

*aim* Administrator  
animal information management system

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# Records Management Administrator

animal information management system

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*by the caplen company*

*The Records Management Administrator provides a comprehensive suite of features and functionality to manage User and Group Accounts, Password maintenance, User and Group access to features and functionality, and User and Group Account usage statistics.*

# Records Management Administrator

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*The entire caplen company team for their hard work, attention to detail and their engineering expertise, which is second-to-none.*

*We also want to thank the many Commercial and Zoological customers who have provided valuable feedback, comments and suggestions, which have allowed us to create the most flexible and intuitive animal records management software solution available.*

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# Section

Introduction

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# 1 Introduction



animal information management system

**Welcome** ... you are joining the worldwide community of users who have chosen the ultimate animal information management system to keep track of their very important animal inventory records.

This software product is the result of working with users in every strata of the animal world ... single pet owners to fully operational zoological parks ... to develop the most comprehensive and feature rich animal information management system.

Many of the features and functionality in **aim** cannot be found in other animal record keeping products ... which is why **aim** has become the technology of choice for animal records management around the world.

Please take a few minutes to familiarize yourself with the **aim** product ... run the software side-by-side with this help system.



This Quick Reference Guide is a living document. The most current version is always shipped on the product CD and placed on the website *downloads & updates* page. Following the installation of the software, you may want to periodically visit the website *downloads & updates* page to see if there is a newer version of this quick reference guide available for download.

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## Section

Getting Started

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## 2 Getting Started

The **aim Administrator** provides an administrative console to manage User accounts and usage rights and permissions.

**User Accounts** : Provide a unique user identification and password ( UID / PWD ) pairing to allow access to application components and track each User's usage statistics.

**Rights and Permissions** : Provides a rules-based mechanism governing access and data manipulation ( insert, edit, delete ) for each User account.

**User Account Statistics** : Provides usage statistics for all User accounts.

To get started, review the User or Group Accounts topic and create the desired number of User Accounts.

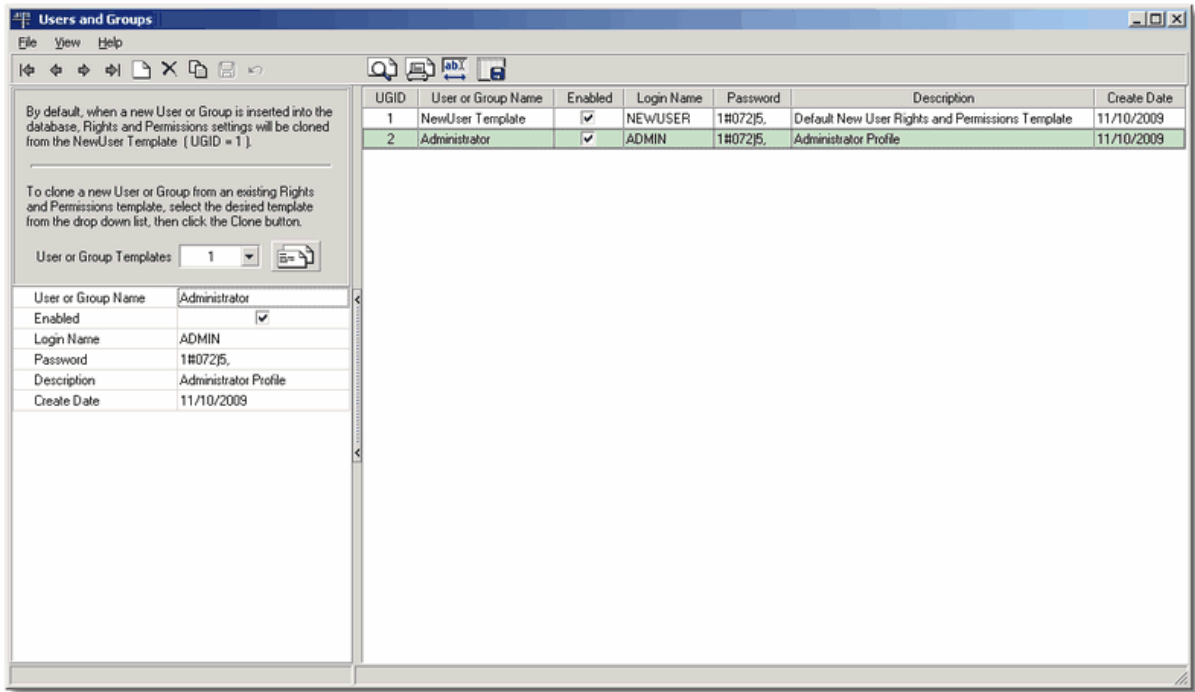
## Section

User or Group Accounts

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### 3 User or Group Accounts

The Records Management Administrator can create and manage as many User Accounts as they need. The following image displays the User Account management form.



#### How Do I Create a New User Account?

New User Accounts can be created in one of two ways:

1. Select the Insert  toolbar button. This will create a new User Account based on the NewUser Template.
2. Select a pre-existing User or Group Template from the drop down list, then select the Clone button. This will create a new User Account based on the selected pre-existing user template.

Choosing either of the above options will present the following User Account editor.

User or Group Name	< New User or Group >
Enabled	<input checked="" type="checkbox"/>
Login Name	< NewUser >
Password	1#072j5.
Description	< Description >
Create Date	12/8/2009

The Enabled setting, encrypted password ( PASSWORD ) and Create Date are automatically provided. You will need to provide the following:

- User or Group Name
- Login Name
- Description

NOTE: If this user account is part of a Group, enter the Group Name and Description, then assign a unique Login Name.

#### Should I Delete or Disable a User Account?

When a User Account is deleted, all usage statistics for that User Account will also be deleted.

When a User Account is disabled, anyone attempting to login with those credentials will be denied entry into an application component.

For historical accuracy, you may want to disable a User Account (i.e., when a User terminates their employment) rather than deleting the User Account. In this way, you have the historical record (usage statistics) in case you need to review those records at a future date.

### 3.1 Change a User Account Password

User passwords can be changed during a User Login, or can be changed by the Records Management Administrator. This topic demonstrates how to change or reset a User's password.

#### Step 1. Select the desired User Account

User or Group Name	Staff
Enabled	<input checked="" type="checkbox"/>
Login Name	pallen
Password	1#072j5.
Description	Staff Profile
Create Date	12/4/2009

Select the desired User Account by navigating the list of Users, or click the desired User Account in the list on the right side of the form.

#### Step 2. Select the Password Property.

User or Group Name	Staff
Enabled	<input checked="" type="checkbox"/>
Login Name	pallen
<b>Password</b>	1#072j5. ▾
Description	Staff Profile
Create Date	12/4/2009

Use your mouse to select the Password property, or use the TAB keyboard key to advance focus in the editor the to Password property.

#### Step 3. Assign a new Password, or reset the Account Password to the default ( PASSWORD ).

User or Group Name	Staff
Enabled	<input checked="" type="checkbox"/>
Login Name	pallen
Password	1#072j5.

Create Password for User or Group  
8 to 15 alphanumeric characters

Password

Confirm

---

Reset Password to default : PASSWORD

Click the down arrow to display the drop down Password panel.

On this panel, you have two (2) options:

1. Enter / Confirm a new Password for the User's Account.
2. Reset the User Account Password to the default value ( PASSWORD ).

Select the **apply** button to assign the Password. The password is displayed and stored as an encrypted value.

NOTE: If you reset the User Account Password to the default value, the User will be forced to create a new password the next time the User logs into an application component.

### 3.2 Login to an Application Component

Logging into any of the **aim** application components follows industry-standards. This help topic demonstrates how to login.

NOTE: Users will only be required to login if the User Login has been enabled.

**AIM Login ...**

Enter Login Name and Password

Login Name

Password

This example demonstrates the login for the Records Management Administrator.

Default Login Name : **ADMIN**

Default Password : **PASSWORD**

The Login Name and Password are case sensitive.

When any User logs in using the default password, they will be forced to change their password ( refer to next image below ).

This same mechanism works for all User Accounts. If an existing User wants to change their password, they can simply enter **PASSWORD** into the Password editor and they will be advanced to Create New Password.



In the above example, the Records Management Administrator logged in using the default values, which changed the user interface, requiring the Administrator to create a new password.

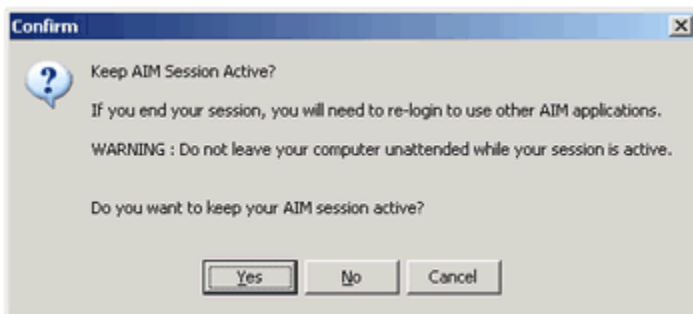
Enter the desired Password into the Password editor, then re-enter the same Password into the Confirm editor.

If the Passwords match, the Password will be encrypted and stored in the User's Account.

**NOTE FOR ADMINISTRATORS :** You are not required to keep the Login Name as ADMIN. As the Administrator, you can select yourself (Administrator) on the User Account Management form and change your Login Name.

### What Happens When a User Exits an Application?

When a User exits an application, they will be presented with the following Confirmation message.



**YES :** The Application will close and the User Session will remain active. If the same User launches another application component, they will not be required to login.

**NO :** The Application will close and the User Session will end. If the same User launches another application component, they will be required to re-login.

**CANCEL :** The Confirmation message will be closed and the User will remain in the current application component.

## Section

Rights and Permissions

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## 4 Rights and Permissions

Each User account is assigned their own set of Rights and Permissions rules, segregated into two (2) categories:


1. Data Forms : Access and Read Only
2. Data Tables : Insert, Edit and Delete

The below display presents the Access and Read Only options for Applications, Menus and Data Entry forms.

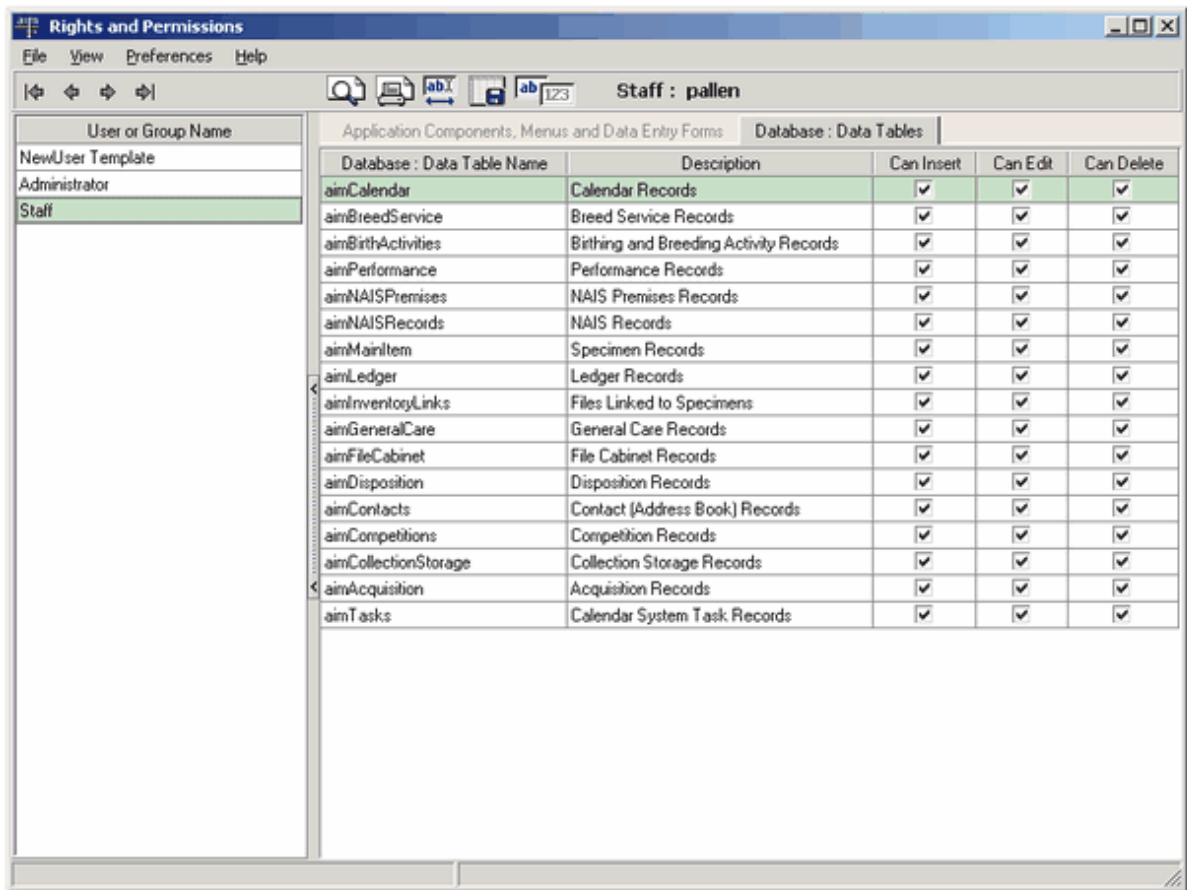
User or Group Name	Permission Category	Assigned To	Applications, Menus and Data Forms	Description	Can Access	Read Only
NewUser Template	AIM Application		Data Records	Core Records Management Application	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Administrator	AIM Application		Architect	Data Architect Application	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	AIM Application		Print Shop	Print Shop Application	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	AIM Application		Data Xchange	Data Xchange Application	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	AIM Application		Administrator	Administrator Management Application	<input type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	Overview : Specimens	Profile Information for Specimens	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	Acquisition	Acquisition Data Entry Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	Disposition	Disposition Data Entry Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	General Care and Maintenance	General Care and Maintenance Data Entry Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	Performance Measurement	Performance Measurement Data Entry Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	Birthing Activities and Breed Service	Birthing Activities and Breed Service Data Entry Forms	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	Competitions, Shows and Events	Competitions, Shows and Events Data Entry Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	NAIS Record Book	NAIS Record Book Data Entry Forms	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	OnDemand Data Views	OnDemand Data Views Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	OnDemand Chart Views	OnDemand Chart Views Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	Calendar and Scheduling	Calendar and Scheduling Data Entry Forms	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	Contacts ( Address Book )	Contacts ( Address Book ) Data Entry Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	Financial Ledger	Financial Ledger Data Entry Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	General Care and Gestation Planner	General Care and Gestation Planner Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	Pedigree and Progeny Workshop	Pedigree and Progeny Workshop Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	User Interface Themes	User Interface Themes Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	Specimen View Groups	Specimen View Groups Designer Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	OnDemand View Group Filter Designer	OnDemand View Group Filter Designer Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	Reusable Report Title Images	Reusable Report Title Images Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	Selection Lists Manager	Selection Lists Manager Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	MenuAndUIForm	Data Records	File Cabinet - Images, Videos and Documents	File Cabinet - Images, Videos and Documents Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The basic rules are:


- Access can be controlled at the Application level ... i.e., A User can be granted or denied access to a specific application component by placing / removing a check mark in the *Can Access* checkbox for the AIM Application component.
- Access can be controlled at the Menu or Data Form level ... i.e., A User can be granted or denied access to a specific data entry form, such as the Financial Ledger, by placing / removing a check mark in the *Can Access* checkbox for the MenuAndUIForm item.
- A User can be assigned Read Only privileges to a specific application component or data entry form. A good example of this would be a Staff member (i.e., Educational Outreach) who needs to use the data in a referential manner, but does not have a requirement to insert, edit or delete data ... simply assign a Read Only attribute to their Data Records permission and they will be able to see, but not alter, any of the data. Assign the User's read only permission by placing / removing a check mark in the *Read Only* checkbox for the AIM Application component or MenuAndUIForm item.

To change the setting of a permission, select the  toolbar button to place the form into edit mode.

The below display presents the Insert, Edit and Delete options for AIM data tables.



The basic rule is that Users can be granted or denied the privilege to Insert, Edit or Delete records for a specific data table. This provides a flexible mechanism to control which Users can insert, modify or remove data contained in AIM data tables. Assign the User's privilege by placing / removing a check mark in the *Can Insert*, *Can Edit* or *Can Delete* checkbox for each data table.

To change the setting of a permission, select the  toolbar button to place the form into edit mode.

**NOTE:** Underlying data tables for user-defined data entry forms (referred to as UDF and created in the Architect application) are automatically added to Rights and Permissions listings in the Administrator. This also applies to data forms and data tables imported from other **aim** users.

## 4.1 Enable / Disable User Login

User Login can be enabled / disabled to accommodate facilities that need this level of governing user access as well as facilities where this functionality is not required.

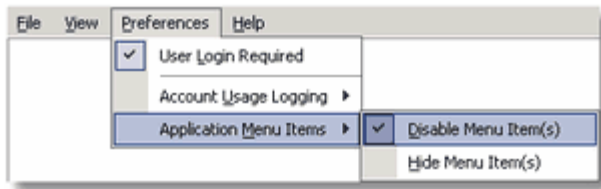


Select the User Login Required menu item to show / hide the check mark for this item. When the check mark is visible, the user login system will be active and all Rights and Permissions will be evaluated for each User.

When the menu item is unchecked, no User login will be required and all Rights and Permissions evaluations will be bypassed.

## 4.2 Show / Hide Application Menu Item(s)

The Records Management Administrator has several options regarding the display of application menu items when the User's *CanAccess* privilege is turned off ( *CanAccess* = FALSE ).



**Disable Menu Item(s).** The application menu item will be disabled, although the text of the menu item will remain visible.

**Hide Menu Item(s).** The application menu item will be hidden from view.

## 4.3 Runtime Priorities for Rights and Permissions

Runtime Rights and Permissions are only considered when User Login is enabled. When User Login is disabled, each application component can be launched and all privileges (access, insert, edit and delete) will be available to the User.

This topic details the sequence (order) of evaluating runtime priorities for rights and permissions when User Login is enabled.

### 1. Does the User have Access to the Application?

When each **aim** application component is launched, a series of rights and permissions are evaluated to determine:

- Is the Login Name and Password valid.
- Is the User Account active ( enabled ).
- Does the User Account have access privileges to the application component.

NOTE: If any of the above evaluations are FALSE, a message will be displayed to the User and the action to launch the application component will be terminated.

### 2. Does the User have Access Privileges to ALL Menu Items and Data Forms?

Rights and Permissions settings are used to enable / disable Data Records menu items. This controls whether a User can access specific data forms within the application component. If a menu item has the *Can Access* privilege set to FALSE, the menu item will be disabled and the User will not be able to access the associated data form.

### 3. Does the User have Read Only Privileges to the Application and Data Forms?

Read Only privileges can be set globally for the application component, or specific to individual data forms within the application.

**Application Read Only.** When an application component (i.e., Data Records) is set to Read Only, then all data forms within the application will be read only. This means that the User will not be allowed to Insert, Edit or Delete records throughout the application. This is useful setting for Users who may need access to data (i.e., Educational Outreach, Research, etc.), but do not need data entry privileges.

**Data Form Read Only.** When a data form is displayed, the User's rights and permissions are evaluated to determine if the User has data entry privileges or is restricted to read only privileges. If the data form is determined to be read only, the the User will not be allowed to Insert, Edit or Delete records on the data form.

### 4. Does the User have Insert, Edit and Delete Privileges on the Data Form?

When a data form is displayed, and all of the above rights and permissions have been passed, a final evaluation is made to determine if the User has Insert, Edit and / or Delete privileges for the underlying data table to the data form. This applies to all data forms shipped with the **aim** product as well as data forms created in the **Architect** or imported from other **aim** users.

The user interface toolbar buttons and information editors will be displayed or enabled / disabled based on the *Can Insert*, *Can Edit* and *Can Delete* rights and permission settings for this User.

## Section

Account Usage Statistics

5

## 5 Account Usage Statistics

Account Usage Statistics provides Records Management Administrators with important information regarding each User's access and usage of **aim** application components.

Depending on the setting of usage statistics logging, a comprehensive record can be detailed when:

- A User enters / exits an application component.
- A User enters / exits an application data form, via the associated menu item.

The following help topics provide detailed information regarding:

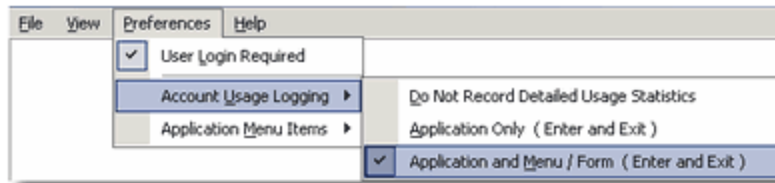
Setting Level of Usage Statistics Logging

Purging Outdated Usage Records

### 5.1 Setting Level of Usage Statistics Logging

The level of statistics logging can range from none to granular. Usage statistics logging is only active when User Login is active.

To set the desired level of statistics logging, select the appropriate menu item from the Preferences | Account Usage Logging menu.

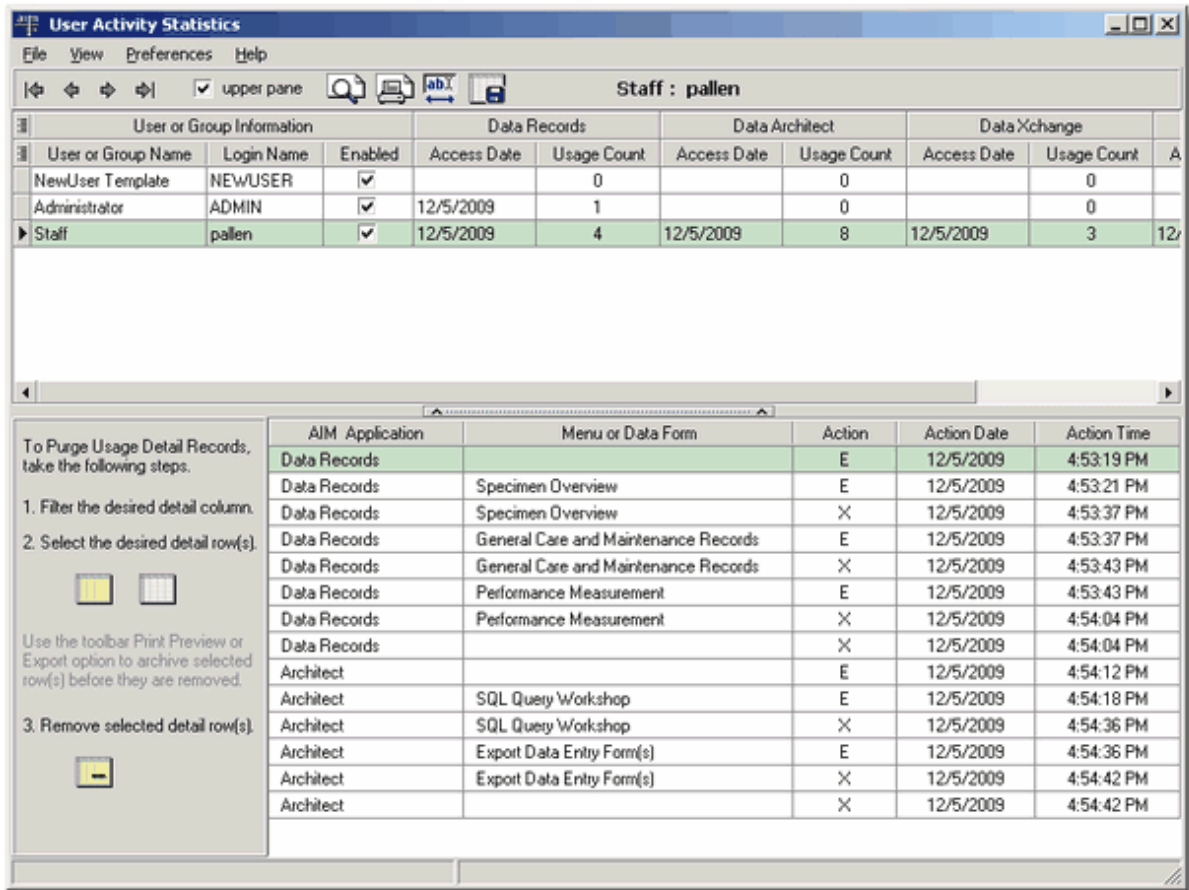


**Do Not Record Detailed Usage Statistics** : No detailed usage statistics will be recorded for each User Account.

**Application Only ( Enter and Exit )** : Usage statistics will be recorded each time a User Account enters or exits and application component.

**Application and Menu / Form ( Enter and Exit )** : Usage statistics will be recorded each time a User Account enters or exits an application component ... as well as each time a User Account enters or exits an application component data form.

The following screen shot demonstrates usage statistics recorded for a User Account.



Notice that the usage records track the User Account for *Application and Menu / Form* usage.

## 5.2 Purging Outdated Usage Records

Depending on the level of usage statistics logging, the number of usage records will grow at a minimal to accelerated rate. With logging set to the most granular level ( Application and Menu / Form ), a usage record will be created each time a User enters or exits an application component ... and each time a User enters or exits a data form ... which can result in a large number of usage records per User Account.

You may find it easier to manage usage statistics records by removing (purging) outdated records. As an example, you may want to archive and purge usage statistics records on a Quarterly, Monthly or Yearly basis ... or governed by local records management policy.

This topic demonstrates how to archive and purge usage statistics records.

### Step 1. Select the desired User Account

**User Activity Statistics**

File View Preferences Help

Staff : pallen

User or Group Information			Data Records		Data Architect		Data Xchange	
User or Group Name	Login Name	Enabled	Access Date	Usage Count	Access Date	Usage Count	Access Date	Usage Count
NewUser Template	NEWUSER	<input checked="" type="checkbox"/>		0		0		0
Administrator	ADMIN	<input checked="" type="checkbox"/>	12/5/2009	1		0		0
Staff	pallen	<input checked="" type="checkbox"/>	12/5/2009	4	12/5/2009	8	12/5/2009	3

AJM Application	Menu or Data Form	Action	Action Date	Action Time
Data Records		E	12/5/2009	4:53:19 PM
Data Records	Specimen Overview	E	12/5/2009	4:53:21 PM
Data Records	Specimen Overview	X	12/5/2009	4:53:37 PM
Data Records	General Care and Maintenance Records	E	12/5/2009	4:53:37 PM
Data Records	General Care and Maintenance Records	X	12/5/2009	4:53:43 PM
Data Records	Performance Measurement	E	12/5/2009	4:53:43 PM
Data Records	Performance Measurement	X	12/5/2009	4:54:04 PM
Data Records		X	12/5/2009	4:54:04 PM
Architect		E	12/5/2009	4:54:12 PM
Architect	SQL Query Workshop	E	12/5/2009	4:54:18 PM
Architect	SQL Query Workshop	X	12/5/2009	4:54:36 PM
Architect	Export Data Entry Form(s)	E	12/5/2009	4:54:36 PM
Architect	Export Data Entry Form(s)	X	12/5/2009	4:54:42 PM
Architect		X	12/5/2009	4:54:42 PM

To Purge Usage Detail Records, take the following steps.

1. Filter the desired detail column.
2. Select the desired detail row(s).
3. Remove selected detail row(s).

Use the toolbar Print Preview or Export option to archive selected row(s) before they are removed.

## Step 2. Select the Usage Statistics Records to be Purged.

Use one of the following options to select the desired usage statistics records to archive / purge:

- Select the toolbar button to select ALL records in the list.
- Hold the CTRL key down while clicking random records with your mouse to select non-contiguous records.
- Select the first record in a contiguous block by clicking the record with your mouse. Then hold the SHFT key down and use your mouse to click the last record in the contiguous block.

NOTE: Selected records will be highlighted.

Select the Remove button located on the Purge panel. Notice that all highlighted records are removed from the usage statistics display.



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P.O. Box 517  
Jefferson, Maryland 21755  
USA

[www.caplencompany.com](http://www.caplencompany.com)

240.490.7019