



OneVizion

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
 - 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:
 - 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
- Use Security Roles to control access to data at the tab level and to control the ability to create relationships among Tracker 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 Tracker Restrictions to control access to records based upon Parent-Child relationships

Security Best Practices, Topics and Recommendations



- 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)

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

Role ID	Role Name
1001277	Fully Restricted
1001643	Sales
1001644	Vendor/Subcontractor
1001683	Site Acquisition Tech
1001684	Construction Manager
1001685	A&E Vendor
1001686	Test Administrator
1001703	Tour Access
1001723	Gen Admin
1002785	Demo_Admin
1002787	Demo_Field_Tech
1002788	Demo_Vendor
10000621	Administrator
10000643	ORA_Dev
10000663	ORA_Dev_Empty
10000683	Marketing Demo
10000703	Construction Vendor
10000705	Site Acquisition Vendor (Demo)
10000708	Construction Manager (Demo)

Default Privs	Read	Edit	Add	Delete
Application Migration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Application Process Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Audit & Log	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Build Application	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Chat & Comment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cell Color	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Configured Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Configured Tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dashboard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Data Ingestion	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Data View	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Design Application	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documentation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feature Visibility	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Integration Hub	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Default Assignments	Assigned
Discipline	<input checked="" type="checkbox"/>
Menu Application	<input checked="" type="checkbox"/>
Global View	<input checked="" type="checkbox"/>
Global Filter	<input checked="" type="checkbox"/>
Global Portal	<input checked="" type="checkbox"/>
Rule	<input checked="" type="checkbox"/>
Import	<input checked="" type="checkbox"/>
Report	<input checked="" type="checkbox"/>
Global Notification	<input checked="" type="checkbox"/>
Chat Notification	<input checked="" type="checkbox"/>
Tracker Tours	<input checked="" type="checkbox"/>

Security – Security Groups

HINT: Quick Search to find tokens and
✓✓ to Select All in a Filtered Data Set

The screenshot shows the 'Edit Security Role - Security Groups' interface. On the left is a list of roles, with 'Administrator' (Role ID 10000621) highlighted. The main area displays a table of security groups with columns for 'Security Group', 'Type', 'Description', and 'Privileges'. The 'Privileges' column includes checkboxes for Read, Edit, Add, Delete, and None. A red arrow points from the 'Administrator' role in the list to the 'Assigned Vendors applet' row in the table.

Security Group	Type	Description	Privileges				
			Read	Edit	Add	Delete	None
Google Mapping For Candidate	Configured Applet	[Visio Map] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
APPLET_WF	Configured Applet	[Workflow] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Assigned Vendors applet	Configured Applet	[Project] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
BH Engineering Applet	Configured Applet	[Visio Map] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
BID_OPP	Configured Applet	[Leads and Opportunities] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
ClearPath Visio Link Properties	Configured Applet	[BackHau] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
ClearPath Visio Site Properties	Configured Applet	[Site] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
CloseoutPackageAdmin	Configured Applet	[Closeout Package] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
CloseoutPackageVendor	Configured Applet	[Closeout Package] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
CloseoutPackageVendorMobile	Configured Applet	[Closeout Package] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Demo External Applet	Configured Applet	[Site] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Document Collection for Vendor	Configured Applet	[Site] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Document Process	Configured Applet	[Documents] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Driving Directions - User to Candidate	Configured Applet	[Visio Map] Applet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="checkbox"/>

Use Security Tokens to set privileges for:

- Applets
- Configured Tabs
- Dashboards
- Tracker Relationships
- Super User Privileges
- Tracker Types
- Workplan Tasks

R=Read
E=Edit
A=Add
D=Delete
and, None

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

REMINDER – Adding a “None” Removes that Privilege

Security – Lock Privileges

The screenshot displays the 'Edit Security Role - Lock Privs' configuration page in a web browser. On the left, a sidebar menu lists various security settings, with 'Lock Privs' highlighted in blue. A red arrow points from this menu item to the 'Lock Privs' section of the main configuration area. The main area contains a table of 'Lockable Trackors' with columns for 'Lockable Trackors Name', 'Trackors Type', 'Tracker Type', 'Description', and 'Privileges'. The 'Privileges' column includes checkboxes for 'Lock', 'Unlock', and 'None'. The role ID '10000705' is highlighted in the sidebar, and the role name 'Site Acquisition Vendor (Demo)' is visible in the table below the sidebar.

Lockable Trackors Name	Trackors Type	Tracker Type	Description	Privileges		
				Lock	Unlock	None
C_PUBLISH_TO_MOBILE	Field	Site		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
C SCIP_APPROVAL	Field	Site		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
C SCIP_READY_FOR_REVIEW	Field	Site		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
N_XITOR_KEY_ALT1	Field	Site	Your field definition seen here!!!!	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SITE_TYPE_BH	Field	Site	BH Site Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SITE_TYPE_POP	Field	Site	POP Site Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SITE_TYPE_RF	Field	Site	RF Site Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S_DD_1A_2C	Field	Site		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S_NAME	Field	Site	Site.XITOR_NAME	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S_SITE_BROCHURE	Field	Site	Site Brochure from PDF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S_STRUCTURAL_CAPACITY	Field	Site		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 – Tracker Restrictions

The screenshot displays the 'Security Roles' management interface. On the left, a table lists various roles, with '10000705 Site Acquisition Vendor (Demo)' highlighted. A red arrow points from this role to the 'Tracker Restrictions' tab in the left-hand navigation menu. The main content area shows the configuration for this role, including a table of tracker types and their restriction modes.

Tracker Type	Restriction Mode
ASR	Union
Accounts	Intersection
Area	
Automation	
BHR Order E-Files	
BHR Order Memos	
BHR Orders	
BTA	
BTA Tool	
BackHaul	
Bill of Materials	
CX Vendor Bids	
Call Sign	
Campaign	
Change Order Communications	
Change Orders	

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

1. Determine what Tracker 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 – Tracker Restrictions

The screenshot displays the 'Vendor Contacts' application interface. A modal window is open for editing the profile of William Powell, an Account Executive at Roland Power Service Company. The left sidebar contains a navigation menu with options like 'VC:General Info', 'VC:Security Roles', and 'VC:Tracker Restrictions'. The main form area shows fields for user credentials, contact information, and tracking details. A red box highlights the 'VC:Tracker Restrictions' menu item and the 'M:Market' and 'V:Vendor ID' fields in the form.

V:Vendor ID	VC:Full Name	VC>Title	VC:First Name	VC:Last Name	VC:Mobile Phone	VC:Office Phone	VC:Email Address
North American Van Lines	Julienne Judson						Juson@VendorDemo.com
North American Van Lines	Johnathon Viator						Jotor@VendorDemo.com
North American Van Lines	Jennell Simone						Jeone@VendorDemo.com
North American Van Lines	Melissa Mccollor						Melom@VendorDemo.com
North American Van Lines	Jorge Jaimes						Jomes@VendorDemo.com
Quality Telecom	Heide Hippert						Heerl@VendorDemo.com
Quality Telecom	Caleb Condon						Caron@VendorDemo.com
Quality Telecom	Carma Carreon						Caeon@VendorDemo.com
Quality Telecom	Doyle Donegan						Dogan@VendorDemo.com
Quality Telecom	James Johnson						Jason@VendorDemo.com
Quality Telecom	Grace Gilpin						Gipin@VendorDemo.com
Quality Telecom	Charlene Shealy						Chaly@VendorDemo.com
Quality Telecom	Florine Cuddy						Fiddy@VendorDemo.com
Quality Telecom	Miles Pardo						Mirdo@VendorDemo.com
Quality Telecom	Jacinda Jenkins						Jains@VendorDemo.com
RightCab, Inc	Krysten Seaman						krysten.seaman@rightcab.com
RightCab, Inc	Luis Davenport	Account Executive	Luis	Davenport	804-507-5812	804-326-6945	luis.davenport@rightcab.com
Roland Power Service Company	William Powell	Account Executive	William	Powell	971-533-8326	971-350-5066	william.powell@generac.com
Roland Power Service Company	Tony Roland	Account Executive	Tony	Roland	404-359-1567	404-359-1000	troland@rolandpwr.net
Site Acquisition Specialists	Kimiko Knapp	Leasing Specialist	Kimiko	Knapp	265-351-6868	866-258-2658	Kiapp@VendorDemo.com
Site Acquisition Specialists	Delma Dodrill	A&E Specialist	Delma	Dodrill	556-278-7148	878-023-2934	Deill@VendorDemo.com
Site Acquisition Specialists	Despina Duhaime	Compliance Specialist	Despina	Duhaime	440-900-4677	366-970-8039	Deime@VendorDemo.com

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

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

Tracker Restrictions

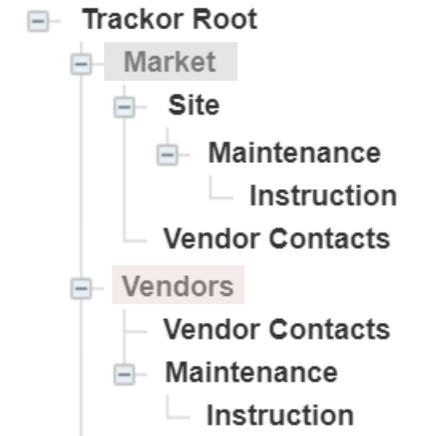
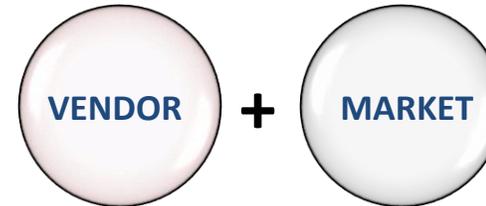
Vendor Contact	Vendor	Market
William Powell	Roland Power Service Company	Atlanta
Tony Roland	Roland Power Service Company	Los Angeles

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

1..15 of 15 Powered by OneVizion®

Tracker 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

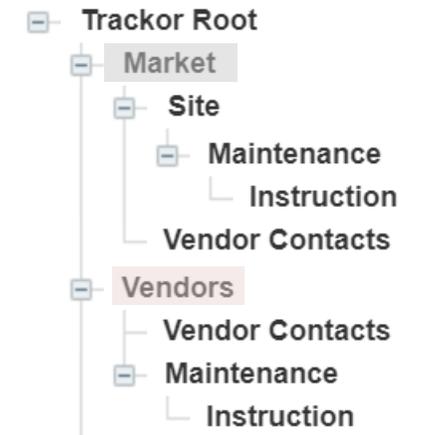
Maint:Maintenance ID	M:Market	V:Vendor ID	Maint:Maintenance Class
AL13936-0002	Atlanta	Roland Power Service Company	Generator
CA10018-0001	Atlanta	Roland Power Service Company	Generator

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

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

The screenshot displays the OneVizion Security Roles management interface. On the left, a table lists various security roles. The 'Edit Security Role - Discipline' window is open, showing a list of disciplines with checkboxes. The 'Edit Disciplines - Role Assignments' window is also open, showing a list of security roles with checkboxes.

Role ID	Role Name
1001685	A&E Vendor
10000621	Administrator
1001684	Construction Manager
10000708	Construction Manager (Demo)
10000703	Construction Vendor
1002785	Demo_Admin
1002787	Demo_Field_Tech
1002788	Demo_Vendor
1001277	Fully Restricted
1001723	Gen Admin
10000683	Marketing Demo
10000643	ORA_Dev
10000663	ORA_Dev_Empty
1001643	Sales
1001683	Site Acquisition Tech
10000705	Site Acquisition Vendor (Demo)
1001686	Test Administrator
1001703	Tour Access
1001644	Vendor/Subcontractor

Edit Security Role - Discipline

Discipline	Description
<input checked="" type="checkbox"/> A&E	Architecture and Engineering Team
<input type="checkbox"/> BH	Backhaul Team
<input type="checkbox"/> COM	Commissioning Team
<input type="checkbox"/> CON	Construction
<input type="checkbox"/> CX	Construction Team
<input type="checkbox"/> ENG	Engineering
<input type="checkbox"/> ENT	Entitlements / Leasing Team
<input type="checkbox"/> LOG	
<input type="checkbox"/> OPS	
<input type="checkbox"/> PERM	
<input type="checkbox"/> PM	
<input type="checkbox"/> PMG	
<input type="checkbox"/> PWR	
<input checked="" type="checkbox"/> REG	
<input type="checkbox"/> SA	
<input type="checkbox"/> SAM	
<input type="checkbox"/> SS	

Edit Disciplines - Role Assignments

Security Role
<input checked="" type="checkbox"/> A&E Vendor
<input checked="" type="checkbox"/> Administrator
<input checked="" type="checkbox"/> Construction Manager
<input checked="" type="checkbox"/> Construction Manager (Demo)
<input type="checkbox"/> Construction Vendor
<input type="checkbox"/> Demo_Admin
<input type="checkbox"/> Demo_Field_Tech
<input checked="" type="checkbox"/> Demo_Vendor
<input type="checkbox"/> Fully Restricted
<input type="checkbox"/> Gen Admin

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.

Edit Security Role - Global Views

Global View Name	Tracker Type
Applet Name: E-File Browser (1)	
<input checked="" type="checkbox"/> Default	Site
Applet Name: Mapping (25)	
<input checked="" type="checkbox"/> Test CheckList	Checklist
<input checked="" type="checkbox"/> Test Checklist Mapping	Checklist Item
<input checked="" type="checkbox"/> Default Map Matching View	Customer Needs
<input checked="" type="checkbox"/> Job Mapping Demo	Project
<input checked="" type="checkbox"/> Default with Status Colors	Registration
<input checked="" type="checkbox"/> Test	Registration
<input type="checkbox"/> Test Company	Scott
<input checked="" type="checkbox"/> Backhaul	Site
<input checked="" type="checkbox"/> Case 106402	Site
<input checked="" type="checkbox"/> Case 110069	Site
<input checked="" type="checkbox"/> Demo Site Mapping View	Site
<input checked="" type="checkbox"/> Link Testing	Site
<input checked="" type="checkbox"/> Microwave capabilities	Site

Edit Security Role - Global Filters

Global Filter Name	Tracker Type
Applet Name: Mapping (20)	
<input checked="" type="checkbox"/> ALL Matches	Customer Needs
<input checked="" type="checkbox"/> GA 400 Opportunity	Customer Needs
<input checked="" type="checkbox"/> Radius for Skip	Customer Needs
<input checked="" type="checkbox"/> Central	Project
<input checked="" type="checkbox"/> Construction Availability	Project
<input checked="" type="checkbox"/> Dish Demo Map	Project
<input checked="" type="checkbox"/> East	Project
<input checked="" type="checkbox"/> Job Mapping Demo Base Filter	Project
<input checked="" type="checkbox"/> South	Project
<input checked="" type="checkbox"/> West	Project
<input type="checkbox"/> All Records	Scott
<input checked="" type="checkbox"/> 3G Solutions Site Database	Site
<input checked="" type="checkbox"/> All (2)	Site
<input checked="" type="checkbox"/> Atlanta market	Site
<input checked="" type="checkbox"/> Backhaul Atlanta Market	Site

Security – Assigned Users

← Search

Edit Security Role - Assigned Users Unsaved Filter

Search for User ID

User ID	User Name	E-Mail	Owner's Tracker Type	Owner's Tracker ID	Disabled	Superuser
100164074	Contractor	contractor@onevizion.com	Users	Contractor	NO	NO
100164336	nuser	newuser@onevizion.com	Users	nuser	NO	NO

1..2 of 2

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

Security – Component Packages

The screenshot shows the 'Edit Security Role - Components Package' interface. On the left, a sidebar contains a search bar and a list of categories: Discipline, Menu Applications, Global Views, Global Filters, Global Portals, Rules, Imports, Run Reports, Report Delivery, Notifications, Notification Types, Export Types, Tracker Tours, Assigned Users, Components Package (highlighted with a blue bar and '0'), and Components Audit Log. The main content area is titled 'Edit Security Role - Components Package' and features a table with the following items:

<input checked="" type="checkbox"/>	Components Package
<input type="checkbox"/>	Closeout Package
<input type="checkbox"/>	Expense Reports
<input type="checkbox"/>	Materials and Asset Management
<input type="checkbox"/>	PO Line Automations
<input type="checkbox"/>	POs and WOs
<input type="checkbox"/>	Priority Automation
<input type="checkbox"/>	Requirements
<input type="checkbox"/>	Simple Checklist Workflow

At the bottom of the table, there is a pagination control showing '< > 1..8 of 8 ^ []' and a help icon (question mark in a speech bubble).

The Component Packages feature allows users to tag system components such as Tracker 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 then 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.

←

1001700

Edit Security Role - Components Audit Log

Search for
Log ID ▼

Log ID	Date/Time	User	Action	Affected Table	Field	New Value	Old Value	Config Session
1001857449	10/21/2019 02:46:07		Insert	SEC_ROLE_PRIV_SYSTEM	(SEC_GROUP_SYSTEM_UPPER("SECURITY_GROUP"))	SHOW_FILTER_BUTTON		
1001855409	10/16/2019 12:13:02		Insert	SEC_ROLE_OBJ_XREF	SEC_GROUP_TYPE_ID (TOKEN_TYPE.TOKEN_TYPE_ID)	18		
1001854475	09/27/2019 14:46:06		Insert	SEC_ROLE_PRIV_SYSTEM	SEC_GROUP_SYSTEM_ID (SEC_GROUP_SYSTEM_UPPER("SECURITY_GROUP"))	SHOW_FILTER_BUTTON		
1001854475	09/27/2019 14:46:06		Insert	SEC_ROLE_PRIV_SYSTEM	PRIV	R		
1001854474	09/27/2019 14:46:06		Insert	SEC_ROLE_PRIV_SYSTEM	PRIV	R		
1001854474	09/27/2019 14:46:06		Insert	SEC_ROLE_PRIV_SYSTEM	SEC_GROUP_SYSTEM_ID (SEC_GROUP_SYSTEM_UPPER("SECURITY_GROUP"))	SHOW_VIEW_BUTTON		
1001853517	09/25/2019 06:58:25		Insert	SEC_ROLE_OBJ_XREF	SEC_GROUP_TYPE_ID (TOKEN_TYPE.TOKEN_TYPE_ID)	18		
					SEC_GROUP_TYPE_I			

< >
1..100 of 598 ^ □

?
OK
Cancel
Apply

←

Components Audit Log

- Discipline
- Menu Applications
- Global Views
- Global Filters
- Global Portals
- Rules
- Imports
- Run Reports
- Report Delivery
- Notifications
- Notification Types
- Export Types
- Tracker Tours
- Assigned Users
- Components Package 0