Administration - Permissions

Permissions in both QuickScore and Scoreboard refer to allocating usage rights to Groups.

The Permissions function does the following:

- Allocates attributes to a Group through a pre-defined checkbox menu
- Allocates Groups to Organisations (which have been previously defined)

Important Note: A Group can consist of one or more individual users. If the Group consists of one user you will be effectively assigning usage permissions to that individual.

There are a large number of attributes that can be allocated to groups depending on which Group structure they belong to, that is: Power User, Communication User or Viewers. By default, all of the attributes are allocated. The example below shows the attributes for a Power User:

(check default uncheck all)			
/iew	Administration		
View All Organizations	Modify Calendars		
Modify Personal Home Page Bookmarks	Administer All Groups		
Change Password	Create and Edit Users in Groups They Administer		
	Delete Users in Groups They Administer		
Jpdate Performance Measures	Modify Organization/Balanced Scorecard Structure		
Update All Viewable Performance Measure Actual Values	Modify Dashboards		
Update All Viewable Scoring Threshold Values	Modify Embeddable Dashboards		
	Modify View Organization Permissions		
Strategic Initiatives	Modify Personally Uploaded Images		
Edit Strategic Initiatives	Modify All Images		
Archive Strategic Initiatives	Application Administration		
Delete Strategic Initiatives	🔽 Import Data		
Document Management	Other		
Modify Documents	Modify Notes		
Delete Documents	Modify Owners and Updaters		
	Modify Related Items		
Reports	Modify Balanced Scorecard Overview		
Modify Reports	View Object History		
Briefing Books			
Modify Briefing Books			

The remaining two user Groups have an attribute set that has been derived from the Power User as shown below, first the Communications User:



And finally the Viewer:

⇒ Adv	anced Permissions for Group Members
	(check default uncheck all)
View V M C	iew All Organizations odify Personal Home Page Bookmarks hange Password

Important Note: There are two attributes that need special attention above and beyond all of the rest, these are:

- View All Organisations When checked this will allow any user in the group to view ALL parts of the organisational structure
- Administer All Groups When checked this will allow a Power User in the group to act as an Administrator for ALL defined groups

With the exception of the two attributes named above, all other attributes are self-explanatory.

Restricting View Access

The following example will demonstrate how to set up a Group to have access to only a small part of the total Organisational structure. Go to Administration and click on Groups. If you have already created a number of Groups with the default attribute set, you should see a screen that looks something like this:

🔩 Administration -		
Setup 4 Security S	Vewers Vewers vorumerchal(1) Commerchal(2) Vorumerchal(3) Vorumerchal(4) Stase Management (4) viewers Evaluation (2) Viewers Evaluation (2) Sales (7)	

Restricting View Access is a two-part process:

- 1. Modify the Group attributes to DENY access to ALL viewable areas
- 2. Use 'View Organisation Permission' to GRANT access to specific viewable areas.

Step 1 – Deny Access: click on the Group for which you want to restrict access. In our example we will restrict the Marketing Group. Click on Marketing, open the 'Advanced Permissions For Group Members' window and UNCHECK 'View All Organisations' like this:

🔍 Administration -	0 unread alerts Search Colin Redgrave Log Ol
Setup Calendars J Images	Marketing v 1 Group
Security G Users G Groups	Group Name Group Type Marketing Communication Users V
Jowners and Updaters View Organization Permissions Embeddable Dashboards	Group Members Group Administrators Group Administrators
Configuration Configuration Application Administration Monitoring	Advanced Permissions for Group Members
Current User Activity	(check default uncheck all) View Other Wew All Organizations Modify Notes Modify Personal Home Page Bookmarks Modify Related Items
SQL Console	Change Password Strategic Initiatives Edit Strategic Initiatives
	Document Management Modify Documents Delete Documents

Click Save to close the window.

Step 2. Grant Access: click on 'View Organisation Permissions' and select Marketing from the dropdown list. The organisation structure you created earlier will appear with two columns of checkboxes. It should look something like this:

Administration -			0 unread alerts Search Colin Redgrave Log
Setup © <u>Calendars</u> © <u>Images</u>	⁴ View Org	anization Permissions	2
Security Sources Sources Sources and Updaters Sources and Updaters Sources and Updaters	Marketing		r 1 Group
Section 2018 Embeddable Dashboards	Save		
Configuration	view Case		
Application Administration			
onitoring) Einance	
Current User Activity) 😑 Sales	
S view Log Files		Private Sector	
dvanced		Government	
Tree Fixer		Education	
SQL Console		Marketing	
		Consulting	
		Customer Help Desk	
		Information Technology	
		Human Resources	
		Commercial	
	Save		

You can now select which parts of the Organisation you want to grant view access to. Note: if you click on the 'Cascade' checkbox it will include all of the sub-organisations to the right of the one you have clicked on. In this example we have included Intrafocus at the top-most level, Sales and everything below it and Marketing, click Save and the screen will look something like this:

Administration -	1		
Setup Calendars Calendars Calendars	View	Orgar	nization Permissions
Security	Group	Marketin	g 🗸
Groups Conners and Updaters	Save	J	
Wiew Organization Permissions	view		Intrafocus
C Application Administration			inance
Monitoring			Sales
Scinencoser Activity			Private Sector
Background Process Status			Education
Advanced			Marketing
S Import Data			Consulting
SQL Console			🔵 Customer Help Desk
			Information Technology
			🔵 Human Resources
			Commercial
	Save)	

The result of this action is to restrict the View of the all users in the Marketing Group to the toplevel Intrafocus scorecard, all of the Sales scorecards and all of the Marketing scorecards. To illustrate, the following two views show An administrator with full viewable access:

Balanced Scorecards -	Ourread alerts Search Colin Redgrave Log Off
Organizations (expand all collapse all) Finance Finance Sais Private Sector Government Education Marketing Consulting Co	Entradous Entradous Entradous Entradous HQ Scoreard A A Costnerr A A Internal Processes A A Learning & Growth A

The restricted viewable access of a user in the Marketing group:

