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.
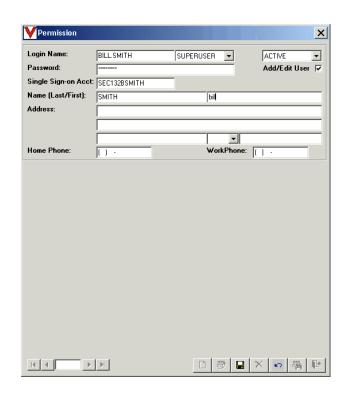- Avoids repetitive steps when creating a group of new users with identical security permissions.

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**.
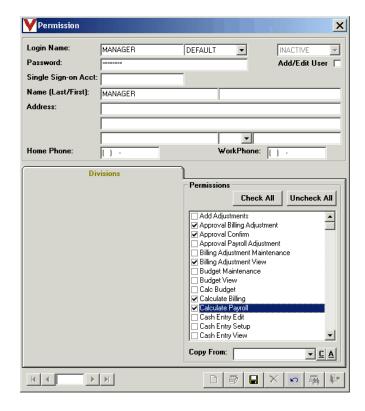7. Enter employee name in **Name (Last/First)** field.
8. Click **Save**

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 *.*
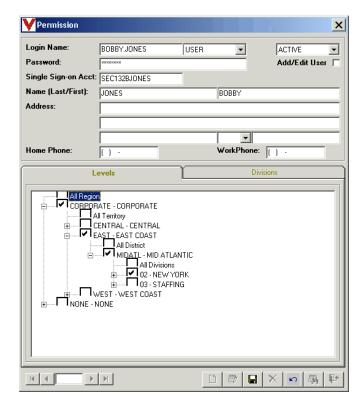
Creating a DEFAULT Group

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** (<u>before</u> selecting permissions)
7. Click **Edit** to continue security setup
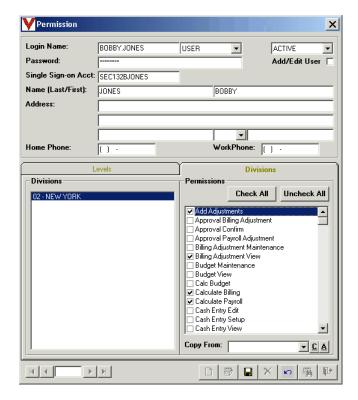8. Select applicable permissions.
9. Click **Save**

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
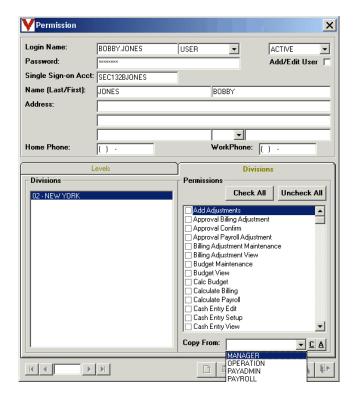9. Click the **Levels** tab and select applicable division, level, or department access.

10. Click on the Division tab (Permissions) and select applicable permissions.
11. Click **Save**

Creating a USER (copying a DEFAULT group)

1. Complete steps 1-9 above.
2. Do <u>NOT</u> 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
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.