



CIM GOLD User's Guide

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Introduction

Welcome to the CIM GOLD® User's Guide. This documentation provides a brief overview of the Customer Information Management program and explains basic ideas and features.

CIM GOLD combines all your customers' account information into a complete, easy-to-use system on your PC. CIM GOLD shows all accounts, including deposit and loan accounts, ATM and debit cards, tax filings, and more that are tied to your customers. This system makes it easy to look up accounts without having to open the Loan, Deposit, and other subsystems individually.

With CIM GOLD, you can create follow-up assignments for employees to complete, such as soliciting customers for loans and calling customers on their birthdays. You can also create comments and messages tied to account holders that track important information about that customer. And CIM GOLD is customizable, so your institution can choose the screens and functions you want to use.

Field-Level Help and Master Help on CIM GOLD Screens

For detailed information on using each screen and field in CIM GOLD, click on any field and press <F1> to read the [help](#) for that field.

You can also search for terms using the CIM GOLD Master help file. See the Master Help topic for more information.

Regular or Enhanced Mode (Tiles)

You can use CIM GOLD in regular mode or [enhanced user mode](#). With the enhanced mode, you can click on tiles to quickly jump to often-used screens.



Overview

CIM GOLD offers convenience and adaptability to your institution's individual needs.

CIM GOLD includes the following features:

- A [tree-like navigation](#). You can also search for a screen by its name.
- Optional [tiles](#) for quick access to often-used screens.
- You can [choose](#) which screens your institution uses.
- You can send lists of data to Report Manager or export data to a tab-delimited file you can later open in programs such as Microsoft® Excel.
- You can interrupt work to process a customer.
- Screens that combine data from several sources to eliminate jumping from screen to screen.
- You can create comments tied to the customer, not accounts.
- You can create comments for follow-up activity.
- You can pop out a screen and look at other screens at the same time.

CIM GOLD also offers a customer information system called [CIS](#) that can help you build customer relationships and implement your relationship banking policies. CIS is integrated with all FPS GOLD systems, including deposits, new accounts, loan origination, loan servicing, Internet banking, and others, to provide a powerful customer summary for all employees to successfully deal with each customer.

Using CIS, bank employees can quickly identify the monetary value or the potential value of a customer based on accounts the customer owns and accounts the customer influences (customer relationships).

When new relationships are discovered, they can be quickly and easily added to CIS. Once added, all bank employees can immediately view the new relationships.

For a detailed guide to CIS, see the [CIS User's Guide](#) on DocsOnWeb.

Basic Concepts

This section defines basic terms and concepts essential to CIM GOLD.

Afterhours Processing

The term "afterhours" refers to the processing that occurs during the night. This processing includes such things as printing reports, statements, and notices. Afterhours processing is done automatically by FPS GOLD programs.

File Maintenance

The term "file maintenance" (commonly abbreviated as "F/M") is found in various places in CIM GOLD. It is also found in the Security Setup. File maintenance means users can change information in fields. Some fields allow file maintenance, and some do not. Additionally, security can be set up for individual fields and screens for file maintenance or inquiry-only access. Inquiry-only access means users can only view information; they cannot change it.


Each <F1> field help topic states whether that field is file maintainable or not, as shown in the following example:



Navigation: [Letters & Actions tab](#) > [Holds & Special Instructions field group](#) >

Hold Code 1

Entry: User, drop-down list

F/M: Yes 

Mnemonic: LNHL1

Screen: Account Detail and several others

F/M: No means file maintenance is not allowed.

F/M: Yes means file maintenance is allowed.

Field

A field is simply a place for data on the screen. You can enter or view information in fields, as shown in the following example:

Account Information

Date Opened

Date Closed **12/03/2010**

Reason Closed

Account Type

General Category

Sub Category

Statement Cycle

Account Representative

Plan Reference Number

Active **Overdrafts**

Mnemonic

A mnemonic is a five-character name for a field. Mnemonics make it possible for you to build specialized reports. Not all fields have mnemonics. The [<F1> help](#) and the Tooltip pop-up will tell you which fields have mnemonics and which fields do not. If a field does not have a mnemonic, the information in that field cannot be included on a report.

For more information on mnemonics and how to use them in reports, see [Section 1.1, Mnemonics](#) in the Report Writer documentation in DocsOnWeb.

List View

A list view is a table of information. Many screens in CIM GOLD have list views. You can sort the information in the columns from descending to ascending or vice versa by clicking on the column header. Each list view also has [right-click functionality](#). See the following example of the list view on the Amortizing Fees Screen:




Code	Description	Original	Remaining	Earned
2		22.22		22.22
4		200.00		200.00
10		350.00		350.00

List Icon

For many fields in CIM GOLD, you click a list icon  to view and select a list of possible entries for that field. The options on these lists are entered by FPS GOLD or by someone at your institution who sets up information using the System Setup Screens.

The following is an example of a list that appears after a user clicks the list icon:

Regulatory Classifications

Amortization 

Collateral Commercial

General Category Commercial

Insurer Private Ins

Loan Class 4

Loan Type Test Syste

Maturity Modifier Balloon Pa

Origination Participati

Purpose Commerci

PMI Information 11.11

Repricing Date 06/01/20

NAICS Code 221 NAICS Lookup CRA Code

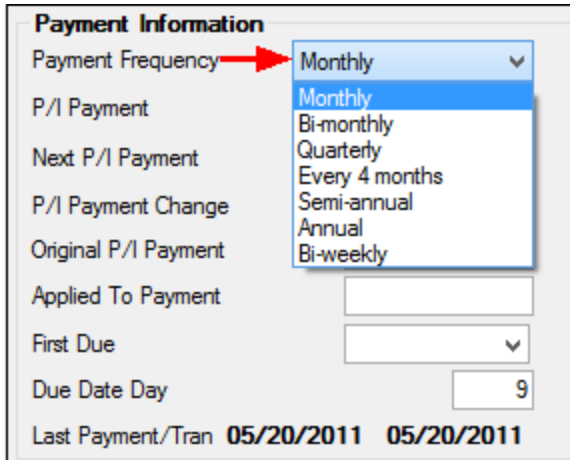
Loan Amortization Code Descrip x

Description	Amortization Code
	0
Fixed Rate	1
Adjustable Rate	2
Renegotiable Rate	3
Graduated Payment	4
Rate Sensitive	5
Rule of 78s	6
Growth Equity	7
Adjustable Rate (Lagging)	12
Rate Sensitive (Lagging)	15

Drop-Down Field

Some fields on CIM GOLD screens are referred to as drop-down fields. Drop-down fields are similar to list icons, except that you open the list by clicking on an arrow in the field, as shown in the following example. FPS GOLD controls the information in these lists.





The screenshot shows a form titled "Payment Information". The "Payment Frequency" field is highlighted with a red arrow and has a dropdown menu open. The dropdown menu lists the following options: Monthly (selected), Bi-monthly, Quarterly, Every 4 months, Semi-annual, Annual, and Bi-weekly. Other fields in the form include "P/I Payment", "Next P/I Payment", "P/I Payment Change", "Original P/I Payment", "Applied To Payment" (text input), "First Due" (dropdown), "Due Date Day" (text input with "9" entered), and "Last Payment/Tran" (displayed as "05/20/2011 05/20/2011").

General Information

As you are entering information or updating information, there are a few things to be aware of.

Read Screens

Make it a habit to read your screens thoroughly. Many of the screens have specific directions listed on them that are not included in this user guide. They are self explanatory and very useful.

Also, many fields on screens have an [error provider icon](#) (🔴). Watch for these icons to know which fields are mandatory, or to view any additional messages that may accompany that field. If this icon appears on any field on a screen, you will not be able to save data changes until the error provider is removed by entering the appropriate data.

Entering Dollar and Rate Amounts

The system automatically enters dollars and decimals in appropriate fields. Generally, you will not need to enter a decimal point or a comma when entering this type of information in CIM GOLD. However, you can also manually enter a decimal, and when you navigate away from the field, the system will automatically place the appropriate amount of zeroes on the end based on the number of digits in the field after the decimal.

Clicking <Save Changes>

Clicking <Save Changes> processes any new or changed data in the fields on the screen. It is important to click <Save Changes> after making any correction, change, addition, or deletion in a field. However, when you have several changes on a screen or are entering data on a new screen, you can enter all necessary changes or new data, then click <Save Changes> to process all of the changes at the same time.

Making Corrections

If you have already clicked <Save Changes> to process changes you have made on a screen, you can still make a correction to that entry. Simply type over the same field with the correct information, then click <Save Changes> again. If you need to make a change to information that can only be changed or corrected with a transaction (such as Principal Balance or Account Balance), use CIM GOLD Teller. Most monetary fields are not maintainable.



Default Fields

Some of the fields on the various screens are default fields. If a default field does not have information entered in it, the system will enter the default information into the field from other sources, such as from institution options, setup files, etc. Some of these fields will display with default information already entered. If they contain the correct information, leave them as they are. If you need to change the default information, type the correct data over the default data, then click <Save Changes>.

Security

Your designated security officer should have set up a user name for you. If not, contact your security officer. You cannot open any FPS GOLD applications without a user name and security code.

In addition, your security officer can decide which screens you can use and which fields on screens you can file maintain. For example, if your job does not require data entry of any kind, you may only have access to inquiry mode functions, which you can only use to view information. If your job deals specifically with loans, you may only have access to the Loan system and those systems associated with it, such as CIS.

For more information about how to set up security features, see the Security section under [Setting Up CIM GOLD](#) in this user guide.

Security Violations

The system will give you three tries to enter a correct user name and security code. If, after three attempts, you have not entered a valid security code, the system will lock you out. If this occurs, contact your security officer to have your violation reset.



Keystrokes

In addition to Windows standard keystrokes, FPS GOLD has a number of keystrokes that are standard throughout different applications and programs. Some are only available in CIM GOLD.

The following is a list of FPS GOLD keystrokes and their functions that are standard throughout different applications and programs.

Keystroke	Function
<Enter>	Transmits information to the host computer.
<Tab>	Moves cursor forward to the next open field.
<Alt> + <Tab>	Toggles among open applications in Windows.
<Ctrl> + <Tab>	Toggles among open windows in an application.
<Shift> + <Tab>	Moves cursor backward, field to field.
<F1>	Opens the Help window .
<Alt> + <F4>	Closes CIM GOLD.
<Ctrl> + <Shift> + <P>	Opens the Print dialog box so you can print the screen being displayed to the printer you select.
<Alt>	Turns on access keys. Access keys appear under the menu bar as a way to quickly access menu functions. When you press <Alt> in CIM GOLD, a line will appear under a letter in each menu that uses access keys. Then press <Shift> plus the applicable underlined letter to open that particular menu. This is the same as using the mouse to click on the menu. For example, <Shift> + F will open the File menu when "F" is underlined.

You can also also set up [speed keys](#) in CIM GOLD.

- You can jump to screens with one keystroke when you link them to speed keys <F2>, <F3>, <F4>, <F5>, <F6>, <F7>, <F8>, and <F9>.
- In CIM GOLD, you choose which speed keys you will use.



Setting Up Security

Before a user can open CIM GOLD, security must be set up for each employee who needs it. This section contains details on setting up security for CIM GOLD.

See the following topics:

[Company Options Screen](#)

[Subscribe to Mini-Applications Screen](#)

[Reset Violations Screen](#)

[Security Setup Screen](#)



Company Options Screen

Security > Company Options

Overview of Security

Before using CIM GOLD and other FPS GOLD product applications, security must be set up for your institution and its employees. The CIM GOLD Security screens are used to set up the following:

- Company security options
- Security for employees and tellers
- Security for CIM GOLD screens
- Security for system screens such as GOLDTeller and GOLDView
- CIM GOLD Field Level Security

The following list specifies the order in which security must be set up within CIM GOLD so that security will work properly for your institution and employees.

1. **Subscribe to Mini-Applications** - Your institution must subscribe to all applications and screens your institution will have access to before you can set up security.
2. **Company Options** - The options on this screen let you define your institution name, length of employee numbers and passwords, days to force security code (password) changes, and minutes of inactivity to time out CIM GOLD and other FPS GOLD products. Company Options are found on the CIM GOLD Security > Company Options screen.
3. **Setup** - Contains setup fields for employee, profile, teller security, CIM GOLD screens, system screens, and Field Level Security. If your institution chooses to use profiles, they must be set up before setting up individual employees.

Some of the features available in the CIM GOLD Security system are listed below.

- You can create profile groups to set up employees with similar security clearance. For example, all tellers could be set up with the same security access.
- You can set up multiple profiles per employee.
- You can specify a length of time after which password changes are forced.
- Users can select their own security codes (passwords).
- You can grant users one of three levels of security: File Maintenance, Inquiry, and None (no access).
- You can set the length of time an FPS GOLD program can remain inactive before automatically locking the program and requiring a password to be entered.
- You can grant specified FPS GOLD customer service employees defined levels of security access.
- You can delete security for terminated employees.
- You can delete unused profiles.
- Reports for changes made to the Security System are FPSDR218, Security Change Report, and Online Report.

Setting Up Company Options

To set up your company's security options:

1. Enter your institution name in the **Institution Name** field.



2. In the **Employee Number Length** field, enter a number between 4 to 10. (For example, if you enter 8 here, all employee numbers must be eight digits long.)
3. In the **Days to Force Employee Password Change** field, enter a number between 15 and 99 (or 9999, never expires) to define the default number of days between forced password changes for your institution. The recommendation is to force a password change at least every 90 days. This company default can be overridden during individual employee setup.

Password changes are forced after the specified length of time. This feature protects your institution from fraudulent use of a security code for any extended period. Should a security code be violated, the user could immediately create a new security code. If the violation goes undetected, the violated code is only usable until the Days to Force Employee Password Change days are reached.

4. In the **Minutes Without Activity to Close Terminal** field, enter the number of minutes for your institution's default that will trigger a timeout for users. A minimum of 5 and maximum of 60 minutes must be entered; the system will not accept a number outside that range. This company default can be overridden during individual employee setup.

The first time a user attempts to enter anything on an FPS GOLD screen after the timeout value has expired, a timeout window will be displayed, and the user must enter their user name and password in order to continue.

This feature, also called an "inactivity logoff," increases security by locking FPS GOLD programs that are not in "active" use.

5. In the **Minimum Length of Password (security code)** field, enter the minimum password (security code) length for your institution's default, a minimum of 5 and maximum of 40. If a number outside this range is entered, the following error message will appear: "PASSWORD value must be from 5 to 8." If employees attempt to set passwords (security codes) with fewer characters than the minimum you specify in this field, they will receive the following error: "PASSWORD IS NOT LONG ENOUGH OR INVALID SPACES IN PASSWORD."
6. If left blank, the **Customer Service Security** field will allow all FPS GOLD support employees access to your institution files. A check mark will turn on the customer service security option, and you are given the option to select the security access granted for FPS customer service employees. You must select the FPS GOLD support employees from the Customer Service list; only those selected will be able to access and support your institution.
7. If you check the **Force Alpha-Numeric Passwords** field, all employees must use both letters and numbers in their passwords (security codes). If the field is left blank, employees can enter any variation of letters and/or numbers they want without restrictions.
8. When the **Force Special Characters in Passwords** field is checked, all employees will be required to have at least one special character in their passwords (security code). If the field is left blank, special characters will not be required in passwords.

For user names and passwords, all printable characters and embedded spaces are now allowed. (See the table below.)user names are not case sensitive. Passwords are case sensitive. Leading and trailing spaces will be ignored.



Characters Allowed in Passwords and User Names	
Alphanumeric characters	abcdefghijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ 1234567890
Special characters	- = , . / \ ! @ # \$ % ^ & * () _ + < > ? : " ' { } [] ; ' ,

9. **User Defined Fields** are designated fields tied to each employee's security setup that can be used for any purpose within an institution. For example, an institution could set up a field to show the title of the employee, date of hire, birth date, etc.
10. For each **User Defined Field** implemented, enter the **Data Type** (Numeric or Alpha-Numeric), field Length, and **Field Description**. Each user-defined field set up at an institution will show on the Employee setup tab.

WARNING

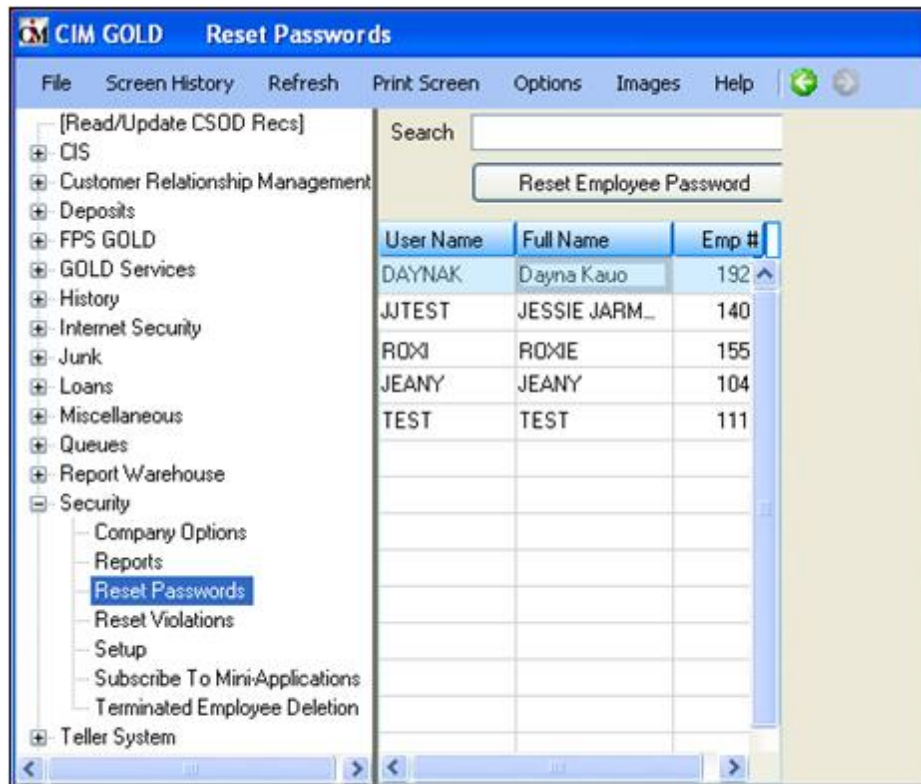
Once the User Defined Fields are set up, they cannot be removed or changed.

The reset password function is located in CIM GOLD Security > Reset Password. When an employee cannot remember their password, the security administrator can reset the password to the employee's user name. The employee would then log in using their user name as a password. The employee will then be prompted to provide a new password. If a user has violated a terminal by entering the password incorrectly three times and can't remember the password, first reset the violated terminal, and then reset the employee password. FPS GOLD recommends that only a limited number of employees be given the ability to reset passwords.

To reset a password, click on the employee's name in the list and click <Reset Password>, then click <Yes> on the Verify Action dialog box.

Only one employee can be reset at a time. Once the password has been reset, an employee has 12 hours to sign on using their user name as the password. At then next logon, the employee will be required to set a new password.





Reset Passwords Screen

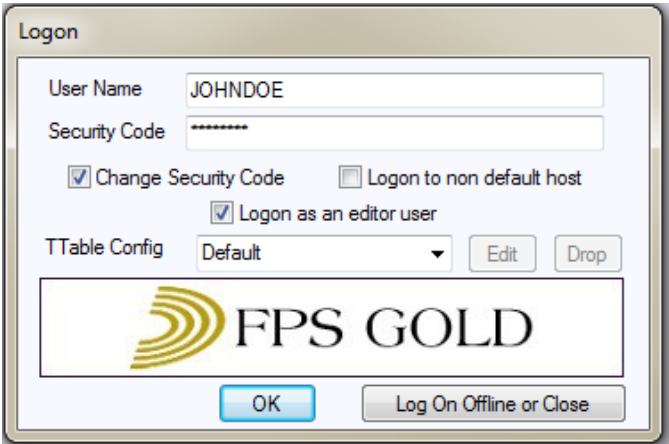
Setting Passwords

For new employees, the password (security code) for their first sign-on will be the same as their assigned user name, and they will be forced to change them. The password they choose will be ruled based on the setup password fields in the Company Options menu. The password will automatically expire after the designated time selected to force an employee password change at your institution.

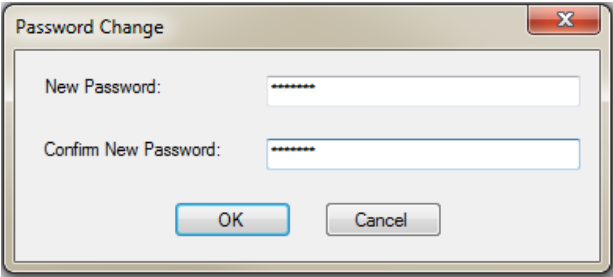
On the day the password is forced to change, the employee will log on to the system as usual and enter their current password. The program will then generate a Password Change dialog box that will prompt the employee to enter a new password (twice). A passwords can only be changed after the correct current code has been entered.

The system keeps track of the last five passwords for each user name. You cannot reuse a previously used password until at least five new passwords have been used. On the sixth password change, you are able to reuse the first password that was used.

If, at any time, you want to change your password, log on as you normally would. Enter your **User Name**, current **Security Code** (password), mark the **Change Security Code** (password) box, and click <OK>. The recommendation is for an employee to change their security code if they suspect that their password has been compromised.



The system will display a Password Change dialog box asking you for the new password (security code).



When changing a password, the system requires the user to enter the new code twice. This is to verify that the user entered the new password correctly.

See Also:

[Rules for Valid Passwords](#)

Rules for Valid Passwords

For user names and passwords, all printable characters and embedded spaces are allowed. (See the table below.)user names are not case sensitive. Passwords are case sensitive. Leading and trailing spaces will be ignored.

Characters Allowed in Passwords and User Names	
Alphanumeric characters	abcdefghijklmnopqrstuvwxyz ABCDEFGHIJKLMNOPQRSTUVWXYZ 1234567890
Special characters	- = , . / \ ! @ # \$ % ^ & * () _ + < > ? : " { } [] ; ' ' "

Types of Passwords Not Allowed

The following table lists the kinds of passwords that are *not* valid. Based on the settings on the Company Options screen, users will have to follow these rules when creating passwords.



Password Length	A Password Is <i>Not</i> Valid If . . .
Any length	<ul style="list-style-type: none"> The new password is the same as the current password or any of the last 4 previous passwords (regardless of case). The Force Special Characters in Passwords field is checked and the new password doesn't contain a special character. The Force Alpha-Numeric Passwords field is checked and the new password doesn't contain at least one number and one letter. The new password is shorter than the value in the Minimum Length of Password field. The new password is empty. The new password has ascending or descending sequences (sequences are found by splitting the password with a blank space). For example, "12 cba" is not valid, but "12 abc" is.
More than 8 characters	<ul style="list-style-type: none"> The new password contains the user name (regardless of case). The new password has a sequence of 5 or more consecutive ascending or descending characters. For example, "LONGabcdePASSWORD" and "LONG54321PASSWORD" are not valid, but "LONGabcdPASSWORD" is valid. The new password has 4 or more consecutive identical characters. For example, "long 1111 password" is not valid.
8 characters or less	<ul style="list-style-type: none"> The password is fewer than 5 characters. There are 3 or more characters that are the same as the last non-blank character. For example, "11121" is not valid. There are 4 or more characters that are the same as the first non-blank character. For example "1211118" is not valid. Characters 1–4 are the same as 5–8, or 2–4 are the same as 5–7, or 3–5 are the same as 6–8, or 1–3 are the same as 4–6. For example "abcdabcd" is not valid. There are more than 3 blank characters in the password. See "Characters Allowed in Passwords" above.

Institution Name

Enter your Institution name in this field.

Employee Number Length

Enter the number of digits allowed in an employee number. The length can range from four to 10 digits and cannot be changed once it is set.

Days to Force Employee Password Change

Enter a number between 15 and 9999 that defines the number of days between forced password changes for employees at your institution. 9999 means the password will never expire.

Password changes are forced after the specified length of time. This feature protects your institution from fraudulent use of a security code for any extended period. Should a security code be violated, the user could



immediately assign themselves a new security code. If the violation goes undetected, the violated code is only usable until the Days to Force Employee Password Change days are reached.

If you change the value in this field, the change is applied to all new employees added after the change. To change the password expiration deadline for your current employees, use the **Password Expiration** field on the Security > Setup screen, Employee tab for each employee.

Minutes Without Activity to Close Terminal

Enter the default number of minutes for your institution that will trigger a timeout for users. A minimum of 5 and maximum of 60 minutes must be entered; the system will not accept a number outside that range. The default is 20 minutes.

The first time a user attempts to enter anything on an FPS GOLD screen after the timeout value has expired, a timeout window will be displayed, and the user must enter their user name and password in order to continue.

This feature, also called an "inactivity logoff," increases security by locking FPS GOLD programs that are not in "active" use. Should a user need more or less time before timeout occurs, the security officer can override the default and enter any length of time up to 546 minutes on the Employee Definition screen.

Minimum Length of Password (5-40)

Enter the minimum password (security code) length for your institution's default, a minimum of 5 and maximum of 40. If employees attempt to set passwords (security codes) with fewer characters than the minimum you specify in this field, they will receive the following error: "PASSWORD IS NOT LONG ENOUGH OR INVALID SPACES IN PASSWORD."

User-Selected Security Code

On the day security codes are forced to change, employees will log on to the system as normal and enter their old security codes. The computer will then ask them to enter a new security code (twice). Security codes can be changed only after the correct current security code has been entered.

The system keeps track of the last six security codes for each user name. You cannot reuse a previously used security code until at least six new security codes have been used. On the seventh time, you are allowed to reuse the old security code.

If at any time you want to change your security number, log on as you normally would. Enter all of the information you normally would as you sign on, except click the **Change Security Code** box. The system will display a dialog box asking you for the new security code.

When changing a security code, the system requires the user to enter the code twice. The reason for this is to verify that the user did in fact enter the number he or she wanted. One typo could cause a lot of confusion.

See Also:

[Rules for Valid Passwords](#)



Customer Service Security

If this field is left blank, all FPS GOLD support employees can access your institution files. A check mark will turn on the Customer Service Security option, and you will need to select the security access you want to grant for specific FPS customer service employees on the Customer Service tab. Only those selected will be able to access your files.

FPS GOLD Only: NCC Security employees can add an FPS GOLD employee to the list with proper authorization.

Force Alpha-Numeric Passwords

If you check this box, all employees must use both letters and numbers in their passwords (security codes). If the field is left blank, employees can enter any combination of letters and numbers without restrictions.

User-Selected Security Code

On the day security codes are forced to change, employees will log on to the system as normal and enter their old security codes. The computer will then ask them to enter a new security code (twice). Security codes can be changed only after the correct current security code has been entered.

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When changing a security code, the system requires the user to enter the code twice. The reason for this is to verify that the user did in fact enter the number wanted. One typo could cause a lot of confusion.

See Also:

[Rules for Valid Passwords](#)

Force Special Characters in Passwords

When this field is checked, all employees will be required to have at least one special character in their passwords (security code). If the field is left blank, special characters will not be required in passwords.

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The system keeps track of the last six security codes for each user name. You cannot reuse a previously used security code until at least six new security codes have been used. On the seventh time, you are able to reuse the old security code.

If at any time you want to change your security number, log on as you normally would. Enter all of the information you normally would as you sign on, except click the **Change Security Code** box. The system will display a dialog box asking you for the new security code.

When changing a security code, the system requires the user to enter the code twice. The reason for this is to verify that the user did in fact enter the number he or she wanted. One typo could cause a lot of confusion.

See Also:

[Rules for Valid Passwords](#)

User Defined Fields field group

User Defined Fields are designated fields tied to each employee's security setup that can be used for any purpose within an institution. For example, an institution could set up a field to show the title of the employee, date of hire, birth dates, etc.

For each User Defined Field implemented, enter the **Data Type** (Numeric or Alpha-Numeric), field **Length**, and **Field Description**. Each User Defined field set up at an institution will show on the Employee setup tab.

WARNING

Once the User Defined Fields are set up, they cannot be removed or changed.

See the following topics:

[User Defined Field Type 1 - 5](#)

[User Defined Field Length 1 - 5](#)

[User Defined Field Description 1 - 5](#)

User Defined Field Type 1 - 5

User-defined fields are designated fields tied to each employee's security setup that can be used for any purpose within an institution. For example, an institution could set up a field to show the title of the employee, date of hire, birth dates, etc.

For each User-defined field implemented, enter the **Data Type** (Numeric or Alpha-Numeric), field **Length**, and **Field Description**. Each User Defined field set up at an institution will show on the Employee setup tab.



WARNING

Once the User Defined Fields are set up, they cannot be removed or changed.

User Defined Field Length 1 - 5

User-defined fields are designated fields tied to each employee's security setup that can be used for any purpose within an institution. For example, an institution could set up a field to show the title of the employee, date of hire, birth dates, etc.

For each User-defined field implemented, enter the **Data Type** (Numeric or Alpha-Numeric), field **Length**, and **Field Description**. Each User Defined field set up at an institution will show on the Employee setup tab.

WARNING

Once the User Defined Fields are set up, they cannot be removed or changed.

User Defined Field Description 1 - 5

User-defined fields are designated fields tied to each employee's security setup that can be used for any purpose within an institution. For example, an institution could set up a field to show the title of the employee, date of hire, birth dates, etc.

For each User-defined field implemented, enter the **Data Type** (Numeric or Alpha-Numeric), field **Length**, and **Field Description**. Each User Defined field set up at an institution will show on the Employee setup tab.

WARNING

Once the User Defined Fields are set up, they cannot be removed or changed.



Subscribe to Mini-Applications Screen

Security > Subscribe to Mini-Applications

The Subscribe to Mini-Applications screen allows you to designate which applications and screens your institution will have access to in CIM GOLD. If a screen is not subscribed to, it will not be listed on the CIM GOLD Subscribe to Mini-Applications screen to give security access to. You must have proper security to access this screen.

The screens are listed in alphabetical order, which is the same way they appear in the CIM GOLD navigation tree. Please be aware that some applications and screens may have a billable fee for their use. You can see which screens are billable by clicking on a screen listed on the Subscribe to Mini-Applications screen; the price for using that screen will appear in the Cost per Month per User field at the bottom of the screen. The Description field will provide a short description of the application or screen selected.

Most screens can be unsubscribed to if you uncheck the box next to the screen. When unsubscribing to a screen, all security given to employees and CIM GOLD Profiles for that screen will be deleted. Use caution when unsubscribing to a screen; if a screen is unsubscribed to in error, all employees and CIM GOLD Profiles will need to be set up for security to the screen again. If a screen is required and cannot be unsubscribed to, you will get an error if you uncheck the box.

NOTE

Employees already signed on to the system can view a newly subscribed screen by deleting their cache. If they wait until the following day, they will be able to view the screen on their first sign on.

The list view displays all screens available to your institution. To subscribe to any screen, check the box next to it. The **Description** field gives a short description of the highlighted screen. The **Cost per Month per User** field shows the cost, if any, of the highlighted screen each month for each person using it.

After selecting all the screens you want to subscribe to, click <Save Changes>.

NOTE

Your institution must subscribe to a screen before that screen will appear in Security Setup or in the CIM GOLD navigation tree for any user. As new screens are added to the list, they are advertised in a release notification.

Unsubscribing

To unsubscribe from a screen, remove the check in its box by clicking on it. If you unsubscribe to any screen, you will see a warning when you click <Save Changes>: "Warning! You are unsubscribing to at least one mini-application. This action will remove all security to these mini-applications for every person and every profile! Do you REALLY want to continue?" Click <Yes> to continue or <No> to cancel and return to the screen.

See also:

Security Setup System



Screens List View

This list view displays all screens available to your institution. To subscribe to any screen, check the box next to it. After selecting all the screens you want to subscribe to, click <Save Changes>.

Description

This field gives a short description of the highlighted screen.

Cost per Month per User

This field shows the cost, if any, of the highlighted screen each month for each person using it.



Reset Violations Screen

Security > Reset Violations

The Reset Violations screen is located in CIM GOLD Security > Reset Violations. Use this screen to reset a password if one of the following occurs:

- the user has entered an incorrect password three consecutive times while attempting to log in;
- the user has been inactive for 90 days or more.

A user cannot sign on to any FPS GOLD product until the violation has been cleared. FPS GOLD recommends that only a limited number of employees be given security to reset violated terminals.

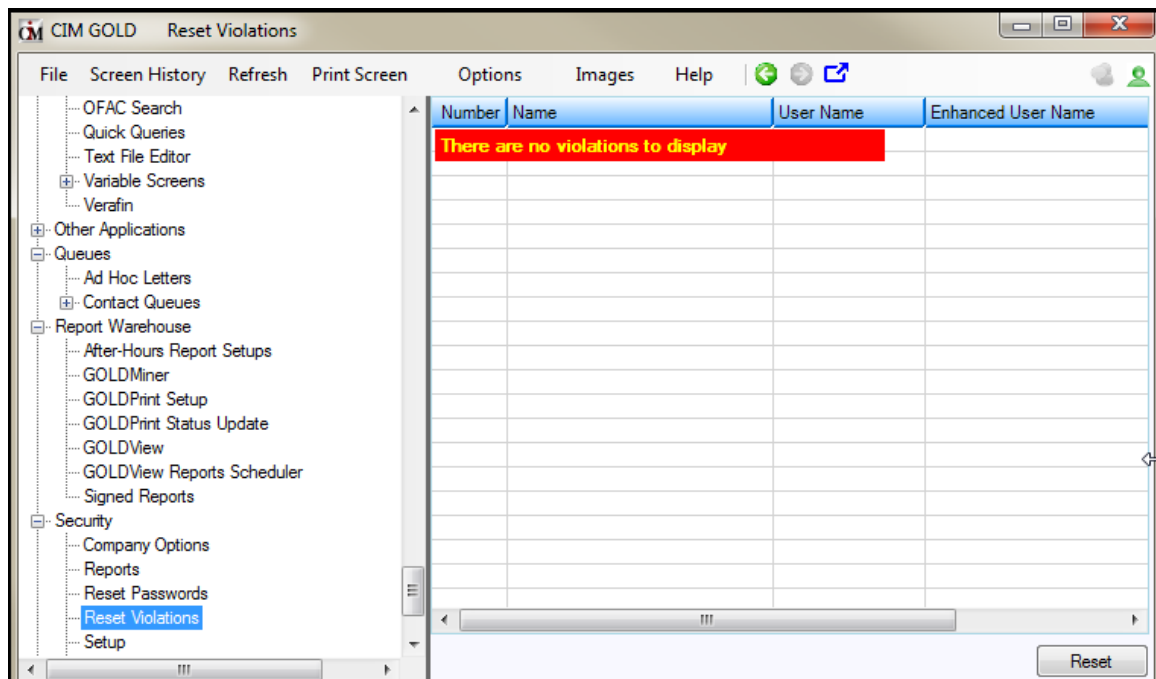
NOTE

FPS GOLD *cannot* reset security violations for your employees. An employee at your institution must reset them.

If there are no security violations when you open the Reset Violations screen, you will see the message “There are no violations to display” in a red box at the top of the screen. See the following example.

FPS GOLD ONLY

Editor users do not have security to this function.



Reset Violations Screen without a Violation

If there are security violations, they will be listed on the screen. See the following example.



Number	Name	User Name	Enhanced User Name	Location	
1810	JOHN DOE	JOHND	JOHN H. DOE	I0061234	

Reset Violations Screen with a Violation

To clear a violation:

1. Highlight the name in the list.
2. Click the <Reset> button on the bottom of the screen.

The reset will clear the violation, and the user can attempt to log in again with their current password.

Changing a Password

Resetting violations does not change the password to the user name. A password is only reset to the user name by resetting the password on the [Employee](#) screen in Security Setup or on the Reset Passwords screen. Use this method if a user forgets his or her password.

Setting Timed Logoff

The Security > Company Options screen contains a field called **Minutes Without Activity to Close Terminal**. Each institution can set this field for any given employee to a number of minutes. When that amount of time has passed without any activity, the system automatically logs the employee off the terminal. That employee must then sign on to the system again following the normal procedure.

Number

This field displays the teller number for the user who caused the violation.

For instructions on how to use this screen, see the [overview topic](#).

Name

This field displays the name of the employee with the security violation.

User Name

This field displays the user name of the user who caused the violation. This field is used on CIM GOLD screens and afterhours reports.

For instructions on how to use this screen, see the [overview topic](#).



Enhanced User Name

This field displays the long user name (if your institution has entered this data) for the employee with the violation.

This name is only used in security. The [User Name](#) field is used on CIM GOLD screens and afterhours reports.

Location

This field displays the PC VTAM location for the user with the violation.

For instructions on how to use this screen, see the [overview topic](#).



Security Setup Screen

Before you can use CIM GOLD, each employee who will use CIM GOLD must have security to the screens or specific fields they will use.

NOTE

FPS GOLD must add security for your institution's Security Administrator before employee security setups can begin. Some security settings can only be changed by a Security Administrator.

Overview of CIM GOLD Security

Security for CIM GOLD is set up on several CIM GOLD screens. The following list shows the order in which security must be set up within CIM GOLD so that security will work properly for your institution and employees.

1. [Subscribe to Mini-Applications](#) - Before security setup, your institution must subscribe to all applications and screens your institution will use.
2. [Company Options](#) - The fields on this screen define your institution name, length of employee numbers and passwords, days to force security code (password) changes, and minutes of inactivity to timeout CIM GOLD and other FPS GOLD products. Company Options are found on the CIM GOLD Security > Company Options screen.
3. Institution defaults for CIM GOLD Customer Index Bubble, CIM GOLD Teller (for Menu and Speed Keys), and Document Imaging (for Firebird Signatures).
4. **Security > Setup** - Contains setup fields for [employee](#), [profile](#), [teller security](#), [CIM GOLD screens](#), and [field-level security](#). If your institution chooses to use profiles, they must be set up before setting up individual employees.

What Is a Security Profile?

On the [CIM GOLD Profile tab](#) and [System Profile tab](#), you can set up security profiles. Profiles save time and ensure that security settings are the same for all employees with the same duties (such as all tellers or all loan officers). A profile is set up one time and then linked to all employees that require the same security access. For example, the security access for all tellers could be set up under the profile name "Teller." The "Teller" profile would then be linked to each employee who requires access to the security given under the "Teller" profile.

Profiles save time because you set up security only once for a group of employees that would require the same security clearance. Also, if a security change is needed for a group of employees that share the same profile, you can change the security one time on the profile, rather than changing each individual employee's security.

NOTE

FPS GOLD client services representatives have inquiry-access only to institution security. We *cannot* release password violations or reset passwords for your institution at any time.



An employee at your institution must handle these types of security issues.

Using the Security Setup Screen

Use the Security Setup screen to assign screen-level or field-level security to individual employees and tellers. You can also create security profiles for groups (such as the loan department) and then assign individual employees to those groups. All individuals assigned to the same group profile will then have the same security settings.

Note: This section gives overviews and how-to information on using Security Setup. For help on an individual field on the Security Setup screen, click in the field and press the <F1> key on your keyboard.

This section describes how to set up:

- [Company Security options.](#)

Employee tab

Use the fields on the Employee tab of the Security > Setup screen to set up employee security.

NOTE

FPS GOLD *cannot* reset passwords or security violations for your employees.

Setting Up an Employee

To set up security for an employee, create a new employee. You can also copy security to a new employee or from one existing employee to another.

To create a new employee:

1. On the [Security Setup screen](#), select **Employees** and click <New>.



The screenshot displays the 'Security Setup Screen, Employee Tab'. On the left, there is a table listing employees:

User Name	Full Name	Emp #	Enhanced Username	Status
TESTER	Chester T. Tester	1241	ChetTester	Active
HERBIE	Username3129	3129	herbie	Active

The main form on the right is for editing the selected employee. Fields include:

- Employee Number: 1241
- User Name: TESTER
- Enhanced User Name: ChetTester
- Full Name: Chester T. Tester
- Job Title: Loan Officer
- Email Address: chettester@FirstBank.com
- Status: Active
- Phone Number: 801 123 1234, Extension: 123144
- Interface Profile: <Institution Defaults>
- Timeout Minutes: 30
- Password Expiration: 90
- Soft Token Key: Assigned, Retrieved, Assign, Remove

At the bottom right, there is a 'Save Changes' button.

Security Setup Screen, Employee Tab

- In the "Create a new Employee" dialog box, type a new **Employee Number**, **User Name**, **Enhanced User Name**, and **Full Name**. The fields on the dialog box are explained in the table below.

NOTE

After you click <OK>, you cannot change the **Employee Number** for this employee. You can only delete this employee and start over. To do this, change the employee **Status** to "Terminated" and delete the employee using the Terminated Employee Deletion screen.

The 'Create a new Employee' dialog box shows the following fields:

- Employee Number: 12314
- User Name: JPUBLIC
- Enhanced User Name: John Public
- Full Name: John Q. Public, Jr.

Buttons: OK, Cancel

Field Name	Number of Characters	Purpose	Editable?
Employee Number	variable—established on the Company Options screen	identify the employee within the organization	No. See the Note above.



User Name	maximum of eight alphanumeric characters	shown on reports and screens	Yes, if Display Effective Security is not checked
Enhanced User Name	up to 40 characters	used to log on to FPS GOLD products	Yes

3. Click <OK>.
4. On the Employee tab, enter the remaining data. The **Status** drop-down list will show the default “Active” status. Select another status if necessary.
5. An **Interface Profile** is used to determine the settings an employee should use for the following three functions: CIM GOLD Customer Index Bubble, Menus and Speed Keys in CIM GOLD Teller, and Document Imaging (for Firebird Signatures).
6. **Timeout Minutes** are defaulted from the Company Options screen. If the length of time is not appropriate for the new employee, you can enter 5 to 60 minutes.
7. **Password Expiration** is defaulted from the Company Options screen. If an employee needs more or fewer days between password (security code) changes, enter a number between 15 and 99 here. You can also enter 9999 for a password that never expires.
8. **SoftToken Key** is a two-step authentication that can be used in EFT GOLD for wires for added security. If your institution has selected **Require SoftToken Authentication** on the EFT GOLD Wire Options screen, enter the appropriate information in this field. For more information on using this feature, see the [EFT GOLD User's Guide](#) in DocsOnWeb.
9. If this employee will use a **System Profile**, select the appropriate profile(s) from the list below by checking the box in the **Member?** column.
10. If this employee will use a **CIM GOLD Profile**, select the appropriate profile(s) from the list below by checking the box in the **Member?** column.

CIM GOLD and System Profiles must be set up before you can use the profile name on an employee security setup.
11. Enter the appropriate information in the **User Defined** fields that your organization may have set up on the Company Options screen.
12. Click <**Save Changes**>.

If the employee being set up is also a teller, continue to the Teller tab. If the employee is not a teller and is not using CIM GOLD or System Profiles, go to the [CIM GOLD](#) and System tabs to set the appropriate security.

<Reset Password> This button should only be used when employees forget their passwords. Clicking this button gives employees 12 hours to enter their user name as their password before the system will force them to create a new password. Giving employees security to the Reset Password mini-application allows them to reset passwords but does not allow them to change any security. The temporary password will be the same as the Enhanced User Name in lower case.

For example, John Doe’s user name is JOHND. He would enter “JOHND” in the **User Name** field and "johnd" as the password. When he clicks <OK>, a Security Code Update window will display. To save the new code, John Doe would then enter a new password in the **Enter New Password** and **Re-enter New Password** fields and click <OK>.



If a password is changed using this method, the password will remain valid until the next Password Expiration interval is reached or the employee forces a password change when logging in to CIM GOLD.

To copy employee security to a new employee:

1. If the **Display Effective Security** box has a checkmark, click on it to remove it.
2. Select the employee in the list, then click <Copy to New> to copy the security settings from the selected employee to a new employee. All the security, including profiles, will be copied to the new employee. (This does *not* copy Teller information.)
3. Make any adjustments to the new employee's individual security as needed.
4. Click <Save Changes>.

To copy security from one existing employee to another:

1. If the **Display Effective Security** box has a checkmark, click on it to remove it.
2. Select the employee you will copy from in the list, then click <Copy to Existing>. The "Select Existing Employee to Copy to" dialog box opens.

The screenshot shows the main interface with the 'Copy to Existing' button highlighted by a red arrow. Below it, a dialog box titled 'Select Existing Employee to Copy to' is open, displaying a table of employees.

Username	Full Name	Number	Enhanced Username	Status	Timeout	Password Expiration
KARENT	KARENT	2336	KAREN TECHWRITER	Active	60	99
KATTEST	KATHERINE TE...	8226	KATTEST	Active	60	90
KAY TEST	KAYF	1997	KAY TEST	Active	30	90
MATTTEST	Matt's Test	5555	MATTTEST	Active	60	99
MATTY	Testing For Matt	5093	MATTY	Active	30	60
MBALJIAN	SHARON BALJL...	2000	MBALJIAN	Active	0	0

3. In the dialog box, select the employee you want to copy to. All the security, including profiles, will be replaced for the employee you are copying to. (This does *not* copy Teller information.)
4. Make any adjustments to the new employee's individual security as needed.
5. Click <Save Changes>.

Deleting an Employee

You can't use the <Delete> button on this screen to remove an employee from the system. This prevents you from accidentally deleting an employee.



To delete an employee:

1. Select "Terminated" from the **Status** drop-down list.
2. Open the Security > Terminated Employee Deletion screen and delete them from the system.

See Also:

[CIM GOLD Profile tab](#)

[System Profile tab](#)

[CIM GOLD tab](#)

CIM GOLD Profile tab

Use the fields on this tab to set up CIM GOLD profiles. Any CIM GOLD profiles that already exist on the system will be shown in the list view.

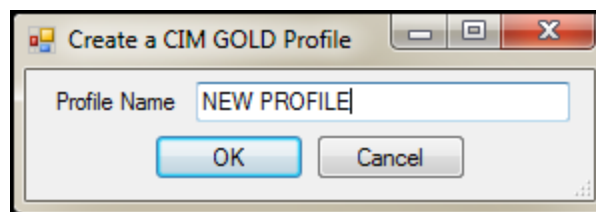
For information on how profiles work and why they are useful, see "[What Is a Security Profile?](#)" in the Security Setup Screen overview section.

Creating a CIM GOLD Profile

You can copy from an existing profile or create a new one.

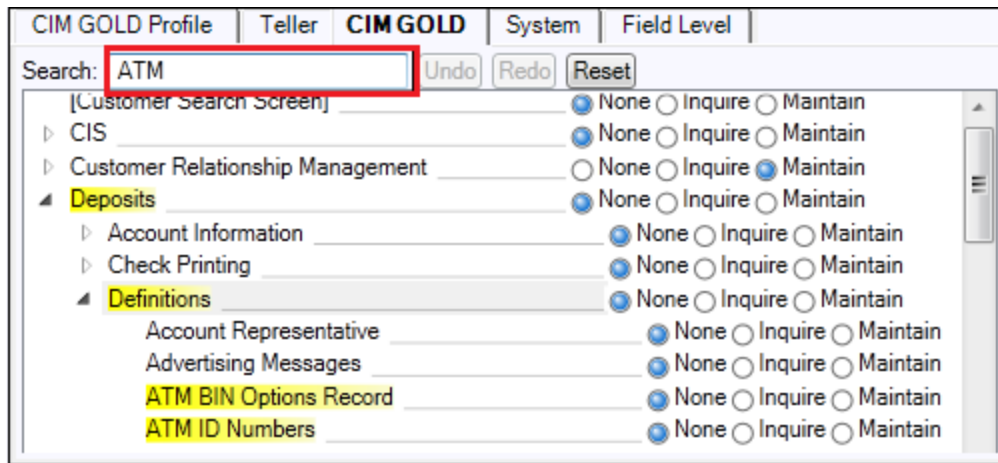
To create a CIM GOLD profile:

1. On the Security Setup screen, select and click <New>.
2. In the "Create a CIM GOLD Profile" dialog box, type a new **Profile Name** and click <OK>. CIM GOLD Profile names can have up to 12 characters.



3. The new Profile Name will be added to the bottom of the profile list with the default "Active" Status. The new profile name will also be added to the **CIM GOLD Profile Membership** list on the [Employee](#) setup tab and can be selected for employees that will be tied to a profile.
4. On the CIM GOLD tab, select all applications and screens the profile will need to use, then click <Save Changes>. The **Search** field allows you to enter data to find the security setting. If found in the main heading list, the main heading is highlighted. See the example below.





5. If you use field-level security restrictions, open the Field Level tab, select restrictions for the profile, then click <Save Changes>.



Copying a CIM GOLD Profile

To copy a profile:

1. Select a CIM GOLD profile from the list.
2. Click <Copy> to copy the security settings from an existing CIM GOLD profile to a new one.
3. Make any necessary adjustments to the new profile.
4. Click <Save Changes>.

Deleting a CIM GOLD Profile

To delete a profile:

1. Make sure the profile is not attached to any employees. Otherwise, you will get an error message that tells you employees are assigned to it.
2. Select the CIM GOLD profile and click <Delete>.

See Also:

[Employee tab](#)

[System Profile tab](#)

[CIM GOLD tab](#)

System Profile tab

Use the fields on this tab to set up security for all FPS GOLD products not listed on the CIM GOLD tab. Only employees with proper security (such as a Security Administrator) can set up system profiles.

For information on how profiles work and why they are useful, see "[What Is a Security Profile?](#)" in the Security Setup Screen overview section.

Creating a System Profile

You can copy from an existing profile or create a new one.

To create a System profile:

1. On the Security Setup screen, select **System Profiles**, then click <New>.



Legacy Name	Description	Prof #	Profile Name	Status	Timeout	Password Expiration
DEPLOYAD	Gold Deploy administrator	8765	DeployAdministrator	Active	0	0
DEPLOYER	Gold Deploy deployer	8766	Deployer	Active	0	0
DEPLOYUS	Gold Deploy user	8767	DeployUser	Active	0	0
TEST	System Profile Test	100	System Profile Test	Active	0	0

- In the Create a new Profile dialog box, enter the appropriate information in the fields (see the example below). FPS GOLD recommends that you designate an employee number range to use for System , such as 9900–9989. The name assigned to the profile will be listed in the System Profile drop-down list on the Employee setup tab and can be selected for employees that will be tied to a profile. A System **Legacy Name** can have up to eight characters. It cannot be the same as any other profile or user name. The **Profile Name** and **Profile Description** can be up to 40 characters long and can be used to further define the profile. When you have finished entering information, click <OK>.

The new profile will be shown in the profile list with the default “Active” Status.

- On the System tab, select all functions the profile will need to use, then click <Save Changes>.

After profiles have been set up, create individual employee security on the [Employee tab](#), and tie each employee setup to the appropriate profiles.

Copying a System Profile

To copy a profile:

- Select a System profile from the list.
- Click <Copy to New> to copy the security settings from an existing System profile to a new one.
or



Click <Copy to Existing> to copy the security settings from one existing System profile to another.

3. Make any necessary adjustments to the new profile.
4. Click <Save Changes>.

Deleting a System Profile

To delete a profile:

1. Make sure the profile is not attached to an employees. Otherwise, you will get an error message that tells you employees are assigned to it.
2. Open the Security > Terminated Employee Deletion screen and delete the profile.



EFT GOLD Security Groups

Add employees to EFT GOLD security profiles based on the actions they need to perform in EFT GOLD. The actions and functions the profiles control in EFT GOLD are explained below.

IMPORTANT

The predefined System Profiles used for EFT GOLD *should not* be changed in any way. If they are changed, your user security functions will not work.

Within EFT GOLD, the security groups are found under Administrative Options > Users/Groups. The example below is sorted alphabetically. Your profile numbers and descriptions may not match these.

WireAdminSecurityGroup
WireCanOverrideTransactionErrors
WireMessageReaderGroup
WireMessageUpdaterGroup
WireOfacApproverGroup
WireOfacWhitelistUpdaterGroup
WireUserAdminSecurityGroup
WireUserSecurityGroup
WireViewFrbBalanceSecurityGroup

Predefined EFT GOLD User Profiles

WireAdminSecurityGroup


The users in this group have access to all Admin functions except Users. The menu items secured by this option are found on the menu under Management, Options, Custom Rules, Alerts, OFAC Whitelist, and System Logs.

WireCanOverrideTransactions

Users in this group can approve wires but not OFAC suspects. Dual control is used, so approvers cannot approve their own submitted wires. The user's limits are used when this action is processed.

WireMessageReaderGroup


Users in this group can view FRB wire messages. "FRB Messages/View FRB Messages" is found on the menu.

Click  to open the menu.

WireMessageUpdaterGroup



Users in this group can create and send FRB messages. If you can create and send messages, you can also view them if you do not remove WireMessageUpdaterGroup from the WireMessageReaderGroup.

"FRB Messages/View FRB Messages" is found on the menu. Click  to open the menu.

WireOfacApproverGroup

Users in this group can approve OFAC suspects, but not wires.

WireOfacWhitelistUpdaterGroup

Users in this group can approve OFAC suspects and add names to your Whitelist.

WireUserAdminSecurityGroup

The users in this group have access to Users functions on the menu under Admin > Users.

WireUserSecurityGroup

Every user that is going to access anything in EFT GOLD needs to be in this group. The billing for EFT GOLD is based on the users with this security.

WireViewFrbBalanceSecurityGroup

Users in this group can view your institution's FRB balance on the Dashboard. Without this security, the user cannot see the balance information.

GOLDDeploy Security Groups/Profiles

The predefined System Profiles used for GOLDDeploy should not be changed in any way. If they are, your user security functions will not work. Add employees to these profiles based on the actions they need to perform in GOLDDeploy. The actions and functions the profiles control in GOLDDeploy are explained below.

DeployAdministrator

The users in this group have access to design parameters and options for deployment of FPS GOLD® software to your users. Users in this group are administrators, deployers, and viewers. They don't need any other security settings.

Deployer

The users in this group have access to schedule and deploy FPS GOLD software releases to your users. Users in this group can also view all screens.

DeployUser

The users in this group can only view the schedules and options that are set up but cannot make changes.

See Also:

[Employee tab](#)

[CIM GOLD Profile tab](#)

[CIM GOLD tab](#)

CIM GOLD tab

Use the fields on the CIM GOLD tab of the Security > Setup screen to set up CIM GOLD security for your employees. Some CIM GOLD applications also require some security settings on the System tab. CIM GOLD security is used for the screens; System security is used for functions within the screens and for financial applications.



Setting Up CIM GOLD Security

Before any employee can access CIM GOLD, security clearance must be set up for that employee. CIM GOLD security can be set up on individual employees and/or on . The profiles can be tied to employees who require the same security clearance to perform their job duties. If multiple profiles are tied to an employee, Effective Security can be viewed.

To set up CIM GOLD access for an employee or profile:

1. On the Security Setup screen, select **Employees** or **CIM GOLD Profiles**.
2. Select the CIM GOLD tab.
3. In the **Security Setup list view**, select the employee or CIM GOLD Profile for which security is being set up or changed.

The screenshot shows the Security Setup interface with the following elements:

- Navigation tabs: Employees, Tellers, **CIM GOLD Profiles**, System Profiles.
- Options: Display Effective Security.
- Search: Search field, New, Delete, Copy buttons.
- Table of Profiles:

Name	Status	Desc
	Active	
ALL F/M	Active	
CIMSECADM	Active	jur
CIMSECAD2	Active	
CINDY TEST	Active	
CINDY TEST	Active	
CONNECTL...	Active	
COPY TEST	Active	
- Application Access List:

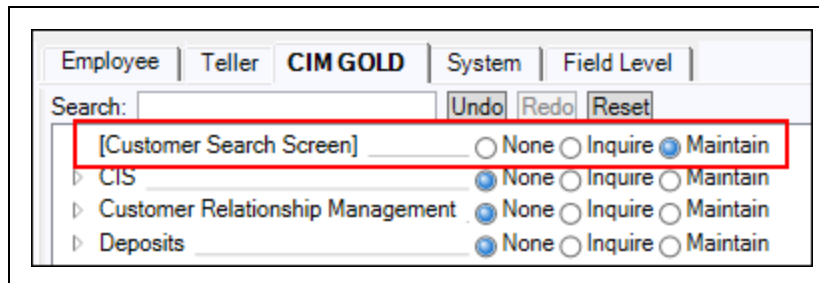
Application	None	Inquire	Maintain
[Customer Search Screen]	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ CIS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ Customer Relationship Management	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ Deposits	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ GOLD Services	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ History	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ Internet and Phone Systems	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ Internet and Phone Systems Setup	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ Loans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ Miscellaneous	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ Other Applications	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ Queues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ Report Warehouse	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ Security	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
▶ Teller System	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Buttons: Undo, Redo, Reset, Save Changes.

4. Select **Inquire** or **Maintain** on each item listed below the applications to which the employee or CIM GOLD Profile should have access. If no access is allowed, select **None**.

NOTE

If you want employees to have security to change [User Preferences](#) under the Options menu at the top of the CIM GOLD screen, you must select "Maintain" for the first item, [Customer Search Screen], on the CIM GOLD tab. See the example below.





5. When you have finished making selections, click <Save Changes>.

See Also:

[Employee tab](#)

[CIM GOLD Profile tab](#)

[System Profile tab](#)

System tab

Use the fields on the System tab on the [Security > Setup screen](#) to set up security for all other FPS GOLD products not listed on the CIM GOLD tab for your employees. Some CIM GOLD applications also require some security settings on the System tab. CIM GOLD security is used for the screens; System security is used for functions within the screens and for financial applications.

Setting Up System Security

The System tab is used to set up security for employees and profiles that need to have access to all other FPS GOLD programs that are not listed on the CIM GOLD tab. The System tab will be disabled if you have not selected **Employees** or **System Profiles**.

Many of the applications listed on the System security tab are obsolete and have been programmed to be used in CIM GOLD, such as GOLD ExceptionManager and IRS GOLD. However, you must select the **Maintain** radio button for the **FPS PC Applications** function on the System tab to grant access to CIM GOLD. There are also other functions in PC Applications which can control access to CIS, employee and officer names, as well as other PC applications. Obsolete menus have been removed from this documentation.

Applications and functions are listed in alphabetic order. Set each option for access for each employee or profile.

To set up System security:

1. On the Security > Setup screen, select either the **Employees** or **System Profiles** radio button.
2. In the list view on the left side of the screen, select the employee or profile you want to set up.
3. Select the System tab, as shown below.



Employee | Teller | CIM GOLD | **System** | Field Level

Search:
Undo | Redo | Reset

Employees Tellers
 CIM GOLD Profiles System Profiles
 Display Effective Security
 Search
 New Delete Copy to New Copy to Existing

User Name	Full Name	Emp #	Enhanced Username	Status
APRILY	April Non Editor	2131	apriyl	Active
BRETTG1	brett non editor	2206	brettg1	Inactive
BUDDY	Username2129	2129	buddy	Inactive
CORBINE	corbine	2351	corbine	Inactive
DAYNAK	daynak	1920	daynak	Active
DOUGB	Doug Brown	1275	dougb	Active
EASTON	Cindy Easton	8920	EASTON	Inactive
ELISHAB	Elisha Baker	2392	elishab	Inactive
ETHAN	Ethan Test User	2115	2115	Active
HERBIE	Username3129	3129	herbie	Inactive
JULIEW	juliew	1795	juliew	Active
JULIEW2	juliew2	1796	juliew2	Inactive
PENNYW	pennyw	2358	pennyw	Active
RMOYES	Rodger Non Editor	7777	rmoyes	Inactive
RODGER	Rodger M	1559	rodger	Inactive
STACEY	stacey	1790	stacey	Inactive
TAMMY2	Tammy Ford Non	1238	Tammy2	Inactive
TAMMYF	Tammy Ford	1237	TAMMYF	Active
TERESA	Teresa Ortiz Non...	1233	TERESA	Active
TERESAF	Teresa Ortiz Editor	1533	TERESAF	Active

Account Merchant List	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Accounting Report Writer	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Accounts Payable	<input type="radio"/> None <input type="radio"/> Inquire <input type="radio"/> Maintain
**drop	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
**drop Function	<input type="radio"/> None <input type="radio"/> Inquire <input type="radio"/> Maintain
Ach Invoice Verification	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Ach Pmt Threshold Verification	<input checked="" type="radio"/> None <input type="radio"/> Inquire <input type="radio"/> Maintain
Capital Approval	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Cash Planning	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Category Codes	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Change Client Number	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Check Reconciliation	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Check Register	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Contract File	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Control Statement Register	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Dist. Screen Formats	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Distribution Profile	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Emp. Code in Responsibility	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Flag Invoices for Payment	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Inventory Product	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Inventory Product Spcl Changes	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Invoice Payee	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Item Profiles	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Location Profiles	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Multiple File Changes	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Only Post To Term Table Office	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Post Recurring Payments	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Print Checks	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Print Control Statements	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Print Reports	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Print Requests	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Recurring Payments	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Report Formats	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain
Set Up Report Writer Reports	<input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain

3. Select **Inquire** or **Maintain** on each item listed below applications to which the employee or profile should have access. If no access is allowed, select **None**. "Inquire" means the employee can view information on the screen but cannot change it. "Maintain" means an employee can view and change information on the screen.
4. When you have finished making selections, click <Save Changes>.

For a list of all security options on this tab and a short description, see [System Security Details](#).

See Also:

- [Employee tab](#)
- [CIM GOLD Profile tab](#)
- [System Profile tab](#)

System Security Details

The following tables list all possible security options on the [System tab](#) of the Security > Setup screen. Only specific security personnel at your institution can set up these screens for employees. These options affect which applications employees have access to, as well as other features and functions within applications.



Account Merchant List - OBSOLETE

[Accounting Report Writer](#)

[Accounts Payable](#)

Accounts Receivable - OBSOLETE

Additional Loan Security - OBSOLETE

[Allow Customer Support Access](#)

[Alter Terminal for Payroll](#)

Commercial Loan Menu - OBSOLETE

[Core File Synchronization](#)

[Core Tools](#)

Customer Information File - OBSOLETE

Deposit Document Prep System - OBSOLETE

Deposit System - OBSOLETE

Electronic Teller Journal - OBSOLETE

Event Letter Parameters - OBSOLETE

[Financial Options](#)

[Fixed Assets](#)

[FPS PC Applications](#)

[Fps-Change Terminal Options](#) - OBSOLETE

Funds Distribution - OBSOLETE

[General Institution Options](#)

[General Ledger System](#)

[GL GOLD](#)

[GOLD ExceptionManager](#)

[GOLD Miner Downloads](#)

GOLDPhone Processing - OBSOLETE

[GOLD Services](#)

[GOLD Teller Security](#)

[GOLDTrak Loan Tracking System](#)

[GOLDView](#)

[GOLDView 32](#)

Item Posting Rejects - OBSOLETE

Loan System - OBSOLETE

Materials Management - OBSOLETE



Office Management - OBSOLETE

Old Office Management System - OBSOLETE

Organization Options - OBSOLETE

[Payroll Management](#)

[PC Check Image Utilities](#)

Prrpts0 - OBSOLETE

[Report Warehouse Menu](#)

Report Writer - OBSOLETE

[Reports and Dacosys Options](#)

[Security Management](#)

[System Print Program](#)

Utility Programs - OBSOLETE

[Web Security](#)

Accounting Report Writer - Application 50		
Bit #	Function Name	Function
03	Dictionary	
01	Run Reports	
02	Set Up Reports	

Accounts Payable - Application 7		
Bit #	Function Name	Function
15	**DROP	6,10
17	**DROP Function OBSOLETE	
36	Ach Invoice Verification	16
39	Ach Pmt Threshold Verification	16
30	Capital Approval	
06	Cash Planning	4
18	Category Codes	
61	Change Client Number	66
12	Check Reconciliation	32
05	Check Register	27
27	Contract File	
38	Control Statement Register	43



Accounts Payable - Application 7		
14	Dist. Screen Formats	9/10
10	Distribution Profile	5/6
31	Emp. Code in Responsibility	
04	Flag Invoices for Payment	8, 12, 15
22	Inventory Product	
23	Inventory Product Spcl Changes	
08	Invoice Payee	30
24	Item Profiles	
28	Location Profiles	
29	Multiple File Changes	1-6 / 2-6
62	Only Post To Term Table Office	30, 34
09	Post Recurring Payments	34
03	Print Checks	20
3	Print Control Statements	36
02	Print Reports	
26	Print Requests	1-5 / 2-5, 15
13	Recurring Payments	13/14
01	Report Formats	59-2
16	Report Writer	63
20	Responsibility File	1-3 / 2-3
33	Restrict Detail Fields	18, 30
64	Run Report Writer Reports	63-1, 63-7
25	Screen Formats	
63	Set Up Report Writer Reports	63-2, 63-3, 63-4, 63-6
19	Ship To Locations	1-1 / 2-1
07	Transaction Processing	29/30
32	Vendor Alternate Payee	2-4, 18
21	Vendor File	1-4 / 2-4, 17/18
35	Vendor Master Ach Screen	17/18, <F2>
11	Void Checks	24
37	Void Control Statements	40



Accounts Receivable - **OBSOLETE**

Additional Loan Security - **OBSOLETE**

Allow Customer Support Access - Application 30

Bit #	Function Name	Function
01	Allow Customer Support Access	

Alter Terminal for Payroll - Application 30

Bit #	Function Name	Function
01	Access	Alter terminal institution and office number

Commercial Loan Menu - **OBSOLETE**

Core File Synchronization

Bit #	Function Name	Function
01	Download Security	

Core Tools

Bit #	Function Name	Function
01	Access	

Customer Information File - **OBSOLETE**

Deposit Document Prep System - Application 4 - **OBSOLETE**

Deposit System - Application 4 - **OBSOLETE**

Electronic Teller Journal - **OBSOLETE**

Event Letter Parameters - **OBSOLETE**



Financial Options - Application 18		
Bit #	Function Name	Function
16	Account Number Structure	
05	Accounts Payable	
06	Accounts Receivable	13/14
01	Company Name/Accounting Prds	3/4
	Financial Options	
	Financial Routing Info Rec	
04	Inventory	
07	Payroll Options	15/16
03	Requisition/Purchase Order	

Fixed Assets - Application 33		
Bit #	Function Name	Functions
01	Access to Program	Gives access to the Fixed Assets system (Application 33) in GOLDVision.
04	Change Client Number	To access clients other than 0 (zero) in the Fixed Assets system, the Maintain radio button must be selected for this option. This is mainly for FPS GOLD use.
05	Distribution Profiles (F8)	
63	Report Writer Report Setup	63-2, 63-3, 63-4, 63-6
64	Report Writer Run Report	63-1, 63-7

FPS PC Applications - Application 57		
Bit #	Function Name	Function
01	Access to PC Applications	WinTerm, GOLDTeller, GOLDPrint, GOLDView, G/L GOLD, GOLDVision, GOLDWriter, GOLD ExceptionManager, GOLDAcquire, CIM GOLD, IRS GOLD
40	Allow Gateway to Alter Terminal	GOLDGateway
41	Chat/remote = F.Remote = I	Access to use chat and remote override
19	CheckWriter Change/add Checks	CheckWriter
22	CheckWriter Change/add Docs	CheckWriter



FPS PC Applications - Application 57		
18	CheckWriter List Checks	CheckWriter
21	CheckWriter List Docs	CheckWriter
20	CheckWriter Print Checks	CheckWriter
27	CIM Can See Employee Dep Accounts	CIM GOLD
38	CIM Can See Employee Dep History	CIM GOLD
33	CIM Can See Employee Ln Accounts	CIM GOLD
39	CIM Can See Employee Ln History	CIM GOLD
42	CIM GOLD Document Imaging	CIM GOLD
24	CIM Security Setup	CIM GOLD
26	CIM Subscription Setup	CIM GOLD
25	CIM User Defined Help Setup	CIM GOLD
02	CIS Access to Emp/offcr Name	CIS (in CIM GOLD)
29	EFTGOLD Access	EFT GOLD
31	EFTGOLD Approve Wires	EFT GOLD
32	EFTGOLD Change Options	EFT GOLD
30	EFTGOLD Submit Wires	EFT GOLD
36	EFTGOLD View Inbound Wires	EFT GOLD
37	EFTGOLD View Outbound Wires	EFT GOLD
28	EFTGOLD Wire Limits	EFT GOLD
23	Eis/dsr Email Setup	Executive Reports
50	File Services Access Settings	File Services Plus
46	File Services Attach Files	File Services Plus
47	File Services Delete Files	File Services Plus
52	File Services Edit Metadata	File Services Plus
51	File Services Export Files	File Services Plus
53	File Services F/M Cache Folder	File Services Plus
49	File Services Stats / History	File Services Plus
48	File Services Transfer Files	File Services Plus



FPS PC Applications - Application 57		
45	File Services Utility Access	File Services Plus
34	GOLDAcquire Access	GOLDAcquire
35	GOLDAcquire Upload	GOLDAcquire
44	GOLDEventLetters Access	GOLD EventLetters
43	GOLDLink Skip / Delete Loan	GOLDLink
11	GOLDWriter Access	GOLDWriter
05	Imaging Acquire From Scanner	GOLDDocument Imaging
14	Imaging Change Group	GOLDDocument Imaging
15	Imaging Change Subgroup	GOLDDocument Imaging
03	Imaging Create Database	GOLDDocument Imaging
12	Imaging Create Group	GOLDDocument Imaging
13	Imaging Create Subgroup	GOLDDocument Imaging
09	Imaging Delete Images	GOLDDocument Imaging
16	Imaging Export Images	GOLDDocument Imaging
07	Imaging Import Images	GOLDDocument Imaging
08	Imaging Modify Image Info	GOLDDocument Imaging
04	Imaging Open Database	GOLDDocument Imaging
10	Imaging Print	GOLDDocument Imaging
17	Imaging Properties	GOLDDocument Imaging
6	Imaging Select Scanning Source	GOLDDocument Imaging
55	Pci Card Vault	
54	View Entire Card Number	

Fps-Change Terminal Options - Application 24 - **OBSOLETE**

General Institution Options		
Bit #	Function Name	Functions
01	Access	
02	Batch Reports Fiche/print	
09	External G/L Posting Setup	
06	General Ledger Autopost Setup	



General Institution Options		
08	General Ledger Cross Reference	
11	Ledgers Control	
12	Ledgers Defaults	
10	Make an Available Account	
03	Print Batch Reports Options	
07	Print G/L Autopost Parameters	
13	Rate Tiers Processing	
05	Rates Tables Processing	
04	Teller Information Processing	

General Ledger System - Application 1		
Bit #	Function Name	Functions
13	Account Budget F/M	53/54, 57/58
26	Account Defaults	79/80
03	Account File Maintenance	53/54, 57/58
16	Account Number Structure	5/6
29	Allow Acct Drop with Bal/Trans	54, 58
30	Allow G/L Sweeps	95/96, 99
15	Budget Rec Disp/Del/Prep/Spred	72, 76, 83/84
25	Calculate Avg Daily Balance	78
11	Close Balances to Next Year	64
01	Company Options Definitions	1/2
27	Copy a Control Group	86
02	Custom Report Definitions	41/42
20	Custom Report Line Detail	40
24	Custom Report Messages	69/70
21	Define Group of Reports	55/56
28	Distribution Profile, Branch Allocation Table	87/88, 91/92



General Ledger System - Application 1		
14	Employee Report Security	81/82
23	Enter Client Number	66
19	Organizational Chart	36
12	Post From Other Applications	68
09	Print Custom Reports	24, 28, 32, 32-1, 32-2, 32-4
10	Print Custom Reports Outofbal	24, 28, 32
08	Print Standard Reports	19/20, 32-5
64	Reserved	
22	Statement Pre-requisites	59/60
18	Sub-Account Titles	17/18, 21/22, 25/26, 29/30, 33/34
04	Trans Dsply/Corr/Drop/Xfer	11/12
05	Trans F-M/Delete/Xfer/Clsd Grp	12
17	Transaction Deletion	16
06	Transaction Entry	8
07	Transaction Entry Past/Future	8

GL GOLD		
Bit #	Function Name	Function
01	Access	

GOLD Services - Application 8		
Bit #	Function Name	Function
21	ATM Comparative Totals OBSOLETE	
12	Bank table Inquiry OBSOLETE	
13	Bond Redemption OBSOLETE	
20	Calculate Date or Days OBSOLETE	
07	Check Recon Detail/Summary OBSOLETE	
09	Check Recon Mass Deletes OBSOLETE	



GOLD Services - Application 8		
08	Check Recon Print Reports OBSOLETE	
11	Check Recon Transmission Hist OBSOLETE	
10	Check Recon Void Checks OBSOLETE	
31	Comp Track Branch Setup	100, then 107/108
34	Comp Track Calculation (INQ)	100, then 113
33	Comp Track Default Setup	100, then 111/112
28	Comp Track Hist Summary (INQ)	100, then 101
29	Comp Track History Detail	100, then 103/104
30	Comp Track Pay Setup	100, then 105/106
32	Comp Track Teller Setup	100, then 109/110
22	Deposit Audit Confirmation OBSOLETE	
19	Deposit Event Setup OBSOLETE	
17	Field Level Security (Loans - APR screen) OBSOLETE	
01	G/L Autopost Setup OBSOLETE	
16	Holiday Scheduling (Loan Past Due Notices) OBSOLETE	
04	IRS Create Returns (F/M) OBSOLETE	
05	IRS Delete All Returns (INQ) OBSOLETE	
02	IRS Information Returns OBSOLETE	
03	IRS Print All Returns (INQ) OBSOLETE	
18	Loan Additional Fields Services OBSOLETE	
23	Loan Audit Confirmation OBSOLETE	
06	Online ACH Posting OBSOLETE	
14	Online ATM Journal OBSOLETE	
27	Privacy Options OBSOLETE	
15	Store/Forward Display/Print OBSOLETE	
24	System Printing OBSOLETE	
25	WWW ACH Batch Queue OBSOLETE	
26	WWW ACH Security OBSOLETE	



GOLDPhone Processing - Application 35 - OBSOLETE**GOLD ExceptionManager**

Bit #	Function Name	Function
15	Allow Change To Transaction	
16	Allow Other User Pref Setup	
10	Can Post Loan Items	
4	Create Notification of Change	
17	May Make Posting Decisions	
11	Officer/employee Acct Access	
2	Process Exception Items	
13	Z Allow Save/remove Selections OBSOLETE	
8	Z Calibrate Printer OBSOLETE	
6	Z Create a Chargeback Item OBSOLETE	
5	Z Create a Return Item (noinq) OBSOLETE	
7	Z Print Reports and Notices OBSOLETE	
9	Z Save Notice Headers OBSOLETE	
12	Z User List Maintenance OBSOLETE	

GOLDTeller Security

Bit #	Function Name	Function
14	Allow Changing Institutions	Change Institutions
04	Check Imaging	
09	Clear/Synchronize Totals	Clear PC Totals/Synchronize PC Totals With Host Totals
16	Database Backup/Restore	Backup Data Files/Restore Data Files/Delete Data Files
05	Forms Design	View/Modify Forms and Droplists
15	GOLDTeller Platform	Platform Session
12	Jrnl Search on Other Ops	Journal/Forward on Other Operators
03	Not Used	
01	Operator File	Operator Information



GOLDTeller Security		
36	Platform Delete/Merge Sessions	
35	Platform File Directories	
34	Platform Options	
37	Platform Sales Tracking	
33	Platform Setup	
08	Print Configuration	Form/Font Configuration
11	Signature Capture	Signature Capture and Display
02	System Configuration	System Configuration
10	System Fields Dictionary	System Field Dictionary
06	Transaction Design	Transaction Design/PC Institution Options
07	Transaction Selection Design	Transaction Selection Design
13	Upload/Download Data File	Upload File to Host/Download File to Host

GOLDTrak Loan Tracking System		
Bit #	Function Name	Function
58	148 Access Apr Screens	
36	Access F1833, Plaza Savings	
29	Access To Appl. On Dead File	
7	Access To Docprep (pf2) Screen	
34	Access To F4385 - Allow Docs	
1	Access To GOLDTrak System	
37	Administrative Security	
44	Agent Screen Access	
18	Allow Unlk Of Lock, Table Flds	
17	Allow Update of 'lock' Group	
30	Allow Update to Default Number	
2	Appl. Inquiry, F/m, or New	
35	Appraisers I=select, F=change	
22	Appraisers Table #3	
46	Branch Manager Override	
38	Branch No. Control On New Apps	
39	Branch Supervisor Security	



GOLDTrak Loan Tracking System		
45	Broker, input, no Status	
23	Brokers Table #4	
5	Build Document Formats (pf2)	
6	Formula Setup (pf2)	
43	Formula Test Mode Access	
54	Freddie Mac Order Screen	
56	Internet Queue Security	
53	Inventory Queue Drop Security	
19	Literal Cnst & Table Acc (pf2)	
28	Literal Constants Access #0	
21	Loan Officers Table #2	
20	Loan Programs and Office Tab#1	
41	Loan Que Printing	
50	Lock Group 10 Access	
51	Lock Group 11 Access	
52	Lock Group 12 Access	
47	Lock Group 7 Access	
48	Lock Group 8 Access	
49	Lock Group 9 Access	
3	Modify Group Input Formats	
10	Move Info To Servicing Files	
33	New X-add Fm,limit Inq- Tables	
24	Override All Lock Security	
31	Override Off # Limits - Tables	
32	Override Status Code - Tables	
16	PC Forms Upload	
11	Print Document Params. (pf2)	
9	Print Documents	
12	Print Field Names (pf2)	
8	Print Formulas (pf2)	
13	Print Input Groups (pf2)	
15	Process Formula Calculations	
55	Release Formulas New Fmlas	



GOLDTrak Loan Tracking System		
4	Rename Field Names (pf2)	
14	Report Writer Access From Here	
42	Secondary Marketing	
57	Unlock Application Security	
27	Verification Of Deposits #8	
25	Verification Of Employments #6	
26	Verification Of Mortgages #7	
40	Wire Screen Access	

GOLD Miner Downloads		
Bit #	Function Name	Function
64	Administrator User	
01	CIF Download	
06	Deposit Download	
09	GOLDMiner Billing Download	
04	GOLDPhone Download	
07	GOLDTrak Deposit Download	
03	GOLDTrak Download	
05	Loan Download	
08	Loan Payee Download	

GOLDView		
Bit #	Function Name	Function
02	Access to Deposit Reports	
03	Access to General Ledger Rpts	
06	Access to GOLDView Reports	
01	Access to Loan Reports	
05	Access to Payroll Reports	
04	Access to Teller Reports	

GOLDView 32		
Bit #	Function Name	Function
02	Access to Deposit Reports	



GOLDView 32		
03	Access to General Ledger Rpts	
01	Access to Loan Reports	
05	Access to Payroll Reports	Payroll File Maintenance Report, FPSDR145
08	Access to Restricted Reports	Employee Deposit Statements, FPSDR199 based on Warehouse index category
07	Access to Special Reports	Reports FPS GOLD processes, such as loan drops
04	Access to Teller Reports	
06	Access to Warehouse Reports	Reports processed by FPS GOLD requiring a separate ISO file

Loan System - OBSOLETE

Materials Management - OBSOLETE

Office Management - OBSOLETE

Old Office Management System - OBSOLETE

Organization Options - OBSOLETE

Payroll Management - Application 11

Bit #	Function Name	Function
43	Alternate Posting	1-15/2-15
41	Batch Reports	
61	Change Client Number	66
13	Check Reconciliation	40
11	Co Emp Pay Change/F1 - Emp Mstr	13<F1>/14<F1>, 38
21	Company Benefits	1-5/2-5
19	Company Deductions	1-3/2-3
18	Company Earnings	1-2/2-2
28	Company User Fields	1-12/2-12
33	Daily F/M	59.1.1
16	Dept Employee Changes	58
37	Distribution	59.1.6



Payroll Management - Application 11		
08	Emp. Benefits	33/34
04	Emp. Earnings/Deductions	21/22, 25/26
06	Emp. Evaluation	
36	Emp. Not Posted and Balancing	59.1.4, 59.1.13
03	Emp. Payroll History	17
05	Emp. Profile	
15	Employee Master	13/14, 13<F1>/14<F1>, 13<F2>/14<F2>, 13<F7>/14<F7>, 13<F10>/14<F10>
34	Employee Master and Labels	59.1.2, 59.1.1
29	Employee Number Change	1-13/2-13
49	Employee Pay Amounts	13<F1>/14<F1>
35	Employee Pay Information	59.1.3, 59.1.5, 59.1.7, 59.1.9, 59.1.11, 59.1.14, 59.1.15, 59.1.18, 59.1.20, 59.1.21, 59.1.22
50	Employee User Field 1	41/42
51	Employee User Field 2	41/42
52	Employee User Field 3	41/42
53	Employee User Field 4	41/42
54	Employee User Field 5	41/42
42	FTE Report	59.1.19
23	Job Cost Codes	1-7/2-7
25	Job Description File	1-9/2-9
27	Job Status File	1-11/2-11
44	Monthly Tax Liability	
26	Pay Grade File	1-10/2-10
10	Payroll Adjustments	12
17	Payroll Cycles	1-1/2-1
09	Payroll Posting - F/M	8, 15/16
38	Position Control and Budget	59.1.8, 59.1.38
30	Position Control Budget Info	1-14/2-14, 2-8<F1>
24	Position Control File	1-8/2-8
55	Post Rate Changes	20, 24
40	Posting Errors	59.1.12
12	Print Payroll Checks	36



Payroll Management - Application 11		
02	Print Reports	59-1.34-42 / 59.2.34-42
22	Project Codes	1-6/2-6
01	Report Formats	59.2.34-42
07	Report Writer	63.1-63.7
63	Report Writer Report Setup	63.2-63.4
64	Report Writer Run Report	63.1, 63.7
20	Tax Tables	1-4/2-4
39	Time Cards	59.1.16
14	Void Checks	44, 48

PC Check Image Utilities		
Bit #	Function Name	Function
06	Modify Auto Print Options	
03	Process Check Exceptions	
02	View Check Exceptions	
01	View Check History	
05	View Check Image Options	
04	View Check Images	

Prrpts0 - OBSOLETE

Report Warehouse Menu - Application 53		
Bit #	Function Name	Functions
03	Print Position Selection	37/38
02	Report/Line/Index Selection	31/32, 33/34, 35/36
01	Warehouse Directory	1/2
04	Warehouse Options	39/40

Report Writer - OBSOLETE

Reports and Dacosys Options		
Bit #	Function Name	Function



Reports and Dacosys Options		
02	Report Functions	
01	Update Functions	

Security Management - Application 19		
Bit #	Function Name	Function
01	Administrative Functions	
04	Appl. Programmer Functions	
03	Print Requests (2, 3, 4)	<F9>, then 2, 3, or 4
05	Reset Security Code	<F11> Reset Emp. Password
02	Reset Security Violation (F9)	<F9>

System Print Program		
Bit #	Function Name	Function
01	Access	

Utility Programs - Application 10 - **OBSOLETE**

Web Security		
Bit #	Function Name	Function
16	Allow Customer Blog	Web banking
02	Allow Software Downloads	Web banking
13	Allow Ticket Submission	Web banking
01	Allow Web Logon/training	Web banking
14	Allow Wo Prioritization	Web banking
06	EIS All	Web banking
12	EIS Branch	Web banking
07	EIS Division a	Web banking
08	EIS Division B	Web banking
09	EIS Division C	Web banking
10	EIS Region	Web banking
11	EIS State	Web banking
05	E-work Orders	Web banking



Web Security		
15	Executive Files	Web banking
04	Executive Information System	Web banking
03	Knowledge Base Access	Web banking



Field Level tab

The Field Level tab on the [Security > Setup screen](#) is used to set up *restricted* file maintenance to specific data fields for employees. In order to use this feature, employees must first be set up with CIM GOLD application and screen security using the [CIM GOLD tab](#) before any field-level security can be tied to them. If an employee is tied to a CIM GOLD profile, the profile name is used to set up restricted access in Field Level Security. If multiple profiles with different field-level security are tied to an employee, all the secured fields from all profiles will be restricted for the employee.

If the Field Level Security feature is not going to be used by your institution, no work is required with this screen. When “Maintain” access is given to applications and screens, all the fields are file maintainable until they have been restricted individually or on a profile setup using this screen.

NOTE

Field Level Security is for CIM GOLD applications and does not correspond with any other PC product.

The Field Level Security screen is organized into two sections. The **Restricted Fields** list view shows all the fields that are restricted for the employee or profile selected. The **All Fields** list view is used to restrict the specific fields for an employee or profile based on **Record Type**.

The **Record Type** dictates what fields are available for the specified type. For example, CSPI is for CIS Customer Profile. The records are the same as the records used in GOLDWriter and system history. For a list of record types and descriptions, see the Master Records section in the help file.

If your institution uses field-level security for employees and CIM GOLD profiles, use the following instructions for setup and changes.

For details on how to use any of the fields on this tab, click in the field and press <F1>.

Setting Up Field-level Security

To set up or change field-level security for employees and profiles, complete the following steps.

1. Select **Employees** or **CIM GOLD Profiles** on the left side of the screen.
2. Select the appropriate employee or profile from the list.
3. Click on the Field Level tab.
4. Select the **Record Type** from the drop-down list; all fields in the selected record will be shown.
5. Click on the **Restrict** box next to the field to restrict access and add it to the list of **Restricted Fields**.
6. Click <**Save Changes**> after restrictions are made for each Record Type.

If any fields need to be unrestricted, select them on the **Restricted Fields** list (use the <Ctrl> button on your keyboard to select multiple fields). Then click <**Clear Selected Restrictions**> and <**Save Changes**>.



Employees Tellers
 CIM GOLD Profiles System Profiles
 Display Effective Security
 Search

Number	Full Name
9201	FPS GOLD ONLY (PLATF...
9210	LINDA KEENEY
9220	MARILYN CRAWFORD
9301	LOGAN SMITH
9320	STEVE MCCREADY
9330	STEVE MCCREADY
9358	Dayna Kauo
9620	CHRISTOPHER VANBELL...
9730	JENNIFER VALENTINES
9920	Dayna K. Kauo
9930	AMY RASMUSSEN - EDIT...
9990	FPSGOLD(6)
9999	test teller

Employee | Teller | CIM GOLD | System | **Field Level**

Restricted Fields

Record	Field	Field Description
CSPI	PIENAM	EMPLOYEE NAME
CSPI	PIAWRD	AMOUNT KEYWORD
CSPI	PIPCMD	PREF CONTACT MET

All Fields

Record Type: CSPI - Customer Profile

Restrict	Field	Field Description
<input type="checkbox"/>	PIPYES	PROFILEYN ...
<input type="checkbox"/>	PIPAMT	PROFILE AMOUNT ...
<input type="checkbox"/>	PIPDAT	PROFILE DATE ...
<input checked="" type="checkbox"/>	PIPCMD	PREF CONTACT MET...
<input checked="" type="checkbox"/>	PIENAM	EMPLOYEE NAME ...
<input type="checkbox"/>	PILSDT	LAST SAVED DATE ...
<input type="checkbox"/>	PIDBDT	DEPENDANT BIRTHD...
<input type="checkbox"/>	PILIDN	LINK TO ID NUMBER ...
<input type="checkbox"/>	PILIDT	LINK ID NUMBER TY...
<input type="checkbox"/>	PILIDA	LINK ID NUMBR ACTI...
<input type="checkbox"/>	PIYWRD	YNKEYWORD ...
<input checked="" type="checkbox"/>	PIAWRD	AMOUNT KEYWORD ...
<input type="checkbox"/>	PIDWRD	DATE KEYWORD ...
<input type="checkbox"/>	PIEPCD	EXCLUDED PROD CO...

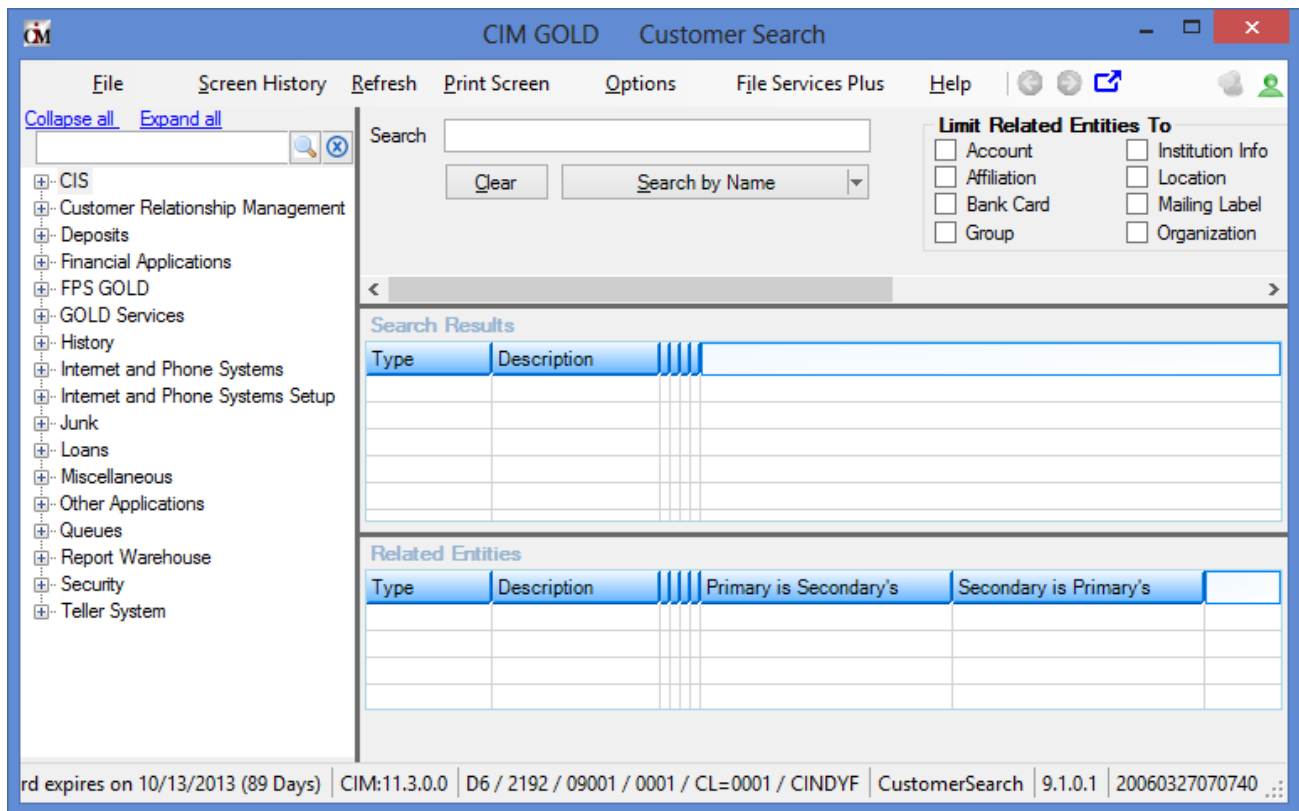


Enhanced Interface

The Enhanced Interface is an option you can select in CIM GOLD that changes the look of CIM GOLD, allowing you to easily recognize and use account information on often-used screens. Each Enhanced Interface can be customized for each user. The Enhanced Interface uses Windows®-type tiles, top menus, color-coded navigation tree, customizable logos, and more. Screens look and function the same as they always have; the Enhanced Interface just helps you find information faster, is easier to navigate, and allows for more user-specific preferences.

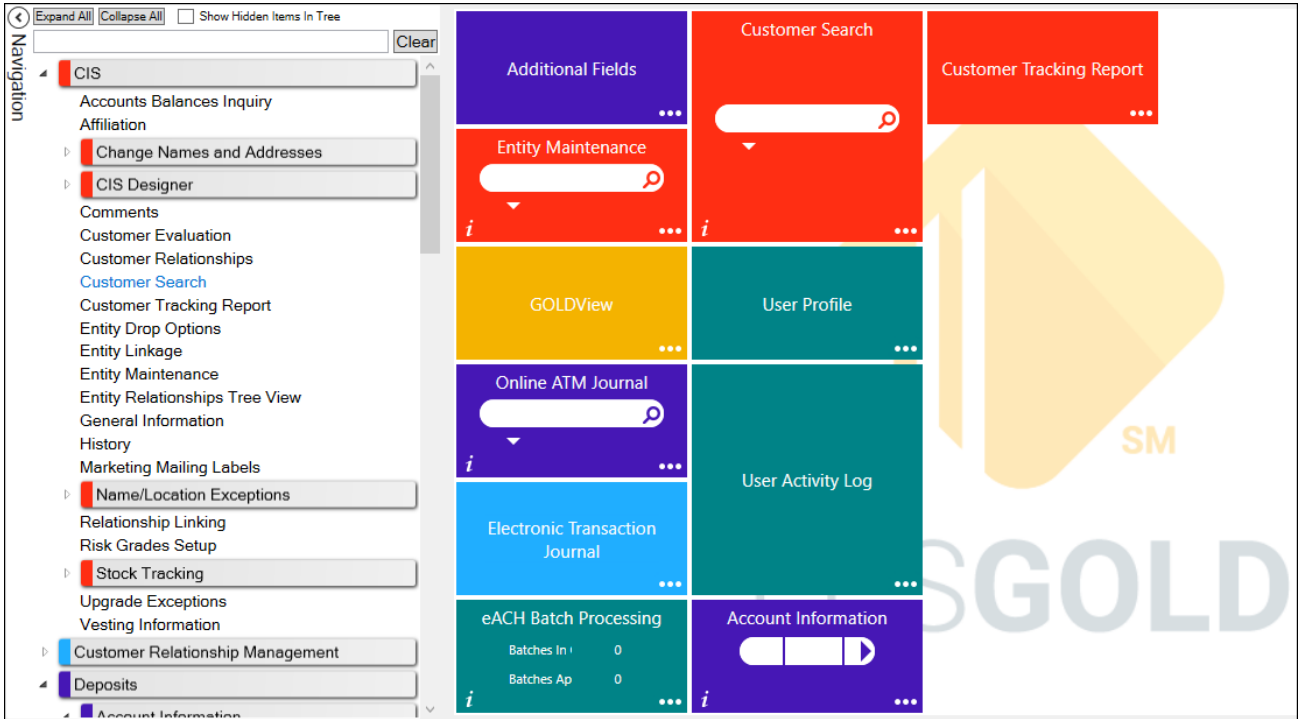
The following are examples of CIM GOLD in regular mode and Enhanced Interface mode.

Regular mode:



Enhanced Interface mode:





For more information about this unique feature, see the following sections.

[Getting Started](#)

[Options](#)

[Adding your business logo to the Home screen](#)

[Enhanced Tree](#)

[Home Screen](#)

[Live Tiles](#)



Getting Started

Options

Before you can begin using the CIM GOLD Enhanced Interface, you must set up some options on the Options > User Preferences, Enhanced Interface tab. Start by checking the **Use Enhanced Interface** checkbox. For more information about each of the options on this tab and how they affect CIM GOLD, see the [Enhanced Interface Tab](#) documentation.

Adding Your Business Logo to the Home Screen

You can add your business logo to be displayed on the Home screen when in Enhanced Interface mode. Before you can add your business logo, save the logo on the network or on your computer where you can easily find it. The logo can be any size, as the **Alignment** option can help you decide how to display the logo (as described in step 4 below).

To add your logo:

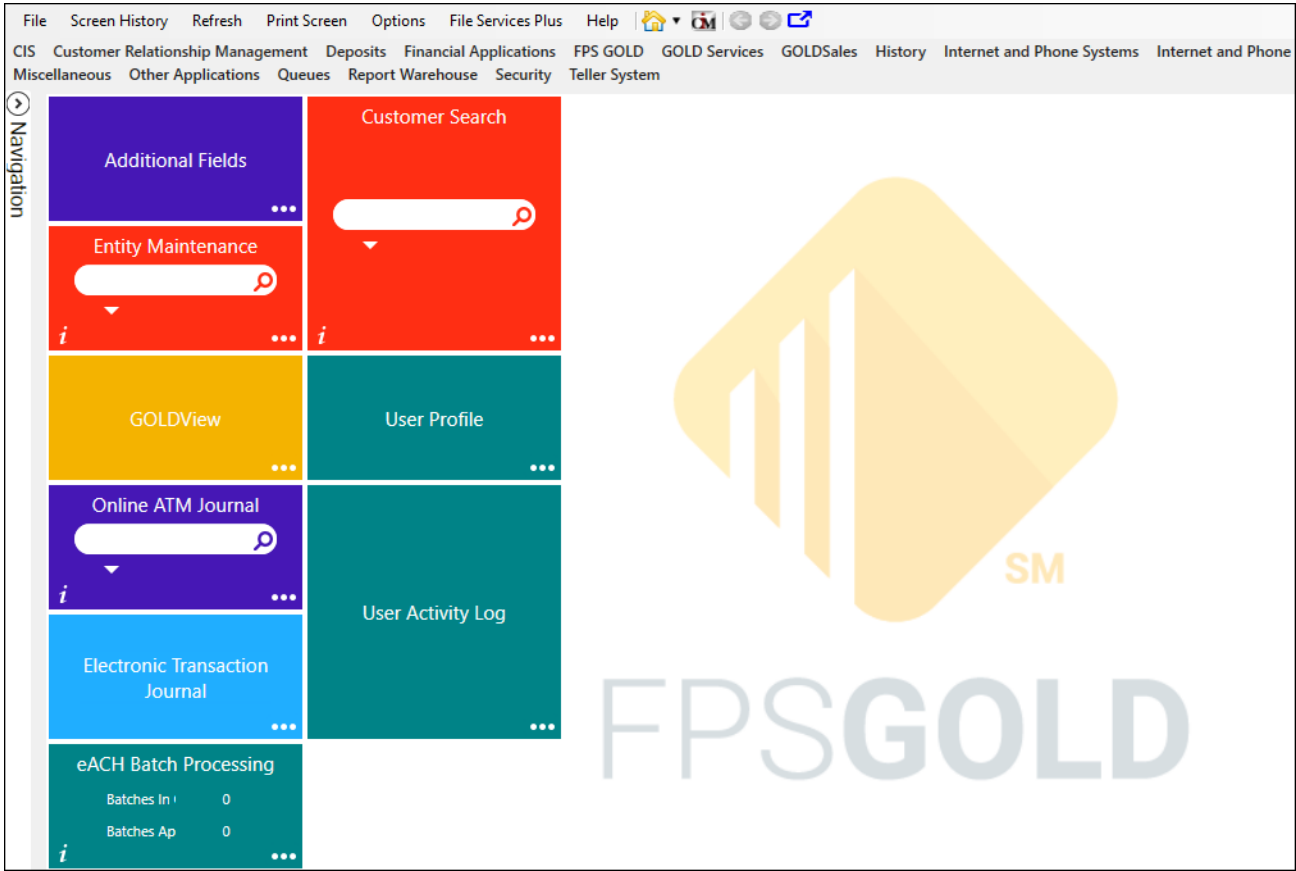
1. Select Options > User Preferences from the top menu bar, then click on the Enhanced Interface tab.
2. In the Background Image field group on that tab, click <Choose File>, select the logo, and click <Open>.

If you want to select a series of images, first make sure you've saved all the images in the same folder on the network or your computer, then click <Choose Folder>. Locate the saved folder, select it, and click <OK>.

3. Set how transparent you want the logo to be displayed by choosing a percentage in the **Opacity** field. 100% means the logo (images) will be displayed clear and unfiltered. 1% means the logo will likely not show up at all, or very lightly. The default is 30%, as shown in the example below.
4. Use the **Alignment** field to select how CIM GOLD will display the logo (or images). Possible choices include:
 - Center the image in the background without modifying the size
 - Fill the entire background with the image, distorting the image if necessary
 - Fill as much of the background as possible with the entire image while retaining the aspect ratio (default)
 - Fill the entire background while retaining the aspect ratio, cropping the image if necessary
5. If you are using a folder of images rather than just one image (as explained in step 2 above), select when the system rotates the image to display a new one from the folder.
6. Click <OK> to save your changes.

The following is an example of how the FPS GOLD logo looks on the CIM GOLD Home screen with 30% opacity:





Enhanced Tree

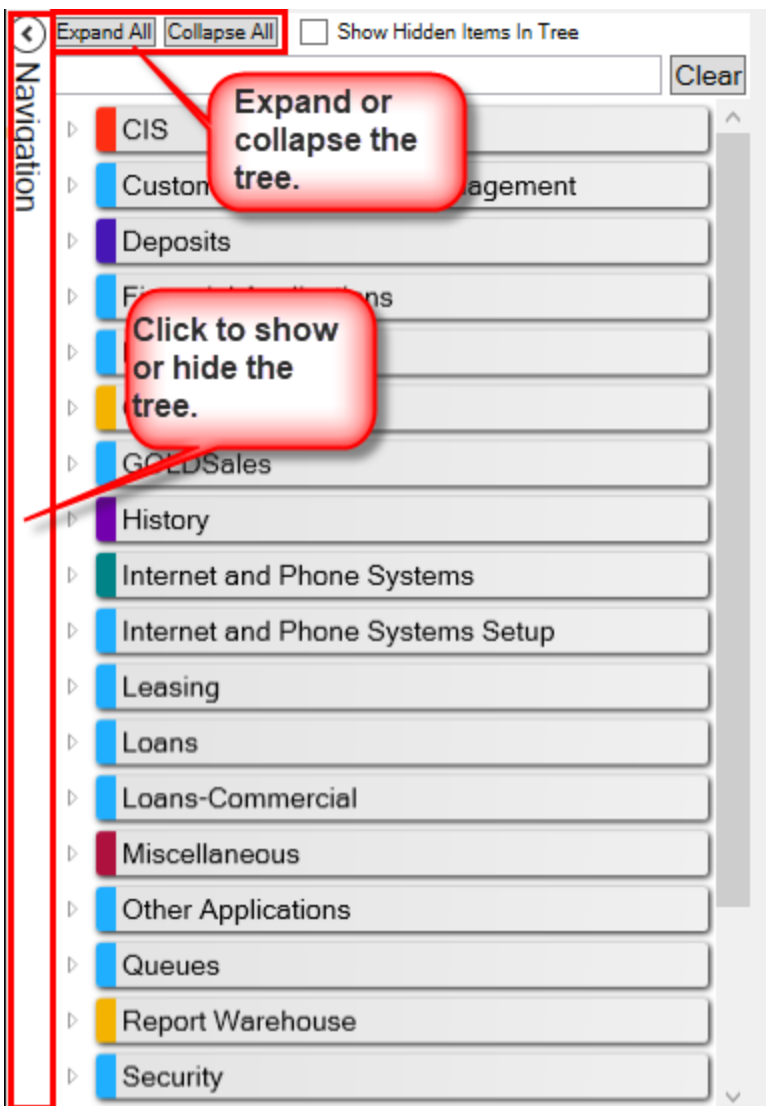
Enhancements have also been made to the CIM GOLD left navigation tree.

Show or Hide the Navigation Tree

- Show the tree by clicking anywhere in the Navigation bar on the left of the screen.
- Hide the tree by clicking the Navigation bar again.

Expand or Collapse the Headings

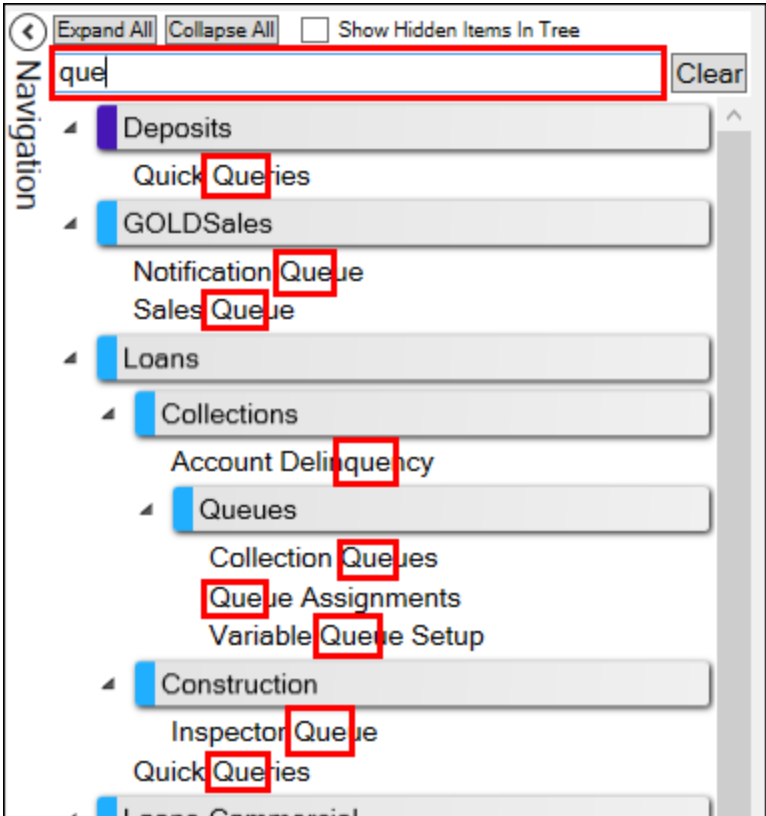
Two buttons at the top of the tree, <Expand All> and <Collapse All>, allow you to expand the tree to show all available screens or collapse the tree to show only the main headings in the tree.



Search for a Screen By Name



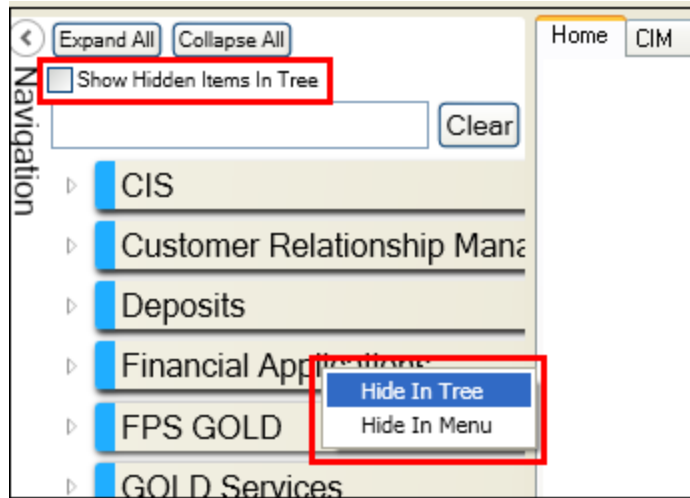
A search box at the top of the tree dynamically expands and collapses the tree as you type to show only screens with matching text in the title of the screen. This is particularly useful for screens that you use only occasionally and don't know the path to the screen. See the following example. If a screen is under a heading, the list will be expanded to show where it is in that heading (for example, Loans > Collections > Account Delinquency in the example below).



Hide a Heading

If there is a heading in the tree that you do not want to see in the menu or in the tree, you can hide the heading by right-clicking on it and selecting "Hide in Tree" and/or "Hide In Menu," as shown below.





Hidden items can be shown temporarily by checking the **Show Hidden Items in Tree** box at the top of the tree. Hidden items will also show up if a matching screen is found while doing a screen search. Major headings can also be permanently unhidden again by right-clicking on the major heading and unchecking the appropriate hide option (after checking **Show Hidden Items in Tree**).

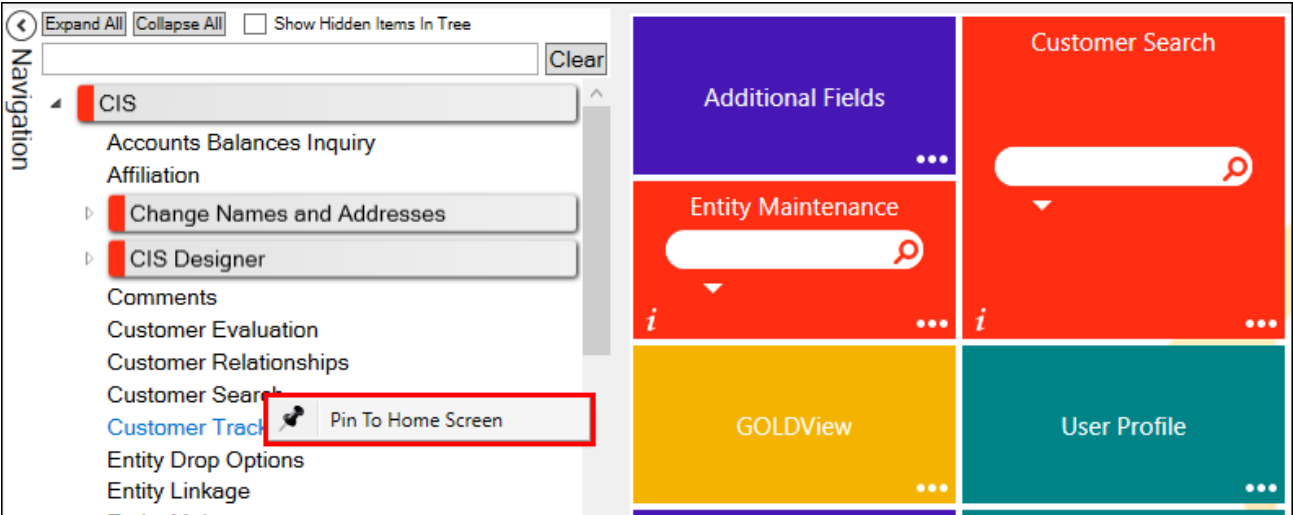


Home Screen

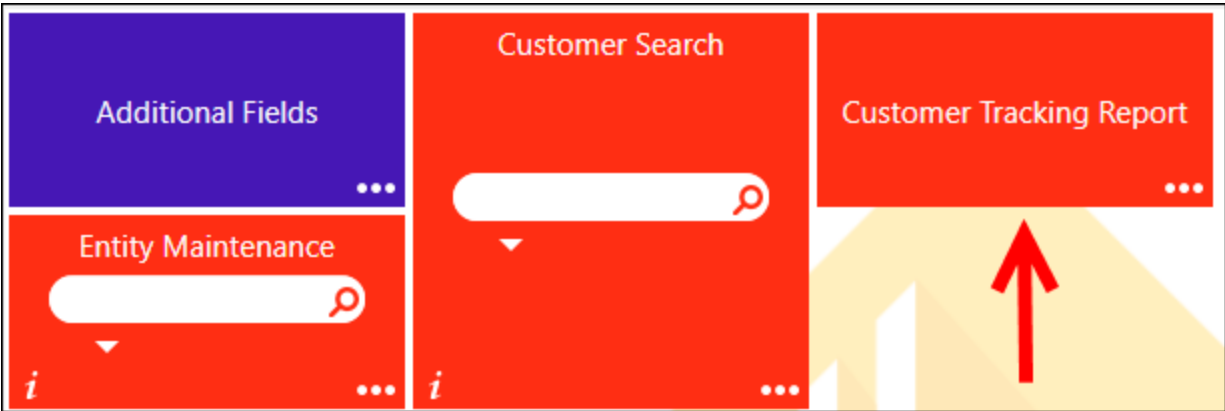
The enhanced CIM GOLD Navigation Home screen has been patterned after the Windows 8 tile concept.

Adding Tiles

From the enhanced navigation tree or from the enhanced navigation menu, you can pin any CIM GOLD screen to the Home screen by right-clicking on the item and selecting "Pin to Home Screen."



This will add a tile for this screen to the home page, as shown below.



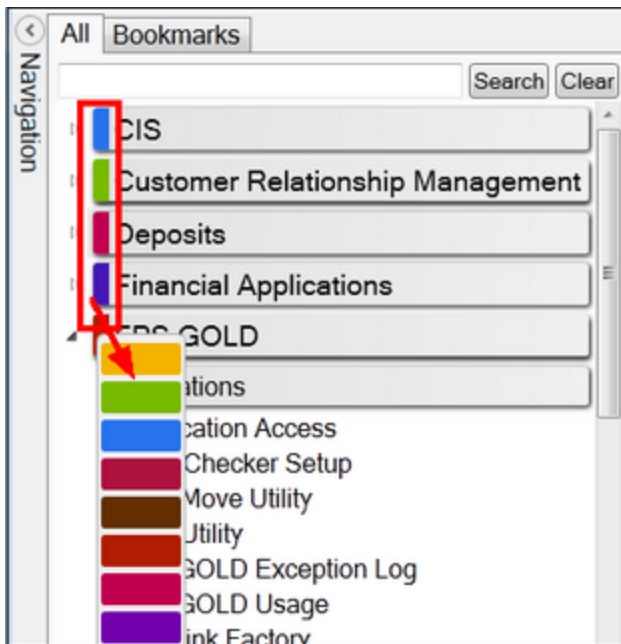
Changing Color, Size, and Position

Once you have selected all the screens you want to display on your Home screen, you can customize the Home screen.

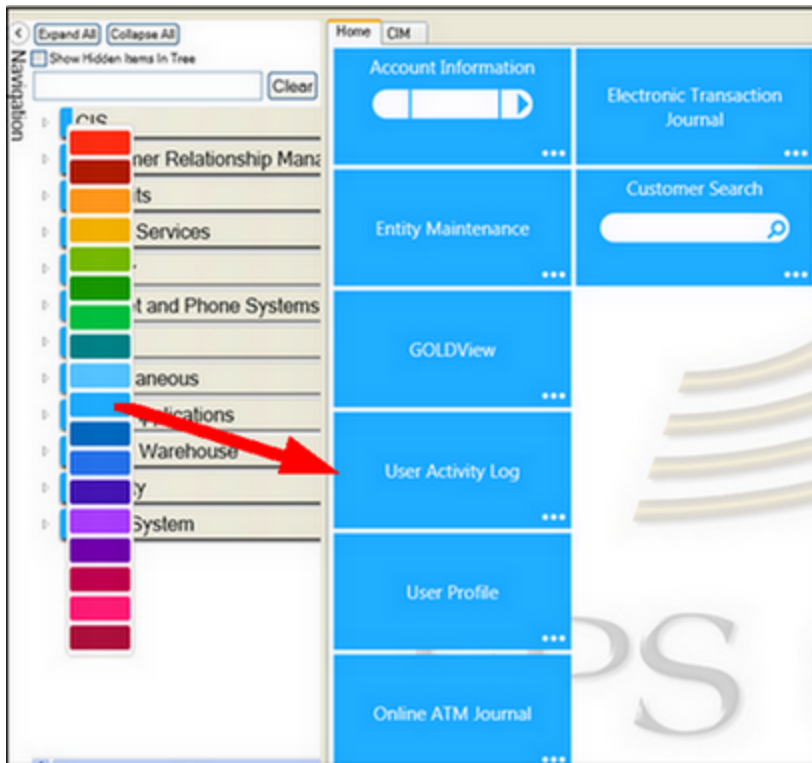
To add colors to tiles to visually separate them on the Home screen:

- 1. Right-click on the colored strip to the left of a heading, as shown below.



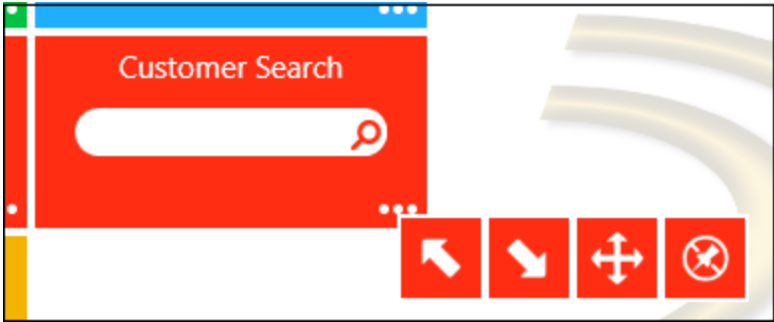



2. Click on a color in the palette to change all tiles in that heading to that color. See the following examples.






The tiles can then be rearranged, grouped, and resized by clicking on the white dots in the lower-right corner of any tile. This opens a graphical menu of options to enlarge, shrink, move, or un-pin the tile.



Click on the "Arrange" icon  or click and hold a tile for a quarter of a second to put the Home screen into maintenance mode. Then you can move and group all the tiles.

Using More Than One Home Page

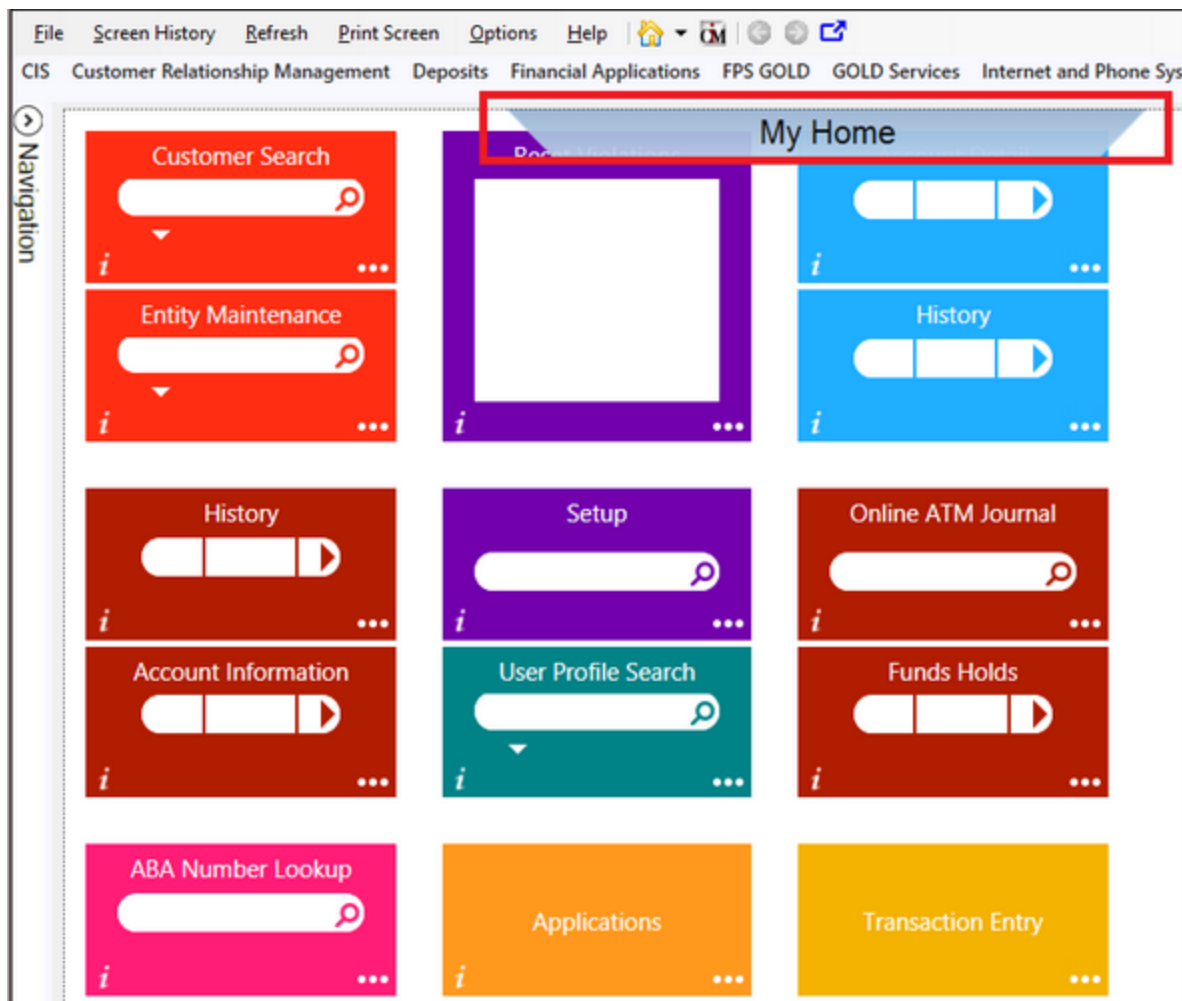
You can create as many as three home pages. Select the home page you want to open by clicking the arrow next to the Home icon at the top of the screen  . See the example below.





When you open a home page, the page title will display at the top of the screen and then fade out after three seconds.





When you open a home page, its title (outlined in red here) displays briefly.

You can move between the home pages three ways, using the steps below.

To move between home pages:

Using the mouse:

1. Position your mouse cursor over an empty space inside the home screen.
2. Press and hold the left mouse button.
3. Move the mouse cursor on the screen vertically to change pages--down to go to the next page and up to go to the previous page.

Using the menu:

1. Click the drop-down arrow next to the Home icon at the top of the screen.
2. Select a page you want to open.

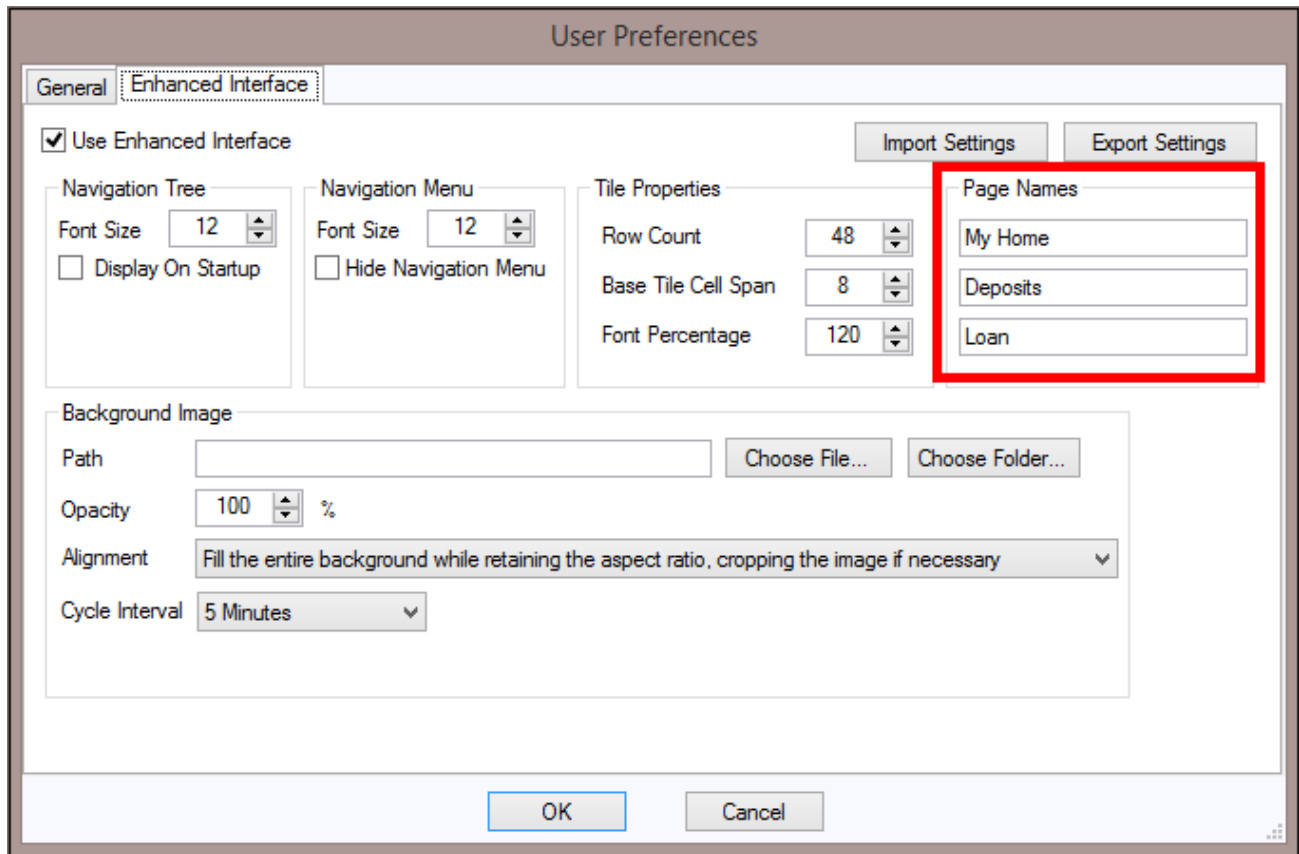
Using the keyboard:

1. Press <Ctrl>+<F12> to go to the next home page.

Home Page Titles




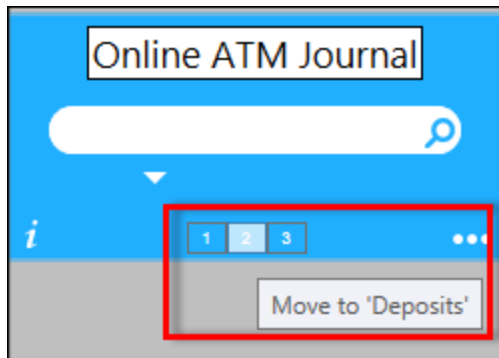
You can create titles for the home pages in the User Preferences dialog box, Enhanced Preferences tab (CIM GOLD Options Menu > User Preferences). See the example below.



CIM GOLD Options menu, User Preferences

To move a tile from one page to another:

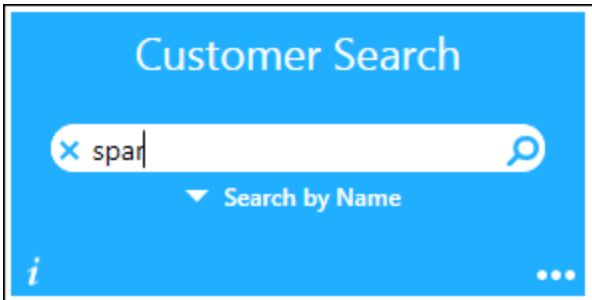
1. Click on the three dots at the bottom right of the tile, then click on the Arrange icon . At the bottom of the tile, there will be three buttons with the numbers 1, 2, and 3.
2. Click on a button to send the tile to that screen. Hovering your mouse pointer over the button will open a tooltip that will tell you which home screen it will be moved to. See the example below.



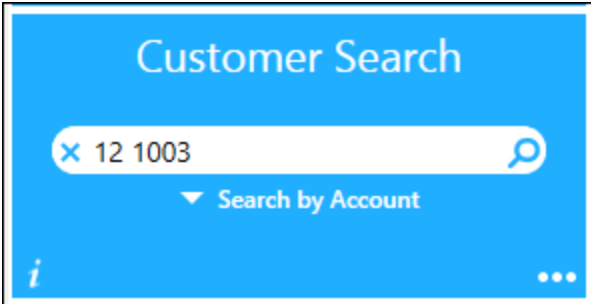
Live Tiles

Live tiles make it easy to open a CIM GOLD screen with pre-populated information or to perform screen functions without leaving the Home screen.

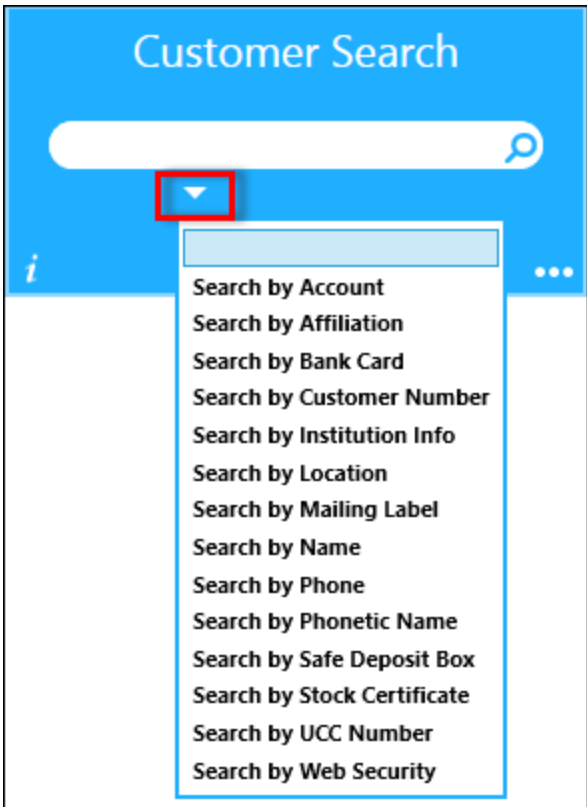
For example, the Customer Search live tile contains a text box where you can enter the data you would like to search for. As data is entered in the box, the live tile detects the type of data being input and automatically selects the entity to search for. You can also enter the data and select an entity from the drop-down list by clicking the drop-down arrow. See the examples below.



When you type in the first few letters of a name, CIM GOLD detects that you are searching for a name.



When you enter the first few account numbers, CIM GOLD detects that you are searching for an account.



Click the drop-down arrow if you want to select the entity type from the list.

Press <Enter> on your keyboard to open the CIS Customer Search screen and perform the search. See the following example.



The screenshot displays the CIM GOLD Customer Search interface. At the top, there is a blue header with the title 'CIM GOLD Customer Search' and a menu bar containing 'File', 'Screen History', 'Refresh', 'Print Screen', 'Options', and 'Help'. Below the header, a navigation bar lists various modules: 'CIS', 'Customer Relationship Management', 'Deposits', 'GOLD Services', 'History', 'Internet and Phone Systems', 'Loans', 'Miscellaneous', 'Other Applications', and 'Report V'. A vertical 'Navigation' sidebar is on the left. The main content area features a search section with a text input field containing 'spa', a 'Clear' button, a 'Search by Name' dropdown menu, and a 'Scanner' button. To the right of the search field is a 'Limit Related Entities To' section with a grid of checkboxes for various entity types: Account, Institution Info, Person, Special Text, Web, Affiliation, Location, Phone, Stock Certificate, Bank Card, Mailing Label, Retirement Plan, Trust, Group, Organization, Safe Deposit Box, and UCC. Below this is a 'Search Results' section containing a table with the following data:

Type	Description		
Person	Jack Sparrow	054-71-4958	Born: 02/29/1960

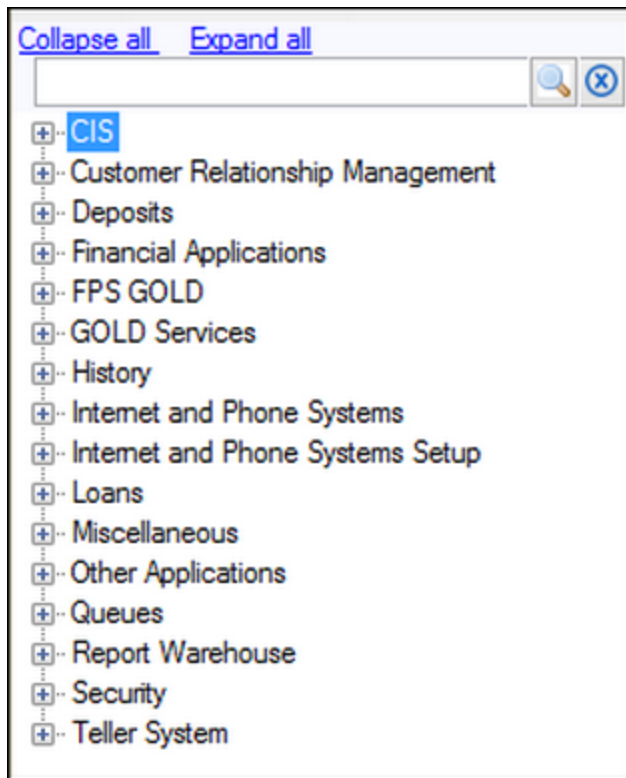


CIM GOLD Features

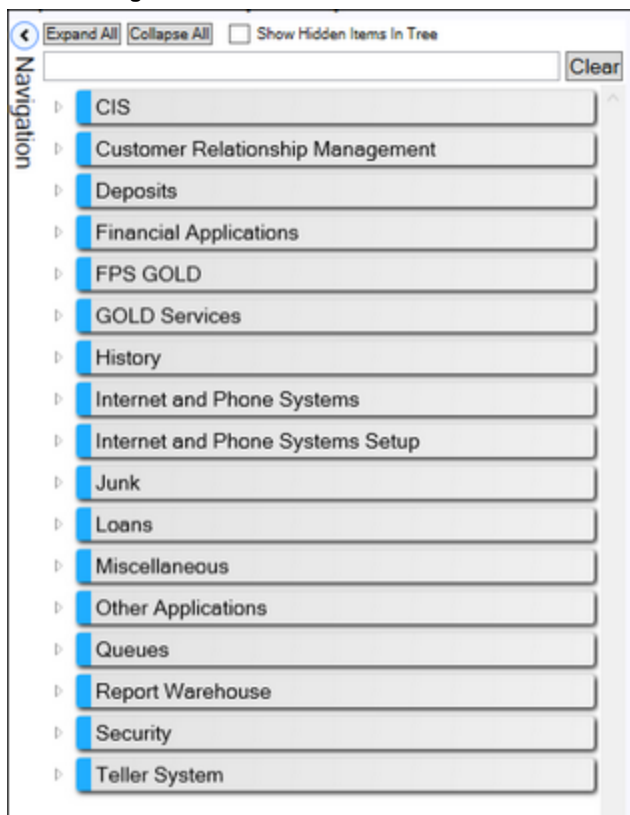
In CIM GOLD, use the left navigation tree to open screens (depending on if you have [security](#) for that screen). If you are using CIM GOLD's Enhanced Interface, you can also open screens from the top menu or from customized [tiles](#) on the home screen.

The left navigation tree looks somewhat different when using the Enhanced Interface. The example on the left below shows the navigation tree as it looks when the Enhanced Interface is not being used. The example on the right below shows the navigation tree when the Enhanced Interface is being used.





Navigation tree without Enhanced Interface




Navigation tree with Enhanced Interface.



Screen Search

At the top of the left navigation tree is a screen search feature. Enter all or part of a screen name in this field, and the system will find that screen in the tree view. This feature makes it easy for you to find exactly the screen you want to open.

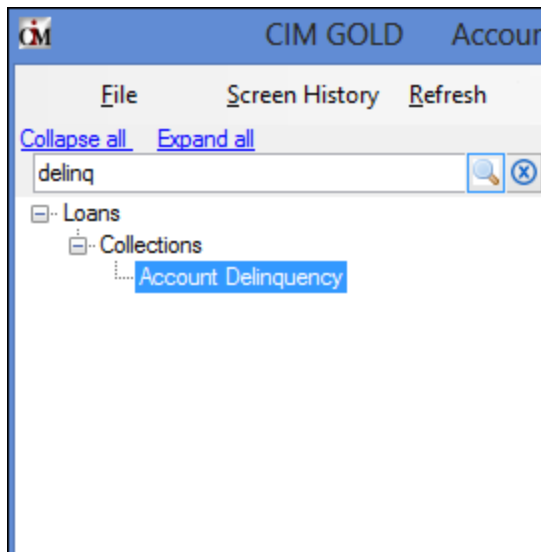
For example, if you wanted to find the Account Delinquency screen in the Loan system, you could enter "delinq" in this field, and all screen names with "delinq" will be displayed in the navigation tree.

- Clicking the x icon  removes the data entered in the search and returns the navigation tree to its original view.
- Clicking the **Collapse all** link collapses the navigation tree menu, so that only the main headings are displayed.
- Clicking the **Expand all** link expands all headings so that each of the screens within that heading are displayed in the navigation tree menu.

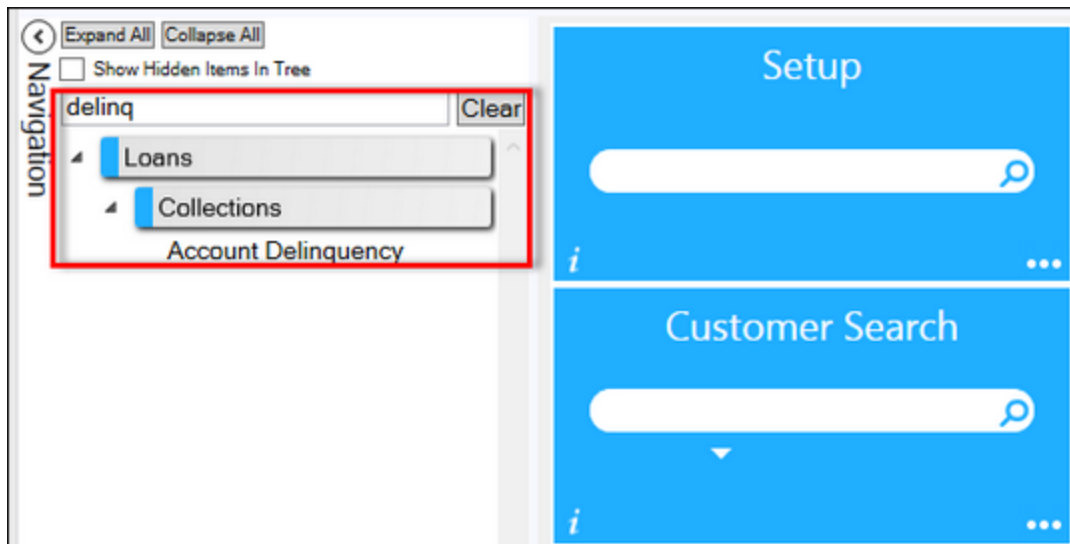
Note: This navigation tree looks different if using CIM GOLD's [Enhanced Interface](#).

See the following examples:





Search results, normal interface



Search results when using the Enhanced Interface

Finding Accounts

The first screen you see after you log on to CIM GOLD is the Customer Search Screen. Use this screen to find the person or account you want to view. For more information about the details of this screen, see the Customer Search Screen topic.

The following is an example of this screen:



Search

Limit Related Entities To

<input type="checkbox"/> Account	<input type="checkbox"/> Institution Info	<input type="checkbox"/> Person	<input type="checkbox"/> Special Text	<input type="checkbox"/> Web Security
<input type="checkbox"/> Affiliation	<input type="checkbox"/> Location	<input type="checkbox"/> Phone	<input type="checkbox"/> Stock Certificate	
<input type="checkbox"/> Bank Card	<input type="checkbox"/> Mailing Label	<input type="checkbox"/> Retirement Plan	<input type="checkbox"/> Trust	
<input type="checkbox"/> Group	<input type="checkbox"/> Organization	<input type="checkbox"/> Safe Deposit Box	<input type="checkbox"/> UCC	

Search Results **There are more matching items on file.**

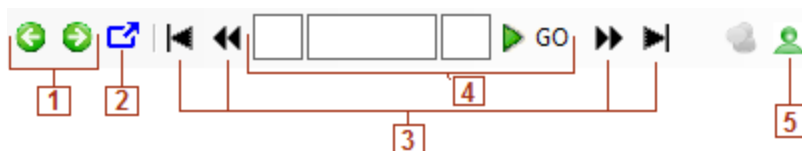
Type	Description				
Organization	Smith & Smith Incd	117888455			
Person	Aaron Smith SR	543-15-5760	Born: 04/30/1972		
Person	Mr Aaron Buddy Smith	540-12-1234	Born: 07/07/1982	A & C ENTERPRISES	
Person	Abel Smith	345-64-5654			
Person	Adam Smith	534-88-3819	Born: 01/01/1971		
Person	adamadam smith	825-48-4524	Born: 06/27/1950		
Person	Alan Smith	444-55-4411			
Person	Albert Juan Val Juan Smith	259-64-6784	Born: 07/09/1934		
Person	Aleithna E Smith	665-66-7777	Born: 09/27/1975		
Person	Alexander M Smith	544-55-6666	Born: 07/01/1971		
Person	Alexandria W Smith	888-55-9999	Born: 08/08/1988		
Person	Alice Smith	533-56-1470	Born: 10/19/1950		
Person	Mr. Alan C Smith	019-01-8047	Born: 06/07/1974		

Entities Related to Primary Person Aaron Smith SR

Type	Description				Primary is Secondary's	Secondary is Primary's
Location	590 S 14th	PO Box 214	Lebanon OR 97355-8415		Borrower	Correspondence Address
Location	456 Delaney St		Port Charlotte FL 33954		Depositor	Correspondence Address
Location	456 N Blue Grass Dr		Bonner Springs KS 66012		Depositor	Correspondence Address
Location	123 Anywhere Street		Provo UT 84601		Borrower	Correspondence Address
Location	123 Bonanza		Provo UT 84601		Borrower	Correspondence Address
Phone	(541) 258-8494	No Restrictions			Contact	Home Phone
Phone	(541) 760-9929	No Restrictions			Contact	Work Phone
Account	01 0300659 09	1-YEAR TIME DEPOSIT	Certificate 1200	Unopened	Owner	Account
Account	01 0200488 04	INTEREST CHECKING, NO IMA	Checking 140	Unopened	Owner	Account
Account	01 0270011 09	HSA CHECKING, NO IMAGES	Checking 130	Unopened	Owner	Account
Account	01 0270026 07	Checking	Checking 130	Unopened	Owner	Account


Moving Between Screens

Once you have found and selected an account, you will notice some buttons and fields at the top of the screen, as shown below. Use these features to open account quickly.



- Click the Back arrow to open the last screen you were on. *TIP:* <Alt> + left arrow on your keyboard also takes you to the last screen.
Click the Forward arrow to open the next screen you were on. *TIP:* <Alt> + right arrow on your keyboard also takes you to the next screen.
- Click the pop-out icon to "pop out" the current screen into its own window so you can keep it open while navigating around CIM GOLD to do other tasks.
- Use the black arrow keys to quickly open the next or last account number on file.
 - Click the First button to go to the very first account on file in numerical order.
 - Click the Previous button to bring up the previous account number.
 - Click the Next button to bring up the next account number (in numerical order).
 - Click the Last button to go to the very last account number on file in numerical order.
- If you already know the account number you want to open, enter that number in the Fast Goto Account field, and then click the green Go arrow **GO**. The system will display that account's information for the screen you are on.



5. Click the Customer Bubble icon  to open an "at-a-glance" view of your customer's relationship to the bank, including how many accounts and what types of accounts the customer has at your bank. This bubble is customizable to your needs. See the [Customer Index Bubble section](#) in the CIS User's Guide in DocsOnWeb for more information.

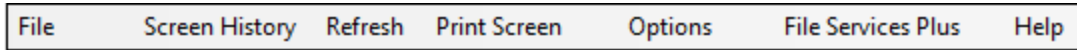
Additional CIM GOLD Information

For more information about each of the menus in CIM GOLD, see the [Main Menu](#).





Main Menus

The menus at the top of CIM GOLD can change depending on which screen you open. However, there are seven main menus, as described below.

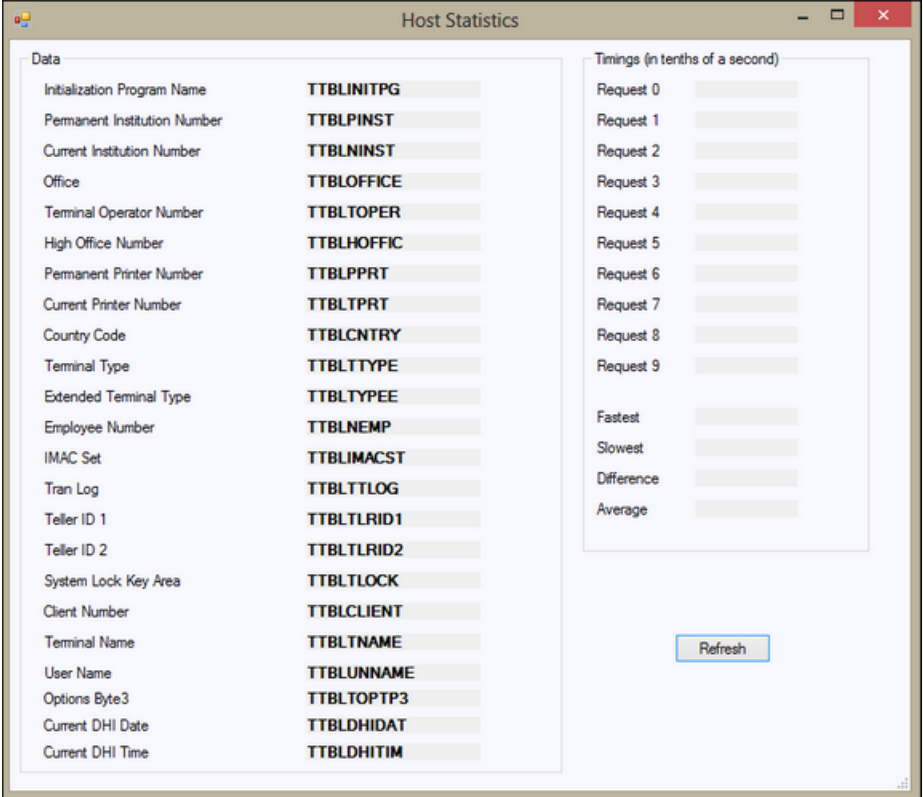


File Menu

The following table describes each of the menu items under the File heading in CIM GOLD.

Menu Item	Description
 Go To Screen...	This function opens the Enter Screen ID dialog box. Here you can enter a number in the Screen ID field and click <OK> to display that screen. The screen identification number is located in the bottom-right of the screen in the status bar (see the Status Bar section below).
 Initiate CIM Repair	<p>Click this menu item to quickly repair problems you may encounter while running CIM GOLD. The following dialog box displays:</p> <div data-bbox="451 898 1442 1304" data-label="Image"> </div> <p>When you click <OK>, the following dialog box displays:</p> <div data-bbox="451 1396 1260 1740" data-label="Image"> </div> <p>When you click <Yes>, CIM GOLD closes and restarts automatically. When CIM GOLD restarts, the problem you encountered should be fixed.</p>



Menu Item	Description
Platform	Click this menu item to open another menu that you can use to start, stop, or terminate Platform.
GOLDTeller	Click this menu item to open another menu with the following options: <ul style="list-style-type: none"> • Close GOLDTeller • Reconnect Remote Override/Chat • Change File Directories • Terminate GOLDTeller
Get Host Statistics	<p>This function opens the Host Statistics dialog box, shown below.</p>  <p>The Host Statistics dialog box displays general information about the PC using the CIM GOLD program. It also displays various response time fields, including fastest, slowest, difference, and average. Click the <Refresh> button to reload the dialog box and display current data for that terminal.</p>
Change Working Set	Use this function to toggle between different modes of CIM GOLD: Production, Month End, and Testing. Production is the live file, and changing fields in this mode will change account records for actual customers. Month End mode displays live files as of the last day of the previous month. Testing mode is a test file for your institution; changes are saved in test files and not on live accounts.
Change Client Number	Click this menu item to open another menu with the following options: <ul style="list-style-type: none"> • General Ledger • Accounts Payable • Fixed Assets



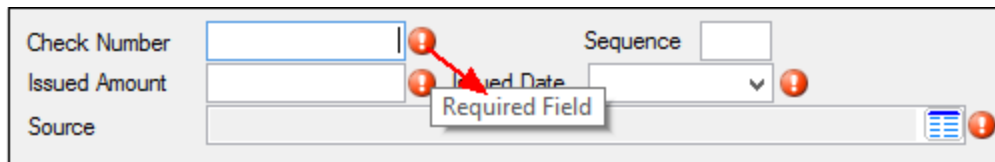
Menu Item	Description
	<ul style="list-style-type: none"> • Payroll <p>Select one of the options to open a dialog box where you can change the client number for that option.</p>



Error Provider

The error provider is a red circle that is displayed on the screen next to a field that contains incorrect data or incomplete data. Often within CIM GOLD, changes to one field will affect another field. If a change requires entry or a fix in another field, this red circle will display.

Move your mouse cursor to hover over this red circle. A message will display stating the problem. Once the problem is fixed and you tab out of that field, the red circle will disappear. See the following example.



The screenshot shows a form with the following fields: 'Check Number' (text input), 'Issued Amount' (text input), 'Source' (text input), 'Sequence' (text input), and 'Issued Date' (dropdown menu). Red circles with exclamation marks are placed next to the 'Check Number', 'Issued Amount', 'Issued Date', and 'Source' fields. A tooltip box with the text 'Required Field' is positioned over the 'Issued Date' field, with a red arrow pointing to its error indicator. A blue icon with a red circle is also visible at the bottom right of the form area.

Note: If you try to save a screen with an error provider, a message will display that states, "You must fix all errors before saving." When you click <OK> to that message, you will be returned to the screen to fix your errors. If there are multiple tabs within your screen, the error may be on any of the tab pages. Check all tabs if the message indicates an error and you do not see the error provider. When an error provider exists on any of the tabs on a screen, it may sometimes cause the <Save Changes> button to be disabled. In other words, if an error provider exists, you may not be able to save changes made to the screen until the information in the field with the error provider is corrected.



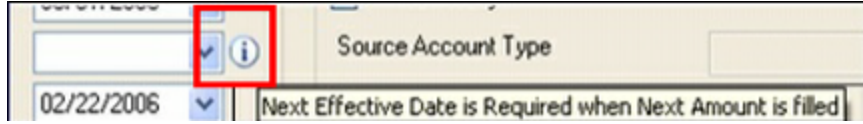
Warning Provider

The warning provider is similar to the [error provider](#). It is a yellow triangle that appears next to a field to display a warning. Move your mouse cursor to hover over the yellow icon and the warning message will display. The difference between the error provider and the warning provider is that the <Save Changes> button will be enabled and the screen will allow you to click <Save> when warning providers are on the screen.



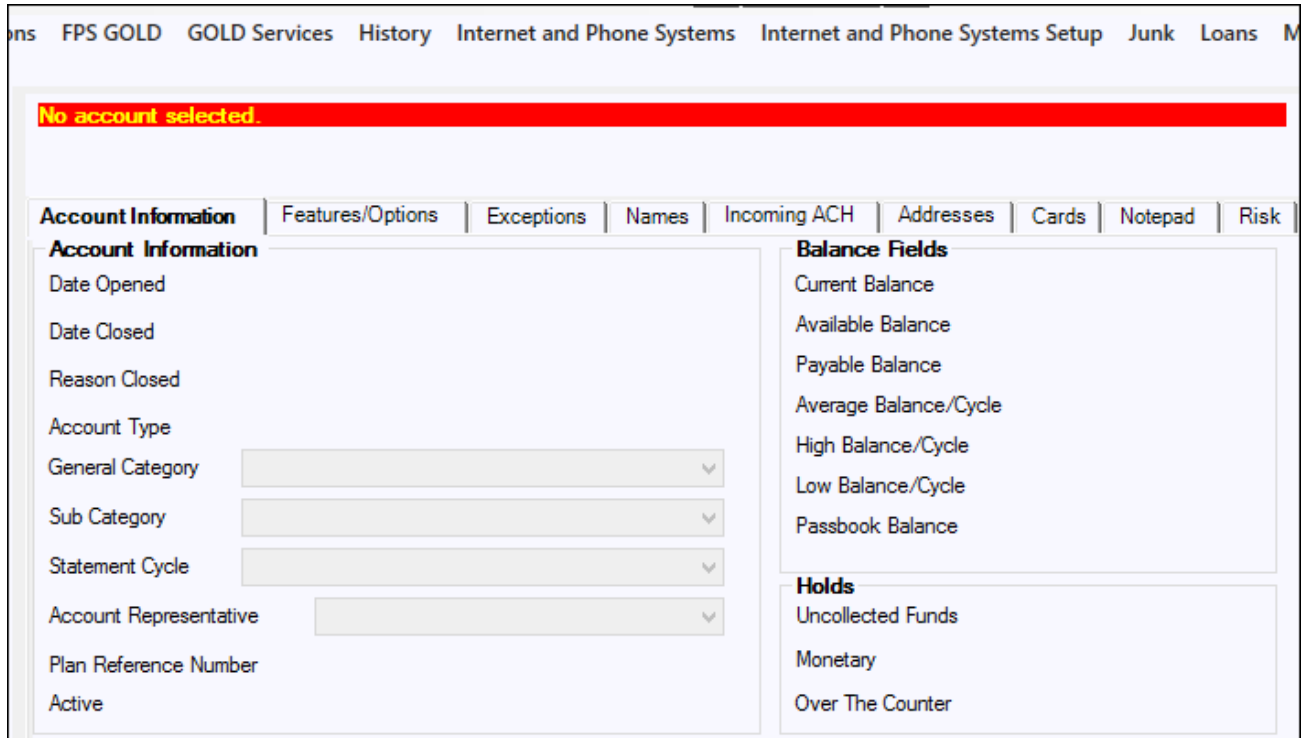
Information Provider

The information provider is similar to the [warning provider](#). It is a white circle that appears next to a field to provide more information for that field. Move your mouse cursor over the white icon, and the message will display. The <Save Changes> button will be enabled even if there are information providers on the screen.



Account Status Bar

The red Account Status Bar at the top of some screens displays information such as "No account selected" if you try to enter an account-based screen with no name or account selected. (See the example below.) Another example of information that displays in the red Account Status Bar is that a certain feature or function is needed on an account in order to use that screen.



ons FPS GOLD GOLD Services History Internet and Phone Systems Internet and Phone Systems Setup Junk Loans M

No account selected.

Account Information | Features/Options | Exceptions | Names | Incoming ACH | Addresses | Cards | Notepad | Risk

Account Information

Date Opened

Date Closed

Reason Closed

Account Type

General Category

Sub Category

Statement Cycle

Account Representative

Plan Reference Number

Active

Balance Fields

Current Balance

Available Balance

Payable Balance

Average Balance/Cycle

High Balance/Cycle

Low Balance/Cycle

Passbook Balance

Holds

Uncollected Funds

Monetary

Over The Counter



User Preferences

Select "User Preferences" from the Options menu to open preferences for your CIM GOLD setup.

IMPORTANT

You must have appropriate security in order to change User Preferences. Your institution's system administrator can grant this security by selecting "Maintain" for the first item, [Customer Search Screen], on the Security > Setup screen, [CIM GOLD tab](#). See the example below.

Employee	Teller	CIM GOLD	System	Field Level
Search: <input type="text"/> <input type="button" value="Undo"/> <input type="button" value="Redo"/> <input type="button" value="Reset"/>				
[Customer Search Screen] <input type="radio"/> None <input type="radio"/> Inquire <input checked="" type="radio"/> Maintain				
▶ CIS	<input checked="" type="radio"/> None <input type="radio"/> Inquire <input type="radio"/> Maintain			
▶ Customer Relationship Management	<input checked="" type="radio"/> None <input type="radio"/> Inquire <input type="radio"/> Maintain			
▶ Deposits	<input checked="" type="radio"/> None <input type="radio"/> Inquire <input type="radio"/> Maintain			

Security > Setup Screen, CIM GOLD Tab

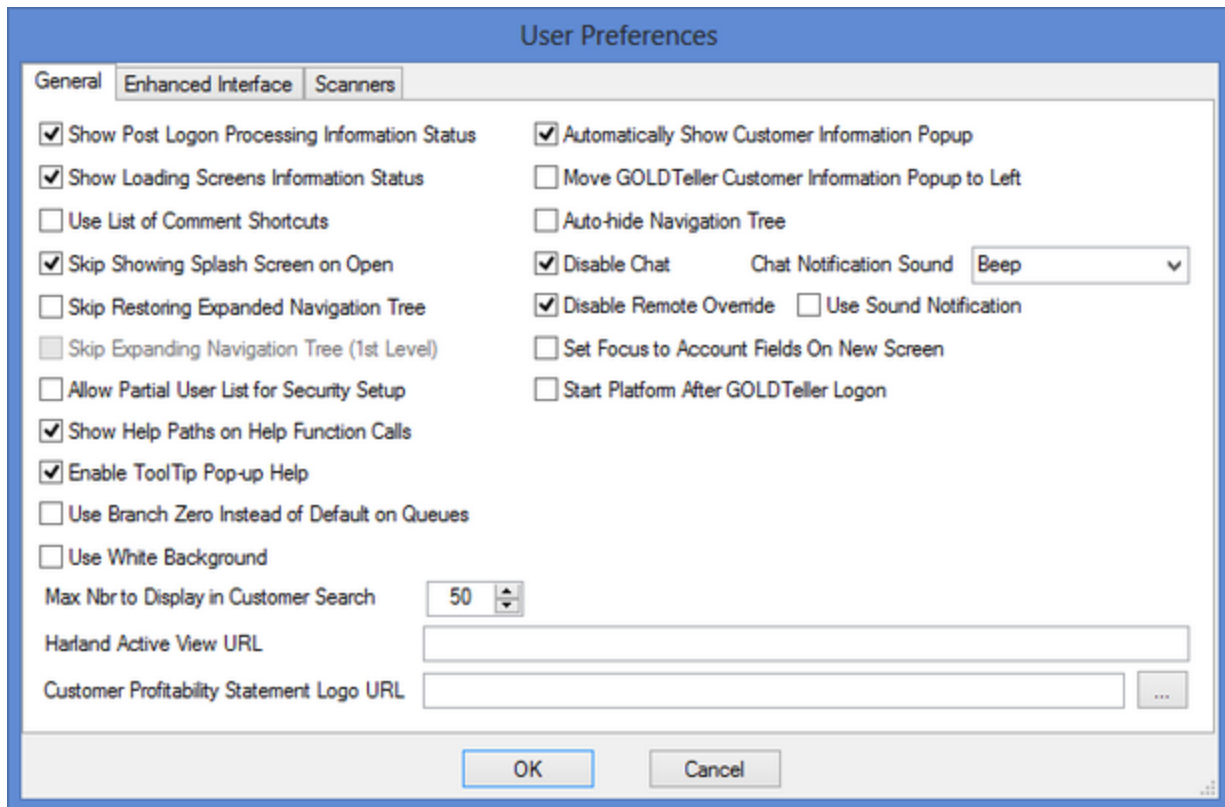
See the following topics for more information about each of the tabs on the User Preferences screen:

- [General tab](#)
- [Enhanced Interface tab](#)
- [Scanners tab](#)

General Tab

The following is an example of the Options > [User Preferences screen](#), General tab, followed by descriptions of each of the options.

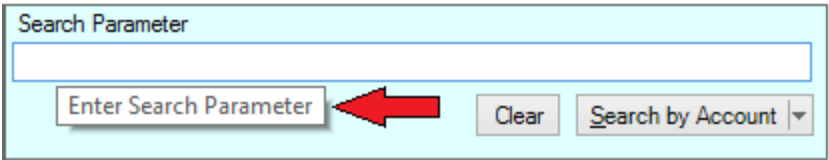





Options, User Preferences Screen, Options Tab

Option	Description
Show Post Logon Processing Information Status	Checkmark this field if you want CIM GOLD to display the status dialog box where available when the system is processing information on the logon.
Show Loading Screen Information Status	Checkmark this field if you want CIM GOLD to display the status dialog box where available when the system is loading screens. For example, CIM GOLD displays this dialog box when loading the Customer Relationship Management > Customer Profile > Platform tab and the CIS > Comments screen.
Use List of Comment Shortcuts	Checkmark this field if you want to use the Comment Shortcut list when creating comments on the CIS > Comments screen. To add items to the Comment Shortcut list, select "Comment Shortcut Setup" from the Options menu.
Skip Showing Splash Screen on Open	Checkmark this field to block the CIM GOLD splash screen from being shown when logging on.
Skip Restoring Expanded Navigation Tree	Checkmark this field to cause the navigation tree on the left side of the CIM GOLD screen to only display primary headings, such as CIS, GOLD Services, Deposits, Loans, etc. To see sub-headings, you must double-click a primary heading to expand the tree view. Note: If you check this field, the Skip Expanding Navigation Tree (1st Level) field becomes enabled. The Skip Restoring Expanded Navigation Tree field affects the Skip Expanding Navigation Tree field.



Option	Description
Skip Expanding Navigation Tree (1st Level)	<p>Checkmark this box if you want CIM GOLD to not expand the first-level headings in the Navigation tree automatically upon logging on.</p> <p>Note: This field is not enabled unless the Skip Restoring Expanded Navigation Tree field (see above) is checked. The Skip Restoring Expanded Navigation Tree field affects the Skip Expanding Navigation Tree field.</p>
Show Help Paths on Help Function Calls	<p>Checkmark this box to cause a Help Tracing dialog box to appear when you select "Mini-Application help" from the Help menu. This option is primarily for FPS GOLD use. When this box is checked, the Help Trace dialog box will display the path and name for the help file, as well as the help keyword, if available. This keyword can be used in the Master help search as an index search.</p>
Enable ToolTip Pop-up Help	<p>Checkmark this field to enable ToolTip Pop-up help throughout CIM GOLD. This kind of help is displayed when you hover your mouse over fields to show mnemonics or brief descriptions of what to enter in the field, among other things. See the following example of a ToolTip Pop-up.</p> 
Use Branch Zero Instead of Default on Queues	<p>Checkmark this field to cause the system to display queues for branch number zero when opening the Collection Queues or Contact Queues screens in the Queues system. If this checkbox is left blank, the screens will open displaying queues for the branch number the PC is set to.</p>
Use White Background	<p>Checkmark this box if you want CIM GOLD to have a white background instead of gray.</p>
Max Nbr to Display in Customer Search	<p>Use this field to select the default for the maximum number of entities you want displayed for a customer search on the Entity Maintenance screen. For example, if looking up "SMITH," your institution may have more than 1,000 customers with that name. The number you enter in this field limits the screen to display entities for only that number of Smiths.</p> <p>On the Entity Maintenance screen, you can click the more button  to display more names than listed.</p>
Harland Active View URL	<p>Use this field to enter the Harland website address if your company has an agreement with them. Harland is a third-party system used for check image retrieval.</p>
Customer Profitability Statement Logo URL	<p>Use this field to select the logo to print on the Customer Profitability Statement.</p>
Automatically Show Customer Information	<p>Checkmark this box if you want CIM GOLD to automatically display the Customer Index Bubble when opening screens in CIM GOLD.</p>

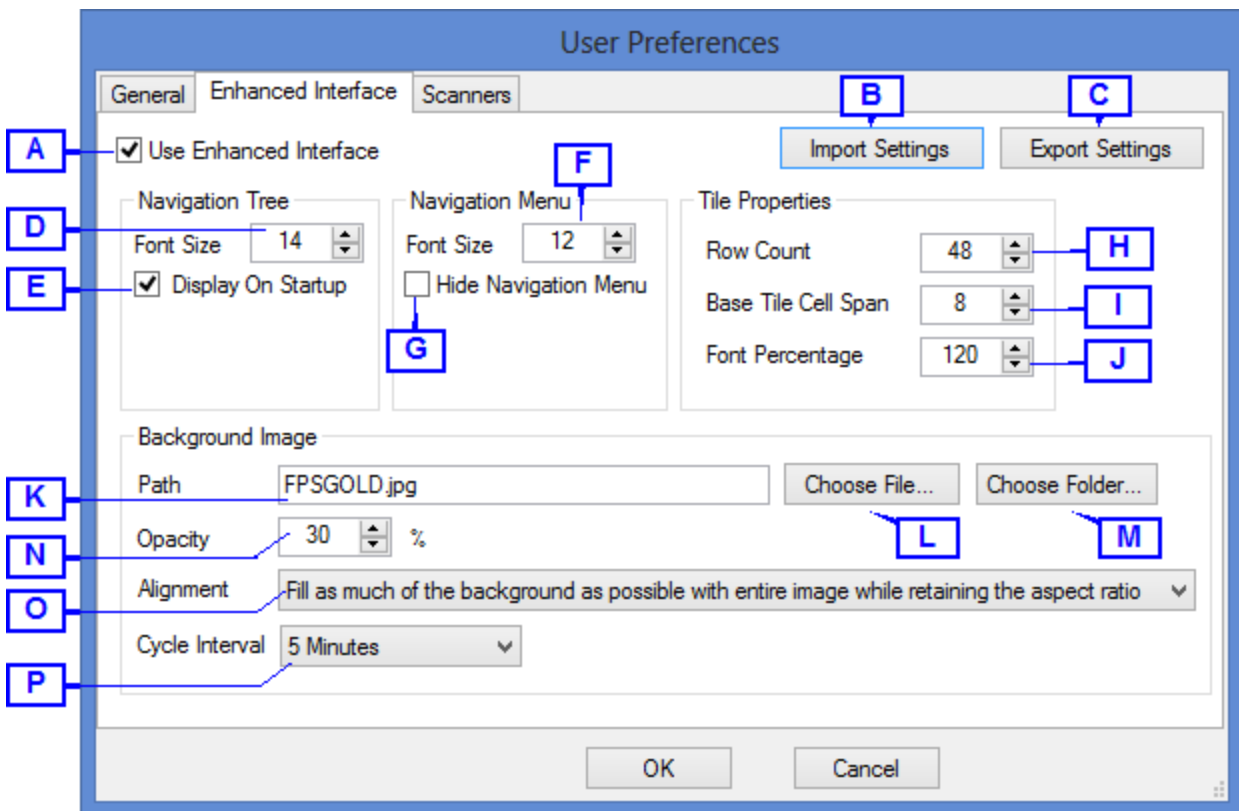


Option	Description
Popup	
Move GOLDTeller Customer Information Popup to Left	Checking this box moves the Customer Index Bubble to the left of the screen when in CIM GOLDTeller.
Auto-hide Navigation Tree	Checkmark this box to hide the navigation tree when your cursor moves focus from the tree to a screen in CIM GOLD. This makes more room on your monitor to view the screen. When this field is checked, the navigation tree containing all screens available to you will hide when the mouse cursor is moved to a screen on the right. To view your navigation tree again, simply move your cursor to the left of the screen in CIM GOLD, and the navigation tree will display. If this field is unchecked, the navigation tree will always be displayed on the left unless you manually close it.
Disable Chat	Checkmark this box if you want to turn off your chat capabilities. You can use chat to communicate with other employees in your bank through CIM GOLD. If this field is checked, your name will not show in the Chat list.
Chat Notification Sound	Use this feature to select a sound when there is a chat communication sent to you. <ul style="list-style-type: none"> You can select a Beep or Ring to alert you. Select "None" for no notification. Select "Instant," and the Chat prompt will be immediately shown in the current window.
Disable Remote Override	Checkmark this box if you want to disable the ability to override teller transactions remotely. You must be logged in to CIM GOLD to get the override transactions.
Use Sound Notification	Check this box if you want a sound notification for use with remote overrides.
Set Focus to Account Fields On New Screen	Checking this box places the cursor in the first account number field on the screen when opening a new screen. If it is not checked, the cursor will be placed on the first field on the screen according to tab order.
Start Platform After GOLDTeller Logon	Checking this box causes Platform to launch automatically upon logging in to CIM GOLDTeller. This means you don't have to launch it separately.

Enhanced Interface Tab

Use the options on the Enhanced Interface tab of the User Preferences screen to use CIM GOLD's [Enhanced Interface](#) and to set up the way the Enhanced Interface will look. The following is an example of the Enhanced Interface tab, followed by descriptions of each of the options.





Options > User Preference Screen, Enhanced Interface Tab

No.	Option	Description
A	Use Enhanced Interface	Check this box and click <OK> to enable CIM GOLD's Enhanced Interface . CIM GOLD will immediately operate in enhanced-interface mode. If you uncheck this box to stop using CIM GOLD in enhanced-interface mode, you must restart CIM GOLD to go back to the regular interface.
B	<Import Settings>	Click this button to import settings for the Enhanced Interface that you previously saved by exporting the settings, as described below. Once you import the settings (an .xml file), all options from that import file will be applied. This is useful if you are setting up many CIM GOLD users and want to use the same setup for each. This allows you to quickly import the settings and apply them for each user.
C	<Export Settings>	Check this box to save the Enhanced Interface settings to a file. The following options on this tab are saved to the file: <ul style="list-style-type: none"> Options A, D, E, F, G, H, I, J, K, N, O, and P from above. (Only the path listed in K is saved to the file, not the image itself.) Information about tiles currently pinned to the Home screen. The colors defined in the navigation tree. The hidden state of items in the navigation tree. The hidden state of items in the top menu.
D, E	Navigation Tree	This is the font size of the text in the navigation tree . If you check the Display on Startup box, the navigation tree will be visible as soon as CIM GOLD is opened.



No.	Option	Description
F, G	Navigation Menu	<p>This is the font size of the text in the top menu. If you check the Hide Navigation Menu box, the top menu is hidden. The top menu has all the screens that the navigation tree on the left has; however, if you prefer to select screens from a menu, this option is available to you.</p> <p>Note: Showing the top menu takes up more vertical screen space and could cause screen content to be pushed off the bottom of the screen on some monitor resolutions.</p>
	Tile Properties field group	Use the fields in this box to establish how you want the tiles to be displayed on the Home screen .
H	Row Count	This is the row count that the Home screen uses. The vertical space available to the Home screen is divided by this number to get the row size. This row size is used in determining the size of tiles and their header font sizes. It is also used to create the virtual grid used when laying out tiles. The virtual grid will use this value for the cell width and height.
I	Base Tile Cell Span	This is the number of rows and columns in the virtual grid that the smallest cell will span. The medium cell will span twice this number for its width, and the large tile will span twice this number for both its width and height.
J	Font Percentage	<p>This is the percentage of a virtual grid cell height that will be used to determine the height of the font for the tile header.</p> <p>H, I, and J Example: If the user is running CIM GOLD at full screen at 1024x768, the entire CIM GOLD window would be 1024x768. The area given to the Home screen would be smaller than that (such as 1150x600). Dividing the height of 600 by 48 (option H above) we would determine that each row is 12 pixels high. Multiplying the 12 pixels by 8 (option I above) we would determine that each small tile is 96 pixels high. We use the same value for the width so the small tile is 96x96, the medium tile is 192x96, and the large tile is 192x192. We then multiply 12 (our row height) by 1.20 (option J above) to get a font height of 14 pixels.</p>
	Background Image field group	Use the fields in this box to establish a logo or group of images to be displayed on the Home screen. See Adding your business logo to the Home screen for more information.
K	Path	This is the path to an image or folder that contains images you want to use as a background to the Home screen. If it is the path to an image, that image will always be shown. If it is the path to a folder, CIM GOLD will randomly cycle through any images in the folder. (Images of type .jpg, .png, .bmp, and .gif are supported.)
L	<Choose File>	Click this button to open a file dialog box where a file can be selected for option K (see above).
M	<Choose Folder>	Click this button to open a directory dialog box where a folder can be selected for option K (see above).



No.	Option	Description
N	Opacity	This is the opacity of an image. If the value is 100%, the image will be displayed on the Home screen as-is. The closer this value is to 0, the more transparent the image will become. At 0, it will be invisible.
O	Alignment	Use the Alignment field to select how CIM GOLD will display the logo (or images). Possible choices include: <ul style="list-style-type: none"> Center the image in the background without modifying the size Fill the entire background with the image, distorting the image if necessary Fill as much of the background as possible with the entire image while retaining the aspect ratio (default) Fill the entire background while retaining the aspect ratio, cropping the image if necessary
P	Cycle Interval	If you are using a folder of images rather than just one image (as explained in option K above), select when the system rotates the image to display a new one from the folder.

Scanners Tab

Scanner functionality is available in CIM GOLD. You can use bar code and magnetic strip scanners to quickly locate bank customer data that includes some form of identification document with scanning data available. The scanners we have currently programmed include the following:

- Honeywell Xenon 1900 series (bar code)
- Magtek SureSwipe HID series (magnetic strip)

If you would like to implement this feature for your institution, send a work order to request it. Institution option OP21 -SCAN (Enable Scanners in CIM GOLD) must be turned on. A \$300.00 one-time activation fee will be assessed.

The CIS Customer Search, Entity Maintenance, CIM GOLD Teller, and GOLD Teller Platform screens will recognize these scanners. They automatically perform a customer search based on the document you scan. Once scanning is complete, you can choose the entity you want to open just as you currently do on these screens. Other screens can be programmed as requested.

Both of these scanners are Windows Human Interface Devices (HID). They work with CIM GOLD screens without requiring extra buttons or clicks on the screen to activate them.

If your institution uses a terminal server or Citrix environment, you will need to set the appropriate serial port and download the associated bar codes based on the configuration of your scanner.

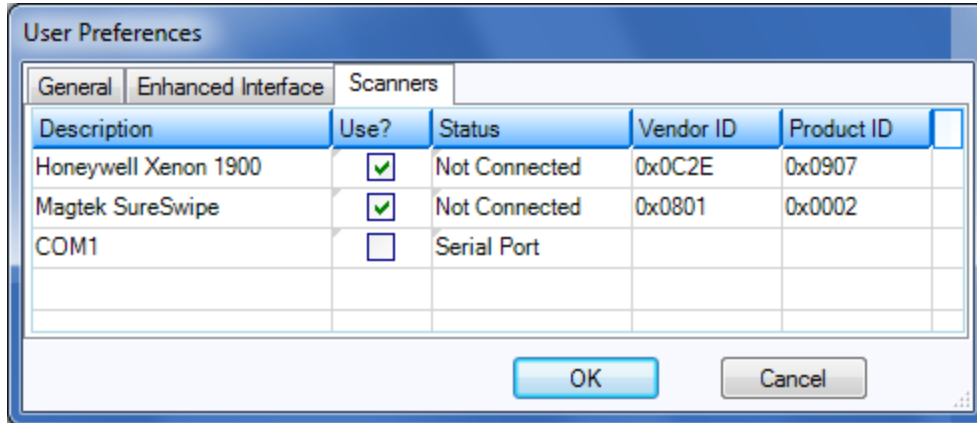
Other devices might work with this feature, but FPS GOLD will have to do some programming to get them in the scanner device list. Contact your [FPS GOLD account representative](#) if you would like additional scanning capabilities.

IMPORTANT



The scanners will only work if you are running Microsoft Windows® 7 or later. They will not work with Windows® XP. Please contact your client services representative with any questions about device support before purchasing any devices. FPS GOLD will not purchase any other devices for this feature.

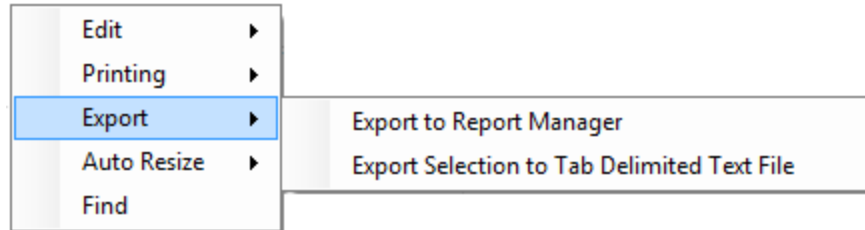
You must check the **Use?** checkbox on the Options menu > User Preferences screen, Scanners tab, for each scanner that is connected to your computer. See the following example.



Right-click Menu

Many fields and list views in CIM GOLD have right-click menus like the example shown below. To open a right-click menu, place your cursor in the field or list view and right-click. Functions in this pop-up menu change according to where your cursor is on the screen at the time you right clicked.

For example, right-clicking on any list view in CIM GOLD brings up the following pop-up menu:



The following table explains the functions available when you right-click on a list view.

Edit menu	<p>Using the edit menu, you can copy cell data (or select all cell data to be copied). Once you copy the list view data, you can paste it into another program such as Microsoft® Excel. The data will stay in the table format of the list view.</p> <p>Any items on this menu that are grayed out do not function, including Edit Cell Value, Clear Cell Value, Cut, Paste, Undo, and Redo. These items are disabled because you usually change information in list views using the fields below the list view.</p>
Printing menu	<p>The Printing menu is used to print information listed in a list view. Using this menu, you can</p> <ul style="list-style-type: none"> • print the information in the list view; • set up the printer where you want to print the list view information; • print a preview of the list view to your computer screen before actually printing it to paper; and • set up the page to print in portrait or landscape, increase or decrease margins, and choose the size and source of the paper.
Export menu	<p>You can export the list view information directly to another file or program using the Export right-click menu.</p> <ul style="list-style-type: none"> • Export to Report Manager: Select this function if you want to export the data in the list view to FPS GOLD's Report Manager program. • Export Selection to Tab Delimited Text File: If you select this function, the Save As dialog box displays, asking you where you want to save the selection as a tab-delimited text file. You can then open it in any tab-delimited file program or even Microsoft Word, Wordpad, or Notepad. Use this when you only want a selection of information instead of all the information in the list view.
Auto Resize menu	<p>Use the Auto Resize menu to increase the columns on the list view table to display all the data.</p> <ul style="list-style-type: none"> • Auto Resize Grid: This will resize the entire list view, both columns and rows, to fit the data. For example, if a column is decreased in size to make room so the data appears cut off, select this option and the data will all display. • Auto Resize Columns: This option works similarly to the Auto Resize Grid. The columns will increase to display all the data.



	<ul style="list-style-type: none"> • Auto Resize Rows: Select this option if you want rows to show all data and not have collapsed data that is hidden.
<p>Find menu</p>	<p>This is a useful function when you need to find specific information in a list view containing lots of information.</p> <ol style="list-style-type: none"> 1. Select this option. A Find dialog box displays. 2. Enter information you want to find in the list view. 3. Click <Find>. The system finds all matches for your search and displays it in a table. 4. Double-click the item in the table to return to the list view with search results selected.

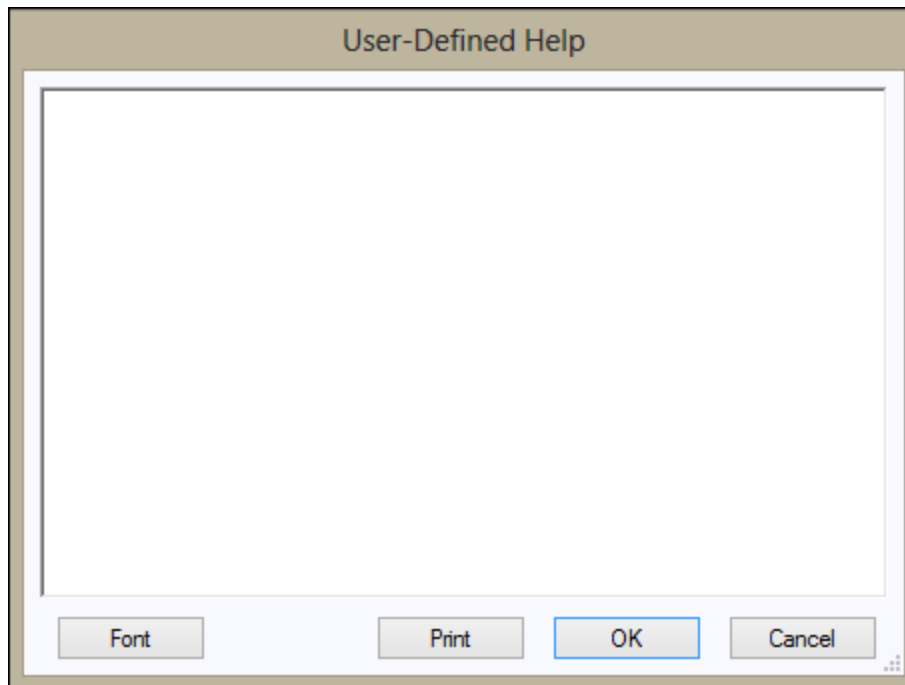


User-Defined Help

User-defined help can be created by employees at your institution for each screen in CIM GOLD. User-defined help is information you write that will be useful for your employees. You must have proper security in order to create user-defined help (see the [Setting Up CIM GOLD](#) section). Any employee with the security to use the screen will be able to view the user-defined help.

To set up user-defined help:

1. Open the screen you want to add user-defined help for.
2. Select "User Defined Help" from the Help menu. The following screen will open:



3. In the screen provided, type any help you would like to tie to this screen.
4. You can change the font of the help by clicking , then selecting the size, font type, and font style you want the help saved in.
5. Click <OK> to save the help for that screen. You can also print the help by clicking <Print>.



How to ...

The following topics explain how to set up and use some basic functions in CIM GOLD.

How to...

[search for accounts.](#)

[set up Speed Keys.](#)

[set up CIM GOLD screens.](#)

[set up Comment types.](#)

[set up Queues.](#)

[search for help on CIM GOLD.](#)

[print from CIM GOLD.](#)

[set up user-defined help.](#)



Search for Customers and Their Accounts

You can easily find customers and all the accounts linked to them. The system defaults to search by name, but you can easily change the **Search** field to search by account, bank card, customer number, UCC number, etc. Below the **Search** field is a drop-down list you can use to select different entities to search by.

1. Open the CIS > Customer Search or Entity Maintenance screen.
2. Type the customer's last name in the **Search** field.
If you press <Enter> on your keyboard, you will likely be able to find the customer's information you want. To narrow the search further, enter a space and the first letter of the first name.
3. Once you find the customer you're looking for, click on the customer's name, and the accounts, boxes, plans, and so on tied to that name will display in the bottom half of the screen. When you double-click on account information, the screen tied to that account will display. For more information about which screen is tied to the account when you double-click on it, see [Set Up Speed Keys](#).

For more information on performing searches, see the Customer Search Screen topic.

Tips for Searches

- If you are unsure of the spelling of a name, type the first few letters of the last name in the **Name** field. For example, if you know your customer's last name is San-something, type *San*, then click <Submit>.
- If a name search retrieves too much information, consider the following: Names will display on the Search Results screen, where you can find the name you are looking for and click on it to view that account owner's information in the bottom half of the screen (see the following example). To limit the name search further, type the last name, a space, and the first and middle initials in the **Name** field. For example, to look up John David Smith, type "Smith JD."
- The asterisk (*) is a wild card search that works on location, mailing labels, names, stock certificates, and UCC entities. It searches the entire database and can take a few minutes. A warning message may be shown asking you if you want to continue with your search. If you do, click <Yes>. All entities except locations and mailing labels search only based on the beginning of the data. You can search locations for data in the first or second address line, and you can search for any data on a mailing label.

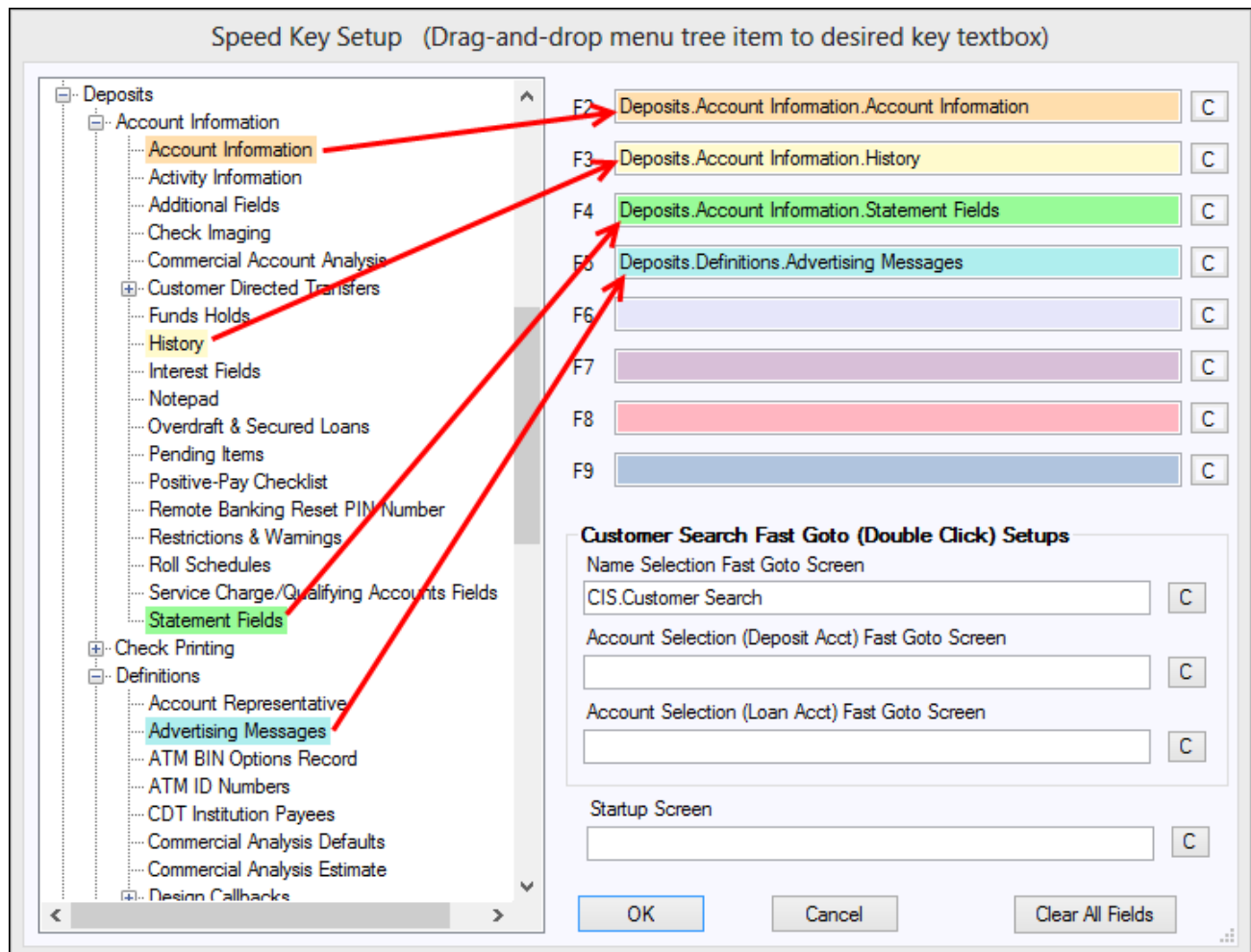


Set Up Speed Keys

In order to open screens more quickly, you can set up eight speed keys in CIM GOLD. The speed keys correlate with the F2 - F9 keys on your keyboard and by double-clicking on your mouse. The following steps explain how to set up speed keys.

Note: Each PC user using CIM GOLD will need to set up their own PC with speed keys.

1. Select "Speed Key Setup" from the Options menu. The Speed Key Setup screen will display.
2. Under each of the headings (such as Contact Queues, Customer Relationship Management, Deposits, Loans, and Miscellaneous) is a list of screens. Click on the screen you want to assign a speed key to, then drag and drop it over to one of the colored F2 - F9 key fields listed on the right. See the following example.



Drag a screen name to assign it to a speed key.

3. If you want to delete (clear) a screen from a speed key, click <C> next to the F2 - F9 key you want cleared. To clear all speed keys (including the double-click speed keys), click <Clear All Fields> at the bottom of the screen.
4. To set up the "Customer Search Fast Goto" options, drag and drop a screen into the fields in the Customer Search Fast Goto (Double Click) Setups box. The fields in this box correlate with the Customer Search screen. When you search for a customer and have a list of all the customer's accounts, you can designate which screen you want to go to once you double-click on an account. For more information about the



Customer Search function, see [Search for Customers and Their Accounts](#). You can set up a screen for both loan and deposit accounts if you have security to it.

5. To set up the initial screen when you log on to CIM GOLD (the default is the Search screen), select the screen and drag it into the **Startup Screen** field.
6. If you want to delete (clear) a screen from the double-click function, click <C> next to the Fast Goto screen you want cleared. To clear all speed keys (including the F keys), click the <Clear All Fields> button at the bottom of the screen.
7. Click <OK> when you are finished setting up speed keys and Fast Goto screens.



Set Up CIM GOLD Screens

CIM GOLD can be set up to use only screens pertinent to your institution. Complete the following steps to set up screens your institution wants to use for CIM GOLD. Note that some screens may have an additional fee for their use. You can see which screens charge additional billing by clicking on a screen listed on the [Subscribe to Mini-Applications](#) screen, and the price for using that screen will display in the **Cost per Month per user** field, as described in the following paragraphs. Only employees with proper security can set up which screens are used in CIM GOLD. See [CIM GOLD Security](#) for more information about security.

1. Select "Subscribe to Mini-Applications" from the CIM GOLD tree under Security. The [Subscribe to Mini-Applications](#) screen lists all the screens available to be used.
2. Check the checkboxes next to each screen your institution will use. As you check the boxes, the **Cost per Month per User** field at the bottom of the screen will display how much the screen will cost to use. If this field is blank or empty, there is no charge.

When you click on a screen, a brief description of that screen will display in the **Description** field at the bottom of the screen.

3. Once all the screens you want to use have been selected, click <OK>. Those screens will now be available for you to use in CIM GOLD. You will need to also set up security for employees for each one of the screens.



Set Up Comments

Using comments in CIM GOLD is a fast and easy way to track your customers' history with your institution and to provide instructions on customer follow-up using standard codes for your institution, instead of typing data. For detailed information about comments and how to set up the Comments screen, see the <F1> help from the CIS > Comments screen.



Set Up Queues

Queues are organized lists of employees' activities that should be accomplished during the day relating to customers.

The Queues Screen lists these items that are set up by a supervisor and organizes them into different queues by date. Typically, these queues list accounts that need action to be taken for a variety of reasons. For example, queues can be used to call on birthdays, notify customers when deposit accounts reach maturity, update an account by discussing a customer's delinquent loan, or even to list customers to solicit for new loans.

For information on setting up queues, see the <F1> help for the Contact Queues screen (Queues > Contact Queues > Contact Queues on the CIM GOLD tree view).



Search for Help on CIM GOLD

Master Help Search is a compilation file of all the help files in CIM GOLD. Its primary purpose is to search all existing CIM GOLD help for particular words, phrases, or mnemonics. In general, each screen has one help file, but there are cases where more than one help file is used. For example, tab pages that are on multiple screens contain their own help file in addition to a help file for a particular screen.

[Search Using the Master Help File](#)

To search in the Master Help File:

1. Select "Master Help Search" from the Help menu to open the CIM GOLD Master Help File.
2. Click the Search tab.
3. Type the words you want to search for in the text field near the top of the tab, then click <List Topics> or press <Enter>. Help items found to contain the words you searched for will be listed by title in the list box below.
4. Highlight an item in the list box, then click <Display>, press <Enter>, or double-click on the item. The complete help item will display in the window to the right, and matching words will be highlighted.

Searches can yield up to 500 results; the Search tab contains several options for tailoring searches to increase the likelihood of finding the precise information you want. In the bottom left-hand corner of the screen are three checkboxes: **Search previous results**, **Match similar words**, and **Search titles only**. If you want to perform a search among the results of your previous search, mark **Search previous results**. If you want your search results to include any words similar to the word or phrase you typed in the search box, mark **Match similar words**. If you only want your search to display results from only the help topic titles and not the actual help text, mark the **Search titles only** field. **Note:** Topic titles are the names of fields, field groups, tabs, and screens in CIM GOLD.

You can also tailor your search using the right arrow button to the right of the text box. Clicking this button reveals a drop-down list containing the words AND, OR, NEAR, and NOT. These words are inserted between words you type in the text box. They function as follows:

AND	The search tool will only display results containing both words, not necessarily together.
OR	The search tool will display results containing either word.
NEAR	The search tool will display results in which both words appear close to each other.
NOT	The search tool will display results in which the first word appears and the second word does not.

[Other Features of the Master Help File](#)

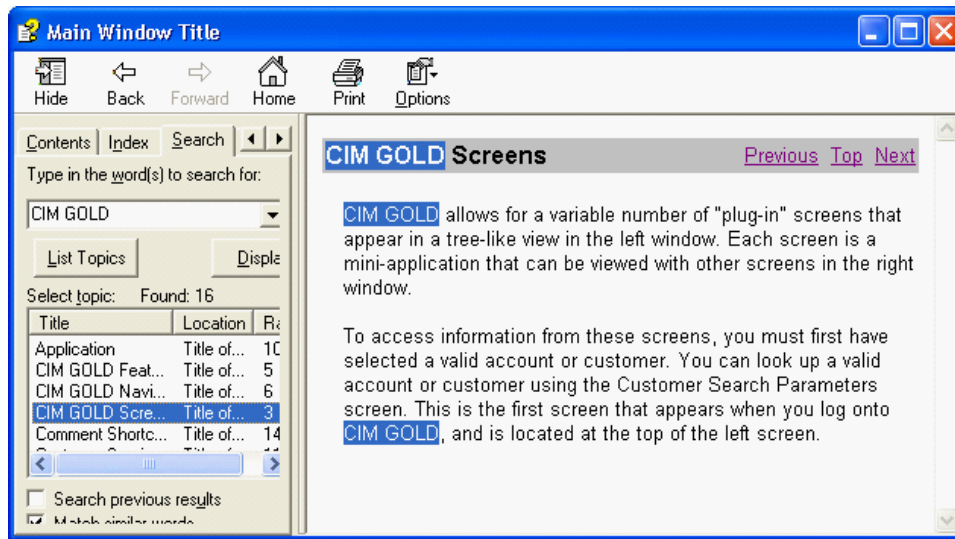
The Contents tab contains a tree view that can display the information for each individual help file in CIM GOLD. This is important for the functionality of the master help screen, but it probably will not be a useful tool for searching for information. This is because CIM GOLD screens often contain multiple help files, so the individual help files listed in the Contents tab do not always reflect the full contents of a CIM GOLD screen or tab.

The Index tab contains an alphabetical list of all CIM GOLD help keywords, which closely resemble field names. This may be useful for users who want to search for help about a particular field using the Index.

Note: If you select a keyword that is the same on more than one screen, a dialog box will display asking you which keyword on which screen are you searching for. You can then highlight the desired field and click <Display> or double-click in the item to view Help for that field. See the following example.

The Index tab allows searching by keywords. A keyword is a word or words relating to a specific help topic. They are listed in the Index tab for quick and easy reference. To view help for a keyword, highlight the desired key-word and click <Display> or double-click in the item to view Help for that field.





Note: Keywords may contain multiple words, but must contain no spaces between the words.

The Search tab allows searching by a word or phrase contained within the description of each help topic. The matched items are listed below the search field. To view help for each item, simply double-click the item and the help description will be displayed on the right.



Print from CIM GOLD

Use this feature to print a copy of the CIM GOLD screen you have opened.

Complete the following steps to print a CIM GOLD screen.

1. Click "Print Screen" on the menu bar. The Print dialog box will display.
2. Select the printer and the number of copies you want to print. The Print Range section of this dialog box is not applicable when printing a screen in CIM GOLD.
3. Click <OK> to print the screen.

Note: To change the paper size, orientation, and paper source, click <Properties> on the Print dialog box and make the desired changes.

You can also print any list view and grid view data from the [right-click pop-up menu](#).



Create User-defined Help

User-defined help is help that you create that will be useful for everyone at your institution. You must have proper security in order to create user-defined help. User-defined help will be available to all employees who have access to the screen.

To create user-defined help:

1. Open the screen for which you want to add user-defined help, then select "User Defined Help" from the Help menu.
2. In the screen provided, type any help you would like to tie to this screen.
3. You can change the font of the help by clicking , then selecting what size, font type, and font style you want the help saved in.
4. Click <OK> and the help will be saved for that screen. You can also print the help by clicking <Print>.

See also:

[Help](#)

[How do I use Help?](#)

[Search for Help on CIM GOLD](#)



CIM GOLD Navigation

Because CIM GOLD is a PC-based product, most of the navigating you can do in CIM GOLD will be with your mouse. If you want to view an account, double-click on the account. If you want to view information under a tab, click on the tab. If you want to look up an address, click the "Addresses" tab, then double-click the account of the address you want to look up.

When you right-click on list views and grid views, a pop-up menu will open that will allow you to copy and paste the information from that field into a word processor or another data-entering application. Also see [Right-click Menu](#).

Also see [Keystrokes](#) for information on access keys, setting up speed keys, and other navigational tips using your keyboard.

To display a new screen, click on the screen name in the tree-view Navigation section (left-side) of CIM GOLD. The screen that was being displayed will automatically close and the new screen will display in the Application section (right side) of CIM GOLD.

See also:

[CIM GOLD Screens](#)

[Title Bar](#)

[Menu Bar](#)

[Navigational Bar](#)

[Status Bar](#)

[Application](#)



CIM GOLD Screens

CIM GOLD allows for a variable number of "plug-in" screens that are listed in a tree-like view in the left window. Each screen is a mini-application that can be viewed with other screens in the window to the right of the navigation tree.

To access information from most of these screens, you must first have selected a valid account or customer. (Some screens are institution-specific rather than account/name specific.) You can look up a valid account or customer using the Customer Search screen. This is the first screen that opens when you log on to CIM GOLD, and it is located under CIS in the left tree-view. You can only open this screen if you have security to it.

You can set up any CIM GOLD screen to be the first screen that opens using the Options menu > [Speed Key Setup](#) screen.



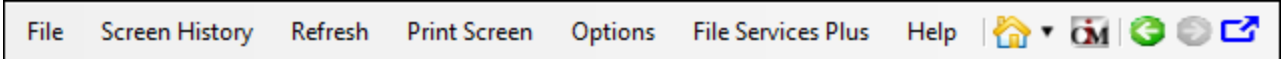
Title Bar

Located at the top of the CIM GOLD program is the title bar, which displays the name of the application, the current screen name, the current customer, and the current account number. Selecting another screen will show the name of that screen for the same customer and account as the current screen.



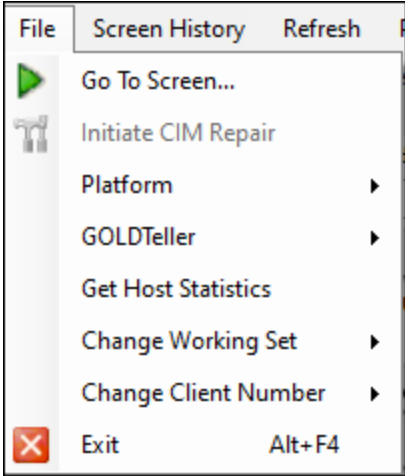
Menu Bar

The Menu bar at the top of the screen lists the main menus in CIM GOLD. These main menus will vary somewhat depending on which screens you are using. See the example below.



Menu Bar at top of Customer Search screen

Selecting a menu will open a drop-down list that shows functions available within that menu, as shown below.

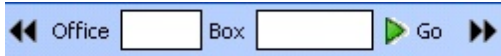


To the side of the menu bar at the top of most screens is a navigational menu you can use to quickly open other accounts.



See [Navigational bar](#) for more information.

Note: These menu options may vary to match the functionality of the screen you are using. For example, if you are using the Safe Deposit Box System screens, you would not use an **Account Number** field. Instead, you would use an **Office** number and **Box** number fields (see following example).



For more information on the functions underneath each menu, see the links below.

- See also:**
- [File](#)
 - [< Back](#)
 - [Forward >](#)
 - [Screen History](#)
 - [Refresh](#)
 - [Print Screen](#)
 - [Options](#)
 - [Help](#)



File

The following paragraphs describe each of the functions in the File menu.

Go To Screen	This function opens the Enter Screen ID dialog box. Here you can enter a number in the Screen ID field and click <OK> to display that screen. The screen identification number is located in the bottom-right of the screen in the status bar .
Initiate CIM Repair	Use this function to repair your version of CIM GOLD. Selecting this function causes the system to install newer .dll files and reload any missing .dll or corrupted files. It is possible that, if the Install.exe is not found on your PC, the repair will display an error and will not work. To remedy this, download the Install.exe file from the Internet again. CIM Repair will not reload files if the files on your PC have a later version than the Install files. For example, the DepositHistory.dll has been removed from your PC, and the AccountDetail.dll (Loan screen) has been updated with an update release of CIM GOLD. The repair will add the DepositHistory.dll install version to your PC, but will not replace the update install version of AccountDetail.dll. Only the same date or newer versions will be reloaded.
Platform	Use this function to start, stop, and terminate Platform.
GOLDTeller	Use this function to close or terminate GOLDTeller, to reconnect to the Override/Chat server when communication is lost, and to change file directories.
Get Host Statistics	This function opens the Host Statistics dialog box. The Host Statistics dialog box displays general information about the computer terminal using the CIM GOLD program. It also displays various response time fields, including Fastest , Slowest , Difference , and Average . Clicking <Refresh> will cause the system to reload the dialog box and display current data for that terminal. It may be used to help trouble shoot problems in screens.
Change Working Set	Use this function to toggle between different modes of CIM GOLD: Production, Monthend, and Testing. Production is the live file, and changing fields in this mode will change live records and can be used for reporting and research. Monthend mode displays live files as of the last day of the previous month. No file maintenance is allowed. Testing mode is a test file for your institution, and changes are saved in test files and not on live accounts. Each institution has a default test set of 1.
Change Client Number	Use this function to change client numbers for this PC for General Ledger, Accounts Payable, Fixed Assets, or Payroll.
Exit	This function will close the CIM GOLD program.

< Back

Takes you to the last screen opened, much like a Web browser.



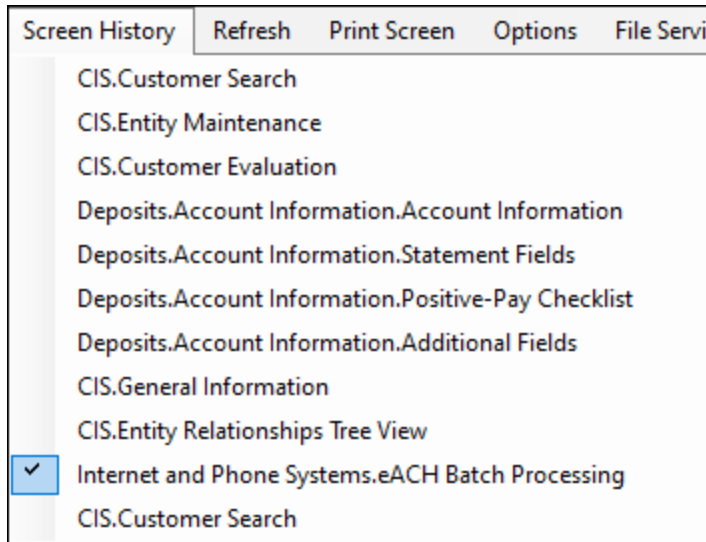
Forward >

Once you've used the < Back menu function, this function takes you to the next screen opened.



Screen History

Each line in the Screen History Menu displays a line describing a screen, a customer, and their account number that you have previously opened. Click on a line in the history to return to that specific screen, customer, and account number.



Refresh

Click this menu item to update the current CIM GOLD screen with the latest data from the FPS GOLD host computer.

Print Screen

Click this menu item to send the current screen view to your printer. Printout includes a header with the date, time, and screen title.

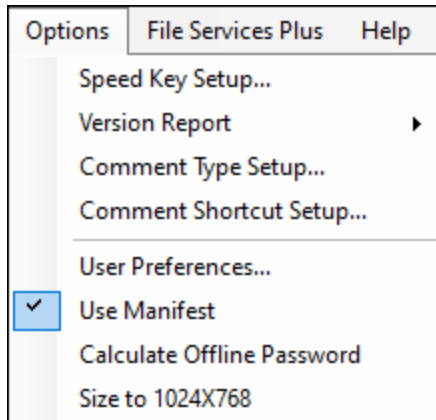
To print from a CIM GOLD screen:

1. Click "Print Screen" on the menu bar, or select "Print Setup" from the File menu, or press <Ctrl> + <Shift> + <P>. The Print dialog box will display.
2. Select the printer and the number of copies you want to print. The Print Range section of this dialog box is not applicable when printing a screen in CIM GOLD.
3. Click <OK> to print the screen.



Options

The following functions are found under the Options menu in CIM GOLD.



Speed Key Setup

You can assign keyboard keys in CIM GOLD to quickly activate often-used features, or to go directly to a screen specific to your job. See [Set up Speed Keys](#) for more information.

Version Report

Use this function to print a list of CIM GOLD program modules and version numbers. You can also save the list and send it to your FPS GOLD banking consultant. This file helps FPS GOLD employees know which version of CIM GOLD you're working with.

Comment Type Setup

This function works with the Comments screen so you can specify the types of comments your institution wants to use. For more information about comments, see the <F1> help from the CIS > Comments screen.

Comment Shortcut Setup

This function works with the Comments screen. You can set up shortcut codes to be used with comments. For more information about comments, see the <F1> help from the CIS > Comments screen.

User Preferences

Use this function to set up user preferences for CIM GOLD. See [User Preferences](#) for more information about the options available for your use in CIM GOLD.

Calculate Offline Password

Select this function to open the Working Offline dialog box. Enter your user name and institution number, click <Calculate Backdoor Password>, and the system will generate a security code you can use to access CIM GOLD in offline mode. Some offline functions require a valid user name and password in order to access them. Others, such as printing a version report or viewing help files, do not need security clearance.

Help

The fields in CIM GOLD have help you can read quickly when you click on a field and press <F1>. The Help menu at the top of CIM GOLD contains menu options to view other information about CIM GOLD. These options are explained below.



About CIM GOLD	This option opens the About CIM GOLD dialog box, which shows the version number, copyright date, and number of sessions in use.
DocsOnWeb	This option opens the documentation on the FPS GOLD secure website. This documentation includes user's guides, details about loan and deposit reports, and any other documentation that does not belong in F1 help.
Master Help Search	This option opens the Master Help dialog box, a compilation of all the help files used in CIM GOLD. You can use this tool to search all existing CIM GOLD help for particular words or phrases.
User's Guide	This option opens the user's guide you're now reading.
Version Summary	This option shows released versions of CIM GOLD and when they were released.
Mini-Application Help	This option opens a help dialog box that displays functionality and field descriptions for a screen or field you click on. To open field help, click on a field on any screen, then select Mini-Application Help from the Help menu, or press <F1> on your keyboard.
What's New with This Version	This option opens the What's New dialog box that lists any changes made to the version of CIM GOLD you're using. Changes are listed by screen name.
What's New (Customer Information Manager)	This option opens the What's New dialog box that lists changes made to the current version as well as past versions of CIM GOLD.
What's New (Current View)	This option opens the What's New screen that lists changes made specifically to the current screen displayed.
User Defined Help	Use this feature to create your own user-defined help for each screen in CIM GOLD. Only employees with proper security will be able to update help files. All users can view the user-defined help. The user-defined help you create will be saved on the FPS GOLD host computer for all CIM GOLD users at your institution, and the help will be available until you remove it.

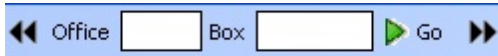


Navigational bar







To the side of the [menu items](#) is a navigational menu you can use to quickly access other accounts.



Note: These menu options may vary to match the functionality of the screen you are using. For example, if you are using the Safe Deposit Box System screens, you would not use an **Account Number** field. Instead, you would use an **Office** number and **Box** number fields (see following example).



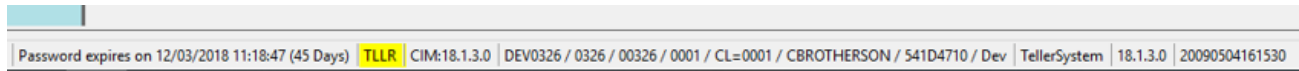
The following table explains each of the navigational icons.

 <Previous Screen/Last Screen>	Clicking on the first green left arrow or the right arrow will take you to the previous screen you opened, or back to the screen you were on before you clicked the previous screen.
 <Beginning of File>	Clicking the left arrow with the vertical line will take you to the very first available account in descending account number order for your institution. For example, if you were currently viewing account number 10, then clicked this icon, you would be taken to account number 1.
 <Previous Account>	Clicking the two-left arrow icon will take you to the previous account number in descending account number order for your institution. For example, if you were currently viewing account number 10, then clicked this icon, you would be taken to account number 9.
 <Go to Account Number>	You can use this field to enter the account number, then when you click the <Go> icon, the system will take you straight to the main deposit or loan account screen for that account number.
 <Next Account>	Clicking the two-right arrow icon will take you to the next account number in ascending account number order for your institution. For example, if you were currently viewing account number 10, then clicked this icon, you would be taken to account number 11.
 <End of File>	Clicking the right arrow with the vertical line will take you to the very first available account in ascending account number order for your institution. For example, if you were currently viewing account number 10, then clicked this icon, you would be taken to account number 999999 (the last account number entered for your institution).



Status Bar

Located along the bottom of the screen is the status bar:



Status Bar

It displays the following information:

- password expiration information;
- **TLLR** if GOLDTeller is running;
- the CIM GOLD version number,
- institution and set number;
- client number;
- user name;
- mode;
- the name of the screen;
- the version number of the screen;
- the screen identification number displayed in the [Application](#) section (the right side of the screen).



Application

Displays screens with account or customer information. These screens can be installed separately for your institution or with the main application. CIM GOLD can be tailored to show only those screens your institution uses. Some screens in CIM GOLD also allow you to make changes to accounts, but proper [security](#) must first be set up for individuals desiring to do this.



Frequently Asked Questions

The following links explain frequently asked questions about CIM GOLD.

[I have logged into CIM GOLD, but I can't see the screen I need. Why?](#)

[How do I use Help?](#)

[Mnemonics are not appearing when I hover over a field. What should I do?](#)

[What do I need on my computer to use CIM GOLD?](#)

[What are the Fast Go keys in CIM GOLD?](#)

[Is there a way to quickly advance through account numbers, safe deposit box numbers, retirement plans, etc. in CIM GOLD?](#)



Why can't I see the screen I need?

- Your institution might not have subscribed to that screen. (Options menu > [Subscribe to Mini-applications](#))
- You might not have security to view that screen. (Options menu > [Security Setup](#))
- You might not have the most current version of CIM GOLD. (Version 8.1.0.0 or greater)
- You might need to clear your cache files, then log on to CIM GOLD again. (File Menu > Delete Cache File and File menu > Delete Current Internal Cache. These two options will clear out your cache and allow you to reload information directly from the host.)
- You might not have the correct file for that screen stored on your computer. (Contact your [FPS GOLD banking consultant](#) to find out which file you may be missing.)
- If none of the above suggestions work, create a Version Report and e-mail it to your FPS GOLD banking consultant. (Options menu > Version Report > Save Report to Disk. This will create a text file that you can attach to an e-mail and send to FPS GOLD.)

Two items affect which screens can be viewed by a user. The first is [Subscribe to Mini-Applications](#) under the Options menu on the menu bar. This option controls what screens are available for use by your institution. If the box next to the screen name is checked, then your institution has subscribed to that screen. If the box is not checked, your institution has not subscribed to that screen.

The second feature that affects which screen a user sees is screen security. Under the Options menu, then Security Setup, your institution can decide which employees have access to what screens. Possible choices are Inquiry Only, File Maintenance and Inquiry, or No access to the screen. If you have not been given Inquiry or File Maintenance access to a screen, that screen name will not appear in the Navigation tree when you have signed on. **Note:** Only screens your institution has subscribed to will display in the Security Setup and in the Navigation tree.

You have security and you subscribe to the screen, but you still cannot view the screen. Why?

Possible reasons include:

1. Do you have the file for the screen? The filename ends in ".dll," such as "AccountDetail.dll." Each screen in CIM GOLD uses one or more *.dll files to store the look and functionality of the screen. If the .dll for a particular screen is not included in your files on your computer, the screen will never appear in your Navigation tree, even if your institution has subscribed to it and you have security to view or maintain it.
2. The cache file on your computer may be outdated. CIM GOLD uses a cache file to store tables, security, etc. A version number of the screen security record is also stored in your cache file. If FPS GOLD has updated the screen security record, then deleting your cache will cause your computer to load that new version of the security record from the host. If you have further questions, please contact your [FPS GOLD banking consultant](#) for further assistance.



How do I use Help?

There are many help tools available in CIM GOLD to assist you. Four of them are listed below:

- **Field Help** – This is used to get help for a specific field. Place the cursor in a field or list box, press <F1> on your keyboard, or select "Mini-Application Help" from the Help menu.
- **Protected Field Help** – This is used for fields that do not allow you to place your cursor in that field. Place your cursor over the field, right-click or left-click to see the field mnemonic. In the box that appears, click <Close> to close the mnemonic box, or click <Help> to view help for that field.
- **Master Help Search** - Select "Master Help Search" from the Help menu. Use the Search tab to type in the words you want to search for. Results will display below the **Search** field. Double-click on one of the results to display help for that result, or highlight the result and click <Display>. You can also use the Contents or Index tabs to search according to topic or keyword.
- **User's Guide** – This is used to get general instructions for using CIM GOLD. Select "User's Guide" from the Help menu. Use the Search tab to type in words you want to search for. Results will display below the **Search** field. Double-click on one of the results to display help for that result, or highlight the result and click <Display>. You can also use the Contents or Index tabs to search according to topic or keyword.

See also:

[Help](#)

[Create User-defined Help](#)

[Search for Help on CIM GOLD](#)



Mnemonics are not appearing

You might not have turned on the User Preference option that allows you to see ToolTip pop-up help.

There is an option in the User Preferences under the Options menu on the menu bar that will turn on the mnemonics to pop up. When the **Enable ToolTip Pop-Up Help** field is checked, the mnemonics will pop up for a field when you hover over that field with your mouse. If that option is unchecked, then pop-up mnemonics will not appear.

Note: Some fields throughout the system do not have a mnemonic, thus no mnemonic will appear with mouse hover. These may be calculated fields or fields that perform a function specific to CIM GOLD. These fields are not stored in a record; therefore, they do not have a mnemonic.



What do I need on my computer to use CIM GOLD?

- You must have access to the FPS GOLD host communications facilities. (Required)
- You must have .Net Framework 2.0. (If not, then CIM GOLD Version 2.0.0 or greater will upgrade your .Net Framework to version 2.0.) (Required)
- You must have a TCP/IP. (Required)
- You should have Windows 2000 or above operating system. (Highly recommended)
- You should have 512 MB RAM, SVGA monitor, and 32 MB free hard disk space. (Highly recommended)

There are certain configurations necessary in order to support CIM GOLD. Those configurations are listed above. If you have any questions, please contact your [client services representative](#).

Note: It is strongly suggested that you have the recommended configurations. These will allow for optimal performance and response time when using CIM GOLD.



What are the Fast Go keys in CIM GOLD?

The "Fast Go" keys in CIM GOLD are referred to as Speed Keys. They are set up by selecting "Speed Key Setup" from the Options menu. For more information, see [Set up Speed Keys](#).

If no speed keys are set up for your user on a PC, then the following default speed keys apply:

- Double-click on a name in a list box. This opens the General Information screen in the Customer Relationship Management section of the navigation tree.
- Double-click on a deposit account number in a list box. This opens the Account Information screen in the Deposits section of the navigation tree.
- Double-click on a loan account number in a list box. This opens the Account Information screen in the Loans section of the navigation tree.

Note: Speed Keys are set up per user per computer.



Can I quickly move through accounts?

Yes. The Deposit System contains unique options on the menu bar to assist you in [navigating](#) between items on the system: <Beginning of File>, <Previous>, <Go>, <Next>, and <End of File>. <Beginning of File> will go to the first account number, safe deposit box, retirement plan, etc. on file depending on what screen you are using when you click <Beginning of File>.

<Previous> will go to the previous account number on file (smaller number), starting with the account number, plan number, box number, etc., displayed at the top of the screen.

<Go> will open a dialog box and allow you to enter an office, account number, and check digit or office number and box number, etc., of an account, safe deposit box, or retirement plan you want to go to.

<Next> will display the next account number, plan number, box number, etc., on file (larger number).

<End of File> will go to the last account number, safe deposit box, retirement plan, etc. on file depending on what screen you are using when you click <End of File>.

Note: The five options listed above are customizable. Therefore, some screens will have all five options and some screens will not. Also, the <Go> button name and number of boxes to the left of it will vary according to what screen you are using. Note that though there may be some variations of these five options per screen, the general functionality of each option as described above is the same.



Client Services

When you encounter problems using CIM GOLDTeller, your institution's liaison should contact your institution's Client Services representative. Use the following link to find information on how to contact your representative.

[Client Services User Guide](#)

