

Configuring FINPACK User Roles

September 2010

In the Lender version, FINPACK can be configured for different user roles. Each role has different features and capabilities within the software. There are currently two user roles within FINPACK: *Analyst* and *Loan Officer*, with *Loan Officer* being the default role.

Rather than having a FINPACK-specific set of user names and passwords, FINPACK relies on groups defined in Windows Active Directory. These groups define the *Analyst* role and are defined in the FPUUsers.ini file stored in the FINPACK program folder. This document describes the functions of these two roles in FINPACK and how to configure the setup.

Analyst Role

Users with the *Analyst* role in FINPACK can lock and unlock individual items in a FINPACK data file; such as, a balance sheet, a cash flow plan, or a yearly analysis. When an individual item is locked, it cannot be modified. A locked item can still be reviewed and printed but it must be unlocked before any changes are possible.

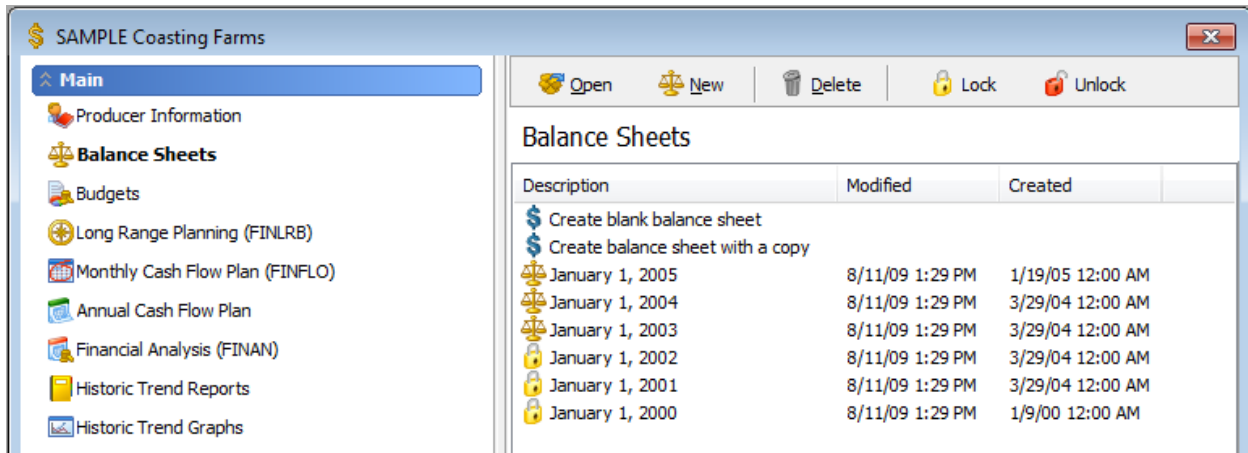
Loan Officer Role

Users in the *Loan Officer* role can create new files, create new items in existing files, and edit unlocked items in existing files. Locked items cannot be edited. A locked item can be copied, and the copied item is unlocked so it can be edited.

If a user is not a member of one of the groups defined in the user role configuration file, or if the user role configuration file does not exist in the FINPACK program folder, then the user is a *Loan Officer* by default.

Locking & Unlocking Process

When the current user is an *Analyst*, there are Lock and Unlock buttons in the file navigator dialog. These buttons lock or unlock the highlighted item in the list. These functions also appear in the popup menu displayed when right-clicking an item.



SAMPLE FILE NAVIGATOR DIALOG SHOWING LOCK & UNLOCK BUTTONS ON THE TOOLBAR. SOME OF THE BALANCE SHEETS ARE LOCKED.

When an individual item is locked a padlock icon is shown in the list next to the item's description. A locked item cannot be edited by any user regardless of their role. But if a new item is created using a copy of a locked item, the new item is not locked and can be edited.

FPUsers.ini File Contents

The contents of the **FPUsers.ini** file define the groups in Active Directory whose members have the *Analyst* role in FINPACK. This file can be created using any text editor (Notepad, etc.) and it must reside in the FINPACK program folder. An example file is shown below.

```
[Main]
AnalystProfileCount=1          ; Number of analyst profiles in this file

[FINPACKAnalystProfile1]
Domain=AD                     ; Domain name
Group=FINPACK Analyst         ; Group name
```

The [Main] segment of the file has the variable AnalystProfileCount which is the number of profiles defined in the file. A profile is comprised of a domain name and group name, and is defined with the segment name [FINPACKAnalystProfileN] where N is replaced with a number. Usually, only one profile needs to be defined, but this setup is flexible in case there is more than one group to check against.

This file is not part of the standard FINPACK installation. If it does not exist in the FINPACK program folder, the user has a *Loan Officer* role in FINPACK.

Defining groups in Active Directory and assigning user membership to these groups can be managed with the tools currently used within your organization.