

# Approved Association System Walkthrough

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## Introduction

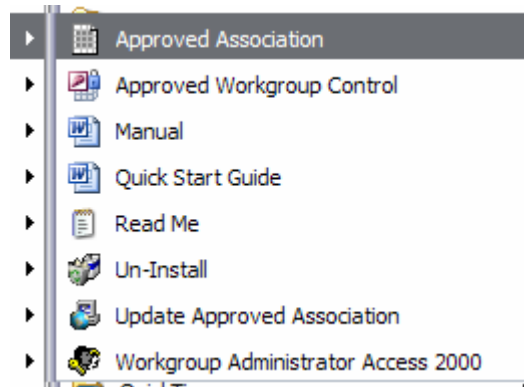
This chapter reviews the general conventions of the Approved Association software. It presents information on how to open the program and insert information into the dialog boxes and windows, in addition to describing and defining each of the items on the Main Menu.

It also gives some general information about security issues, describes special formats that are to be used in the program, and instructs you on closing the software program. For more specific information, refer to each chapter as needed.

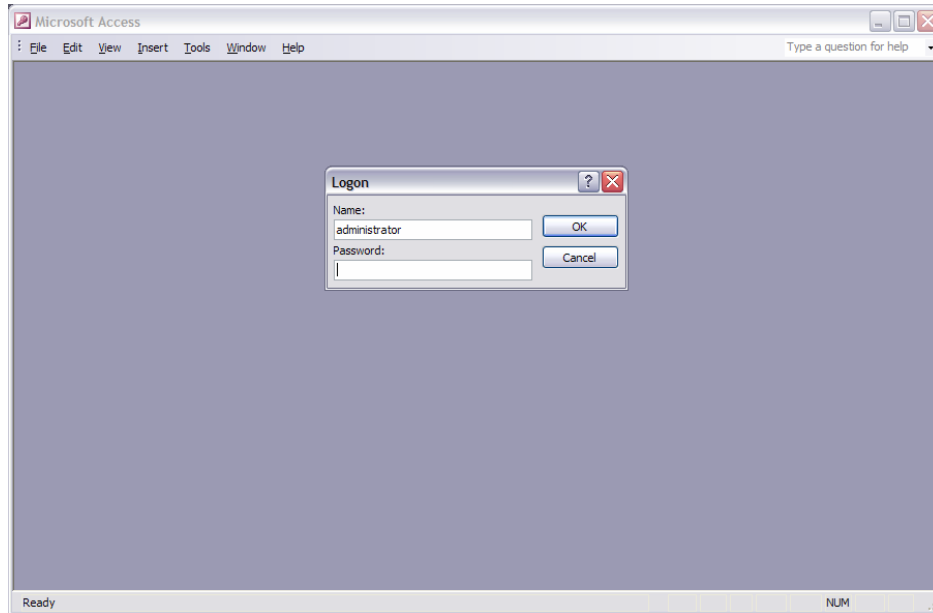
*Note: All chapters of the AA User Guide assume the reader is familiar with the basic concepts of using Windows XP. For more information on the basics of Windows XP, see Appendix A.*

## Launching Approved Association

Using Approved Association (AA) is very much like using any other Windows-based software. To start AA, click the Start menu, locate the Approved Association program group, and select Approved Association. The following is a sample of how the AA program group might appear on your computer's Start menu:

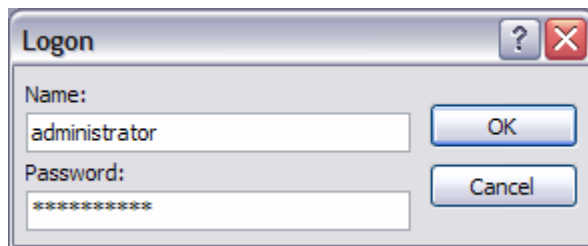


AA will open as displayed:



In the Logon dialog window, enter your name and password. If you have not yet created a username for AA type "administrator" to log in.

Notice that your password will appear as asterisks (\*) in the edit field as you type. This is to prevent others from viewing the actual password while it is on the computer screen.



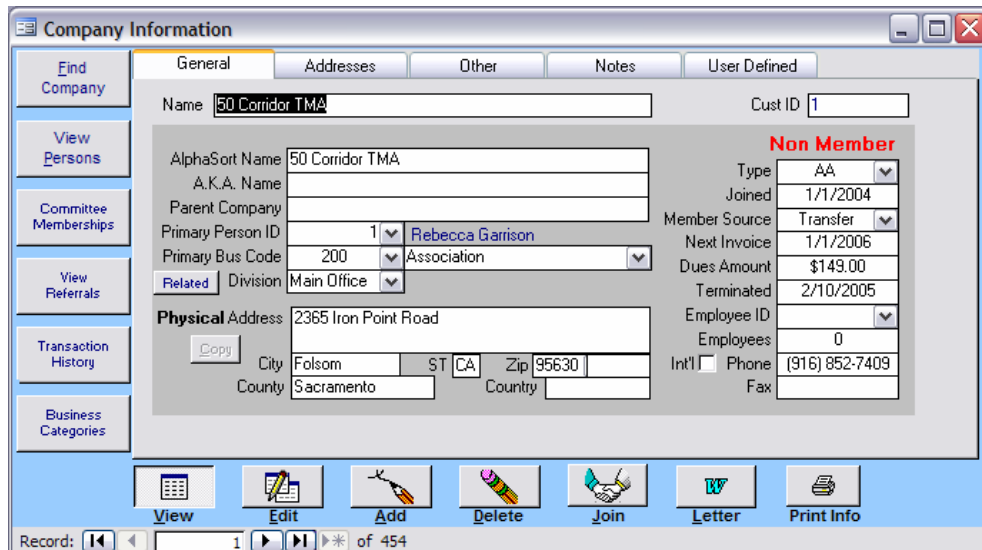
Click the OK button to go to the Main Menu of AA.



*Note: Please keep in mind that the program version you are using may appear somewhat different from the image above; however, the system basics are the same.*

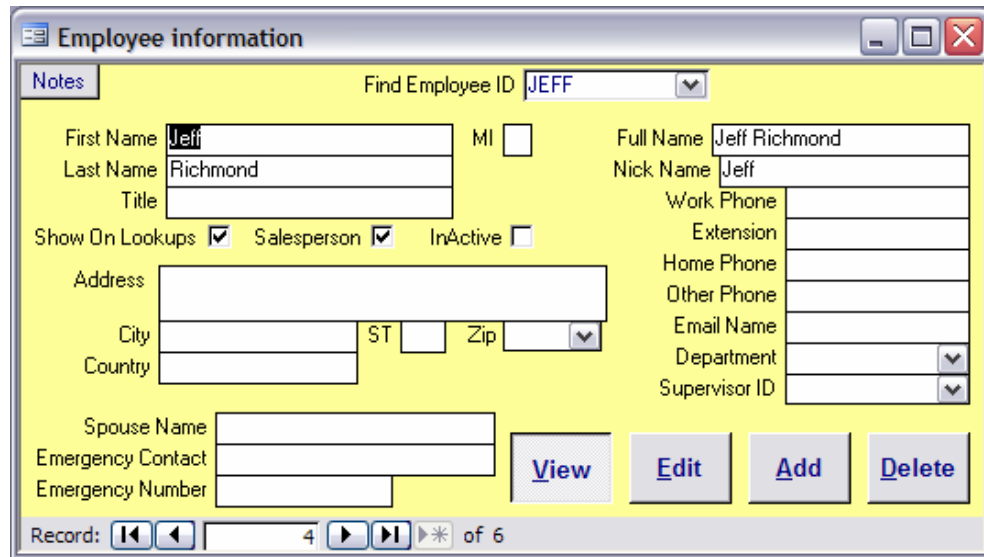
## Interface Conventions

AA consists of primary windows for major functions, secondary windows for ancillary and setup information, dialogs for communicating with the user, and alert boxes for cautions, warnings and errors. A major function window appears similar to this:



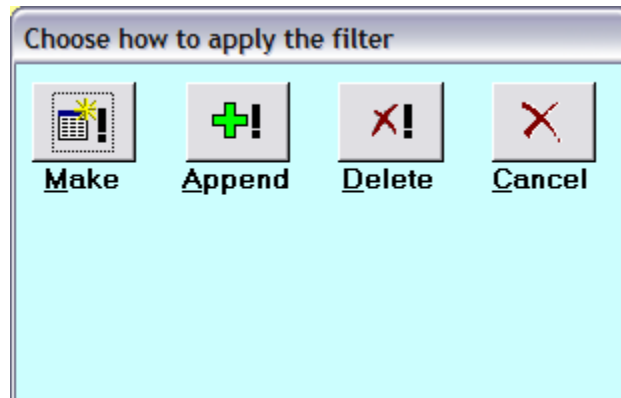
This example has command buttons on the left and bottom of the window, and tabs near the top.

A secondary window appears similar to this:



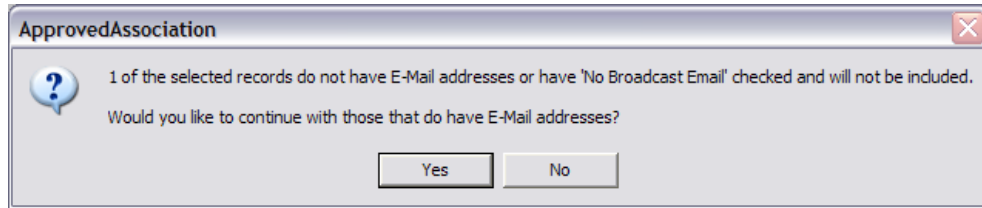
Secondary windows generally deal with a specific data element, which in this case is employee information.

Dialogs appear similar to this:



Dialogs generally appear when additional input is needed during a command function. Dialogs must be dismissed before program operation can continue.

Alert boxes appear similar to this:



Alert boxes can be informational, or may be used to inform the user of a warning or error. Alerts must be dismissed before program operation can continue.

## **Other Interface Conventions**

Inconsistencies make this hard to write.

## **Buttons**

Many different kinds of buttons are used throughout Approved Association. Some allow access to more functions or windows such as the Committee Memberships button that allows you to access the Committee window. Some buttons (e.g. OK) allow you to complete the current function. Radio buttons allow you to select options, such as information for search or report criteria.

## **AA Account Security**

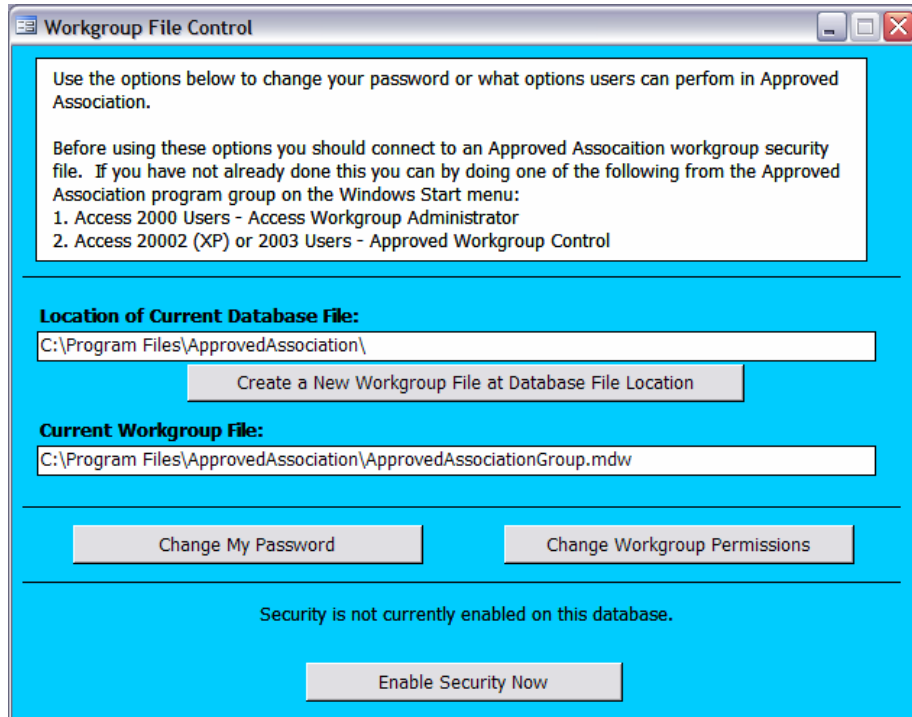
Different users may experience different access levels to the fields on a window even though you can view them. In some instances, a user may not have access to a window at all. Certain system functions are secured and only users who are explicitly given access to the function will be able to perform that function. For example, only users who are explicitly given access to the “delete member” function will be permitted to delete members. Functions that are not secured can be accessed by anyone.

There are 20 standard security functions defined in AA. Administrative personnel will define system “roles” which are connected to individual system functions. Examples of such roles might be “Data Entry Clerk,” “Data Entry Manager,” “Member Service Agent,” and/or “Member Service Manager.”

Administrators will also assign roles and/or individual system functions to individual users. If a user is assigned to a system function, that user is allowed to access that function. If a user is assigned to a role, that user is allowed to access all of the functions assigned to that role.

## **Changing Your Password**

To change your logon password, click the More Options button on the Main Menu and click Workgroup Security in the list on the right. This will open a Workgroup File Control window:



Click the **Change My Password** button to access the Change Password panel:

