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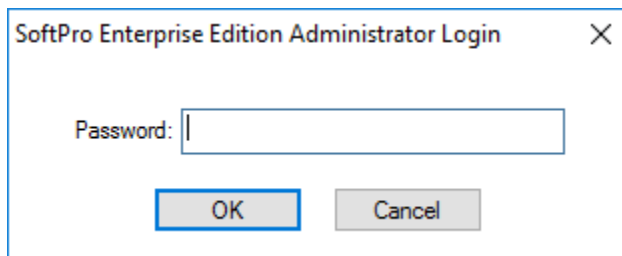**SOFTPRO**
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SPADMIN

The **SoftPro Administrator (SPAdmin)** is a tool used to set up permissions and passwords for SoftPro programs for Enterprise and Standard Edition versions. The **Administrator** is also used to control **User Preferences**.
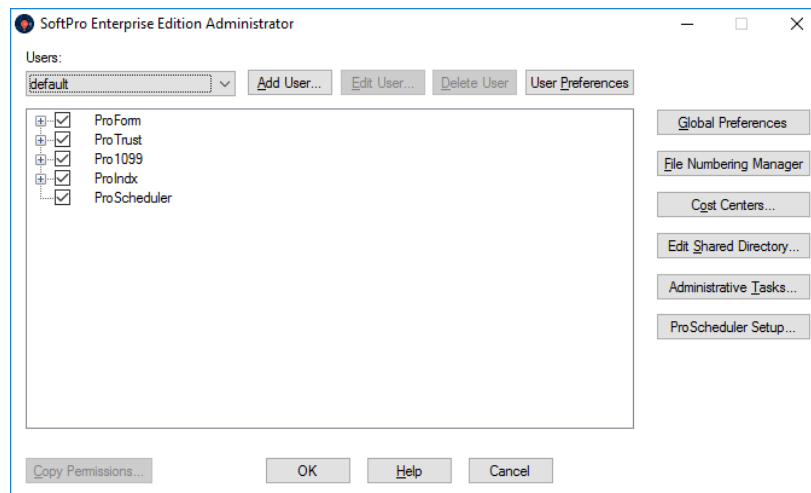
With the **Administrator**, you can grant or deny a user's access to entire programs (ProForm, ProTrust, Pro1099, ProIndx) or specific program features (opening a file, printing, changing a transaction, etc.).

To access the **Administrator**, navigate to where Softpro lives in your environment (i.e. Network drive or Local drive). Open the **Tools** folder, then the **SPAdmin** folder. Open **spadmin.exe**. The **Administrator Login** prompt will appear.
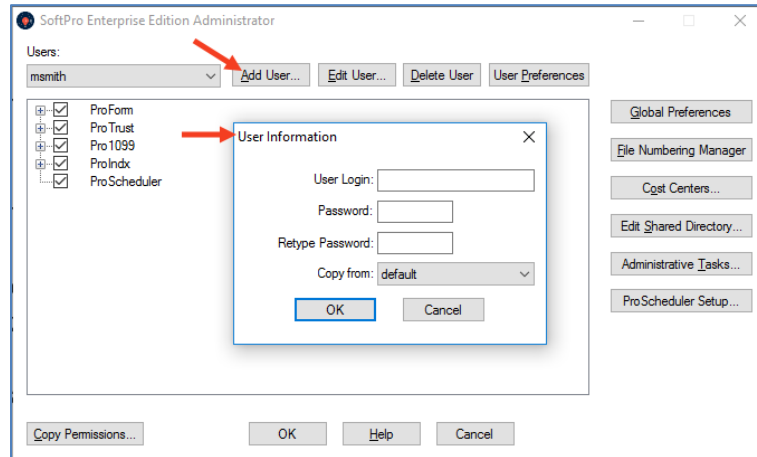

> _**NOTE**: The first time you access the Administrator, you will be prompted to set the password._

Enter the **Administrator Password** and click **OK**. The **Softpro Administrator** will appear.

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Adding a User:

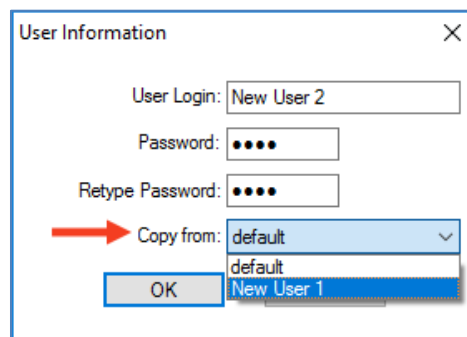Click **Add User**. A blank **User Information** window will appear.

Enter a login name for the user in the **User Login** field (User Login cannot exceed 25 characters). You can enter the user's existing network login name, but make sure to enter it in the same case.

Enter a password in the **Password** field (Password cannot exceed 15 characters). You can enter the user's existing network password if you want the user's network login and SoftPro login to coincide.

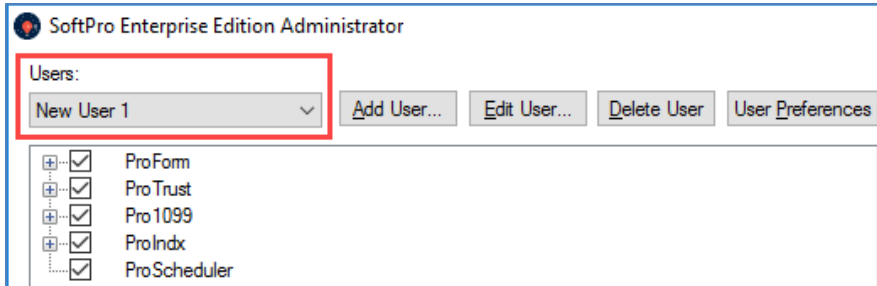Enter the password in the **Retype Password** field.

To copy the security profile from an existing user other than the **<default>** user, choose the user in the **Copy from** field (you can still change the new user's permissions).
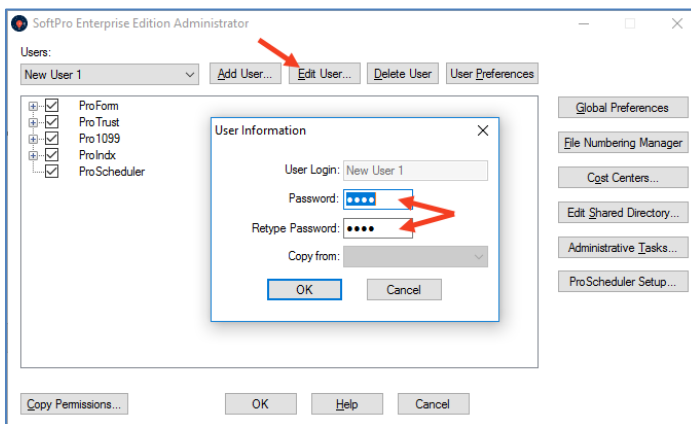

Click **OK**.

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Editing a User Password:
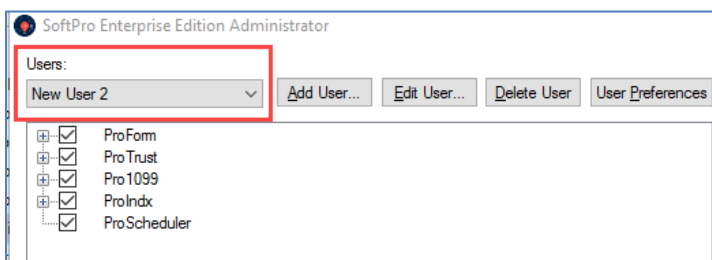
Select a **User**.

Click **Edit User**. Enter a new password in the **Password** field. Enter the new password in the **Retype Password** field. Click **OK**.
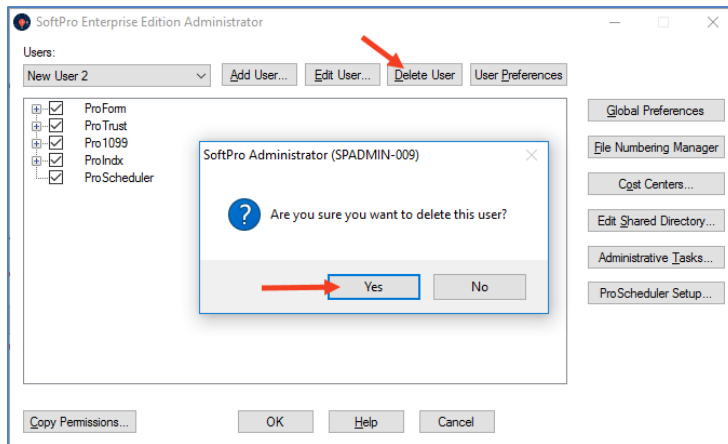

Deleting a User:

Select a **User**.

Click **Delete User**. A prompt will appear. Click **Yes**.

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Users Preferences:

User Preferences are ProForm settings that are controlled for each user in the **SoftPro Administrator**. The **User Preferences** screen contains viewing privileges and several other ProForm settings in addition to the file paths to shared ProForm resources.

To access a user's preferences, select a **User**. Click **User Preferences**.
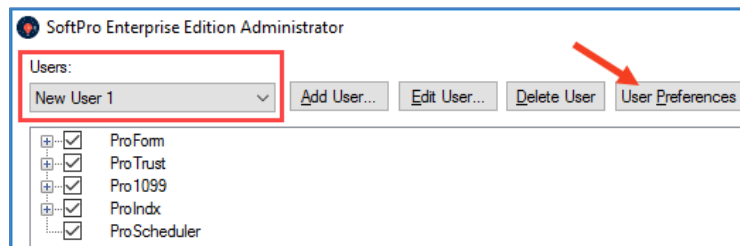
Common Directories

Directories on the **User Preferences** screen point to shared SoftPro resources.

Data files: Path to all ProForm data files (.pfd), which contain individual closing, title insurance, or refinance order data.

Templates: Path to ProForm templates (.pft) that contain starter data for different underwriters, closing types, or other standard orders that can be copied over files to improve efficiency. The Default Template is copied to all new files unless the user that is creating a file chooses another template.

Documents: Path to the ReadyDocs folder that contains all ProForm ReadyDocs (.rdw). ReadyDocs are the documents such as the HUD-1 Settlement Statement that can be printed from ProForm. Must also contain the Merge folder, and SPPRMTS.TXT and USRPRMPT.TXT files.

Document Manager: Path to the saved folder structure and document tree in the ProForm ReadyDocs Manager. Must contain the PFSTRDY.MGR, PFSTWDM.MGR, PFSTWPM.MGR, PFUTRDY.MGR, PFUTWDM.MGR, and PFUTRPT.MGR files.

Reports: Path to the PxRpts, P1Rpts, RiRpts, and PTRpts folders that contain SoftPro reports.

Reports Manager: Path to the folder structure and reports tree that is set up in the ProForm Reports Manager. Must contain the PFSTRPT.MGR and PFUTRPT.MGR files.

Available Tabs/Documents

These options allow you to disable **Tabs** that appear in a ProForm file and restrict access to certain Document groups. When a **Tab** is disabled, the Documents associated with that Tab will be restricted and cannot be printed or viewed on screen.

For example, a particular user might never require the use of the Title Insurance screens and documents in ProForm. In this case, you could turn off the viewing privileges for the Title Insurance tab for that user in the SoftPro Administrator.

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If the check is removed from **Title Insurance** on the **User Preferences** screen, the **Title Insurance Tab** will not appear when a ProForm file is opened or created. **Title Insurance Documents** (such as the ALTA Commitment) will not be available for printing or viewing on screen.
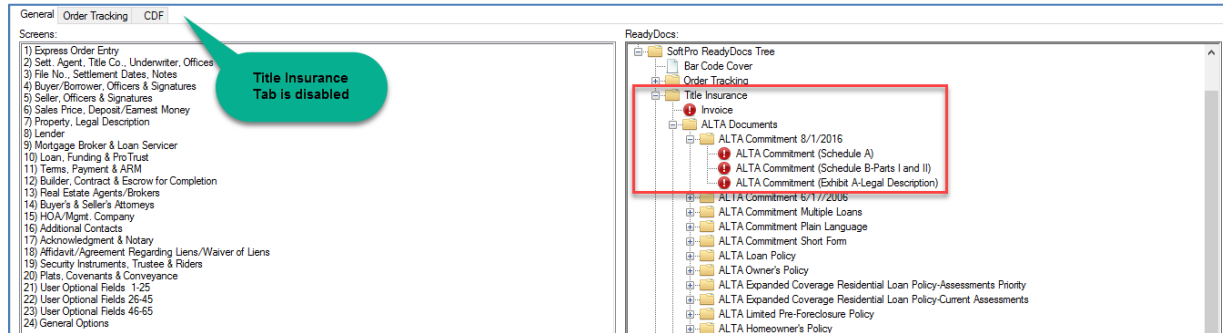
Miscellaneous

Use Network Login instead of Softpro Login: Instead of requiring your SoftPro users to enter in their SoftPro user name and password to log in to SoftPro programs, you can set the Administrator to accept a user's initial Network Login as the SoftPro Login. Once a user is logged into your Network, they can access SoftPro programs without an additional login required. If you do not choose to use this feature, SoftPro users will be required to enter their user names and passwords before accessing SoftPro programs.

Use LAN Look-up Tables: By default this option is selected and Look-up tables that are shared across the LAN will be used in ProForm. Disable this option to point ProForm to the network SQL database Look-up tables instead.

Overlay Tab Selection: With this option selected, the user can select which tabs to copy whenever the Overlay File/Template feature is used. If this option is disabled, information from all tabs will be copied each time.

Allow printing of checks if file is out of balance: By default, ProForm will not print checks if a file is not in balance. Select this option to override the default.

Require Trust Account Code on new file: In SoftPro Enterprise, a Trust Account Code must be entered when creating a new ProForm file. You can disable this requirement by unchecking the Require Trust Account Code on new file option. Trust Account Code can be assigned later by opening the Disbursements or Receipts Register.

Accounting Export: Select this option to enable Accounting Export features in ProForm.

Automatic Close of Escrow: With this option selected, the Settlement Status of a ProForm file will be automatically changed to Closed once the following conditions apply:

> File balance = 0.
> All anticipated receipts have been received.
> All disbursements are posted.
> Ledger balance = 0.

Automatic Lock of Escrow: The Lock Status of a file will switch to Escrow Locked (meaning that all HUD-1 or CDF screens will become read-only) when the Settlement Status is Closed. You can change the locked status of a file using the Lock Status field on the Express Order Entry screen.

Save Data When Printing: With this option selected, your data file will be automatically saved when printing a ReadyDoc.
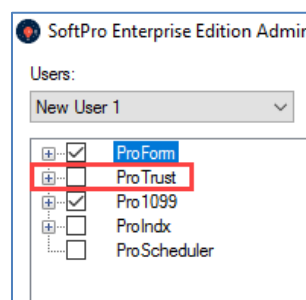
Workflow - User is on HOLD: If selected, the User is on HOLD box indicates that no new orders are to be assigned to that user within the workflow. You would use this option if a user is going on vacation, taking extended leave, etc. Instead of removing the user from the nodes where that user belongs, you simply put that user on hold. When the user is back, you can activate that user for the workflow by unclicking on this checkbox.
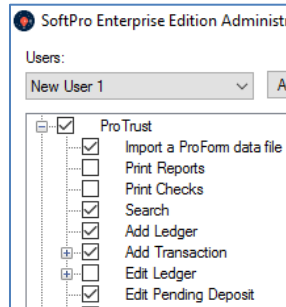
Permissions:

You can control user access to SoftPro programs and individual program functionality using the SoftPro Administrator **Permissions**. You can configure a different set of permissions for each user, or copy permissions from one user to another.

To set **Permissions** for a user, select a **User**.

Remove **Permission** to access a Softpro program by clicking the checkbox next to the program name to deselect it.

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To remove **Permissions** for a specific program feature, click the **plus (+)** next to the program name. A list of features will appear. If you are removing permission to a specific feature but not an entire program, leave the check in the box for the program name.
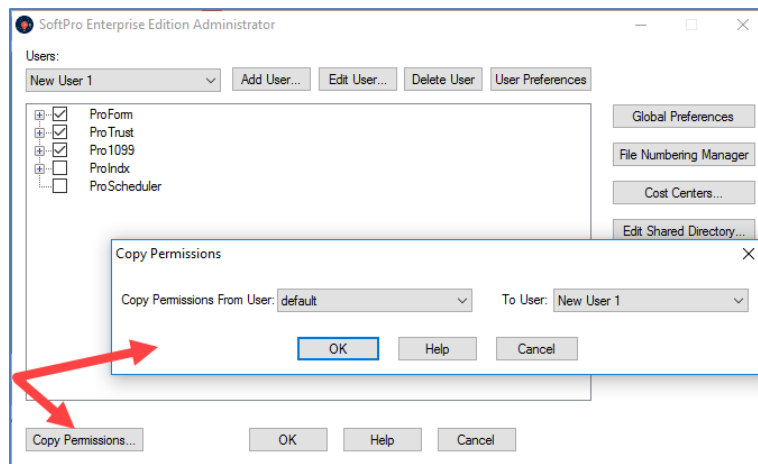

Copying Permissions:

When creating a new user, choose a **User** to copy **Permissions** from in the **Copy from** field. This will copy the **Permissions** and **User Preferences**.

After setting up the **Directories** for the **<default>** user, you should copy from the **<default>** when adding users for the first time. This will guarantee that each user has the same directory settings.
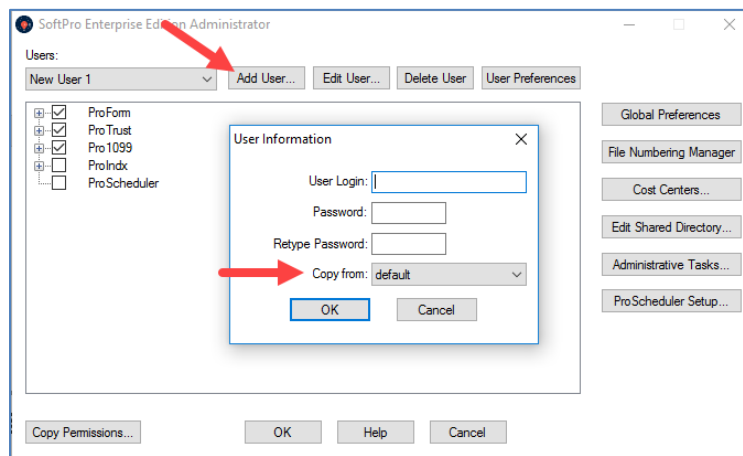

You can also copy **Permissions** to an existing user by selecting **Copy Permissions** and choosing from the drop down menu which user you are copying **Permissions** to/from.

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Global Preferences:

Click **Global Preferences** on the SoftPro **Administrator** to access several unique ProForm options:
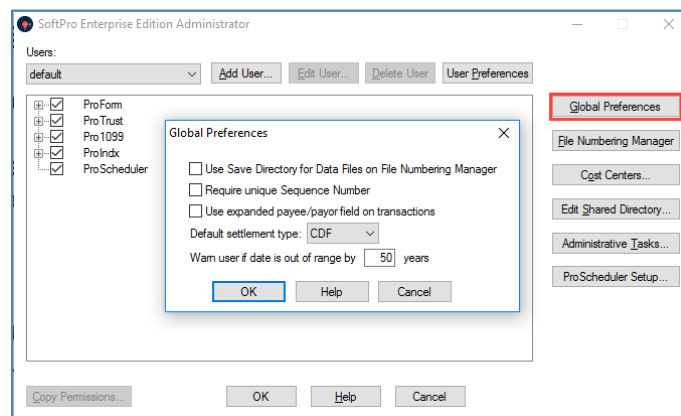
Use Save Directory for Data Files on File Numbering Manager: Select this option to use the Save Directories specified in the File Numbering Manager to save ProForm files. By default, the Data Files directory on the User Preferences screen is the directory to which ProForm files are saved.

Require Unique Sequence Number: Select this option to mandate that every ProForm file contain a unique sequence number in its file name. Different users cannot use the same number when creating a file, even if they add different prefixes to them. By default, this option is not selected.

Use expanded payee/payor field on transactions: For users of custom checks developed by SoftPro Professional Services, you can select this option to expand payee fields on Checks and

Flex Checks to 255 characters each. This option only applies to custom checks created to accommodate expanded fields.

Default Settlement Type: This option allows users to default newly created files to the HUD, GFE HUD or CDF format.

Warn user if date is out of range: This option is to protect against date errors in ProForm. If a user enters a date that is beyond the number of years, a warning message will appear. The default is 50, so a user in 2005 could not enter a date of 2056 or more without a warning. Conversely, a date of 1944 or earlier will prompt a warning. This option will help prevent transactions being omitted from reports because of data entry typos.
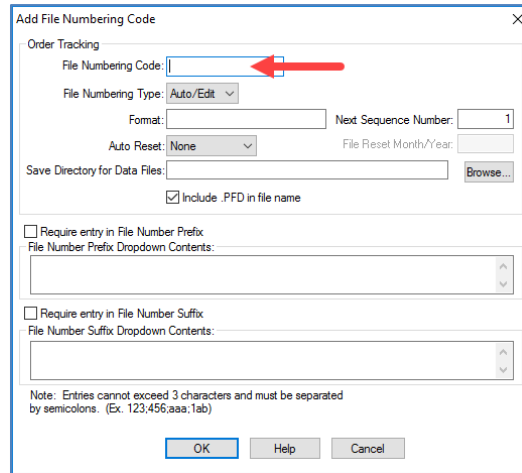
File Numbering Manager:

The automatic file numbering feature comes with the **Order Tracking** module of ProForm. The **File Numbering Manager** is used to create and edit file numbering systems. The **File Numbering Manager** can be used in conjunction with **Cost Centers**.

To add a **File Numbering Code**, click **File Numbering Manager**. Click **Add New Code**.
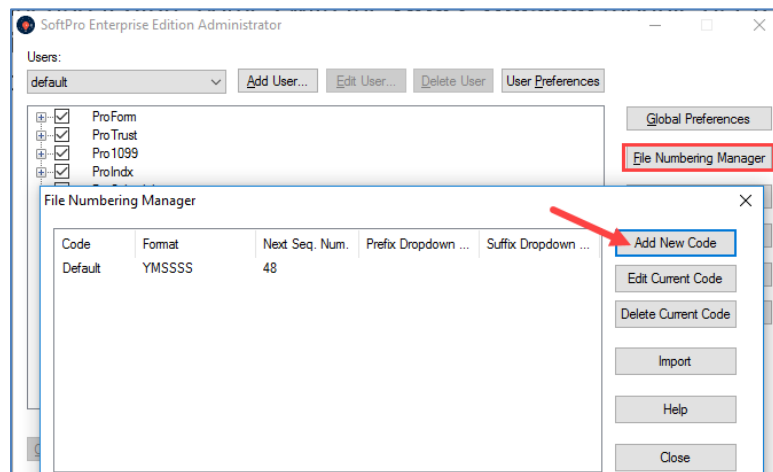
Enter a code to identify the file numbering system in the **File Numbering Code** field. When users start new ProForm orders, they will select from the codes assigned to their **Cost Centers** to properly number new files.
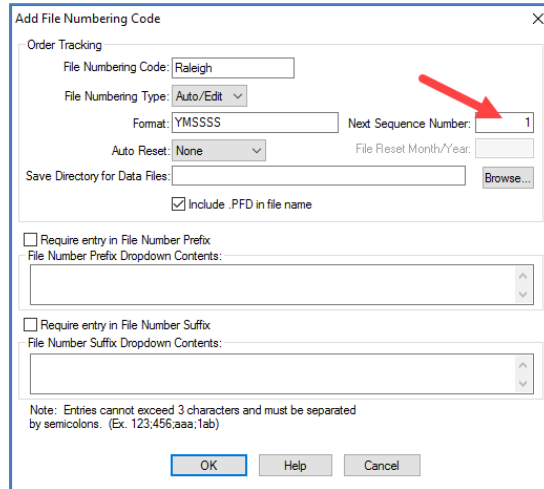
Select a **File Numbering Type**.

Auto	File numbers will be generated that cannot be edited by the user.
Auto/Edit	File numbers will be generated automatically, but the user can manually edit them. This is the default File Numbering Type.
User	File numbers will not be generated automatically. File numbering will be left completely up to the user.

Enter the **Format** for the file numbering. The **Format** is a series of codes, placed in the order in which you want the items they represent to appear in the file number. For example, if you want a four-digit year, two-digit month, and a four-digit number, you would enter YMSSSS.

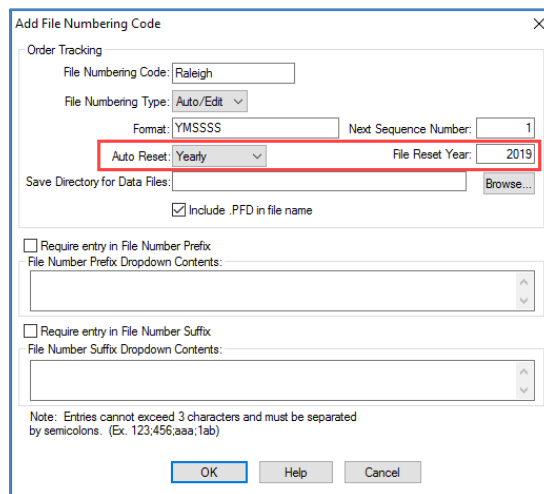|	
" "	Inserts text in between quotes. For example, to have the prefix NORTH appear at the beginning of each new file number, enter "NORTH" at the beginning of your format. You can include any text that you like to meet your requirements.
Y/y	Current year. Use Y for four-digit year (ex. 2018) or y for two-digit year (ex. 18).
M/m	Inserts number of current month. Use M for two-digit month (ex. January would appear as 01) or m for single-digit month (ex. January would appear as 1).
S	File numbering sequence. Enter as many S characters as you want spaces in the sequence. By default the first number in the sequence will be 1. For example, the first number in SSSS format would be 0001.

**NOTE**: **Do not include spaces between codes. You can use any combination of codes in your format, not to exceed 20 total characters.**

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Enter a **Next Sequence Number**. The **Next Sequence Number** determines the increment by which the file number advances with each new file. The default is 1, which means that if the current file is number 002, the next one will be 003.
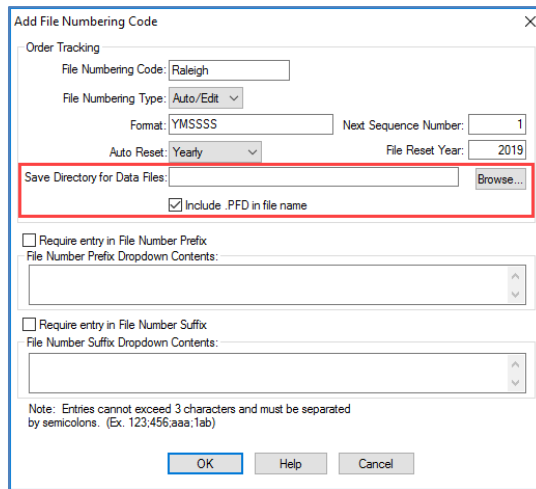

If desired, select an **Auto Reset** option. The default is **None**. With this setting, the counter will reset automatically once it reaches the maximum value allowed by the format. (For example, if the sequence number format is SSSS, the first number will be 0001 and will reset after file number 9999.) Select **Yearly** or **Monthly** to reset the counter in a particular year or month. Enter the month or year to reset the sequence number in the **File Reset Month/Year** field.

If desired, enter a **Save Directory for Data Files.** It is possible to have users save ProForm files to a different directory. All new files created in ProForm using this file numbering system will be saved to the directory entered here.
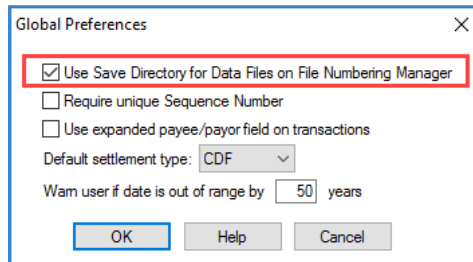
NOTE: ***You must select Use Save Directory for Data Files on File Numbering Manager on the Global Preferences dialog to activate this feature. Selecting this option will override the Data Files Directory on the User Preferences screen as the directory to which ProForm files are saved.***
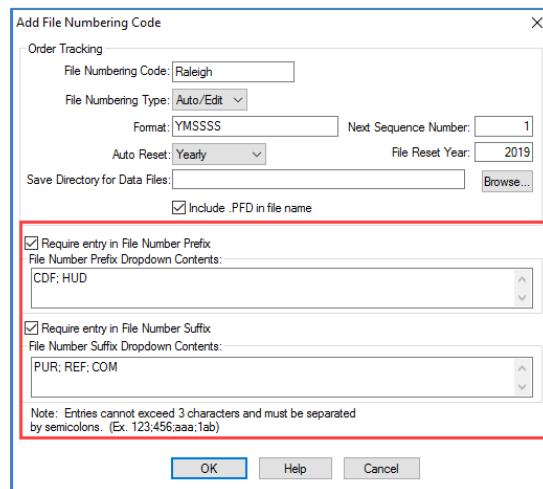
Require users to select a **File Number Prefix** or **File Number Suffix** when creating new files in ProForm. Prefixes and Suffixes are 1-3 character codes that you can customize for each **File Numbering Code.**

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To import a **File Numbering Manager File**, click **Import**. Click **Browse** to search for and select the **pfpx.fnm** file you want to import. Click **Open**. Only files named **pfpx.fnm** can be opened.
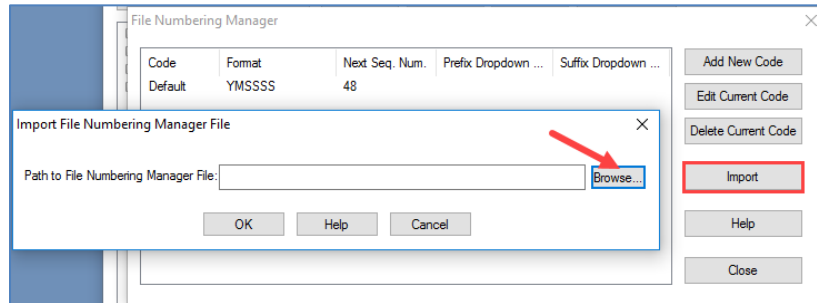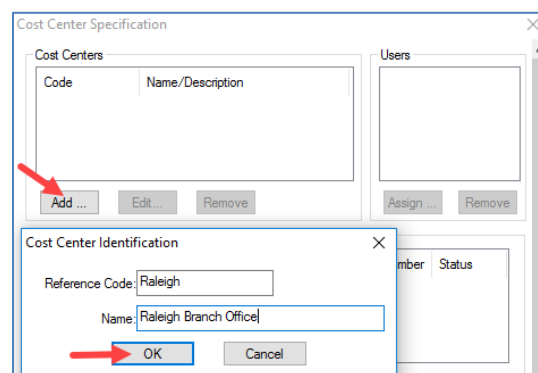

Cost Centers:

The **Cost Centers** feature of the SoftPro Administrator gives you the flexibility and control to set up different Cost Centers or branches. This will allow you to have different branches entering orders in ProForm using different File Numbering Systems and Trust Accounts, all while retaining control at a central location. You are in control of which Trust Accounts, File Numbering systems, check types, and users are assigned to each Cost Center.
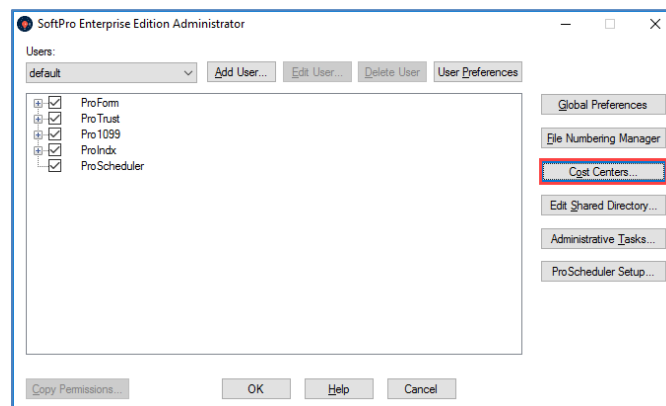

To add a new Cost Center, click **Cost Centers**. Click **Add** below the **Cost Centers** window. The **Cost Center Identification** dialog box appears. Enter a code and a description. Click **OK**.
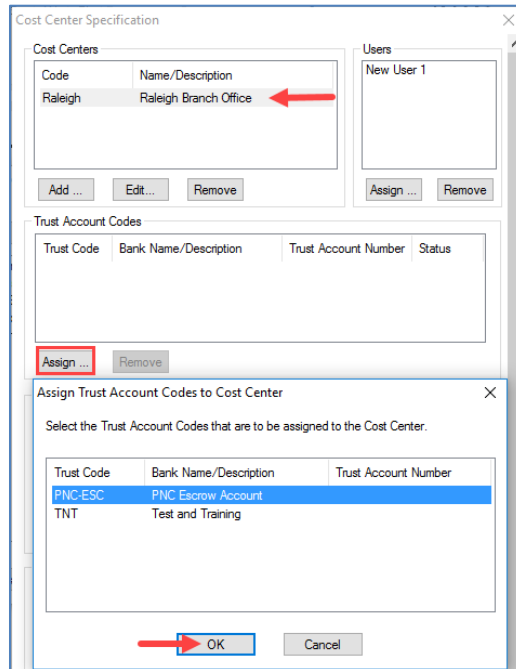
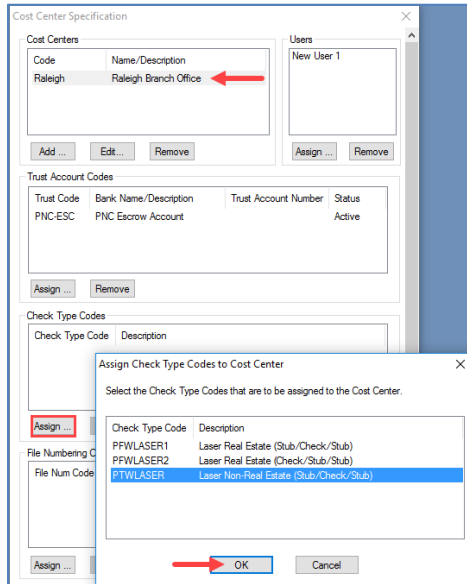To add users to a Cost Center, select a **Cost Center** and click **Assign** below the **Users** window.

The **Add Users to Cost Center** dialog will appear. Select the users you want to assign and click **OK**.
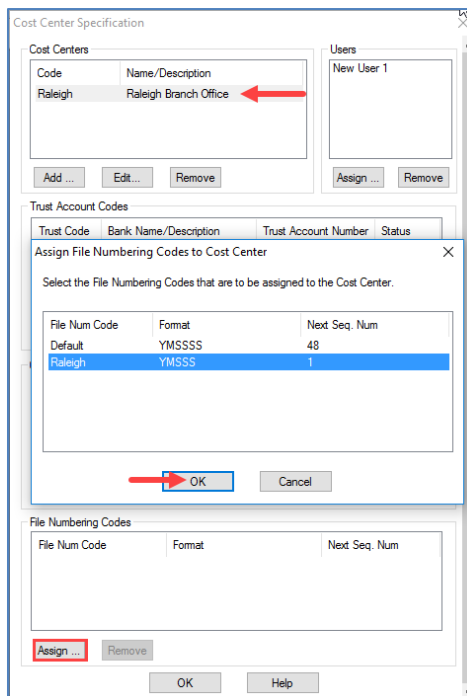The new users will appear in the **User** pane.
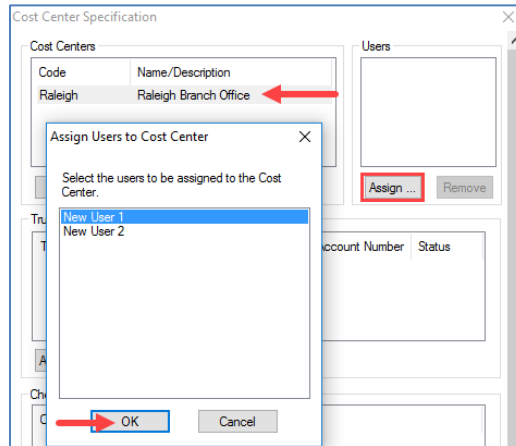
To assign a Trust Account Code to a Cost Center, select a **Cost Center**, click **Assign** below the **Trust Account Code** window. The **Assign Trust Account Codes to Cost Center** dialog will appear. Select the codes that you want assigned to the selected Cost Center**.** Click **OK.**

To assign a Check Type to a Cost Center, select a **Cost Center**, click **Assign** below the **Check Styles** window. The **Assign Check Type Codes to Cost Center** dialog will appear. Select the check types that you want assigned to the selected Cost Center**.** Click **OK.**


To assign a File Numbering Code to a Cost Center, select a **Cost Center**, click **Assign** below the **File Numbering Codes** window. The **Assign File Numbering Codes to Cost Center** dialog will appear. Select the codes that you want assigned to the selected Cost Center**.** Click **OK.**

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Edit Shared Directory:

The **Shared Directory** in SoftPro is the directory in which permissions files are stored.
To edit the directory, click **Edit Shared Directory**. The **SoftPro SQL – Shared Directory** window will appear. Edit the path in the **Shared Directory** field. You can browse for a directory by clicking **Browse** and selecting a folder. Click **OK**.
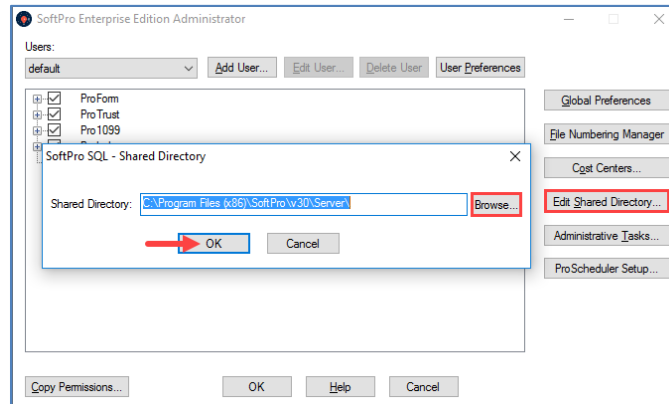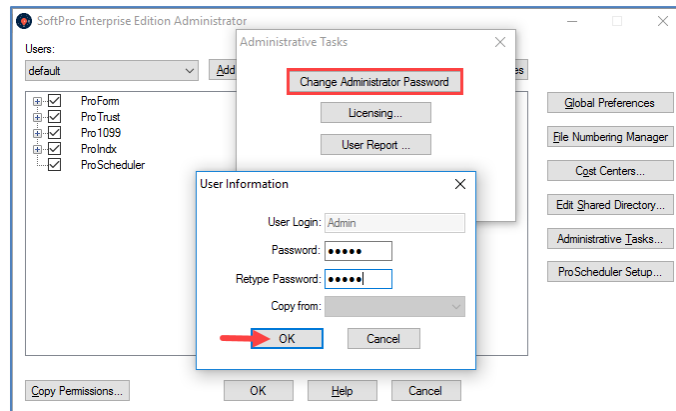
Administrative Tasks:
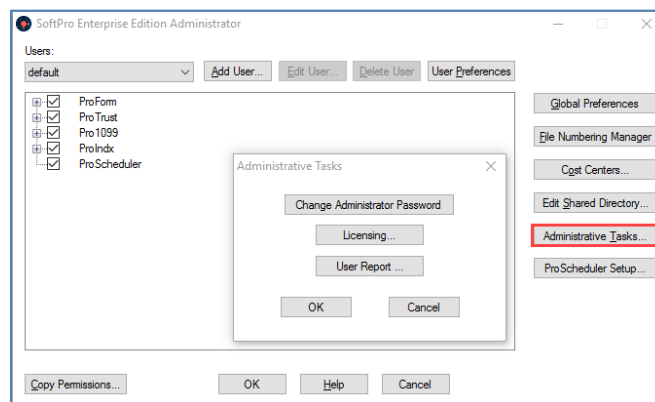
The **Administrator Password** protects the SoftPro Administrator from unauthorized access. You will be prompted to set up the Administrator Password the first time you start the Administrator. After the Administrator Password has been set, you will be prompted to enter it whenever the program is started. (Be aware that the Administrative Password is case-sensitive.) The Administrator Password can only be changed inside the SoftPro Administrator.

To change the Administrator Password, click **Change Administrator Password.** Enter a new Administrator Password in the **Password** field. Enter the new password in the **Retype Password** field. Click **OK**.

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To view the status of **Licenses** for any SoftPro program, click **Licensing**. The **SoftPro Licensing** dialog will appear. Click **Display License Usage**. All product licenses currently in use will appear, including the users, time/date acquired, and status.
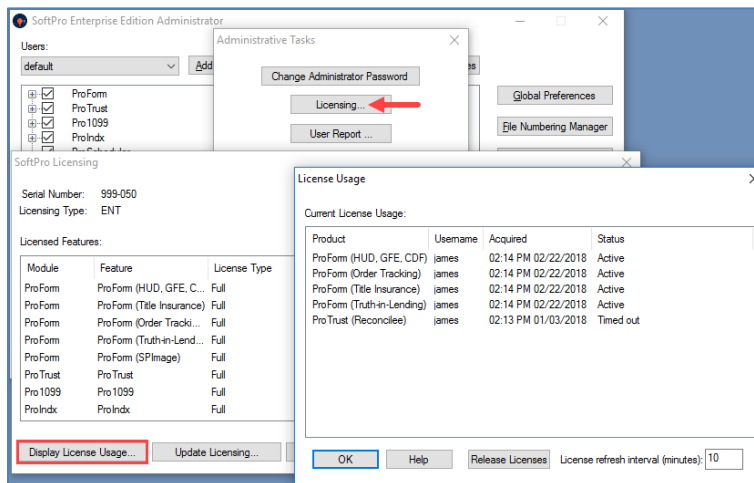
In a network environment, a situation can occur when a user stops using SoftPro but the user's license remains locked. This can happen if a user shuts down a computer without properly exiting ProForm. In this case, if all other licenses are taken and a new user tries to access ProForm, that user may be denied access. To free up the license, use the **Release Licenses** feature in the SoftPro Administrator.
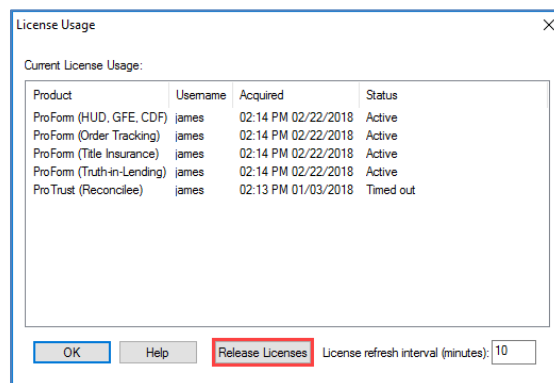
The **User Report** feature allows the System Administrator to produce a comprehensive report of the **Permissions** assigned to each **User**. The **User Report** button will produce a comma delimited text file (*.csv) that can be imported into an Excel spreadsheet or Access database, if desired.
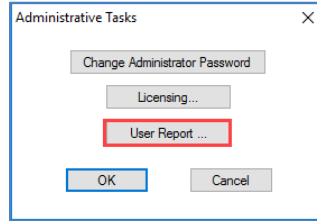
To run the report, click **User Report**. Using the **Save As** window that appears, browse to the location you wish to store the .csv file. Click **Save**. Click **OK** to exit the **Administrative Tasks** dialog and **OK** to exit the Administrator. The .csv file can then be imported into an Excel spreadsheet or Access database for your use.

A **1** will indicate the user has the listed **Permission**, a **0** will indicate the user does not have that **Permission**.

Users	default	New User 1	New User 2
ProTrust	1	1	1
Import a ProForm data file	1	1	1
Print Reports	1	0	0
Print Checks	1	0	0
Search	1	1	1
Add Ledger	1	1	1
Add Transaction	1	1	1
Enter Deposit Number	1	1	1