

Add User Security levels for each user in the system.

Explanation:

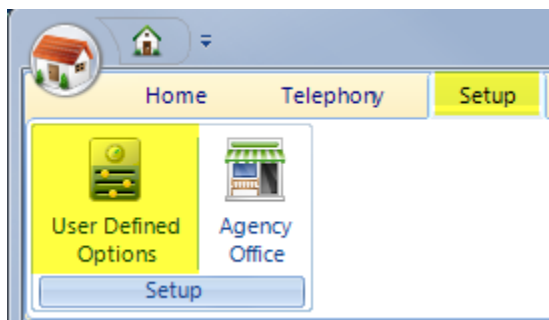
Adding User Security to each user in HomeTrak Companion is considerably different than in your current version of HomeTrak. In version 7.1 of HomeTrak, you enter in each security option to the user as you enter the user to the system.

In HomeTrak Companion security templates or profile groups have been added in the “User Defined Options” tool located in the “Setup” tab. You can add new profiles in this section as well as edit any existing profiles already in the system. These profiles contain security options relevant to the name, for example the scheduler profile may contain only the options that are relevant to scheduling.

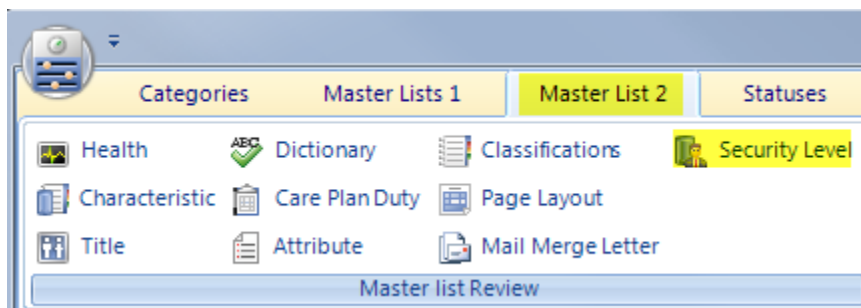
In the “Agency Office” tool located in the “Setup” tab you can set up the users and add security profiles to each user. Each user in your current 7.1 version of HomeTrak will be migrated into HomeTrak Companion, however once the migration into HomeTrak Companion has taken place the appropriate security profile must be added to each user.

Review and Add Profiles:

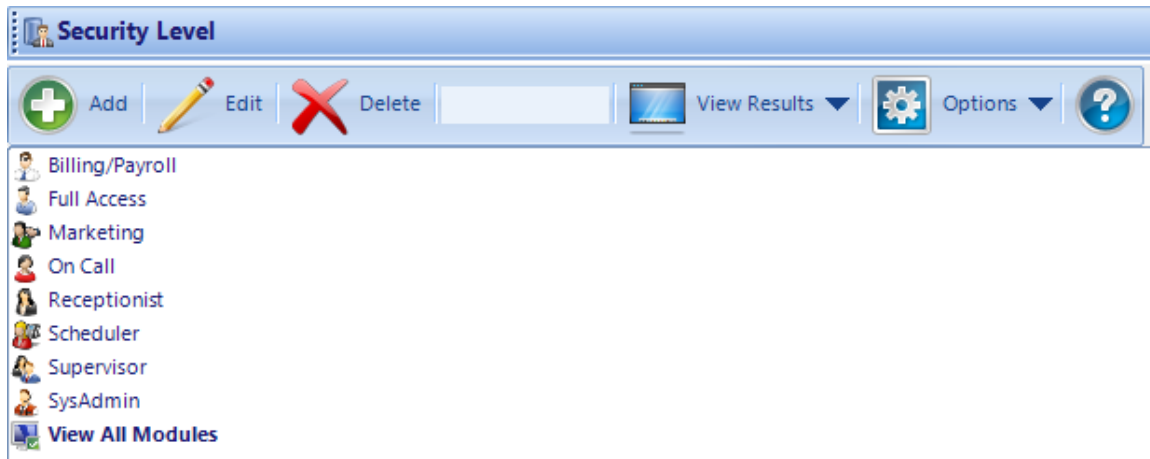
In the “Setup” tab from the main menu, click on the “User Defined Options” tool.



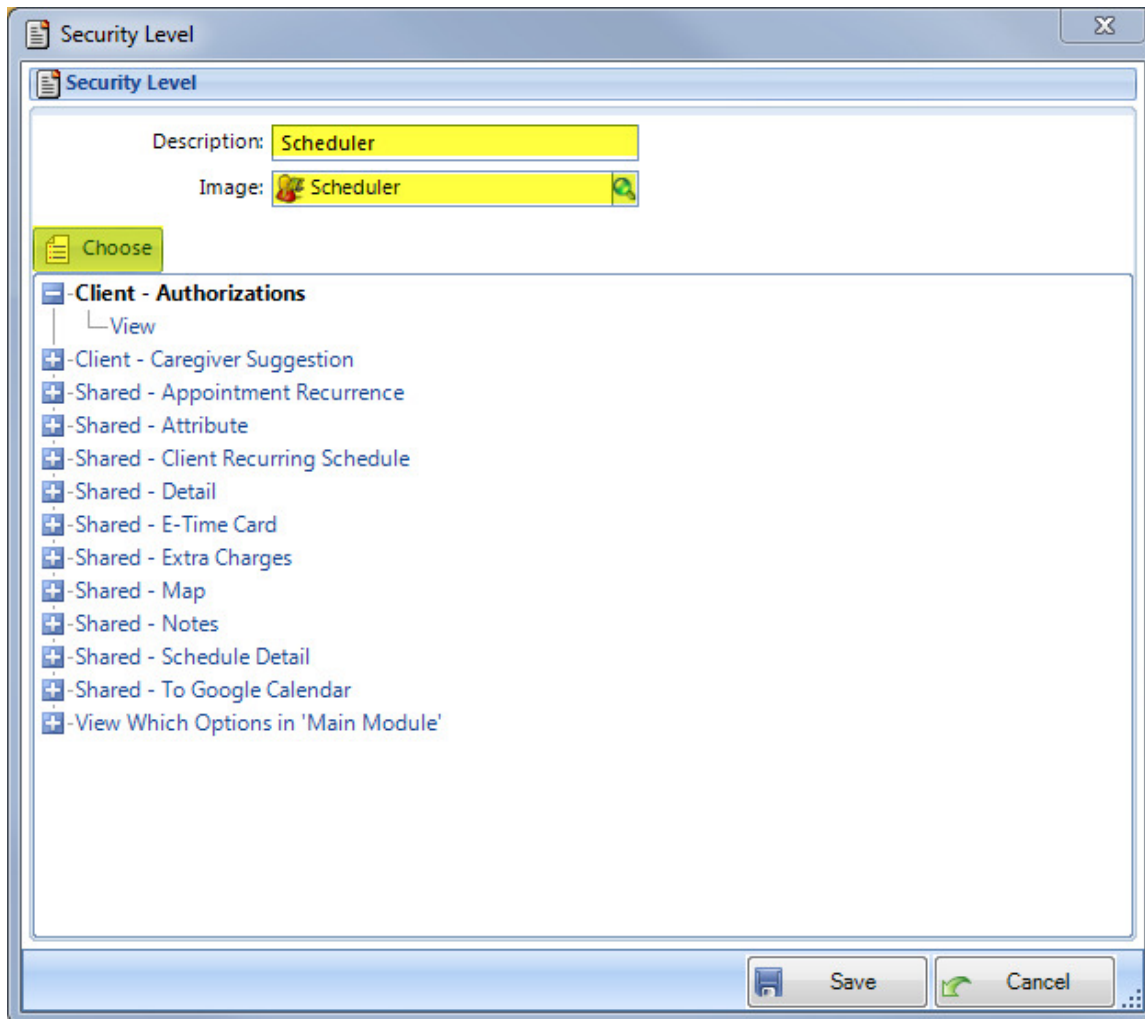
In the “Master List 2” tab; click on the “Security Level” tool.



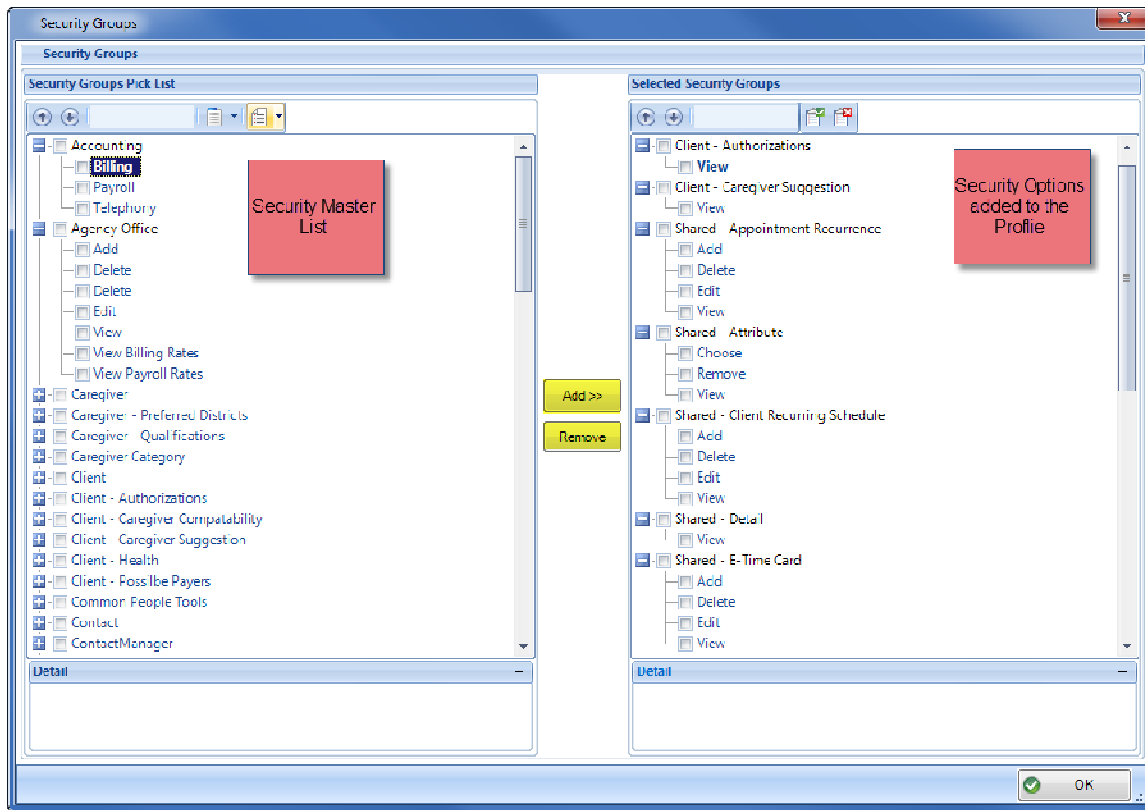
In the security section you will view all of the access profiles created in HomeTrak Companion. It is here that you can review, edit, add new or delete profiles.



When you add or edit a profile, you change the description and image for the profile. In order to add or edit security options for the profile you must click on the “Choose” tab.

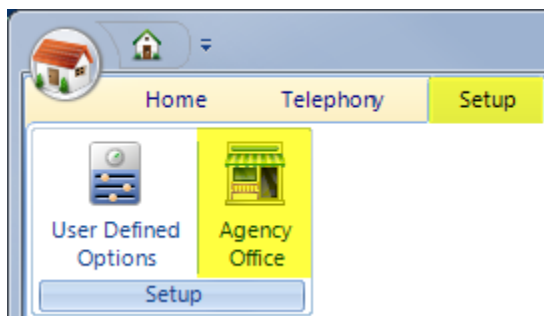


When you click on the “Choose” tab the Security Groups pick list screen appears allowing you to add or remove security options to the right hand side list.

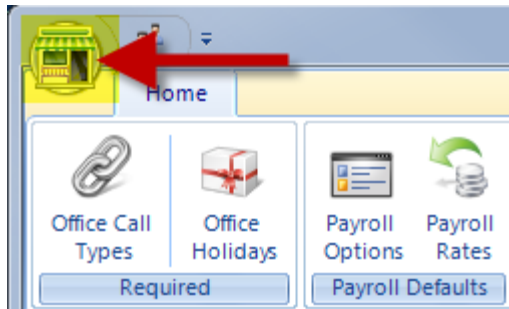


Once you have reviewed the security options for each profile and made the necessary changes and additions you are now ready to add the profile to the individual users.

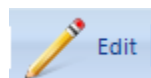
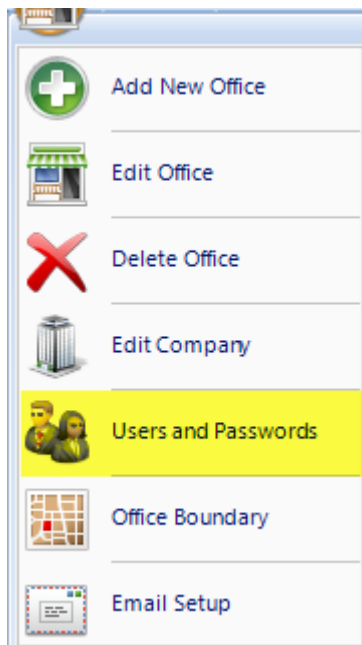
In the “Setup” tab from the main menu, click on the “Agency Office” tool.



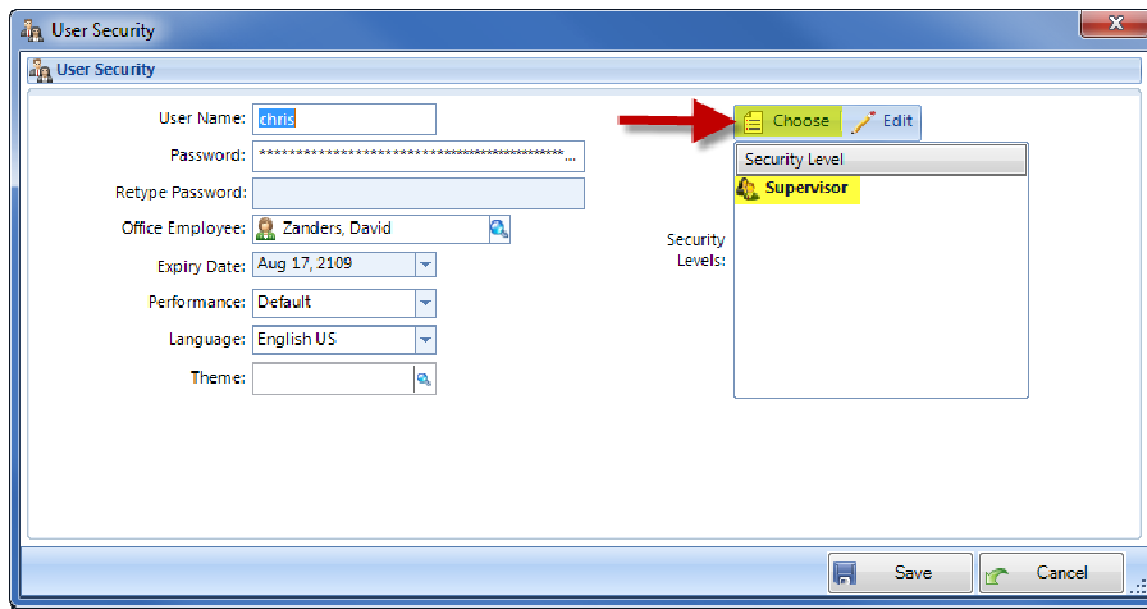
Click on the main agency tool in the upper left of the Agency Office screen to access the Users and Passwords.



Click on the “Users and Passwords” option to view, add, edit and delete a user/users to your system. This is also where you can add security profiles to each user.



When you edit a User Security record, the User Security window appears. On the right is a list of all the security profiles added to that user. You can add or remove profiles to the user by clicking on the “Choose” tab.



You can now add or remove security profiles to the user using the pick list.

