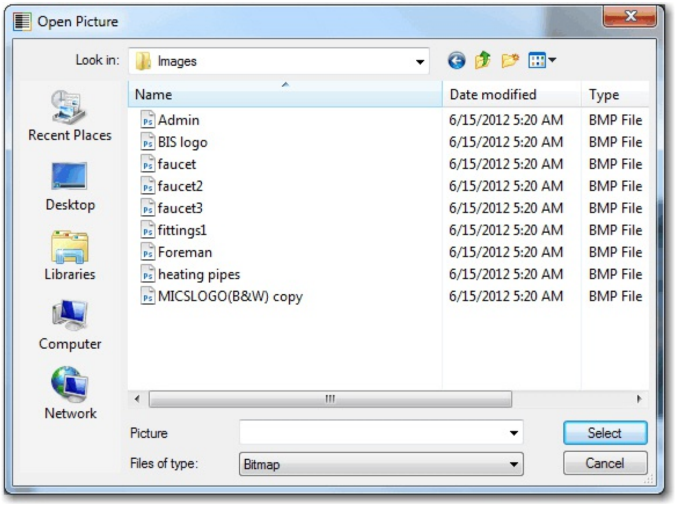
User can control field level security of another user

The Enterprise edition also permits authorized users to control Field Level Security of another user. Field Level Security refers to specific field data entry in other areas of the program.

Picture

Finally, the user's picture can be attached to this record, providing the image is in BMP or JPG format. Simply click on the Picture button and navigate to and select the file selected.

Figure: PW-11
Open Picture navigation screen.



Open Picture

Look in: Images

Name	Date modified	Type
Admin	6/15/2012 5:20 AM	BMP File
BIS logo	6/15/2012 5:20 AM	BMP File
faucet	6/15/2012 5:20 AM	BMP File
faucet2	6/15/2012 5:20 AM	BMP File
faucet3	6/15/2012 5:20 AM	BMP File
fittings1	6/15/2012 5:20 AM	BMP File
Foreman	6/15/2012 5:20 AM	BMP File
heating pipes	6/15/2012 5:20 AM	BMP File
MICSLOGO(B&W) copy	6/15/2012 5:20 AM	BMP File

Picture:

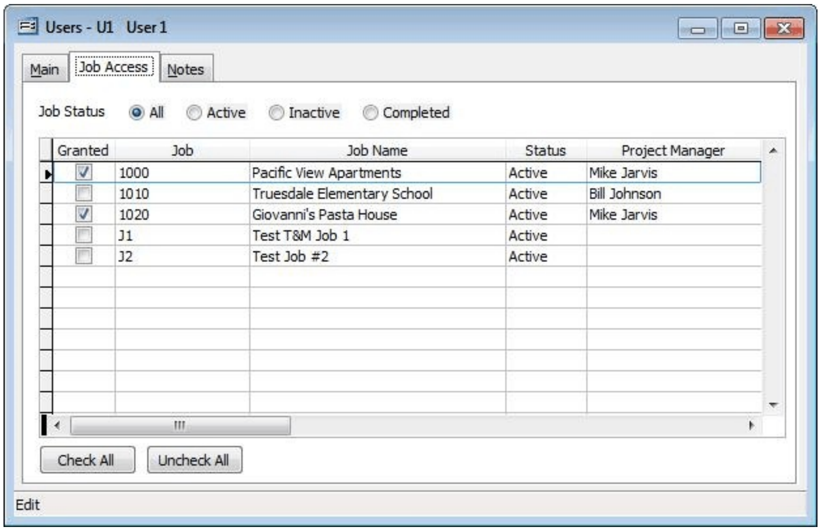
Files of type: Bitmap

Remove
This button is used to remove the bitmap image.

Job Access Tab

Job Access is a security feature that allows the ADMIN to designate specific user access per jobs. This is useful when project managers must filter through reports and long lists of jobs to find the ones they are overseeing. With Job Access the list will show the ones they have been assigned to; this will also prevent them from creating transactions for jobs that they do not have access to. Settings in the Jobs and Users master record allows the ADMIN to assign or limit access wherever needed.

Figure: PW-11.1
Shows the Job Access Tab on the Users master record.



Users - U1 User 1

Job Status ● All ○ Active ○ Inactive ○ Completed

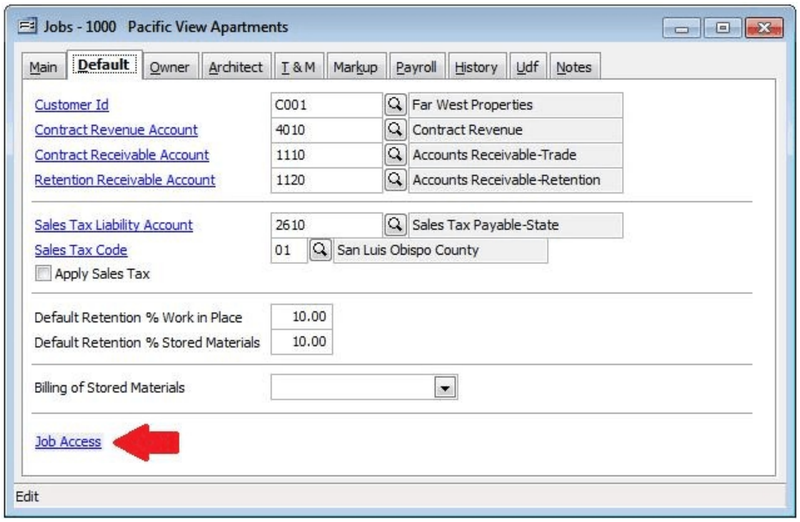
Granted	Job	Job Name	Status	Project Manager
☑	1000	Pacific View Apartments	Active	Mike Jarvis
□	1010	Truesdale Elementary School	Active	Bill Johnson
☑	1020	Giovanni's Pasta House	Active	Mike Jarvis
□	J1	Test T&M Job 1	Active	
□	J2	Test Job #2	Active	

The ADMIN will have access to all jobs and is the only user that can set the access priviledges for the other users.

Figure PW-11.1 shows the list includes All jobs; the list can be filtered for the different job statuses. Notice that User 1 has been allowed access to 2 of the 5 jobs.

The default is to allow access to all jobs when this new feature is first installed or when a new user is created.

Figure: PW-11.2
Shows the Job Access link on the Jobs master record Default Tab.



Jobs - 1000 Pacific View Apartments

Customer Id	C001	Far West Properties
Contract Revenue Account	4010	Contract Revenue
Contract Receivable Account	1110	Accounts Receivable-Trade
Retention Receivable Account	1120	Accounts Receivable-Retention
Sales Tax Liability Account	2610	Sales Tax Payable-State
Sales Tax Code	01	San Luis Obispo County

□ Apply Sales Tax

Default Retention % Work in Place 10.00
Default Retention % Stored Materials 10.00

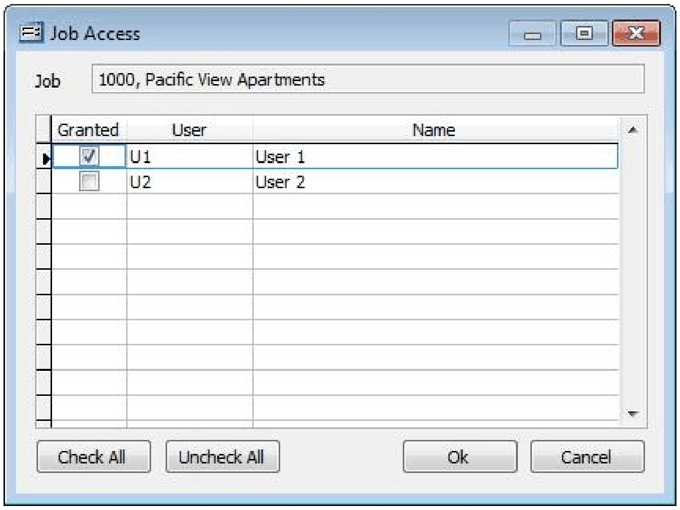
Billing of Stored Materials

Job Access

Edit

This link can only be opened by the ADMIN user.

Figure: PW-11.3
Shows the Job Access form.



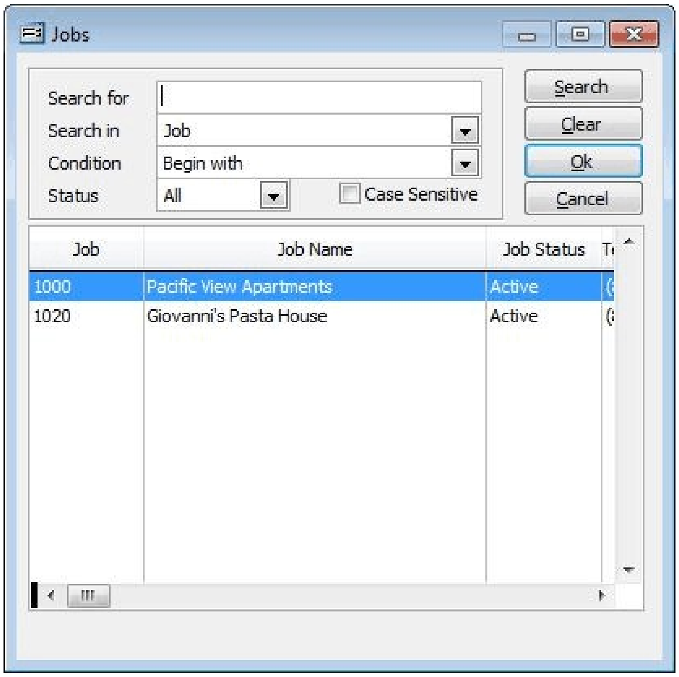
Job Access

Job 1000, Pacific View Apartments

Granted	User	Name
☑	U1	User 1
□	U2	User 2

Job Access can also be designated per job as shown above. When the settings are changed on this form it will automatically update the settings on the Users master record.

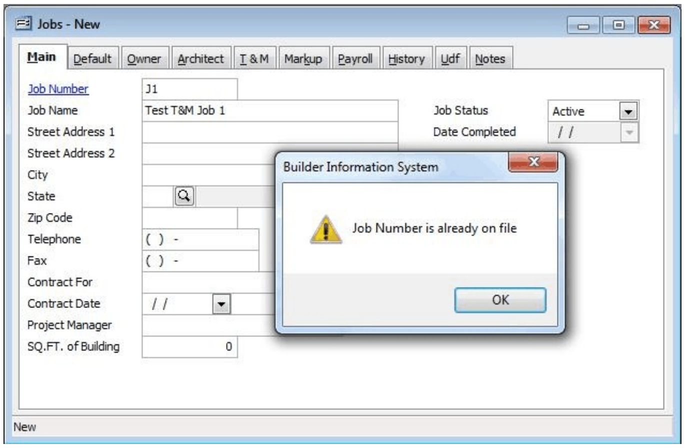
Figure: PW-11.4
Shows the Job Search form, only showing accessible jobs.



Search for
Search in: Job
Condition: Begin with
Status: All
□ Case Sensitive

Job	Job Name	Job Status	T
1000	Pacific View Apartments	Active	(
1020	Giovanni's Pasta House	Active	(

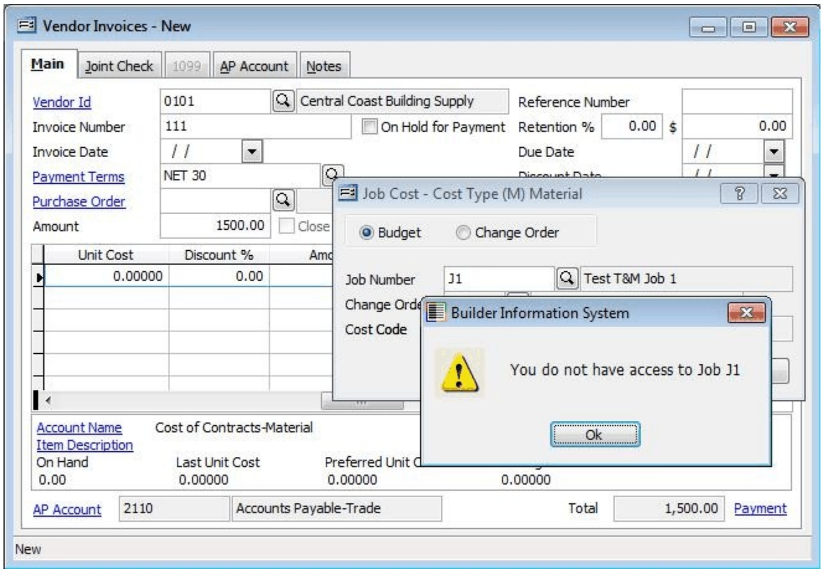
Figure: PW-11.5
Shows a new job with the same number as an existing non-accessible job cannot be created.



Job Number	J1
Job Name	Test T&M Job 1
Street Address 1	
Street Address 2	
City	
State	
Zip Code	
Telephone	( ) -
Fax	( ) -
Contract For	
Contract Date	/ /
Project Manager	
SQ.FT. of Building	0
Job Status	Active
Date Completed	/ /

Job Number is already on file

Figure: PW-11.6
Shows a transaction cannot be entered for a job if the user does not have access.



Vendor Invoices - New

Vendor Id 0101 Central Coast Building Supply
Invoice Number 111
☐ On Hold for Payment
Reference Number
Retention % 0.00 $ 0.00
Invoice Date / /
Due Date / /
Payment Terms NET 30
Purchase Order
Amount 1500.00 ☐ Close

Unit Cost	Discount %	Amo
0.00000	0.00	

Job Cost - Cost Type (M) Material

● Budget ○ Change Order

Job Number J1 Test T&M Job 1
Change Ord
Cost Code

Builder Information System

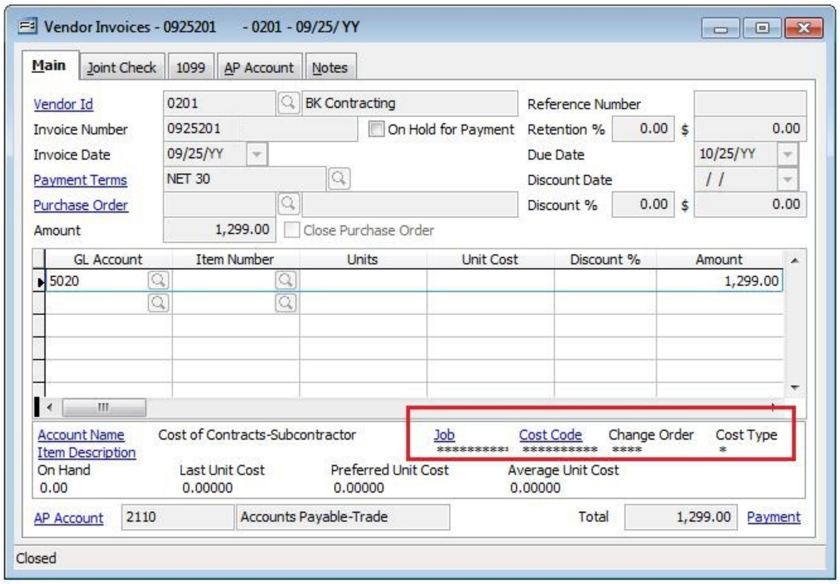
You do not have access to Job J1

Account Name Cost of Contracts-Material
Item Description
On Hand 0.00
Last Unit Cost 0.00000
Preferred Unit C 0.00000
0.00000

AP Account 2110 Accounts Payable-Trade
Total 1,500.00
Payment

New

Figure: PW-11.7
Shows the job information will not be available for any transactions that include non-accessible jobs.



Vendor Invoices - 0925201 - 0201 - 09/25/ YY

Vendor Id 0201 BK Contracting
Reference Number
Invoice Number 0925201
☐ On Hold for Payment
Retention % 0.00 $ 0.00
Invoice Date 09/25/YY
Due Date 10/25/YY
Payment Terms NET 30
Discount Date / /
Purchase Order
Discount % 0.00 $ 0.00
Amount 1,299.00 ☐ Close Purchase Order

GL Account	Item Number	Units	Unit Cost	Discount %	Amount
5020					1,299.00

Account Name Cost of Contracts-Subcontractor
Item Description

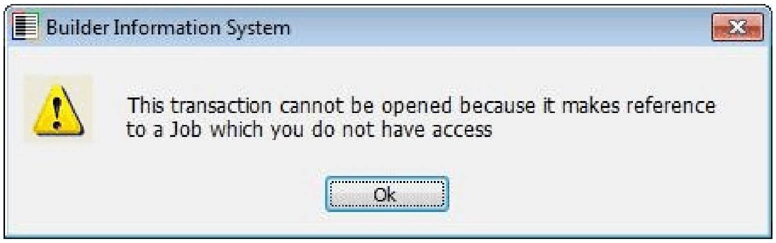
Job	Cost Code	Change Order	Cost Type
**********	**********	****	*

On Hand 0.00
Last Unit Cost 0.00000
Preferred Unit Cost 0.00000
Average Unit Cost 0.00000

AP Account 2110 Accounts Payable-Trade
Total 1,299.00
Payment

Closed

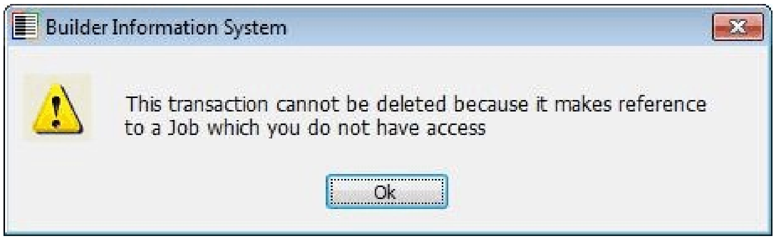
Figure: PW-11.8
Shows the user will not be able to open other job transactions.



Builder Information System

This transaction cannot be opened because it makes reference to a Job which you do not have access

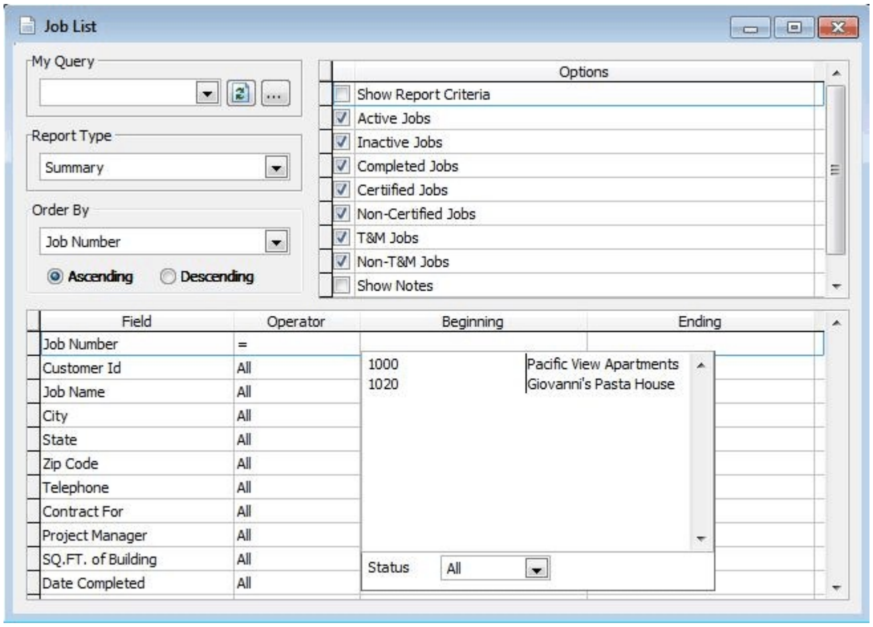
Figure: PW-11.9
Shows the user will not be able to delete other job transactions.



Builder Information System

This transaction cannot be deleted because it makes reference to a Job which you do not have access

Figure: PW-11.10
Shows the user can only view reports for the jobs he or she has access to.



Job List

My Query:

Report Type: Summary

Order By: Job Number

● Ascending ○ Descending

Options

- □ Show Report Criteria
- ☑ Active Jobs
- ☑ Inactive Jobs
- ☑ Completed Jobs
- ☑ Certified Jobs
- ☑ Non-Certified Jobs
- ☑ T&M Jobs
- ☑ Non-T&M Jobs
- □ Show Notes

Field	Operator	Beginning	Ending
Job Number	=		
Customer Id	All		
Job Name	All		
City	All		
State	All		
Zip Code	All		
Telephone	All		
Contract For	All		
Project Manager	All		
SQ.FT. of Building	All		
Date Completed	All		

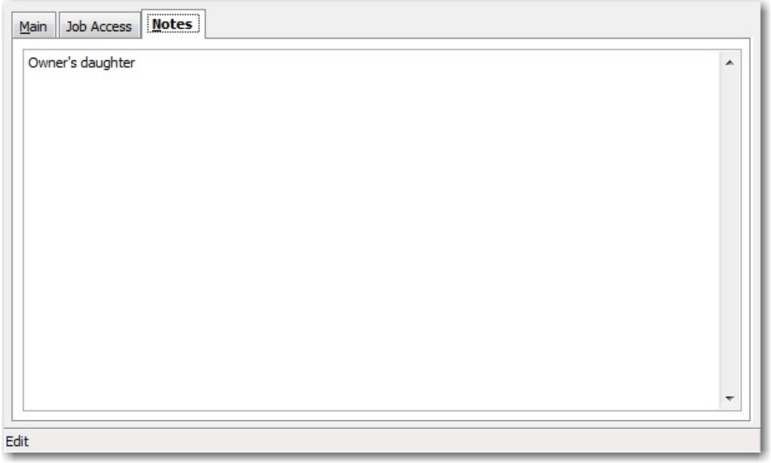
1000	Pacific View Apartments
1020	Giovanni's Pasta House

Status: All

Notes Tab

The Notes section is a work area for miscellaneous notes and may be used as needed.

Figure: PW-12
Sample Users master record Notes tab screen form.



Owner's daughter

Save the Changed Record

When the record is complete or satisfactorily edited, users should either click on the 💾 Save button on the toolbar, or press Ctrl-S to save the changes.

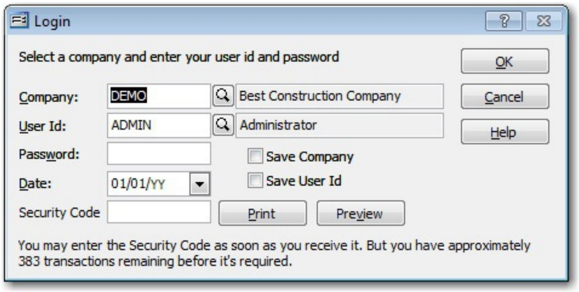
Login

The Login selection on the Administrator menu opens the login screen. The Login screen is also displayed when BIS® starts up or when the Open Company option is selected from the File menu. The company ID, the user ID, password (if necessary for the user ID entered) and a login date may be displayed or can be entered. When all information has been entered, click the OK button and the system will verify the company and user, and a progress bar will be displayed. If the login information is valid, the system will initiate the System master menu. If the information is incorrect, the user will be prompted to re-enter some or all of the information.

Menu Access

Administrator | Login

Figure: PW-13
Login screen form.



Select a company and enter your user id and password

Company: DEMO Best Construction Company

User Id: ADMIN Administrator

Password:

Date: 01/01/YY

Security Code

□ Save Company

□ Save User Id

You may enter the Security Code as soon as you receive it. But you have approximately 383 transactions remaining before it's required.

Company

Enter the Company Id or use the Find tool to select the company to be opened.

User Id

Enter the User Id or use the Find tool to select the user.

Password

If the user has had a password assigned, it should be entered in the Password field. This feature is used in conjunction with the Access feature.

Date

Initially, the computer default date will appear in the Date field, but the user can change this date manually or by using the Calendar tool accessed from the down arrow.

Save Company

When checked, this feature enables the computer's installation of BIS® to open to the same company that was last closed by the user.

Save User Id

When checked, this feature enables the computer's user of BIS® to open to the same user.

Security Code

If the security code field appears after typing in the company at the Login screen, it indicates that no security code has been entered for that company. This information is covered later in this manual. Once obtained, it may be entered at any time.

Print

The Print button enables the Application for Security Code to be printed. If the security code field appears after typing in the company at the Login screen, it indicates that no security code has been entered for that company. This information is covered later in this manual. Once obtained, it may be entered at any time.

Preview

The Preview button enables the Application for Security Code to be previewed. If the security code field appears after typing in the company at the Login screen, it indicates that no security code has been entered for that company. This information is covered later in this manual. Once obtained, it may be entered at any time.

I plan to purchase support from MICS at this time

This option appears only when the Security Code has not yet been entered. It adds an appropriate notation on the Security Code Application.

I plan to purchase a maintenance agreement from MICS at this time

This option appears only when the Security Code has not yet been entered. It adds an appropriate notation on the Security Code Application.

Remaining Uses

This information appears only when the Security Code has not yet been entered. It tells the user how many uses of BIS® are available prior to requiring the entry of the Security Code.

OK Button

Press this button when the information entered is correct to open the selected company records.

Cancel

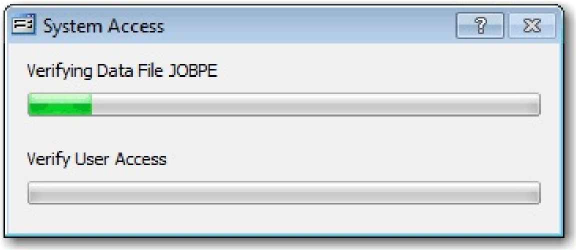
This button cancels the Login process.

Help

This button opens the help file to the Login/Open Company page of the Help file.

When all of the information has been entered, a small window will indicate the new company files are being loaded and checked. This screen appears every time any company files are loaded.

Figure: PW-14
System access after entering the login information.



Event Logs

Event logs are specialized BIS® reports available from the Administrator menu. They include a User Logon Status, a Transaction Log, an Error Log, and a Credit Card Authorization Log (requires PPI integration).

Menu Access

Administrator | Event Logs

User Logon Status Report

The User Logon Status Report shows the logon and/or logoff status of users.

Menu Access

Administrator | Event Logs | User Logon Status

Report Types

Summary

The Summary Report Type displays the User Id, Name, Status, Computer (Workstation) Name, and Logon Date and Time.

Order By

- User

Options

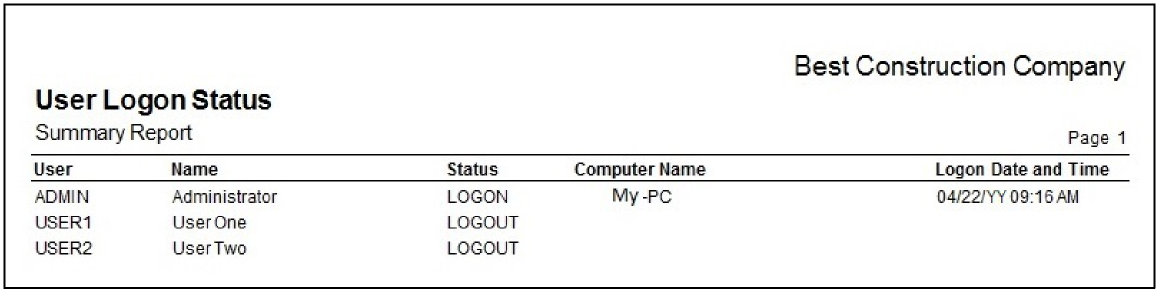
- Show Report Criteria
- Logon
- Logout

Fields

- User

User Logon Status — Summary Report

Figure: PW-15 User Logon Status – Summary Report, showing both Logon and Logout users.



Best Construction Company

User Logon Status

Summary Report

Page 1

User	Name	Status	Computer Name	Logon Date and Time
ADMIN	Administrator	LOGON	My -PC	04/22/YY 09:16 AM
USER1	User One	LOGOUT		
USER2	User Two	LOGOUT		

Transaction Log

The Transaction Log report shows the transaction completed by users that can be sorted in a variety of ways.

Menu Access

Administrator | Event Logs | Transaction Log

Report Types

Summary

The Summary report type displays the Transaction Date, Session Date, User Id, Transaction, Journal, Reference, Amount, and Reversal status (whether the transaction was reversed).

Order By

- Transaction Date
- Session Date
- User
- Transaction
- Journal
- Reference
- Amount
- Reversed

Options

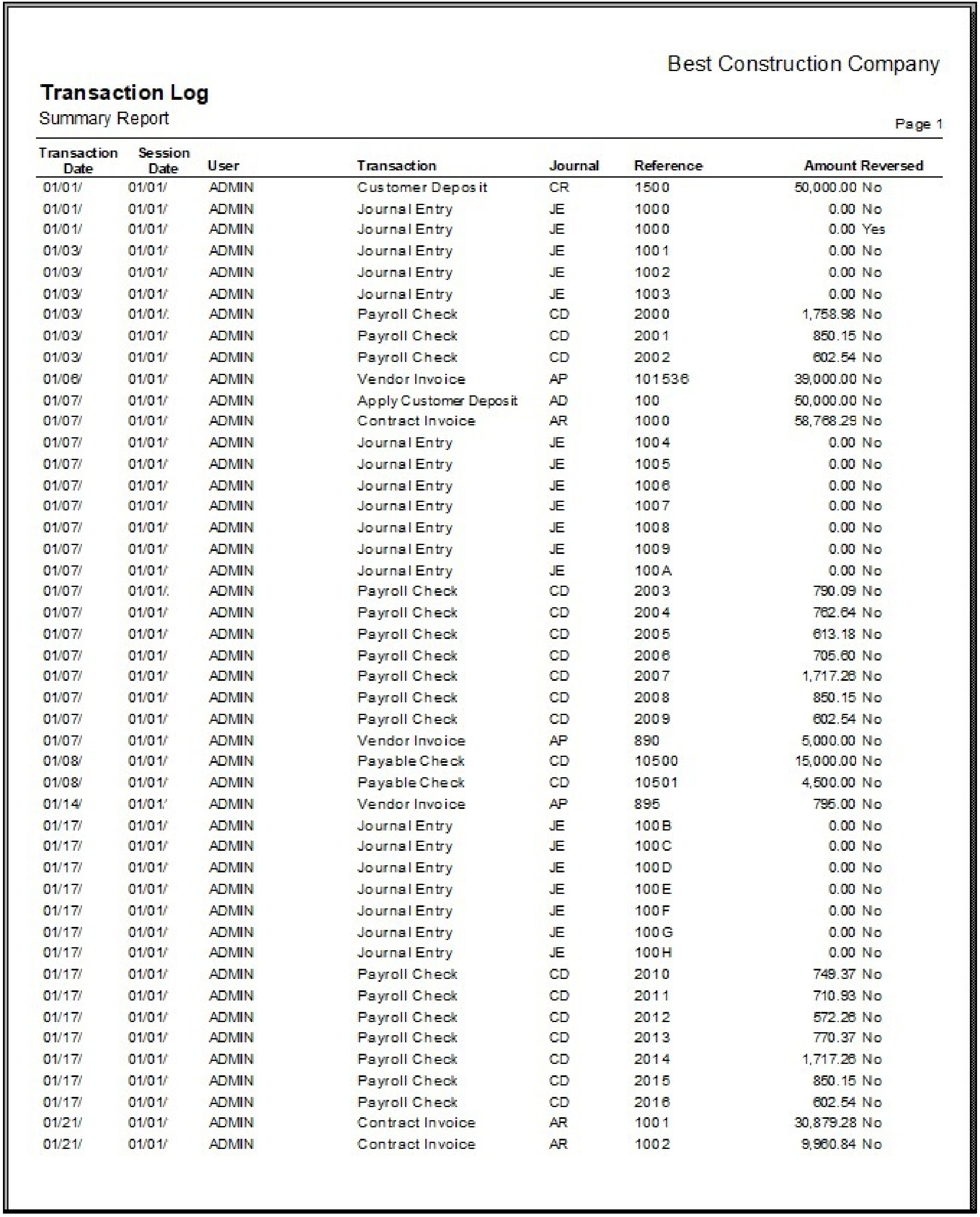
- Show Report Criteria
- Case Sensitive

Fields

- Transaction Date
- Session Date
- User
- Journal
- Amount
- Description

Transaction Log — Summary Report

Figure: PW-16 Transaction Log – Summary Report, sorted by Transaction Date



Best Construction Company

Transaction Log

Summary Report

Page 1

Transaction Date	Session Date	User	Transaction	Journal	Reference	Amount	Reversed
01/01/	01/01/	ADMIN	Customer Deposit	CR	1500	50,000.00	No
01/01/	01/01/	ADMIN	Journal Entry	JE	1000	0.00	No
01/01/	01/01/	ADMIN	Journal Entry	JE	1000	0.00	Yes
01/03/	01/01/	ADMIN	Journal Entry	JE	1001	0.00	No
01/03/	01/01/	ADMIN	Journal Entry	JE	1002	0.00	No
01/03/	01/01/	ADMIN	Journal Entry	JE	1003	0.00	No
01/03/	01/01/	ADMIN	Payroll Check	CD	2000	1,758.98	No
01/03/	01/01/	ADMIN	Payroll Check	CD	2001	850.15	No
01/03/	01/01/	ADMIN	Payroll Check	CD	2002	602.54	No
01/06/	01/01/	ADMIN	Vendor Invoice	AP	101536	39,000.00	No
01/07/	01/01/	ADMIN	Apply Customer Deposit	AD	100	50,000.00	No
01/07/	01/01/	ADMIN	Contract Invoice	AR	1000	58,768.29	No
01/07/	01/01/	ADMIN	Journal Entry	JE	1004	0.00	No
01/07/	01/01/	ADMIN	Journal Entry	JE	1005	0.00	No
01/07/	01/01/	ADMIN	Journal Entry	JE	1006	0.00	No
01/07/	01/01/	ADMIN	Journal Entry	JE	1007	0.00	No
01/07/	01/01/	ADMIN	Journal Entry	JE	1008	0.00	No
01/07/	01/01/	ADMIN	Journal Entry	JE	1009	0.00	No
01/07/	01/01/	ADMIN	Journal Entry	JE	100A	0.00	No
01/07/	01/01/	ADMIN	Payroll Check	CD	2003	790.09	No
01/07/	01/01/	ADMIN	Payroll Check	CD	2004	762.64	No
01/07/	01/01/	ADMIN	Payroll Check	CD	2005	613.18	No
01/07/	01/01/	ADMIN	Payroll Check	CD	2006	705.60	No
01/07/	01/01/	ADMIN	Payroll Check	CD	2007	1,717.26	No
01/07/	01/01/	ADMIN	Payroll Check	CD	2008	850.15	No
01/07/	01/01/	ADMIN	Payroll Check	CD	2009	602.54	No
01/07/	01/01/	ADMIN	Vendor Invoice	AP	890	5,000.00	No
01/08/	01/01/	ADMIN	Payable Check	CD	10500	15,000.00	No
01/08/	01/01/	ADMIN	Payable Check	CD	10501	4,500.00	No
01/14/	01/01/	ADMIN	Vendor Invoice	AP	895	795.00	No
01/17/	01/01/	ADMIN	Journal Entry	JE	100B	0.00	No
01/17/	01/01/	ADMIN	Journal Entry	JE	100C	0.00	No
01/17/	01/01/	ADMIN	Journal Entry	JE	100D	0.00	No
01/17/	01/01/	ADMIN	Journal Entry	JE	100E	0.00	No
01/17/	01/01/	ADMIN	Journal Entry	JE	100F	0.00	No
01/17/	01/01/	ADMIN	Journal Entry	JE	100G	0.00	No
01/17/	01/01/	ADMIN	Journal Entry	JE	100H	0.00	No
01/17/	01/01/	ADMIN	Payroll Check	CD	2010	749.37	No
01/17/	01/01/	ADMIN	Payroll Check	CD	2011	710.93	No
01/17/	01/01/	ADMIN	Payroll Check	CD	2012	572.26	No
01/17/	01/01/	ADMIN	Payroll Check	CD	2013	770.37	No
01/17/	01/01/	ADMIN	Payroll Check	CD	2014	1,717.26	No
01/17/	01/01/	ADMIN	Payroll Check	CD	2015	850.15	No
01/17/	01/01/	ADMIN	Payroll Check	CD	2016	602.54	No
01/21/	01/01/	ADMIN	Contract Invoice	AR	1001	30,879.28	No
01/21/	01/01/	ADMIN	Contract Invoice	AR	1002	9,960.84	No

Error Log Report

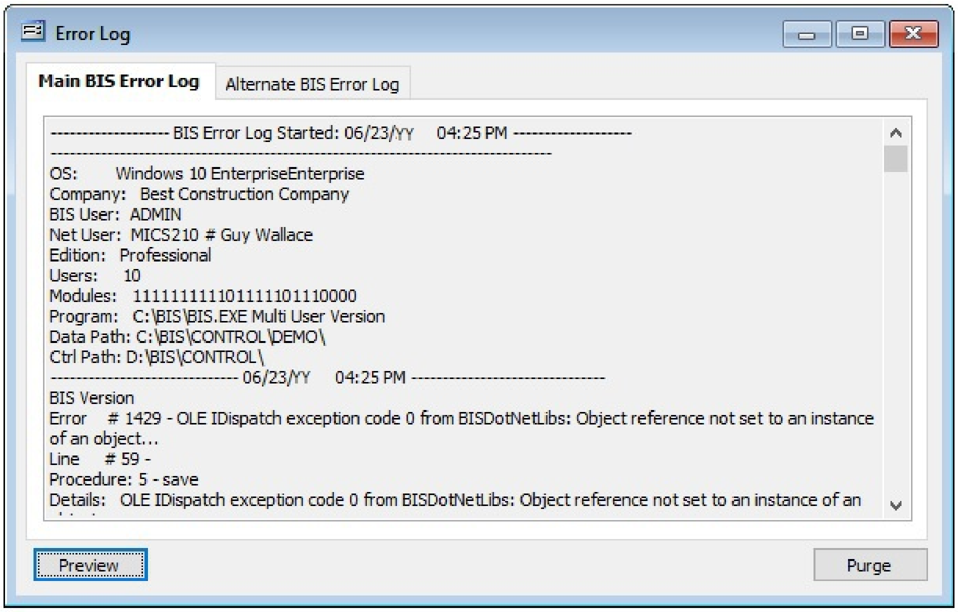
The Error Log Report shows any system errors recorded since the log was purged. The information in this log may assist the MICS Technical Support Department when diagnosing a problem with an installation.

Menu Access

Administrator | Event Logs | Error Log

Error Log

Figure: PW-17
Administrator, Event Logs, Error Log.



```
------------------ BIS Error Log Started: 06/23/YY     04:25 PM ------------------
--------------------------------------------------------------------------------
OS:       Windows 10 EnterpriseEnterprise
Company:   Best Construction Company
BIS User:  ADMIN
Net User:  MICS210 # Guy Wallace
Edition:   Professional
Users:     10
Modules:   11111111101111101110000
Program:   C:\BIS\BIS.EXE Multi User Version
Data Path: C:\BIS\CONTROL\DEMO\
Ctrl Path: D:\BIS\CONTROL\
----------------------------- 06/23/YY     04:25 PM ------------------------------
BIS Version
Error    # 1429 - OLE IDispatch exception code 0 from BISDotNetLibs: Object reference not set to an instance
of an object...
Line     # 59 -
Procedure: 5 - save
Details:   OLE IDispatch exception code 0 from BISDotNetLibs: Object reference not set to an instance of an
```

Purge Button

Use this button to clear all error information from the Error Log.

Credit Card Authorization Log

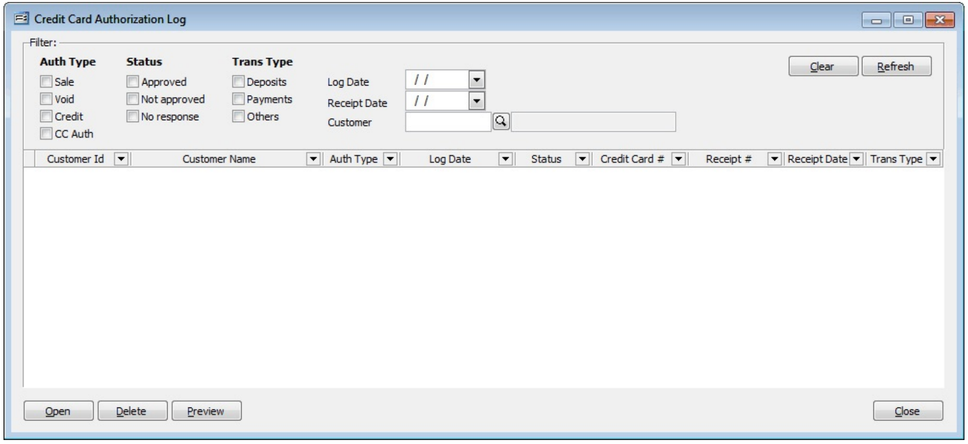
The Credit Card Authorization Log will display all attempts to authorize a credit card transaction. More detailed information is included in the Credit Card module manual. This feature requires PPI integration.

Menu Access

Administrator | Event Logs | Credit Card Authorization Log

Credit Card Authorization Log

Figure: PW-18
Shows the Credit Card Authorization Log.



Index