Customer Support/Connection Procedures

- Access the Horizon FTPS Server
- Establish a Remote Support Connection
- Setup New Horizon User

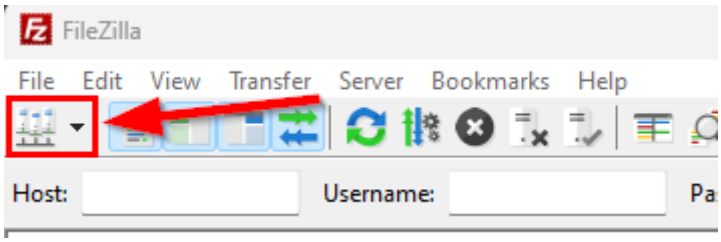
Access the Horizon FTPS Server

In order to upload or download data to or from Horizon's FTPS server, Horizon customers will need to use an FTP client and authenticate using a secure account. FileZilla is a free multi-platform FTP client which can be installed and configured quickly and easily. This article will detail the process to download and install FileZilla and configure the Horizon FTPS server for customer access. Other FTP clients can be used provided they support FTP over TLS with explicit encryption.

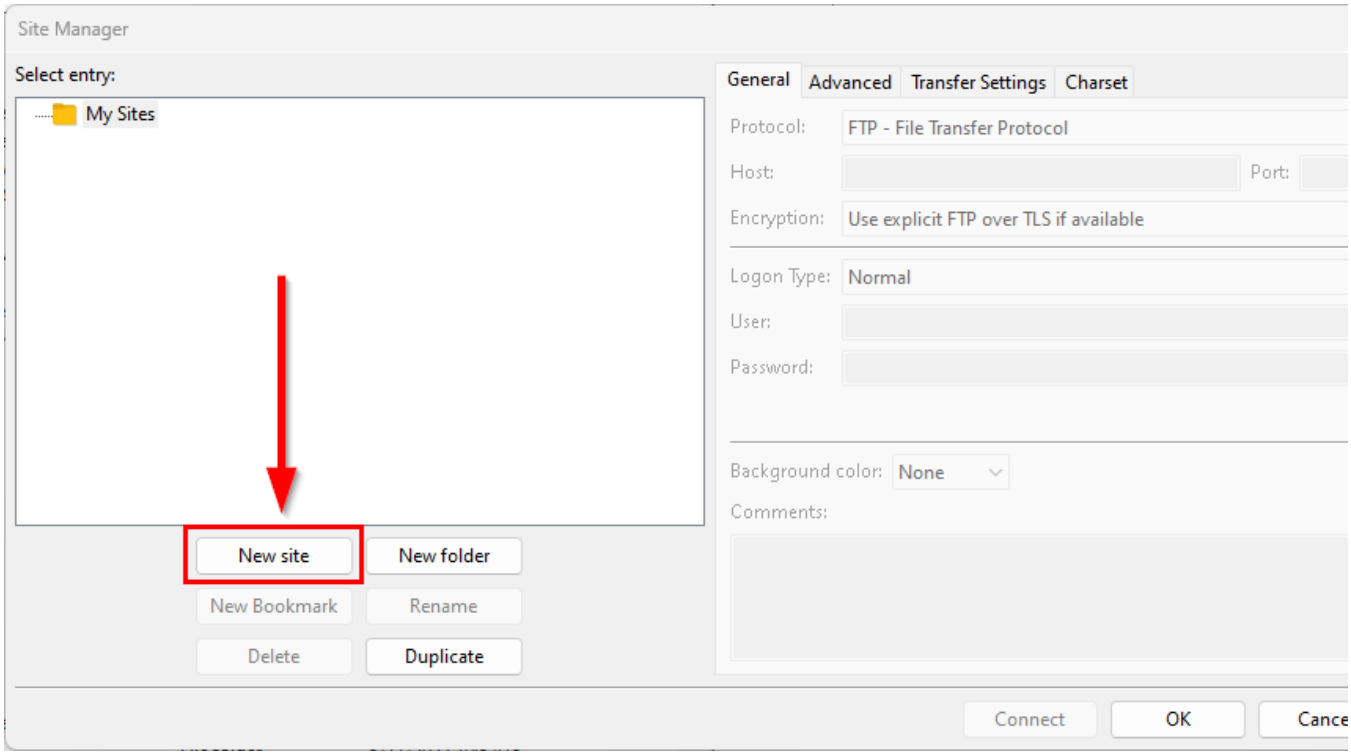
> Your Horizon FTPS credentials can be provided by your Horizon project manager. If you do not have them or they aren't working, please contact your Horizon project manager.

Procedure

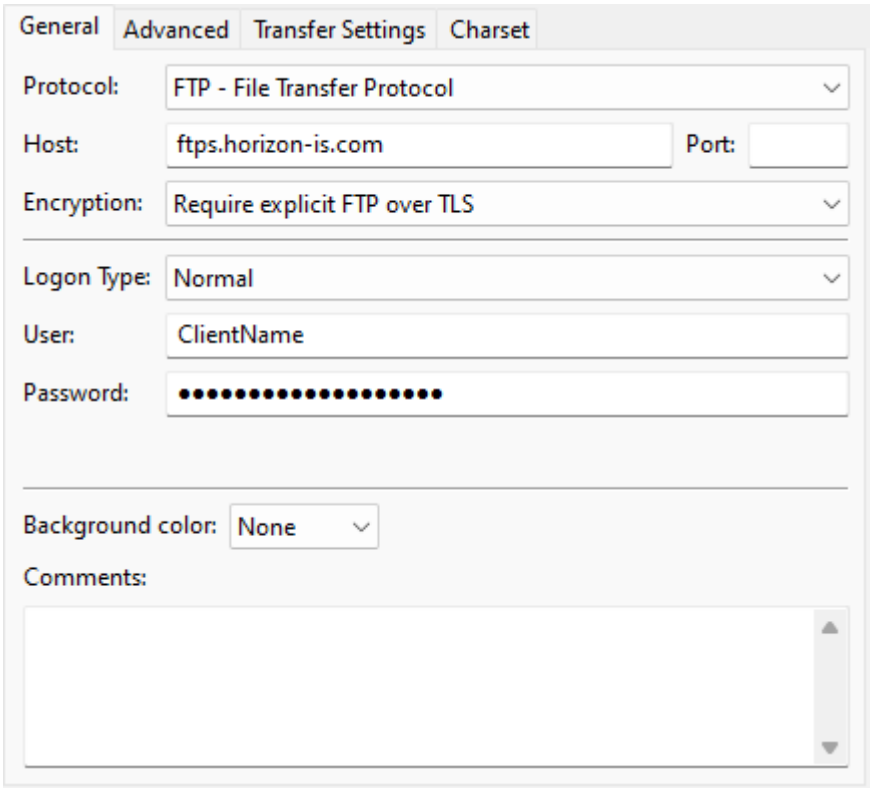
1. Download the **FileZilla** client.
2. Run the **FileZilla** client installer, accepting defaults in the wizard. Decline any optional offers during installation, such as **AVG Secure Browser**.
3. Run **FileZilla** and click the **Hosts** button on the toolbar:



4. Click the **New site** button:



5. Enter the following information:
   - Protocol: **FTP - File Transfer Protocol**
   - Host: **ftps.horizon-is.com**
   - Encryption: **Require explicit FTP over TLS**
   - Logon Type: **Normal**
   - User: **[ClientName]**
   - Password: **[ClientPassword]**



6. Click the **Connect** button, choose the **Save passwords** option, and click the **OK** button.

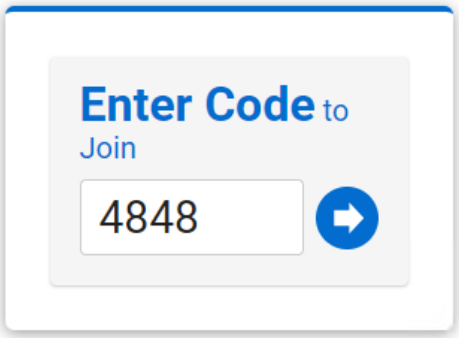
7. If an **Unknown certificate** window appears, confirm the SSL certificate lists "ftps.horizon-is.com" in the common/alternative names, check both boxes at the bottom of the window to trust the certificate, then click the **OK** button.
8. **FileZilla** should make a secure connection to the Horizon FTPS server and place you in the customer's secure directory.
9. You can now drag-and-drop files between the local machine and the Horizon FTPS server as needed.

Establish a Remote Support Connection

During a routine troubleshooting process, our technicians may require temporary remote access to your computer. Use this process to connect to a secure remote session a Horizon technician has prepared for you.

Procedure

1. Open a web browser and navigate to https://horizon.help.
2. You will be prompted to enter a code; Your technician will provide your personal code, type the code and click the blue arrow button:



3. A file called **ScreenConnect.Client.exe** will be downloaded, click the file to run the remote connection tool.

Setup New Horizon User

SETUP A NEW USER

All steps are done in the HZHS16.exe program

Open the Horizon Administrator V16 module (Horizon Software > Shared > Programs > HZHS16.exe)

(right click on a module shortcut on the desktop - select OPEN file location. then navigate to Horizon Software > Shared > Programs > HZHS16.exe)

ADD NEW USER

1. Maintain menu > User Maintenance
2. Look at another user to see the password security
3. Type the new user information
    1. User Code
    2. Initials
    3. Last Name
    4. First Name
    5. Password
    6. Security options matching other users
    7. Administrator – check box if the user is an administrator (full access to everything)
    8. Read Only ALL – check box if the user is to have view only access; cannot add/edit anything
    9. Email
4. Click SAVE

COMPANY SECURITY

The following instructions will allow access to the company files, i.e., C001, C002, etc.

1. Security menu > Company Security

2. Company Code: select the company the user can access

3. Check Valid Users: check the new user name
4. Click SAVE

ENABLE MODULE(S)

The following instructions will set a module to be enabled or disabled.

1. Security menu > Module Security
2. Company Code: select the company the user can access
3. User Code: select the new user
4. Click LOOKUP SECURITY
5. Installed Modules: the list of available modules will appear; MODULE SECURITY section: Click on a module name, on the right

1. if nothing is checked, the user can open the module selected on the left
2. if DISABLE MODULE is checked, the user will not be able to open the module selected on the left
3. if READ ONLY is checked, the user will not open the module, but will not be able to save changes.

6. Click SAVE
7. The PAYROLL program is always automatically disabled for all users.