

The Security function controls access to the application itself and to individual functions within the application.

- The assignment of permissions and user rights is administered and maintained by the client (**not Valiant**).
- An authorized user can create/edit user logins and passwords for other users.
- Specific permissions can be assigned to an individual user or category of users.
- Vision™ has three (3) user categories: USER, DEFAULT and SUPERUSER.
- All individual Vision™ users must be designated a User or Superuser.

SUPERUSER

- This category is created by Valiant.
- Generally assigned to those individuals who will be assigned the responsibility of the organization, typically the System Administrator.
- Has full security rights and privileges to all Levels, Divisions and application functions.
- Can create security rights and restrictions for all other user categories.
- Users cannot create a Superuser.

DEFAULT

- Special user category designed to create Permission Groups – from which individual users may be assigned.
- Default is only used to create the Permission Group – individual users cannot be assigned a Default.
- Avoids repetitive steps when creating a group of new users with identical security permissions.

USER

- Individual employees are assigned, either with individually selected Division and Permission rights or by Permission Groups (i.e. Default).

Creating a Superuser

1. Select Security from the File Menu
2. Enter employee name in **Login Name** field.
3. Select **SUPERUSER**
4. Enter a **Password** (at least 6 characters with 1 capital letter and 1 number)
5. Enter **Single Sign-on Acct** (Citrix user ID assigned to employee)
6. Check **Add/Edit User**.
7. Enter employee name in **Name (Last/First)** field.
8. Click **Save**

Note

A *Single Sign-on Acct* field is available in Vision that allows designated users to automatically log into Vision upon successful completion of the Citrix login at <http://www.online.valiant.com>.

The screenshot shows a 'Permission' dialog box with the following fields and values:

- Login Name:** BILL.SMITH
- User Category:** SUPERUSER
- Status:** ACTIVE
- Password:** [Masked]
- Add/Edit User:**
- Single Sign-on Acct:** SECT32BSMITH
- Name (Last/First):** SMITH | bil
- Address:** [Empty]
- Home Phone:** [] - []
- WorkPhone:** [] - []

Creating a DEFAULT Group

1. Enter a DEFAULT group name in the **Login Name** field.
2. Select **DEFAULT**
3. Enter a **Password**
4. **Note:** A Single Sign-on Acct is not needed for DEFAULT groups.
5. Enter the DEFAULT group name in the **Name (Last/First)** field.
6. Click **Save** (before selecting permissions)
7. Click **Edit** to continue security setup
8. Select applicable permissions.
9. Click **Save**

Permission

Login Name: MANAGER DEFAULT INACTIVE

Password: ***** Add/Edit User

Single Sign-on Acct: _____

Name (Last/First): MANAGER

Address: _____

Home Phone: () - _____ WorkPhone: () - _____

Divisions

Permissions

Check All Uncheck All

- Add Adjustments
- Approval Billing Adjustment
- Approval Confirm
- Approval Payroll Adjustment
- Billing Adjustment Maintenance
- Billing Adjustment View
- Budget Maintenance
- Budget View
- Calc Budget
- Calculate Billing
- Calculate Payroll
- Cash Entry Edit
- Cash Entry Setup
- Cash Entry View

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Creating a USER

1. Enter employee name in **Login Name** field.
2. Select **USER**
3. Enter a **Password**
4. Enter **Single Sign-on Acct** (this is the Citrix user id assigned to the employee)
5. Check **Add/Edit User**, if applicable.
6. Enter employee name in **Name (Last/First)** field.
7. Click **Save** (before selecting permissions)
8. Click **Edit** to continue security setup
9. Click the **Levels** tab and select applicable division, level, or department access.
10. Click on the **Division** tab (Permissions) and select applicable permissions.
11. Click **Save**

Permission

Login Name: BOBBY.JONES USER ACTIVE

Password: ***** Add/Edit User

Single Sign-on Acct: SECT32BJONES

Name (Last/First): JONES BOBBY

Address:

Home Phone: () - WorkPhone: () -

Levels | Divisions

- All Region
 - CORPORATE - CORPORATE
 - All Territory
 - CENTRAL - CENTRAL
 - EAST - EAST COAST
 - All District
 - MIDATL - MID ATLANTIC
 - All Divisions
 - 02 - NEW YORK
 - 03 - STAFFING
 - WEST - WEST COAST
 - NONE - NONE

Permission

Login Name: BOBBY.JONES USER ACTIVE

Password: ***** Add/Edit User

Single Sign-on Acct: SECT32BJONES

Name (Last/First): JONES BOBBY

Address:

Home Phone: () - WorkPhone: () -

Levels | **Divisions**

Divisions: 02 - NEW YORK

Permissions: Check All Uncheck All

- Add Adjustments
- Approval Billing Adjustment
- Approval Confirm
- Approval Payroll Adjustment
- Billing Adjustment Maintenance
- Billing Adjustment View
- Budget Maintenance
- Budget View
- Calc Budget
- Calculate Billing
- Calculate Payroll
- Cash Entry Edit
- Cash Entry Setup
- Cash Entry View

Copy From: [] [] []

Creating a USER (copying a DEFAULT group)

1. Complete steps 1-9 above.
2. Do **NOT** select individual permissions.
3. Select the DEFAULT group from the **Copy From** drop-down.
4. Select “C” (Current Division) to copy to divisions highlighted (under Levels tab) or highlighted (under Levels tab)
5. Select “A” (All Divisions) to copy all divisions (under Levels tab)
6. Click **Save**

Note: Please refer to document *Vision Security – Permissions with Sample Groups.xls* for permission definitions.