

# Public-Private Dialogue

## The PPD Reform Tracking Tool

### 8 - Protecting data

Create an account and password .....	1
Create a privilege set .....	2

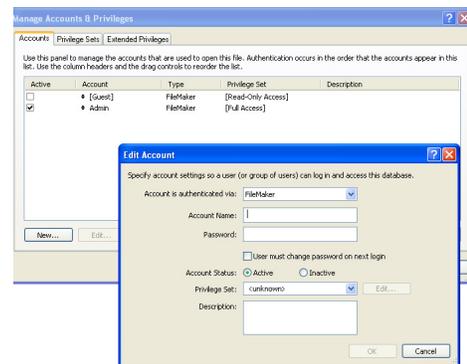
Although your operating system includes file security features, you should use FileMaker Pro accounts and privileges to protect your data. In FileMaker Pro, you restrict which users can access a file when you protect files by defining accounts and passwords. The account name and password that users enter determine which privilege set is used. These privilege sets limit what users can do in the file.

#### **Create an account and password**

##### **About accounts**

*Accounts* authenticate users who attempt to open a protected file. An account includes an account name and usually a password. Accounts can be set up for individual users or you can create accounts that are shared among groups of individuals.. Shared accounts are useful when you want fewer accounts to maintain and aren't concerned with tracking individual access to a database file. However, it's safer to create many accounts than to have multiple users share one account. Passwords are case-sensitive, but account names are not.

When you create a database, two predefined accounts are created (Admin and Guest) and three predefined privilege sets are available (Full Access, Data Entry Only, and Read-Only Access).



The Admin account is not assigned a password and is assigned the Full Access privilege set, which permits access to everything in the file. The Guest account allows users to open a file without specifying an account name, is not assigned a password, and is assigned Read-Only privileges.

Passwords and access privileges for predefined accounts can be changed.

To create an account and password:

1. Choose File menu > Manage > Accounts & Privileges.
2. Click New in the Accounts tab.
3. For Account is authenticated via, Choose FileMaker.

4. Type Account Name and password,
5. For Account Status, select Active.
6. For Privilege Set, choose [Read-Only Access].
7. For Description, type what you need
7. Click OK.

You see the new account listed with the default Guest and Admin accounts.

9. Click OK.

An alert appears informing you that the Admin account is not password protected. You must acknowledge this setting before FileMaker Pro allows you to continue.

10. Click Allow to close the alert.

You see the Confirm Full Access Login dialog box.

11. Type Admin for Full Access Account., leave Password blank, then click OK.

Note For security purposes, always password-protect the Admin account in files you create.

## ***Create a privilege set***

### ***About privilege sets***

*Privilege sets* specify a level of access to a database file. In addition, FileMaker Pro allows for extended privilege sets, which determine sharing options for files.

### **Predefined privilege sets**

Each new database file has three predefined privilege sets.

- Full Access permits accessing and changing anything in the file
- Data Entry Only permits only the viewing and entering of data
- Read-Only Access permits viewing but not changing data

In every database, there must be at least one account with the Full Access privilege set. For security reasons, this account should have a password. You can't change or delete predefined privilege sets except to enable or disable their extended privilege sets, but you can duplicate predefined privilege sets and modify the copy to use it in a different way.

### **Custom privilege sets**

While predefined privilege sets in FileMaker Pro provide for common types of data access, creating unique privilege sets lets you limit access to specific aspects of a database, such as which layouts can be viewed, which menus are available, and whether printing is allowed.

### **Extended privilege sets**

Extended privilege sets determine the data sharing options that are permitted by a privilege set, such as whether a privilege set permits users to open a shared file or view a database in a web browser.

### **Create a custom privilege set**

Suppose your PPD relies on temporary staff at certain times of the year. This staff needs to have access to your data, but you want to prevent temporary employees from printing or exporting information in your database. You can create a specific privilege set for temporary staff that does not allow access to printing or exporting data.

1. Choose File menu > Manage > Accounts & Privileges.
  2. Click the Privilege Sets tab.
  3. Select the [Data Entry Only] privilege set, then click Duplicate.
  4. Data Entry Only Copy is selected. Click Edit.
  5. For Privilege Set Name, type for example Temp Staff.
  6. For Description, type for example No printing or exporting for temp staff.
  7. Clear Allow printing and Allow exporting.
- Temp Staff appears in the privilege set list. This privilege set can be used by one or more accounts.
7. Click OK.
  9. Click Allow to close the alert.
- You see the Confirm Full Access Login dialog box.  
Type Admin for Full Access Account., leave Password blank, then click OK.

