

## Installation Options:

When you install PlanGuru, you are asked whether you want to activate the security features.

If you activate the features, you will be given the opportunity to add users and passwords.

PlanGuru automatically sets up an administrative user with:

- username of 'Admin' and a
- password of 'Admin'

We recommend that you change the administrative password to a personalized password.

## Once security is activated, only the administrative user can perform the following functions:

- Add companies
- Add projections
- Add new users
- Maintain current users

PlanGuru allows you to optionally enable user security. When security is enabled the administrator can control which users have access to an analysis and what permissions each user has.

## Enabling/Disabling Security:

After installation, PlanGuru Security can be turned on or off by going to:

- **File | Firm Information**
- **Maintain User Security**
- **Enable/Disable User Security**
- You will receive a pop-up window to allow you to manage PlanGuru security.

## Important: Once security has been enabled:

- All projections can be accessed by the administrative user.
- New companies and analysis can only be added by the administrative user.

## Adding/Editing/Deleting Users:

Once security has been enabled, users can be added, edited or deleted by going to:

- **File | Firm Information | Maintain user security | Manage users**
- You will receive a Manage Users window

ID	User Name	First Name	Last Name
6	gloria	Gloria	McMahon
2	Admin	Admin	User

User Name:

Password:

Confirm Password:

First Name:

Last Name:

To add a new user:

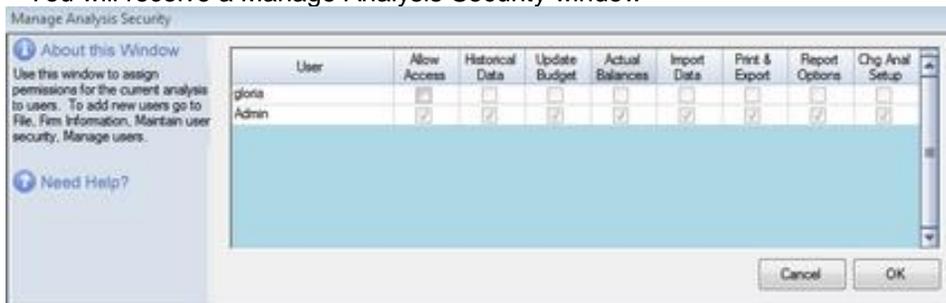
- Enter the User Name for the new user.
- Enter the new user's password and enter it again to confirm the password.

- Enter the new user's First Name
- Enter the new user's Last Name
- Click Add to add the new user
- Click Exit to cancel your changes and return to a previous screen.

**Giving a User the Right to Access an Analysis:**

Users are given access to an analysis by the Administrative user. To give a user/s access to an analysis, the Administrative user has to open the analysis and go to:

- **Edit | Manage Security**
- You will receive a Manage Analysis Security window



Select the checkbox for each permission you wish to grant for each user. Your choices are:

- **Allow Access:** User will have access to the entire analysis
- **Historical Data:** User will have access only to the historical data
- **Update Budget:** User will have access to update the budget
- **Actual Balances:** User will have access to update actual balances
- **Import Data:** User will have access to import data
- **Print and Export:** User will have access to print the analysis and export data
- **Report Options:** User will have access to all report options
- **Roll Forward:** User will have access to roll the analysis forward

Click **OK** to save your selections.

Click **Cancel** to leave the security for the analysis unchanged.

**Important: Only the PlanGuru Administrator can turn off security once it has been activated.**