



## User Administration – Vaultview Security

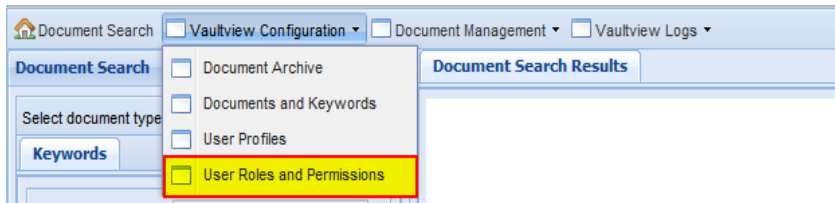
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User Administration using Vaultview Security allows Vaultview Administrators to define Roles and Permissions within Vaultview to grant users access to functions and document types within Vaultview. The following instructions outline the steps in configuring Vaultview Security.

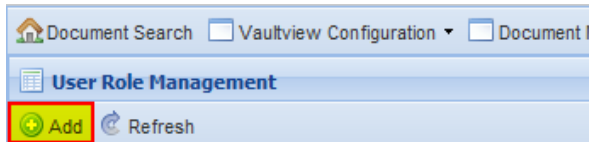
### Configuring User Roles

User Roles are a predefined set of permissions to allow viewing, editing of documents within Vaultview, and / or access to specific Vaultview functions.

1. Under the Vaultview Configuration menu, select User Roles and Permissions.



2. Click the Add button on the User Role Management configuration screen.



3. Enter the Name and Description of your desired User Role. (ie. Name: Acct Admins, Acct Users . Description is optional.) Click Add when finished.

A screenshot of a dialog box titled 'Add - User Role'. The dialog box has a light blue background and contains two input fields: 'Name:' with a text box and 'Description:' with a larger text area. At the bottom of the dialog box, there are two buttons: a green 'Add' button with a plus sign icon and a red 'Cancel' button with an 'X' icon.



4. Once a User Role has been created, it must be configured through the User Role Management menu.

The screenshot shows the 'User Role Management' interface. At the top, there are navigation links: 'Document Search', 'Vaultview Configuration', 'Document Management', and 'Vaultview Logs'. Below these is a 'User Role Management' header with 'Add' and 'Refresh' buttons. A table lists four user roles:

	Name	Description	Administrator Role	User Role Management
1	Acct Admin		false	Management
2	IT Admin		false	Edit, Delete
3	User	User Role	false	Assign Application, Assign Menu, Document Permission, Login Setting
4	Admin Role	Admin Role	true	

The context menu for the 'Admin Role' is open, showing options: 'Management', 'Edit', 'Delete', 'Assign Application' (highlighted in red), 'Assign Menu', 'Document Permission', and 'Login Setting'.

5. Assign Applications as required for your User Role. Click Save when finished.

- a. *Base System Module* – Should be restricted to Vaultview System Administrators **ONLY**.
- b. *Vaultview Configuration* – Allows Vaultview Administrators to Create and Configure New Vaultview Document Types, and perform User Administration.
- c. *Document Management* – Allows Vaultview Users to access the Vaultview Internal Mailbox and manually upload and index documents.
- d. *Vaultview Log* – Allows Vaultview Administrators to view the Vaultview Audit Logs.

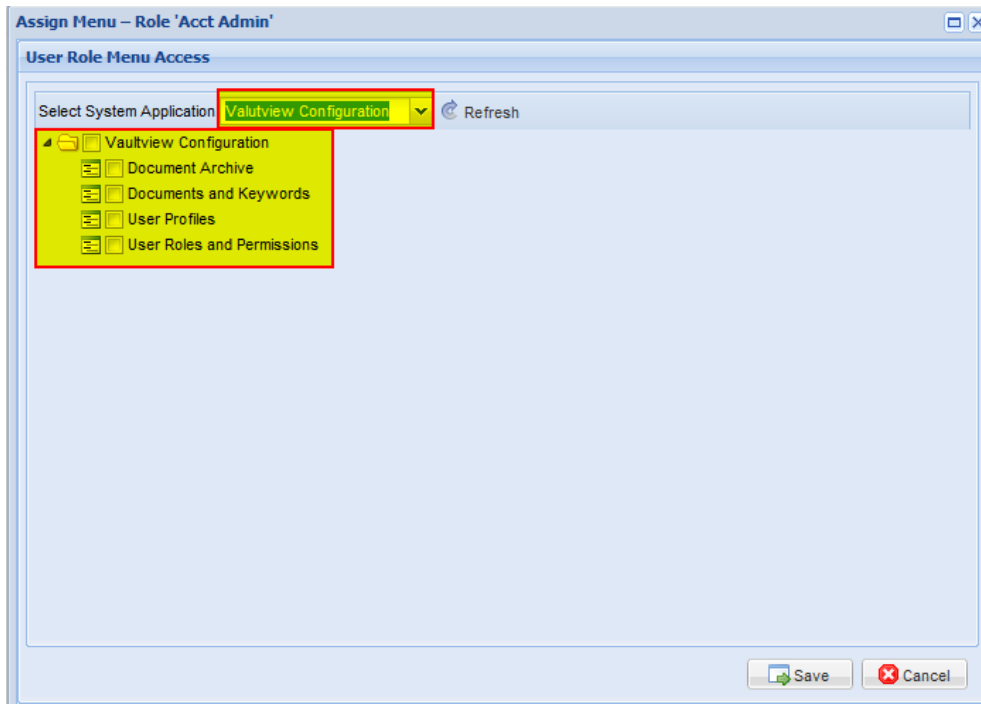
The screenshot shows the 'Assign Application - User Role 'Acct Admin'' dialog box. It has a title bar with a close button. The main area is titled 'User Role Application Access' and is split into two panes: 'Available Applications' and 'Assigned Applications'. The 'Available Applications' pane contains a table with the following entries:

Application Name
Vaultview Configuration
Document Management
Vaultview Log

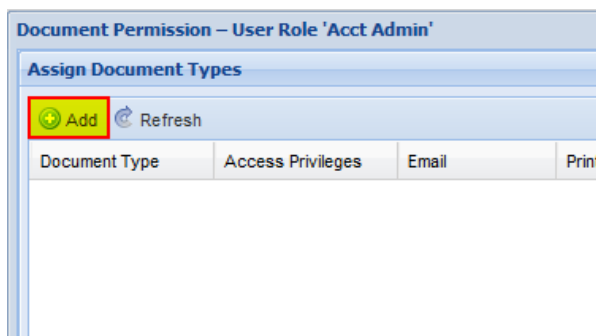
The 'Assigned Applications' pane is currently empty. Between the panes are four arrow buttons for navigation. At the bottom right, there are 'Save' and 'Cancel' buttons.



6. Assign Menu as required for your User Role. Click Save When Finished.
  - a. Vaultview Configuration Menu - Click Save When Finished.
    - i. Document Archive – Vaultview Image Repository. (Changes to the Document Archive could have adverse effects on the Vaultview System and should not be done without consulting Tronitech Technical Support.)
    - ii. Documents and Keywords – Document and Keyword Administration.
    - iii. User Profiles – User Administration.
    - iv. User Roles and Permissions – User Role Administration.
  - b. Document Management Menu - Click Save When Finished.
    - i. Mailbox – Vaultview Internal Mail.
    - ii. Manual Upload – Single Document Upload and Index.
  - c. Vaultview log - Click Save When Finished.
    - i. User Security Audit Log.
    - ii. Document Management Audit Log.

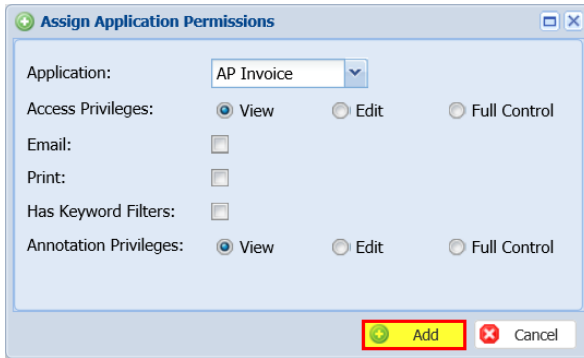


7. Document Permission as required for your User Role. Click Save When Finished.
  - a. Click Add





b. Select the Document Type and Configure Permissions. Click Add When Finished.



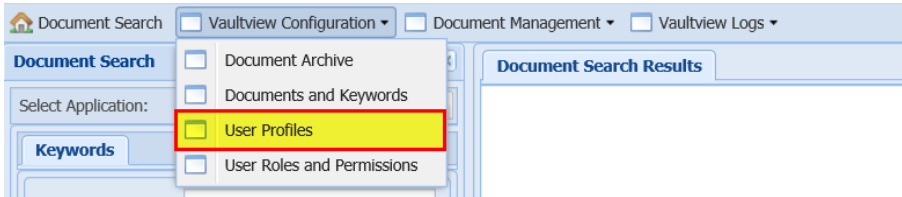
Note: Without a Keyword Filter Role members can see all images in the document types they have access to. Keyword Filters allow the Vaultview Administrator to restrict Role members to specific documents with a document type. (ie. Can only view Invoices starting with ABC)

Multiple Document Types can be added to the User Role.

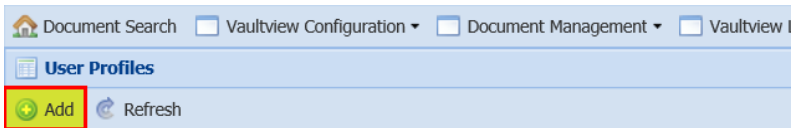
### Configuring User Profiles

User Profiles are user credentials that are assigned to specific User Roles within Vaultview which grant or restrict access to documents and / or functions within Vaultview.

1. Under the Vaultview Configuration menu, select User Profiles.



2. Click the Add button on the User Profiles configuration screen.



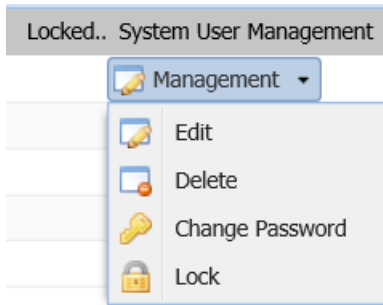


8. Enter the User Profile information:
  - a. Select the desired User Role
  - b. Enter the desired Login ID
  - c. Enter the User Full name
  - d. Enter the User email address
  - e. Enter the User initial password.
  - f. Confirm password.
  - g. Comments are optional settings

Note: The user will be prompted to reset their password the first time they login to Vaultview.

### User Administration

If a user needs to be edited, removed, have a password reset, locked or unlocked, select the corresponding item from the User Profile Management menu.





## Contact Information

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