



A Division of Harris Computer Systems

GENERAL ENTRY: SECURITY SETUP

1. Custom Settings
2. 1. Customize
3. 2. Printer Setup
4. 3. Password Setup
5. 4. Signatures
6. 5. Edit Operators
7. 6. Regional Setup
8. X. Return to Sys. Maintenance

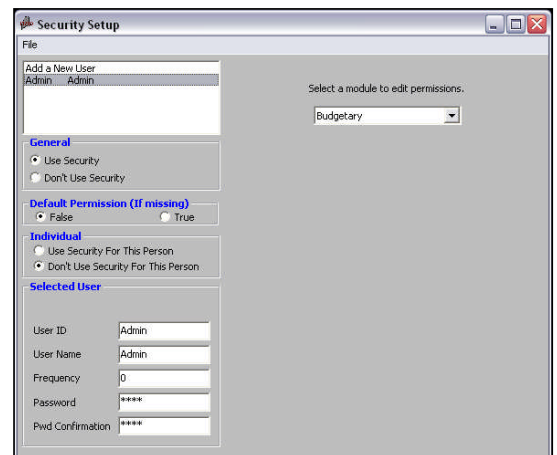
The TRIO Software System provides the option to create and modify user accounts that enable functions to be turned on or off within each module. This can prove useful when people have specific tasks and only need to be able to get into specific areas of the software. Prior to setting up the users, it is recommended that a list be created of each user and their typical job functions, this will be used as a reference point later on. Please note that until users are set up, the default login, *Admin*, can be used by anyone and gives full permissions to available modules in TRIO. In addition to this tip sheet, further information on Security Setup can be found in the General Entry electronic Helpfile.

Setting up Security

To begin setting up security, start TRIO and select **M. System Maintenance > 1. Custom Settings > 3. Password Setup**. A User ID and Password screen will display – enter the same information as what was used to log into TRIO. Once **OK** is selected, the Security Setup screen will display.

The box on the top left of this screen lists users already set up in the system. There is also an option within this box to *Add a New User*. Underneath that, the **General** section allows the security settings for TRIO to be activated or not. If security is not used then any settings made on this screen will not affect any users. The **Default Permissions** section is used by the system if a user does not have permissions set up for a particular section in TRIO. If True is selected, users will have full access to these parts of the program. Access will be denied when False is selected instead. The **Individual** section is used to activate security for the currently selected user. If *Don't Use Security For This Person* is selected, the selected user will have access to all parts of the program.

The Selected User section is used to configure the settings specific to the user selected above. The User ID is used for logging into the program. The User Name is linked to the User ID and will display on any reports referencing the user. The Frequency control how often the user must reset their password; the number entered is the number of times that a user logs into the program. The Password and Password Confirmation fields are used to set up the password for the user.



The modules available in TRIO are listed on the right side of the screen. Once one is selected, the different functions available in that module are displayed. Along with those functions there are three columns: *Full*, *Partial*, and *None*. *Full* grants access to the function and/or sub-functions underneath it, *None* denies access to the function and/or sub-functions, and *Partial* is automatically selected if there is a mix of *Full* or *None* for the function's sub-categories. Please note that if a user should not have access to a module at all, set the function Entry Into XXX as *None*. This option will set all subsequent boxes as *None* also. This also is true for each function; if the function is selected to *None* then the sub-functions will automatically be set to *None* as well.

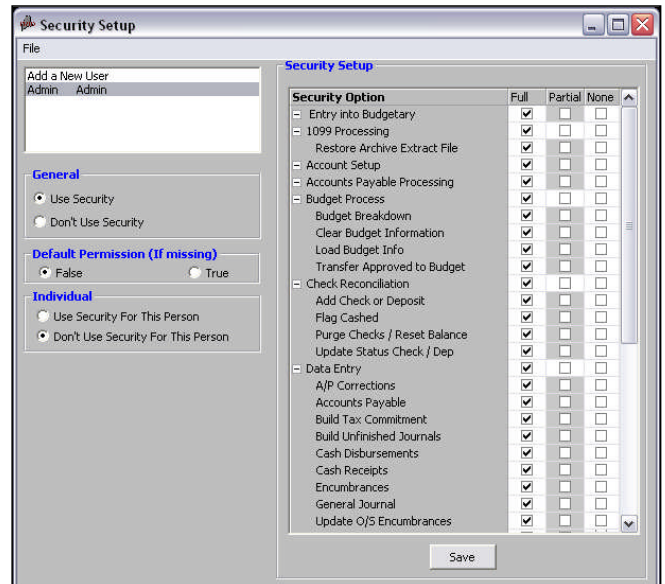
General Entry: Security Setup *CONTINUED*

To set up security settings in TRIO, do the following:

1. Log into TRIO as Admin or a user with Admin permissions.
2. From the General Entry Menu select **M. System Maintenance > 1. Custom Settings > 3. Password Setup.**
3. Enter in the User ID and password for a user with Admin permissions.

To modify security settings for a user that is already setup:

1. From the Security Setup screen select the user in the box in the top left corner of the screen.
2. Select the module on the right and then select whether the user has Full or None for privileges for that particular function in that module.
3. Press **Save** on the bottom of the screen and **F12** to save and exit.



To add a new user and change default permissions (allowed to all):

1. Select *Add a New User* from the top left section.
2. Enter a User ID (the name selected when logging in) in the bottom Selected User section.
3. Enter a User Name (if there were 2 Pats in the office it could be specified here).
4. Frequency – enter the number of days until this User's password will need to be changed. Enter 0 for never.
5. Enter a password and confirm that password
6. Press **F11** to save the user
7. Select the module from the drop down box on the right side of the screen
8. Select what privileges the selected user has for each function: *Full* or *None*.
9. Press **F12** to save and exit.