

VSys Advanced Security

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Introduction:

Advanced Security allows you to be much more specific about your security rights than the older Compatibility mode. If you are a veteran VSys user and set up your security in the beginning you are probably using Compatibility mode if you have not changed it.

To find out which you are running: **Administrator tools -> Security manager ->Security options - Compatibility mode checkbox** at the top

Things to think about ahead of time:

Who gets what kind of rights?

- Superusers: Get all rights. (Best practice - you should have at least 2)
- Roles: Can you group users together with the same rights? Do you have 4 people who all do "data entry" and need the same type of access to the program?
- Default user: Are there minimum rights that everyone gets? (Not required)

Which rights are applicable to which people or roles?

Fundamentals of how Advanced Security works

In Advanced Security, for 99% of the options the user has no rights to that until the rights are granted. Adding a **default user**, will change this first level of rights for a person. In this example, we will not be using a default user.

Starting Rights - all undefined	
People	
Create	● Undefined
Edit	● Undefined
View	● Undefined
Delete	● Undefined
Report	● Undefined
Hours	
Credit volunteer hours (simplified)	● Undefined
Credit volunteer hours (from assignments)	● Undefined
Credit volunteer hours in bulk	● Undefined
Letters	
Mail merge	● Undefined
Letter templates	● Undefined
Basic Mailing labels	● Undefined

The **user role**, allows you to assign rights to a job or by the needs of several people. Instead of going through and adding specific rights to people, create role and overlay that onto the person's security.

Starting Rights - add data entry role		
People		
Create		Access
Edit		Access
View		Access
Delete		Undefined
Report		Undefined
Hours		
Credit volunteer hours (simplified)		Access
Credit volunteer hours (from assignments)		Access
Credit volunteer hours in bulk		Undefined
Letters		
Mail merge		Undefined
Letter templates		Undefined
Basic Mailing labels		Access

Then rights can be added or subtracted at the **individual level** permitting or denying access.

Starting Rights - add data entry role - Mary's rights		
People		
Create		Access
Edit		Access
View		Access
Delete		Undefined
Report		Access
Hours		
Credit volunteer hours (simplified)		No Access
Credit volunteer hours (from assignments)		No Access
Credit volunteer hours in bulk		Undefined
Letters		
Mail merge		Undefined
Letter templates		Undefined
Basic Mailing labels		Access

Deciding on rights:

- Tools: Identify on the grouping level or individual level which you want. Grouping level applies to new things in that group - ie. all of Comments means any new comment will be visible.
Suggestion: Click everything open and print the **Grid**
- Special: If you don't recognize anything here, you don't need to touch it.
- People: Replace rights
Link: Test effective rights for a person
- Jobs: Defaults to Read-only access (hint: shift/click to change rights in bulk)
- Certifications: Defaults to no access
- Projects: Per project basis

Process:

Editing a default user : Edit default user rights.

Setting up a role: Security roles -> Add security role

Setting up security for an individual:

- 1) Search for individual
- 2) Username/password/enabled
- 3) Add tool profiles
- 4) Add User roles
- 5) Add individual modifications (add/subtract rights)

Testing rights:

Describe rights: Report of rights

Impersonate this user: Only available to Superusers/ right-click option

Enabling Security