

Getting Started with Security

August 1, 2026

Getting Started with Security

Applications > Security

Getting Started with Security

Use the Security area to access user and role administration screens and to manage security-related records that are available to your assigned permissions.

What you can do here

- **Toggle navigation** to display or hide the application navigation panel.
- **Save** to save changes made to an open security record.
- **Save and Close** to save changes and close the current record.
- **Attach** to add a file attachment to the current record.
- **Ok** to confirm a message or dialog.

First session: Open the Users screen

Your first task is to confirm that you can access the Security area and open the user administration screen.

1. In **Applications**, open **Security**.
2. If the navigation panel is hidden, select **Toggle navigation**.
3. Open the **Users** screen.
4. Confirm that the Users screen loads successfully.

The available screen information does not show a control for creating a user, selecting an existing user record, or the fields required to maintain user details. Therefore, this quick start cannot document a complete user creation or editing procedure.

What success looks like

You can open the Users screen from **Applications > Security** without an access error. This confirms that your account has access to the Security area.

Next steps

- Open **Roles** to review the roles available for assigning security permissions.
- Open **Trusted Login Devices** to review devices approved for trusted sign-in.
- When a security record is open and you have made permitted changes, select **Save** or **Save and Close**.

Related pages

- [Security — Overview](#)
- [users](#)
- [Security — Learning Path](#)
- [Trusted Login Devices : 61](#)
- [Principal Users](#)