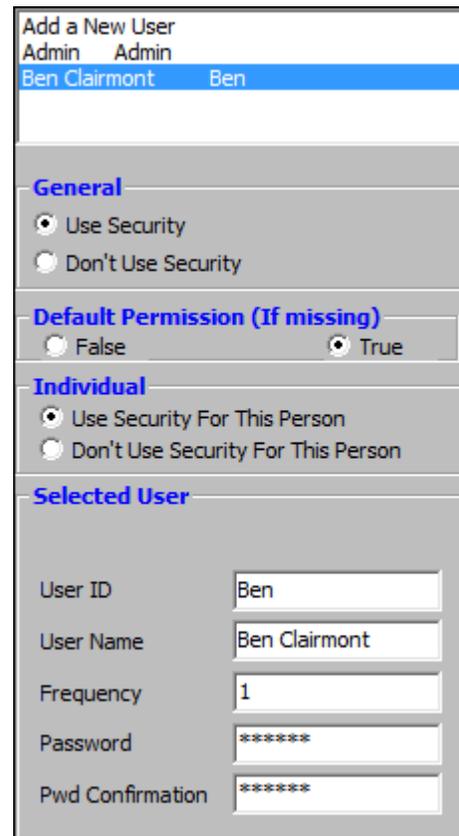


The user and security system in TRIO is designed to give system administrators the ability to grant, deny or limit access to the various TRIO applications for individual users. This help sheet covers the basics of user and security setup and maintenance in the system.

Security Setup

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 username and password used to log into TRIO and click **OK** to access the Security Setup screen.

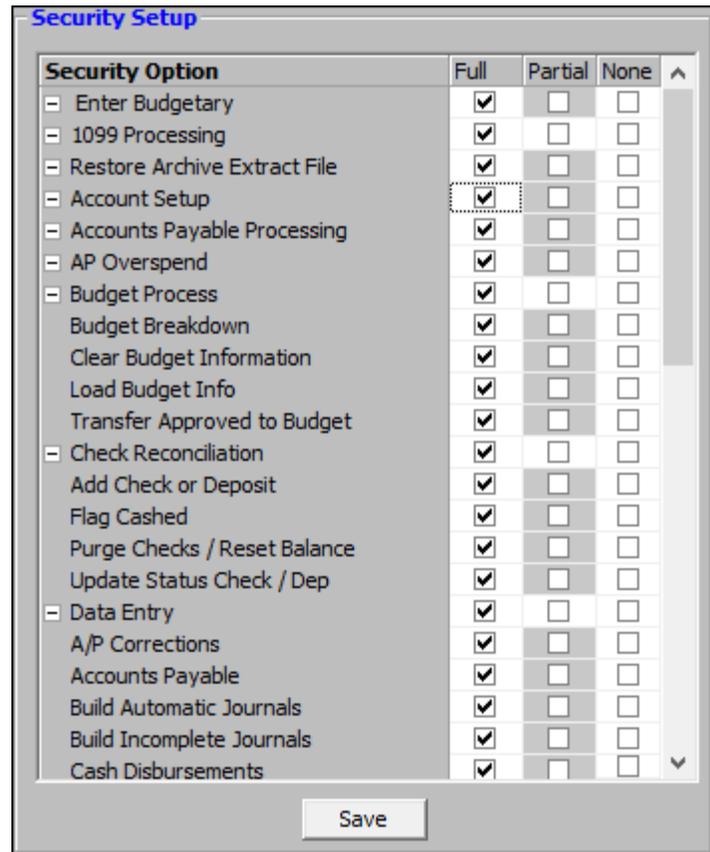
- **Users** – The box on the top left of this screen shows the users that are already set up in the system as well as the option to **Add a New User**.
- **General** – This section enables or disables the use of security in TRIO as a whole. If security is not used then any settings made on this screen will be ignored by the system.
- **Default Permissions** – This 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.
- **Individual** – This section is used to activate security for the currently selected user. If **Don't Use Security For This Person** is selected, the user will have full access to every part of TRIO.
- **Selected User** – This section is used to configure the settings specific to the user selected above. The **User ID** is used for logging into TRIO. The **User Name** is linked to the User ID and will display on any reports which reference the user. **Frequency** determines how often the user must change their password; the number entered is the number of days between the mandatory password changes. The **Password** and **Password Confirmation** fields are used to set the users initial password.



The individual TRIO programs are listed in the drop-down box on the right side of the screen. Selecting an application will list all of the areas of that program along with the processes in that area. The three columns to the right of the various areas, **Full, Partial, and None**, determine the level of access for that area or process.

- **Full** grants access to the area or process
- **None** denies access to the area or process
- **Partial** is automatically selected if there is a mix of **Full** or **None** for the area's processes.

If a user should not have access to a module at all, Budgetary for example, select **General Entry** in the program dropdown list and set the **Entry into Budgetary** to **None**.



To access security settings in TRIO

1. Log into TRIO as 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 TRIO application on the right and then select whether the user has Full or None for privileges for the particular area or process in that application.
3. Click **Save** on the bottom of the screen and **F12** to save and exit.

To add a new user and change their permissions

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 John Smith 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. Entering a 0 means that users will never be forced to change their passwords. **For security purposes, it is highly recommended that passwords are changed regularly (30, 60, 90 days for example).**
5. Enter a password for the new users into the **Password** and **Confirm Password** fields. Users can change their own password at any time by selecting **File > Options > Change User Password** from General Entry.
6. Press **F11** to save the new user
7. Select an application from the drop down box on the right side of the screen
8. Select what privileges the selected user has for each area of that program: **Full** or **None**.
9. Press **F12** to save and exit.