

Security Setup and Configuration

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Simply Smarter Information Management

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Security Set-Up and Configuration

This Lesson will Cover

- The OneVizion Security System
 - Default Privileges
 - Security Groups/Tokens
 - Special Workplan Task Privileges
 - Lock/Unlock Privileges
 - Trackor Restrictions
 - Disciplines
 - Menu Applications
 - Global View and Filters

- Global Portals
- Rules
- Imports
- Reports and Report Delivery
- Notifications and Notification Types

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- Assigned Users
- Component Packages
- Component Audit Log

Security Best Practices, Topics and Recommendations

- The OneVizion Security Model is based upon Security Roles
- Security Roles control:
 - \circ $\,$ Access to information contained in the system $\,$
 - Privileges with regard to access (R-E-A-D or None)
 - Access to system functions (e.g., menus, admin tools, etc.)
- A good way to commence security set-up is to create an Administrative Superuser and a General User Security role. Clone the General User Security Role and add or remove privileges based upon Job Function.
- In addition to an Admin Superuser, Security Roles can be created to grant limited administrative features to lower level admins (e.g., create reports or run imports)
- Security Privileges are generally controlled at the Role level, but, can be overridden at the individual User level



Security Best Practices, Topics and Recommendations

- Use Business Rules to enforce password requirements (e.g., expiration, format, etc.)
- Create a limited set of Global Views and Filters then let users modify the Global Views to create their own job-specific Local Views and Filters

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- Use Security Roles to control access to data at the tab level and to control the ability to create relationships among Trackor Types
- Assign multiple Security Roles to a User(s) to grant a Union of all privileges. Use the "None" flag to remove a privilege.
- Security Roles can be augmented with Business Rules to further increase flexibility and granularity
- Use Trackor Restrictions to control access to records based upon Parent-Child relationships

Security Best Practices, Topics and Recommendations

- **ONEVIZION** Simply Smarter Information Management
- Security Roles can be used in conjunction with Menu Applications to steer user behavior and limit access to data and system functionality.
- Security Role-based Task Privileges and Disciplines can be used to control R-E-A-D privileges to Workplan tasks – down to the individual task level
- Any Trackor Type in the system can be designated a OneVizion user you are not limited to the User Trackor Type (e.g., Vendors, Customers)
- Use Security Roles to control access to Lock/Unlock functionality
- Use Security Roles to control access to Notifications and Notification Types
- Use Security Roles to control access to Global Portals
- Use Security Roles to control "default" privileges for new system objects

Security – Default Privileges (General Info)

Security Roles G:Default Y Unsaved Filter ~

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Role ID

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1001643 1001644 1001683

1001684 1001685

1001686

10000621 10000643

10000663

10000683

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Ξ.	Role Name	De Edit Security Role - Google Chrome							-	
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	Sales	e 🗲 Search	Edit Security Role -	General Info						
	Vendor/Subcontractor		General Info							
	Site Acquisition Tech	General Info								
	Construction Manager		Security Role *	Administrator						
	A&E Vendor	Security Groups	Description	Administrator						
	Test Administrator	Special Task Privs	Default Privs		Read	Edit	Add	Delete	Default Assignment	5
	Tour Access	Lock Privs	Application Migratio	n					Discipline	~
	Gen Admin	LOCK Privs	Application Process						Menu Application	\checkmark
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_	Administrator	Menu Applications	Configured Applet		 Image: A set of the set of the	~			Report	
	ORA_Dev		Configured Tab			~			Global Notification	~
	ORA_Dev_Empty	Global Views	Dashboard			~			Chat Notification	\checkmark
	Marketing Demo	Global Filters	Data Ingestion		~	~	 Image: A set of the set of the	~	Trackor Tours	\checkmark
	Construction Vendor		Data View		 Image: A set of the set of the	~		\checkmark		
	Site Acquisition Vendor (Demo)	Global Portals	Design Application		✓	~	\checkmark	~		
	Construction Manager (Demo)	Rules	Documentation		 Image: A set of the set of the	~	\checkmark	~		
		Imports	Documents		✓	✓	\checkmark	~		
		imports	Feature Visibility		✓					
		Run Reports	Integration Hub		✓	✓	\checkmark	~		
		Report Delivery								



HINT: The "Login As" feature is extremely useful when testing system Security Settings. Another helpful approach is to login as a "test user" using one Browser (i.e., Chrome) while still being logged in as SysAdmin using a different Browser (i.e., Firefox)

The "inherited" privileges of new objects added to the Vizion Platform are controlled from the General Info tab

Security – Security Groups

Security Roles

HINT: Quick Search to find tokens and $\checkmark \checkmark$ to Select All in a Filtered Data Set

A=Add

D=Delete

and, None



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Search for		Role ID	~				Edit Add 🔻	Delete •••	
ole ID 🛓 Role Name	🕕 Edit Secu	urity Role - Google Chrome						- 🗆 ×	Use Security Tokens to set
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001644 Vendor/Subcontractor	=*								
001683 Site Acquisition Tech	General	O Search for		Description	*				• Annlets
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002787 Demo_Field_Tech	Trackor	BH Engineering Applet	Configured Applet	[Visio Map] Applet				-	
002788 Democyendor	Discipli	BID_OPP	Configured Applet	[Leads and Opportunities] Applet	~				Trackor Relationships
0000621 Administrator	Menu A	ClearPath Visio Link Properties	Configured Applet	[BackHaul] Applet	~				
0000643 ORA_Dev		ClearPath Visio Site Properties	Configured Applet	[Site] Applet	~				Super User Privileges
0000663 ORA_Dev_Empty	Global \	CloseoutPackageAdmin	Configured Applet	[Closeout Package] Applet	~				
0000683 Marketing Demo	Global F	CloseoutPackageVendor	Configured Applet	[Closeout Package] Applet					Trackor Types
0000703 Construction Vendor	Global F	CloseoutPackageVendorMobile	Configured Applet	[Closeout Package] Applet					
Site Acquisition Vendor (Demo)	Rules	Demo External Applet	Configured Applet	[Site] Applet					Workplan Tasks
Construction Manager (Demo)		Document Collection for Vendor	Configured Applet	[Site] Applet					
	Imports	Document Process	Configured Applet	[Documents] Applet					
	Run Rej	Driving Directions - User to Candidate							
	Report	Driving Directions - User to Candidate	Configured Applet	[Visio Map] Applet					R=Read
	Notifica	2						Cancel Apply	n-neau

HINT: New Security Tokens are Automatically created as new components are added

REMINDER – Adding a "None" Removes that Privilege

Security – Lock Privileges

R <	Security Roles G:Default Y Unsaved Filte	r ~								Les Ifos	ter Q
O Search for				Role ID 🗸				E	dit Add	▼ Delete	
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10000621	Administrator	-	Edit	Security Role - Lock Privs T Unsave	d Filter 🗸						260411
1001684	Construction Manager	Search									
10000708	Construction Manager (Demo)	General Info	Q	Search for			Lockable Trackors Name 🐱				
10000703	Construction Vendor	O						Privileges			
1002785	Demo_Admin	Security Groups		Lockable Trackors Name	Trackors Type	Trackor Type	Description	Lock 🗸	Unlock 🗸	None 💴	
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1002788	Demo_Vendor	Lock Privs	Ш	C_SCIP_APPROVAL	Field	Site			~		
1001277	Fully Restricted	Cell Color Privs		C_SCIP_READY_FOR_REVIEW	Field	Site					
1001723	Gen Admin	Trackor Restrictions		N_XITOR_KEY_ALT1	Field	Site	Your field definition seen here!!!!				
10000683	Marketing Demo			SITE_TYPE_BH	Field	Site	BH Site Type				
10000643	ORA_Dev	Discipline		SITE_TYPE_POP	Field	Site	POP Site Type				
10000663	ORA_Dev_Empty	Menu Applications		SITE_TYPE_RF	Field	Site	RF Site Type				
1001643	Sales	Global Views					IN Site Type				
1001683	ofte Acquisition Tech	Global Filters		S_DD_1A_2C	Field	Site					
10000705	Site Acquisition Vendor (Demo) Test Administrator	Global Fillers		S_NAME	Field	Site	Site.XITOR_NAME				
1001080	Tour Access	Global Portals		S_SITE_BROCHURE	Field	Site	Site Brochure from PDF		~		
1001644	Vendor/Subcontractor	Rules		S_STRUCTURAL_CAPACITY	Field	Site					
		Imports									
		Run Reports									
		Report Delivery									
		Notifications	?						ок	Cancel	Apply



A list will be presented of all Configured Fields in the system that have the Lock flag set. SetLock/Unlock privileges for that Security Role.

Security – Trackor Restrictions

	Security Roles G:Default Y Unsaved Filte	r ~		
O Search fo	r		Role ID 🖌	
Role ID	Role Name	随 Edit Security Role - Google Chrome		
001685	A&E Vendor	demoblue.onevizion.com/adm	in/securityroles/Form.do?id=10000705	
0000621	Administrator	-	Edit Security Role - Trackor Restrictions	
001684	Construction Manager	Search		
0000708	Construction Manager (Demo)	General Info	Trackor Type	Restriction Mode
0000703	Construction Vendor	Security Groups	ASR	T
002785	Demo_Admin	On a sid Table Dains	Accounts	Union
002787	Demo_Field_Tech	Special Task Privs	Area	Intersection
002788	Demo_Vendor	Lock Privs	Automation	
001277	Fully Restricted	Cell Color Privs	BHR Order E-Files	
001723	Gen Admin	Trackor Restrictions	BHR Order Memos	
0000683	Marketing Demo	*	·	
0000643	ORA_Dev	Discipline	BHR Orders	
0000663	ORA_Dev_Empty	Menu Applications	BTA	
001643	Sales		BTA Tool	
001683	Site Acquisition Tech	Global Views	BackHaul	
0000705	Site Acquisition Vendor (Demo)	Global Filters	Bill of Materials	
001686	Test Administrator	Global Portals		
001703	Tour Access		CX Vendor Bids	
001644	Vendor/Subcontractor	Rules	Call Sign	
		Imports	Campaign	
		Run Reports	Change Order Communications	
		Report Delivery	Change Orders	
		Notifications	?	



Trackor Restrictions are used to restrict which RECORDS a user can see.

- 1. Determine what Trackor Type(s) you wish to Restrict
- 2. Construct appropriate Parent-Child Relationships
- 3. Set Restriction Mode
- 4. Restrictions are applied to that Security Role only (e.g., Vendor)

Security – Trackor Restrictions

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We have made the Vendor Contact Trackor Type a User which allows us to assign User credentials AND restrict access to records for Vendor Contact users based upon Security Role Trackor Restrictions.

It is common practice to create separate Trackor Types for business partners such as Customers and Vendors and give them access to the system. These can be managed in their own user Trackors.

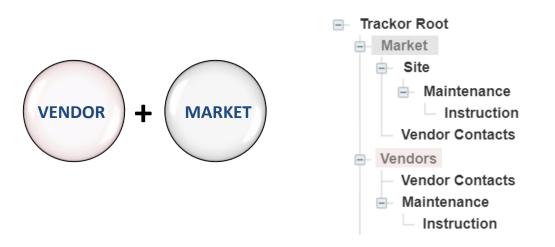
Trackor Restrictions

Vendor Cont	act	Vendor	Market		
William Powel	II	Roland Power Service Company	Atlanta		
Tony Roland		Roland Power Service Company	Los Angeles		
Maint:Maintenance ID	M:Market	V:Vendor ID	Maint:Maintenance Class		
AL13936-0000	Atlanta	Southeast Generator Service, Inc.	Generator		
AL13936-0001	Atlanta	Coolray HVAC [●]	HVAC		
AL13936-0002	Atlanta	Roland Power Service Company [●]	Generator		
AL13936-0003	Atlanta	RightCab, Inc [●]	Cabinet		
AL13936-0004	Atlanta	EIC Solutions	HVAC		
AL13936-0005 •	Atlanta	Heating and Air Unlimited •	HVAC		
AZ15042-0004	Arizona	Roland Power Service Company [●]	Generator		
CA10018-0000	Atlanta	Coolray HVAC •	HVAC		
CA10018-0001	Atlanta	Roland Power Service Company [●]	Generator		
CA10036-0002 •	Los Angeles	Roland Power Service Company [●]	Generator		
CA11007-0001	Los Angeles	Roland Power Service Company [●]	Generator		
CA11007-0002	Los Angeles	Roland Power Service Company [●]	Generator		
FL13815-10001	South Florida	Roland Power Service Company [●]	Generator		
GA17837-10000	Atlanta	Telecom Cabinet Inspection Services, LLC	Cabinet		
MA20623-0000	Boston	Roland Power Service Company [●]	Generator		



Trackor Restrictions set on Maintenance and Instruction

• UNION – Vendor Contact User sees all records that are assigned to his Company OR in his Market



Trackor Restrictions

Vendor Contact	Vendor	Market		
William Powell	Roland Power Service Company	Atlanta		
Tony Roland	Roland Power Service Company	Los Angeles		

Vendor Contact = William Powell

Maint:Maintenance ID	M:Market	V:Vendor ID	Maint:Maintenance Class
AL13936-0002	Atlanta	Roland Power Service Company •	Generator
CA10018-0001	Atlanta	Roland Power Service Company •	Generator
12 of <u>2</u>	Powered b	y OneVizion®	

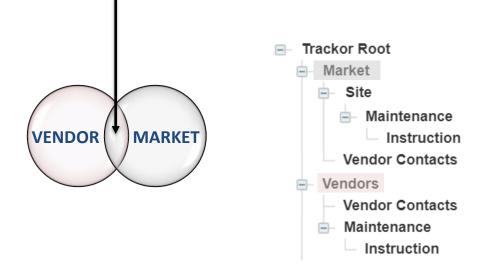
Vendor Contact = Tony Roland

Maint:Maintenance ID	M:Market	V:Vendor ID	Maint:Maintenance Class	
CA10036-0002	Los Angeles	Roland Power Service Company [●]	Generator	
CA11007-0001	Los Angeles	Roland Power Service Company •	Generator	
CA11007-0002	Los Angeles	Roland Power Service Company •	Generator	
	Powered by One	Vizion®		



Trackor Restrictions set on Maintenance and Instruction

 INTERSECTION – Vendor Contact User sees all records that are assigned to his Company AND are in his Market



Security – Disciplines

	Security Roles G:Default Unsaved Filte	ir ~				
O Search for			Role I	D v		
Role ID	Role Name	随 Edit Security Role - Google Chrome				
1001685	A&E Vendor	demoblue.onevizion.com/admin/s	/securityroles/Forr	m.do?id=1002787		
10000621	Administrator		Edit Security	Role - Discipline		/
1001684	Construction Manager	Search	Luit occurity			
10000708	Construction Manager (Demo)	General Info	V Disciplin	ne Description		/
10000703	Construction Vendor	Security Groups	A&E	Architecture and Engineering Team		
1002785	Demo_Admin	- Special Task Privs	ВН	Backhaul Team		
1002787	Demo_Field_Tech	Special lask Privs	Сом	Commissioning Team		
1002788	Demo_Vendor	Lock Privs	CON	Construction		
1001277	Fully Restricted	Cell Color Privs	Сх	Construction Team		
1001723	Gen Admin	Trackor Restrictions	ENG	Engineering		
10000683	Marketing Demo		ENT	Entitlements / Leasing Team		
10000643	ORA_Dev	Discipline	LOG			1640202
10000663	ORA_Dev_Empty	Menu Applications	OPS	E Search	Edit Disciplines - Role Assignments	
1001643	Sales	Global Views	PERM			
1001683	Site Acquisition Tech	Global Views	D PM	General	VI Security Role	
10000705	Site Acquisition Vendor (Demo)	Global Filters	PMG		A&E Vendor	
1001686	Test Administrator	Global Portals	PWR	Role Assignments		
1001703	Tour Access	Rules	REG	Components Audit Log	Administrator	
1001644	Vendor/Subcontractor	Rules	□ SA	Components Addit Log	Construction Manager	
		Imports			Construction Manager (Demo)	
		Run Reports	ss ss			
		Report Delivery			Construction Vendor	
					Demo_Admin	
		Notifications	?		Demo_Field_Tech	
					Demo_Vendor	
					Fully Restricted	
					Gen Admin	
					Сапсе	el Apply



Disciplines are another way of managing privileges related to Workplan Tasks. Workplan Tasks are assigned a Discipline and one or more Disciplines can be associated with a Security Role.

A user who is assigned a Security Role with a certain Discipline(s) can update Workplan Task Dates assigned to that Discipline.

Special Workplan Task Privileges override Disciplines.

Security – Global Views and Filters, Menus & Portal

Security assignments for Global View and Filters, Menu Applications and Portals are simple and identical in concept. Simply check the box for the appropriate item you wish to grant privileges to for the selected Security Role.

— <	Security Roles	随 Edit Security Role - Google Chrome			E Search	Edit Security Role - Global Filters			
•	G.Derault Y Unsaved Filter	demoblue.onevizion.com/admin,	/securityroles/Form.do?id=1001685						
O Search for	r	E Search	Edit Security Role - Global Views		General Info	Ø Search for			
Role ID	Role Name	General Info	Ø Search for		Security Groups	Global Filter Name	Trackor Type		
1001685	A&E Vendor		JI Global View Name	Trackor Type	Special Task Privs	□ <u>Applet Name: Mapping</u> (20)			
10000621	Administrator	Security Groups	Global view Name Trackor Type			ALL Matches	Customer Needs		
1001684	Construction Manager	Special Task Privs	□ <u>Applet Name: E-File Browser</u> (1)		Lock Privs				
10000708	Construction Manager (Demo)	Lock Privs	Default	Site	Cell Color Privs	GA 400 Opportunity	Customer Needs		
10000703 Construction Vendor		LOCK PHVS	<u>Applet Name: Mapping</u> (25)			Radius for Skip	Customer Needs		
1002785	Demo_Admin	Cell Color Privs	Test CheckList Checklist		Trackor Restrictions	Central	Project		
1002787	Demo_Field_Tech	Trackor Restrictions	Test Checklist Mapping	Checklist Item	Discipline	Construction Avaiability	Project		
1002788	Demo_Vendor	Discipline	Default Map Matching View	Customer Needs		Dish Demo Map	Project		
1001277	Fully Restricted		Job Mapping Demo	Project	Menu Applications	East	Project		
1001723	Gen Admin	Menu Applications	Default with Status Colors	Registration	Global Views	Job Mapping Demo Base Filter	Project		
10000683	Marketing Demo	Global Views	Test	Registration	Global Filters	South	Project		
10000643	ORA_Dev	Global Filters	Test Company	Scott	Ciobal Pilers		-		
10000663	ORA_Dev_Empty	Global Portals	Backhaul	Site	Global Portals	West	Project		
1001643	Sales	Giobal Portais			Dulas	All Records	Scott		
1001683	Site Acquisition Tech	Rules	Case 106402	Site	Rules	G Solutions Site Database	Site		
10000705	Site Acquisition Vendor (Demo)	Imports	Case 110069	Site	Imports	All (2)	Site		
1001686	Test Administrator		Demo Site Mapping View	Site	Due Due de	Atlanta market	Site		
1001703	Tour Access	Run Reports	Link Testing	Site	Run Reports				
1001644	Vendor/Subcontractor	Report Delivery	Microwave capabilities	Site	Report Delivery	Backhaul Atlanta Market	Site		



Security – Assigned Users

∈		Edit Secur	ity R	ole - Assigned	Users ▼ Unsaved Filte	er 🗸			
Discipl	Discipline Menu Applications		n for			User ID	~		
			£	User Name	EMail	Owner's Trackor Type	Owner's Trackor ID	Disabled	Superuser
Global	Views	100164074		Contractor	contractor@onevizion.co m	Users	Contractor	NO	NO
Global	Filters	100164336		nuser	newuser@onevizion.com	Users	nuser	NO	NO
Global	Portals								
Rules									
Import	S								
Run Re	eports								
Report	Delivery								
Notific	ations								
Notific	ation Types								
Export	Турез								
Tracko	r Tours								
Assign	ed Use <mark>rs</mark>								
Compo	onents Package 0	< >		12 of 2 🔺					
Compo	onents Audit Log	?							



The Assigned Users tab provides a list of all Users who are members of the selected Security Group.

Security – Component Packages

E Search	Edit Security Role - Components Package						
Discipline	V Components Package						
Menu Applications	Closeout Package						
	Expense Reports						
Global Views	Materials and Asset Management						
Global Filters	PO Line Automations						
Global Portals	POs and WOs						
Rules	Priority Automation						
Rules	Requirements						
Imports	Simple Checklist Workflow						
Run Reports							
Report Delivery							
Notifications							
Notification Types							
Export Types							
Trackor Tours							
Assigned Users							
Components Package 0	< > 18 of 8 ~ 🚺						
Components Audit Log							



The Component Packages feature allows users to tag system components such as Trackor Types, Configured Fields, Tabs, Applets, Rules, Reports, etc. with a unique identifier. This effectively "groups" these components into a single package.

The Component Package tag can them be used to filter on all components that comprise that package when running the Components Export feature.

This provides users with a simple and easy way to manage the multiple components that might comprise a new application or applets.

Security – Component Audit Log

The Security Component Audit Log tracks all additions, deletions and update made to a Security Role. The Component Audit Log tracks the Date/Time, the User making the transaction, the Action taken, the Field or Component acted upon, the Old Value and the Current Value. An optional Config Session ID can also be assigned.

E Search	1001700 Edit Security Role - Components Audit Log										
Discipline	D Search for	O Search for					Log ID 🗸				
Menu Applications	Log ID	Date/Time	User	Action	Affected Table	Field	New Value	Old Value	Config Session		
Global Views	1001857449	10/21/2019 02:46:07		Insert	М	(SEC_GROUP_SYSTE M.UPPER("SECURITY _GROUP"))	USERS				
Global Filters	1001855409	10/16/2019 12:13:02		Insert	SEC_ROLE_OBJ_XREF	SEC_GROUP_TYPE_I D	18				
Global Portals		10,10,2017 12.10.02		moore		(TOKEN_TYPE.TOKE N_TYPE_ID)					
Rules	1001854475	09/27/2019 14:46:06		Insert	SEC_ROLE_PRIV_SYSTE	SEC_GROUP_SYSTE M_ID (SEC_GROUP_SYSTE	SHOW_FILTER_BUTTON				
Imports	1001004470	09/27/2019 14.40.00		maert	М	M.UPPER("SECURITY _GROUP"))					
Run Reports	1001854475	09/27/2019 14:46:06		Insert	SEC_ROLE_PRIV_SYSTE M	PRIV	R				
Report Delivery	1001854474	09/27/2019 14:46:06		Insert	SEC_ROLE_PRIV_SYSTE M	PRIV	R				
Notifications					SEC_ROLE_PRIV_SYSTE	SEC_GROUP_SYSTE M_ID					
Notification Types	1001854474	09/27/2019 14:46:06		Insert	M	(SEC_GROUP_SYSTE M.UPPER("SECURITY _GROUP"))	SHOW_VIEW_BUTTON				
Export Types						SEC_GROUP_TYPE_I					
Trackor Tours	1001853517	09/25/2019 06:58:25		Insert	SEC_ROLE_OBJ_XREF	(TOKEN_TYPE.TOKE N_TYPE_ID)	18				
Assigned Users						SEC_GROUP_TYPE_I					
Components Package 0	< >	1100 of 598 🖍 🚼									
Components Audit Log	?							ок	Cancel Apply		

