



System Security

Security Administration

Username, Password and System

Access Management

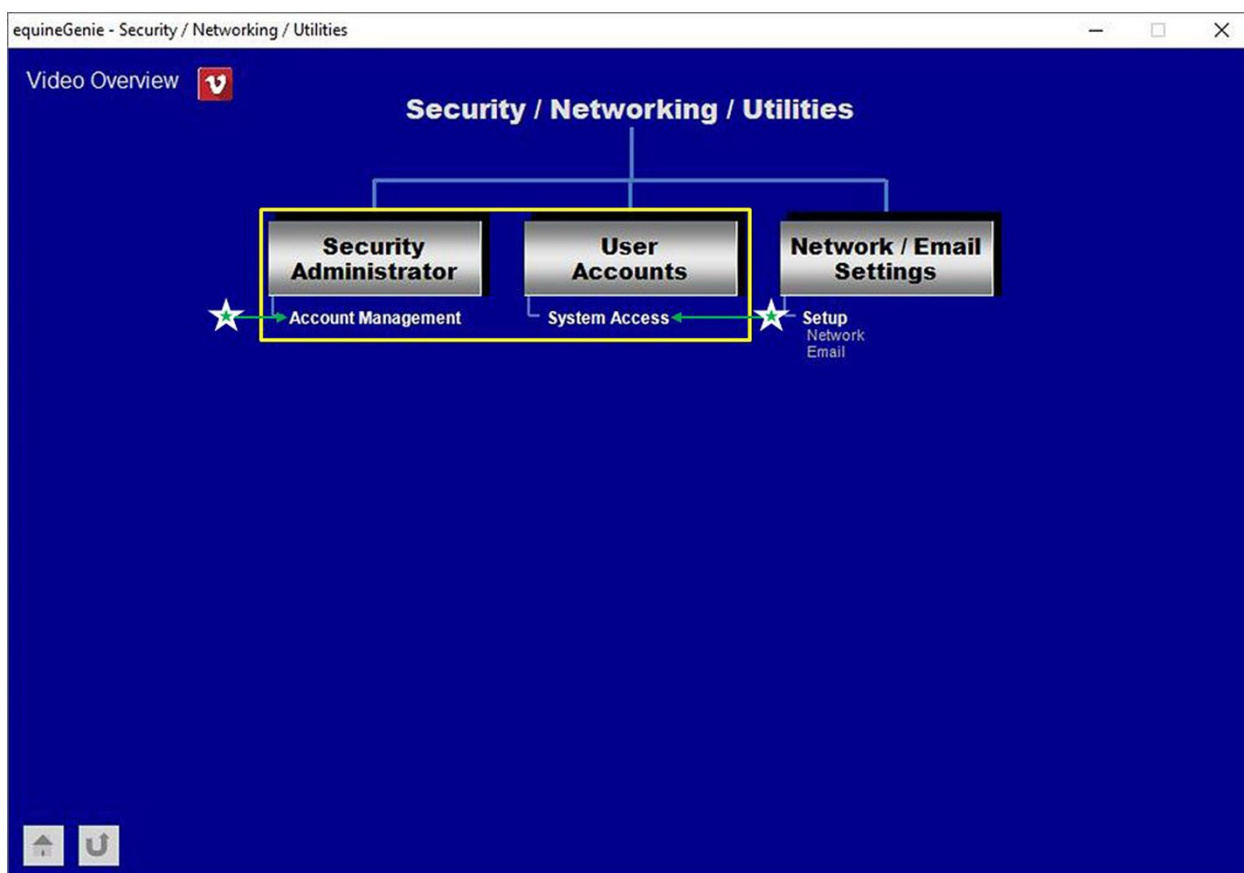
User Accounts

System Security

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Security Introduction

Access to equineGenie can be controlled by assigning a username and password to everyone who uses equineGenie in your business.

When initially setting up equineGenie's security it is important to identify one and only one person as the security administrator.

After a security administrator has been identified and assigned their username and password, other individuals can be assigned a username and password. When an individual's username and password has been assigned, access can be further controlled by identifying the areas within equineGenie in which each user will have access.

It is important for the system administrator to document all usernames and passwords and keep them in a secure location. For obvious security reasons, equineGenie does not have a backdoor if a username and/or password are forgotten. If required, a GenieCo customer care representative can get or reset a username and/or password in your equineGenie database.

Note: *Security settings can be set up on either equineGenie or remotely using clientGenie. However, any security settings will not take effect until equineGenie is closed and restarted.*

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System Security – Administrator

Path: Home: Security Networking: Security Administrator: Account Management

There is no prerequisite setup required.

Think/Plan before you setup your business's security! The system security is used to control who has access to your equineGenie system. It is strongly recommended that a system security administrator is identified and setup before any other system users are set up.

Note: It is recommended that only one security administrator is identified and the security admin assigned enter their username and password!

- ① To **Enter** a Username, select [New Item] from the *Enter / Select Username* dropdown. Then click in the *Enter / Select Username* dropdown and enter the Username.

Note 1: The first username you assign should be for the security administrator.

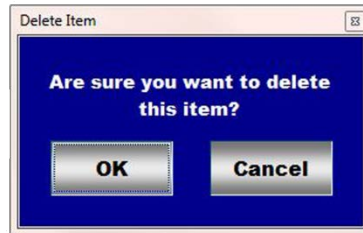
Important: For maximum security only one security administrator should be identified.

- ② **Enter** the password for the associated username in the *Enter Password* box. The password can be any length and can be alpha, alphanumeric, numeric and special characters. A password can be case sensitive.
- ③ **Select** the equineGenie areas a user should have access by clicking on the associated button. When a button is selected the center of the selected button will have a **Red Spot**.

Note 2: The security administrator should have access to all areas within equineGenie including the *Security Admin*. A user, other than the security administrator, can have access to all areas

within equineGenie, but **DO NOT** select the *Security Admin* button for a user other than the security administrator.

- ④ The username and password can be setup for another equineGenie or clientGenie user by selecting **Another User**. Selecting **Another User** will enter and clear the previous user's username, password and access selections.
- ⑤ **If you need to remove a user other than the security administrator**, the user can be removed by displaying the user's username, password and access selections and then, selecting the *Remove Selected User* **Red** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to remove the user.



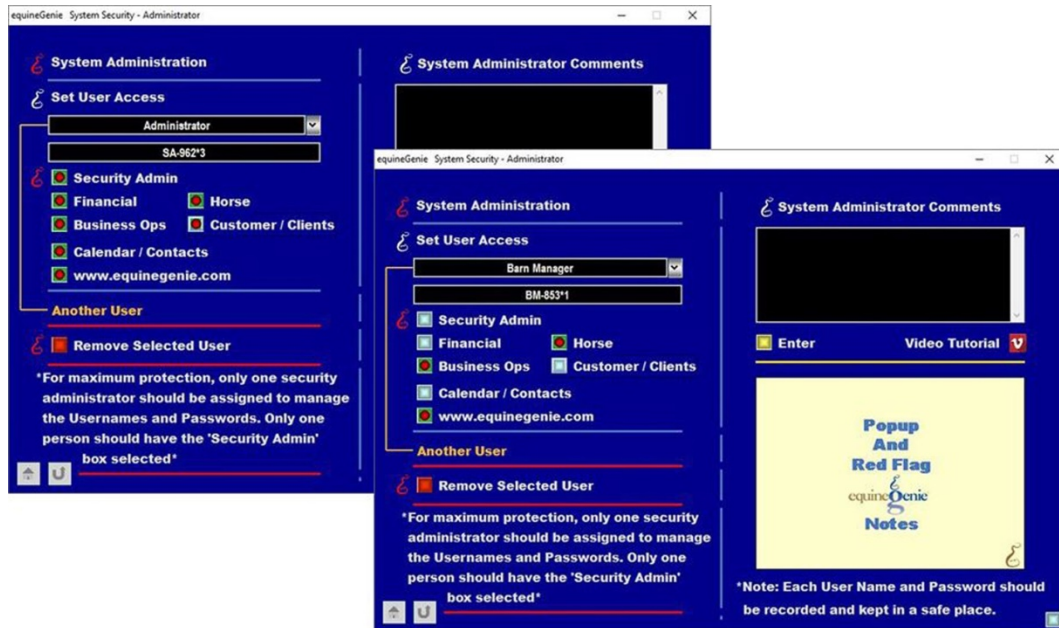
Note 3: Read the **RED** Genie Note beside the *Remove Selected User* button. The **RED** Genie Note will explain what conditions must be met to remove the selected displayed user. Removing a user will completely remove the displayed user from equineGenie's security login.

The security administrator cannot be removed using the *Remove Selected User* button. A security administrator can be changed by selecting the security administrator's username and changing the username and password. A change is easily made by highlighting the username and password and entering the new ones.


- ⑥ **Enter** any comments or notes associated with the *System Security – Administrator* setup.
- ⑦ **Select Enter before leaving the System Security - Administrator screen.**
- ① **Selection** of the **light blue button** in the lower right corner on the *System Security – Administrator* screen will display a report with all the usernames, passwords and assigned access for all the system users.

Note 4: The username, password and access report is only available to a user whose *Security Admin* button has been selected. To better control the security settings and access to equineGenie it is strongly recommended that there is only one security administrator.

Security Setup Example



Security Administrator Username and Password Setup Report

<div> <div>Make Believe Ranch</div>  </div>		
System Security - Access Report		
User Name	Password	System Privileges
Administrator	SA-962*3	Security Admin Financial Horse Business Ops Customer / clients Calendar / Contacts www.equinegenie.com
Barn Manager	BM-853*1	Horse Business Ops www.equinegenie.com
Office Manager	OM-369*7	Financial Business Ops Customer / clients Calendar / Contacts www.equinegenie.com

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User Accounts – System Access

Path: Home: Security Networking: User Accounts: System Access

There is no prerequisite setup required.

The User Accounts – System Access screen allows a user to change their password, but not their user name.

Note: The system Security Administrator should periodically check for changed passwords!

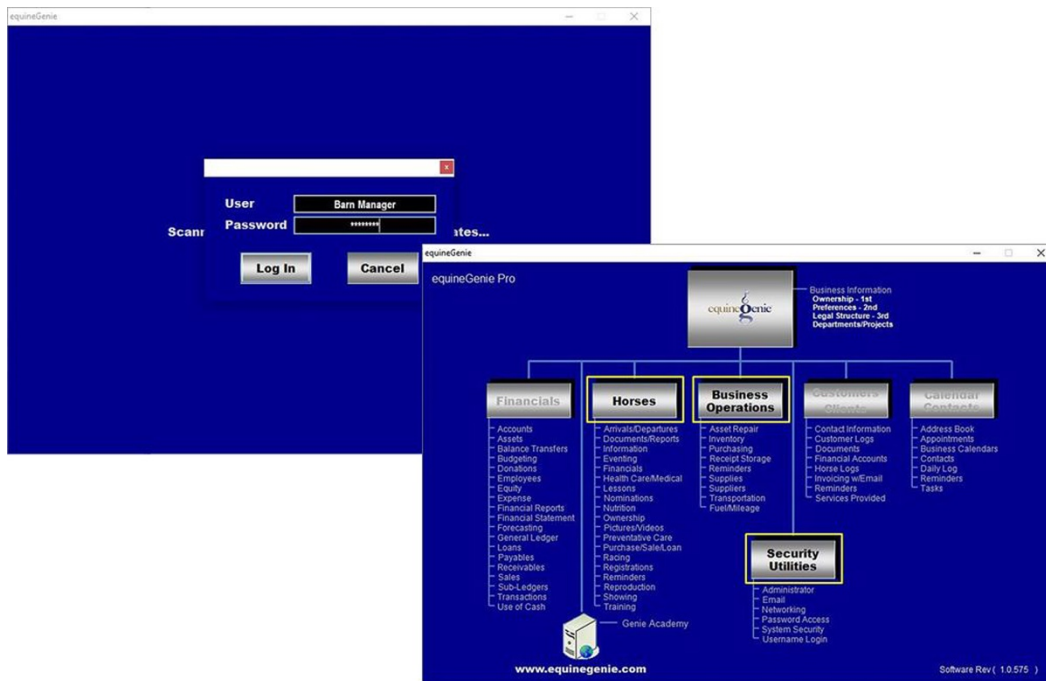
- ① When a user logs into equineGenie their current password is displayed in the *Enter New Password* text box. To change their password they need to mouse over their current password in the *Enter New Password* text box and enter their new password.

Note 1: The new password will have to be used to log into equineGenie in the future.

- ② Select Enter before leaving the *System Security – User Access* screen.

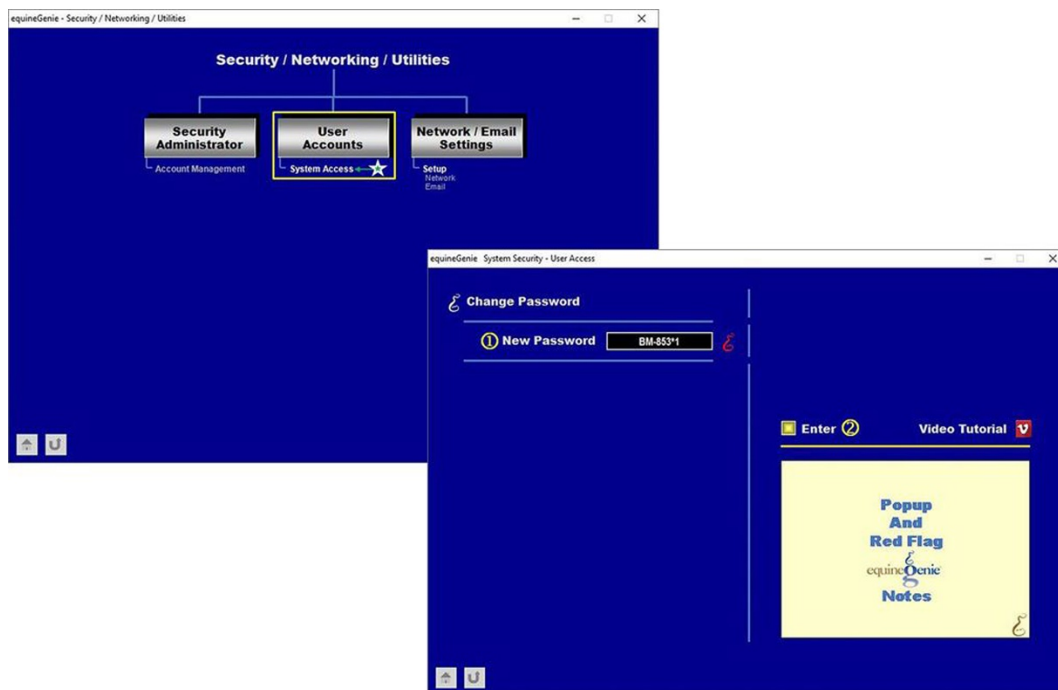
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Barn Manager Login Example



Note 2: The barn manager's security was set for access to only the Horse and Business Operations, and the Genie Academy on the equineGenie website. Therefore, they are the only active menu items on the equineGenie home screen. The Security Utilities is active so the barn manager can change the password if necessary.

Barn Manager Change Password Example



Note 3: The only active menu item on the Security / Network / Utilities screen is the User Accounts. The User Accounts is active so the barn manager can access the System Security – User Account if the barn manager’s password needs to be changed. Only the barn manager’s password will be available to be changed. Only the Security Administrator can change a username.

- ① **To change the password**, the barn manager would need to mouse over the current password displayed in the *New Password* box and enter the new password.
- ② **After the new password has been entered**, the barn manager would select **Enter** before leaving the *System Security – User Access* screen.

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