# Administration – Users and Groups

Important: All users must be defined to the application and all users must be assigned to a group.

Both QuickScore and Scoreboard can have any number of users assigned to the application. In a typical system we would expect to see a small number of Administrators (Power Users) and a larger number of Updaters (Communication Users). The number of Power and Communication users is determined by the number of licenses bought. You can also have as many Viewers as are required, this group could be quite large as there is no license requirement.

Users

To define a user to the application go to Administration and click on 'Users'. This screen shows a typical small system with around 20 users defined:
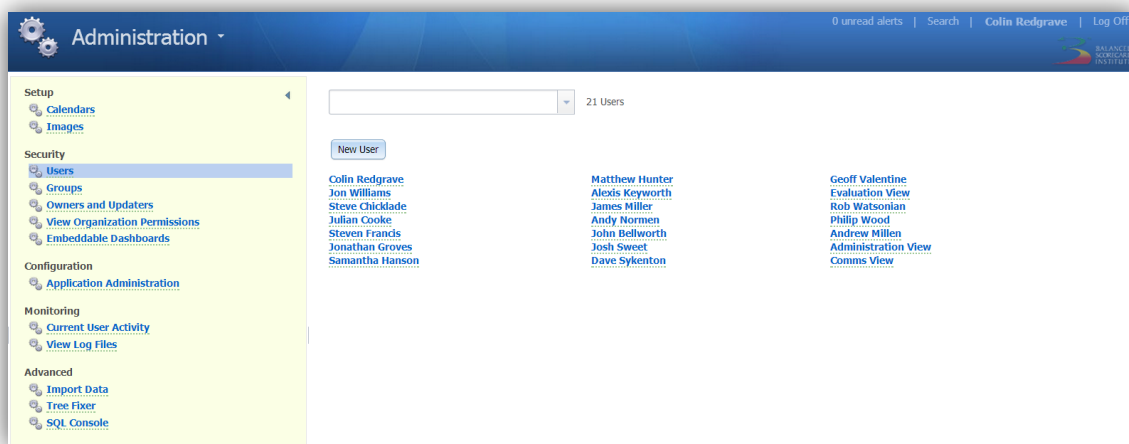
Click on the New User button and a dialogue box like this will appear:
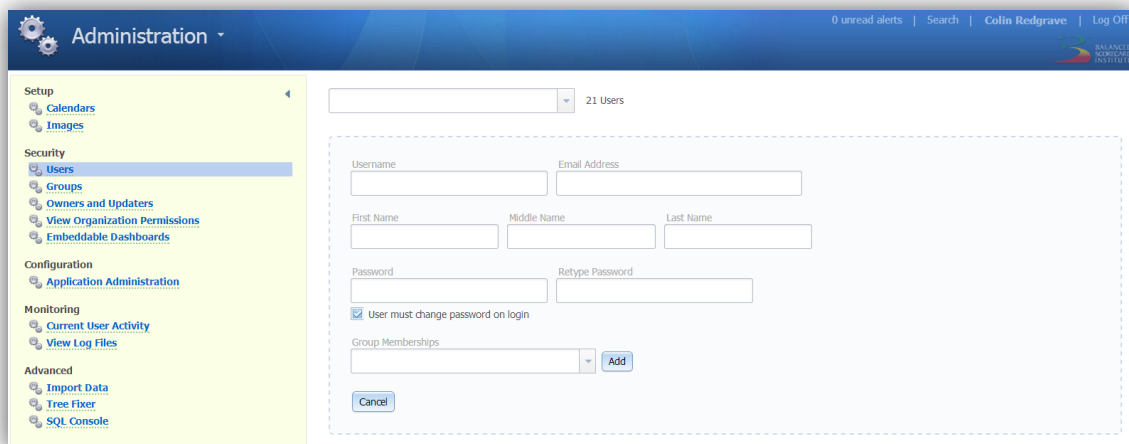
Fill in all of the user details, but for now leave the Group Membership box blank, click Save. Note: when you have created a few users and groups you can use the group membership box to assign a user to a group, at this time we will assume there are no groups defined.

Go back to the Users panel (click on Users) and you will see the new user in the list. If you click on the new user name, you will be able to edit the details.

The user must now be allocated to a Group. This needs to be done to allow you to determine what 'Permissions' that user will have. For more information on Permissions see the Quick Start user guide: Administration – Permissions.

Groups

The primary function of a Group is to determine what level of 'Permissions' a user has in the system. There are three major categories:

Power User (Administration) - user permissions:

- Full permissions in the product, the ability to create: a scorecard structure, dashboards, briefing books, reports and use of defined administrative functions.

Communication (Updater) - user permissions:

- Update Data Capabilities - Manually, Excel CSV import, Spider Connect
- Can be assigned as an Owner and Updater
- Edit Notes
- Assign Actions
- Update Actions
- Edit Related Items
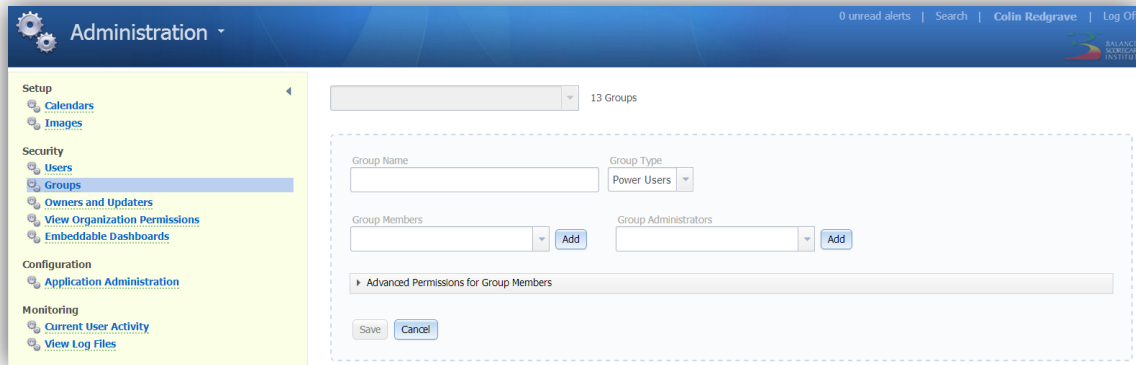- Create Bookmarks
- Edit/Upload/Delete Documents

View Only - user permissions:

View only (of administrator selected areas of the product)

To create a Group, click on 'Groups' in the Security section of the Administration menu. You will see a screen similar to this:
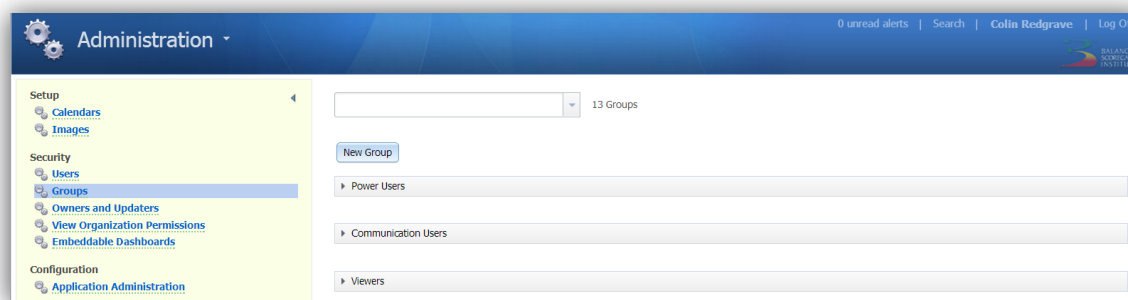
Click on the New Group button and you will see a dialogue screen like this:

First decide which Group Type you want to create and select it from the Group Type drop-down menu. The differences in the Group Type can be seen by opening the 'Advanced Permissions for Group Members' window. The permissions for the Power User group look like this:
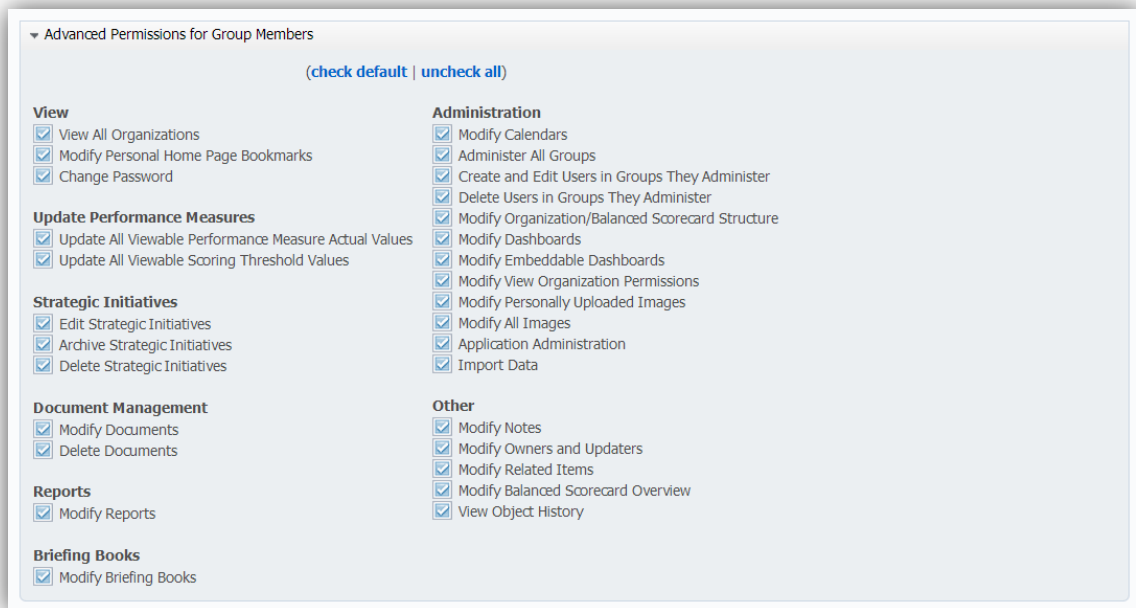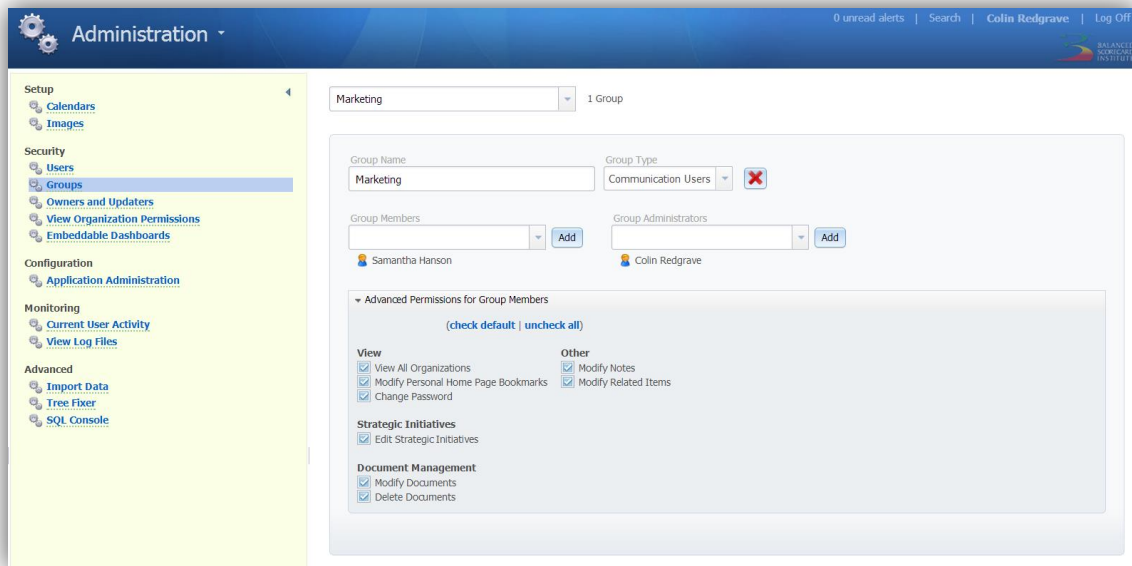

The permissions for the Communication users and Viewers are derived from this set above. Click on each in turn from the drop-down list to see their settings.

Important Note: The default setting for Power, Communication and Viewer users is to allow ALL of the permissions associated with that group. This is especially important to recognise when you want to DENY access to certain areas in the system for specific users. The topic of Permissions is covered in the Quick Start guide: Administration Permissions.

For this example we are going to create a group called Marketing in the Communications area. First, add the name Marketing. Next select Communication Users from the Group Type. Next Click on the Group members drop-down and select a name from the user list. Optionally click on the

Group Administration box and select an Administrator from the drop-down list (you may have to go back a few steps and add some additional users). The result will look something like this:

In the example above, Samantha Hanson has been assigned to the Communications User Group called Marketing. The Marketing group has been given full permissions as default for the Communications User Type, i.e. they can perform any of the Communications tasks as described above.

Modifying the group permissions structure is key to allowing access to particular parts of the system. If you want to restrict access, then modified groups need to be set up.

Important Note: This group can 'View All Organisations' in the entire system. Before you go on to create further groups and allocate users, you should look at the next Quick Start guide: Administration Permissions.