Permissions - 1

The application is **Group** based. When a user signs in they are recognised as a **User** within a **Group Type**. The **Group Type** determines the permissions for a user.

There are three **Group Types**:

1. **Power Users** - A power user can do anything
2. **Communication Users** - A communication user can own objectives and metrics, update actual values, write notes, set alerts and create tasks
3. **Viewers** - A viewer can view the system

Within a **Group Type** you can add as many **Groups** as you need. You can change the permissions of the **Group** based on the super-set of permissions allocated to the **Group Type**.

A Typical configuration might look something like this:

Group Type	Groups	Permissions
Power Users	Administrator	All permissions
	Scorecard Builder	Building permissions only
Communication Users	Financial	All communicator permissions
	Sales	View sales, update only sales
	Marketing	View sales and marketing, update only marketing
	Operations	View operations, update only operations
Viewers	Partners	View only operations

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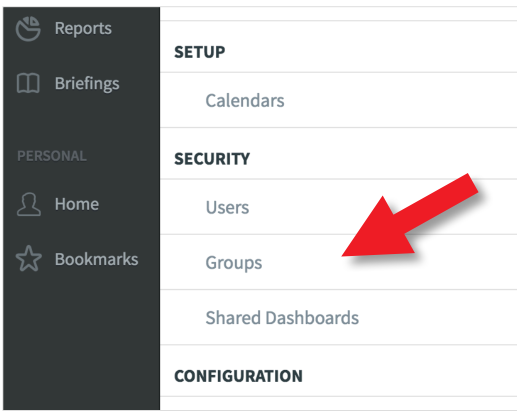
Permissions - 2

To create a Group you need to be an Administrator. If you are an Administrator go to the Administration view.

Click on the small cog at the bottom left hand side of the screen to open the **Administration** view.

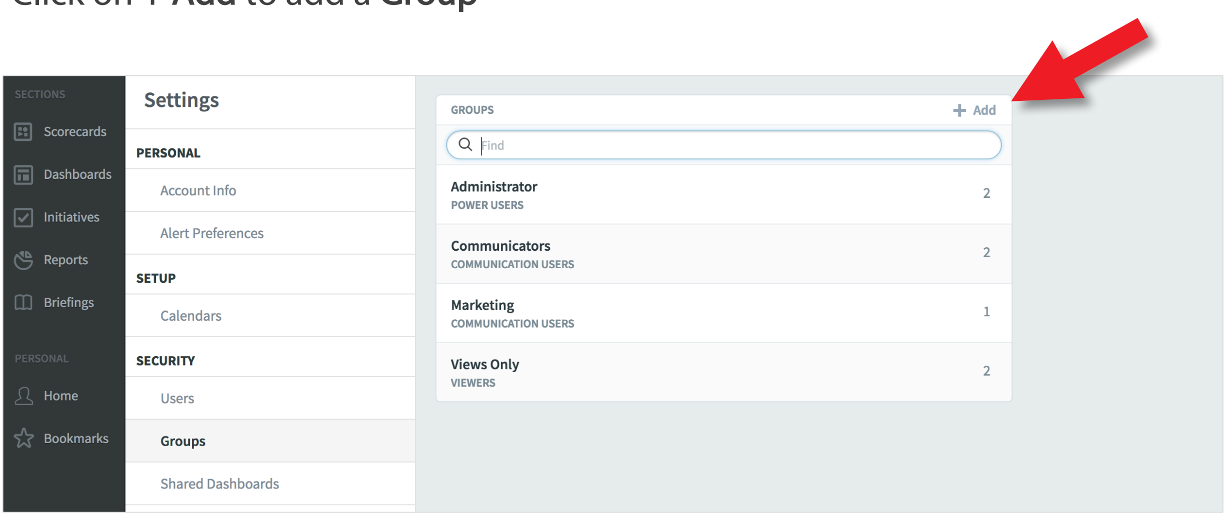


You will be presented with the **Account Information** screen.

Click on **Groups** under **Security** about half way down the Settings list.

A screen similar to the one below will appear.

Click on **+ Add** to add a **Group**



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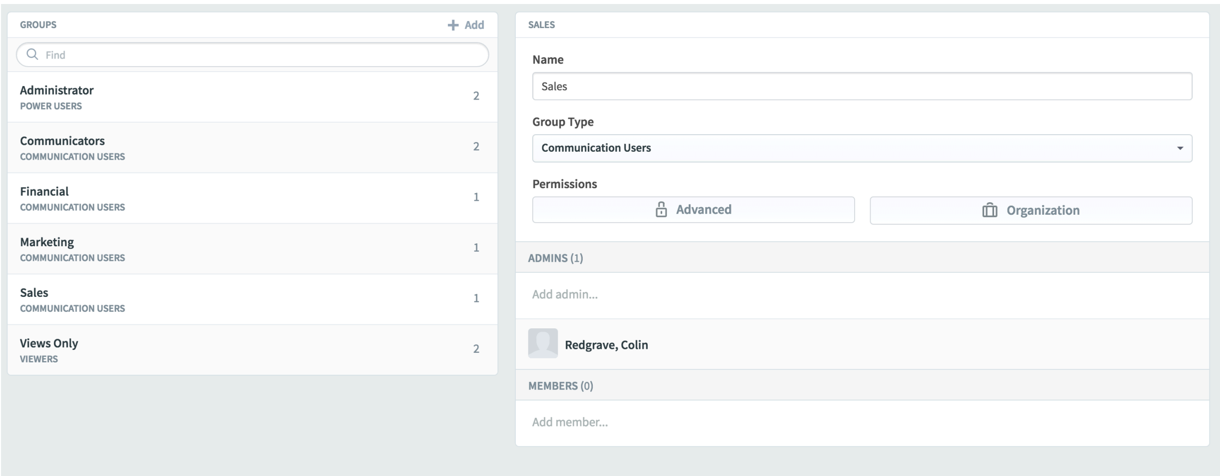
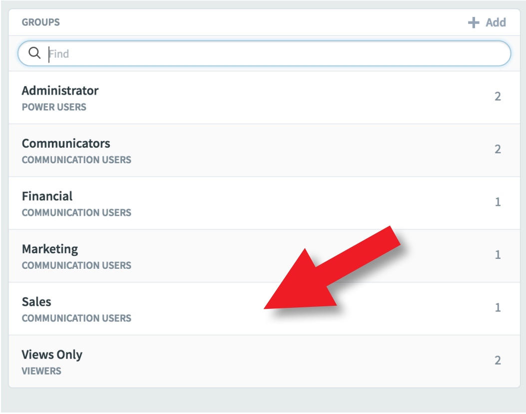
Permissions - 3

The **New Group** panel will appear next to the **Groups** panel. Add the name of the new group (we have added Sales) and click on the **Group Type** and select **Communication User**



Important: click **Save** to save the group



The new group will not appear in the Group list until the browser is refreshed.

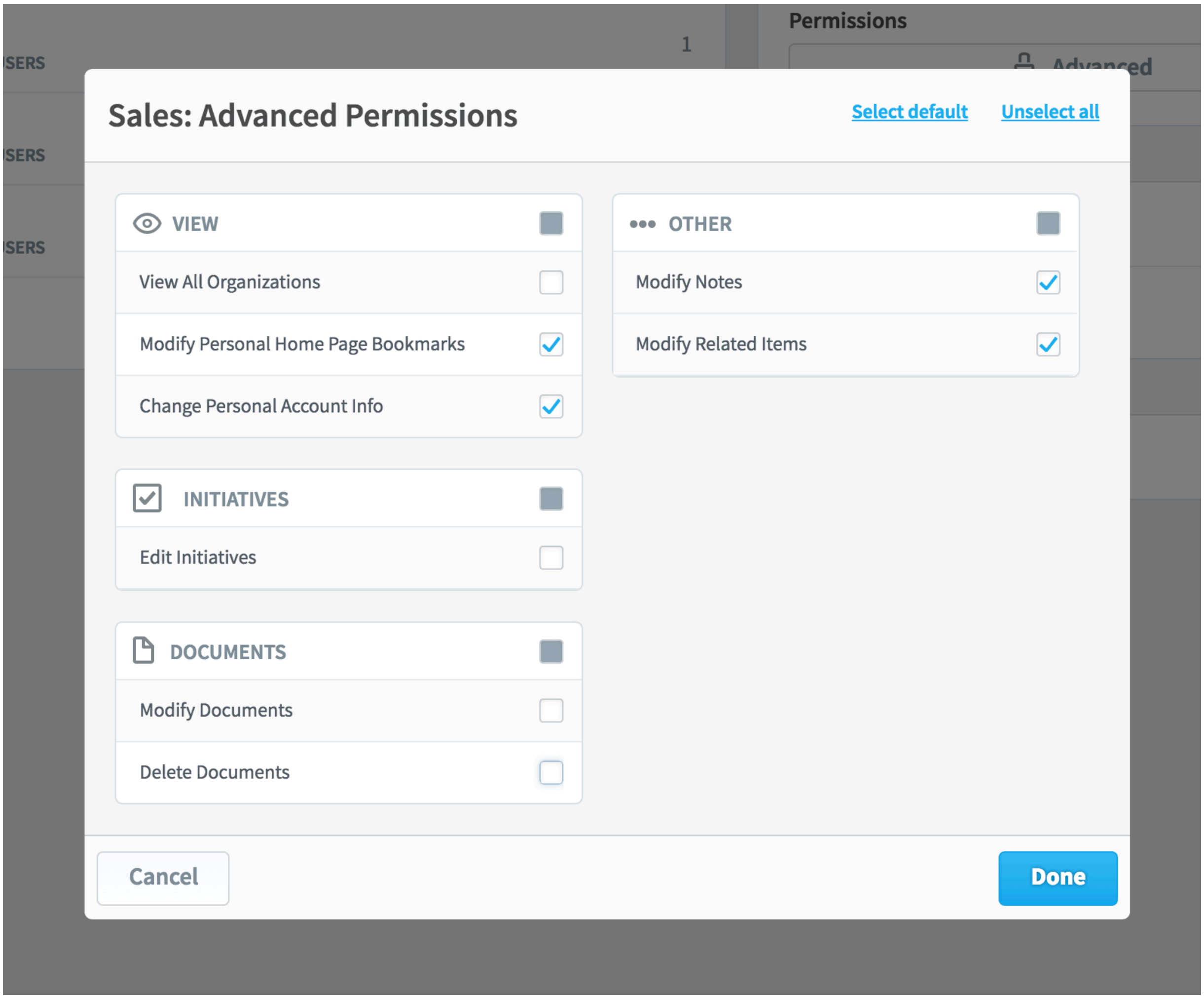
Refresh the browser and you will see that the new group, in this case Sales, has appeared in the list with a group type of Communication User

Click on **Advanced** in the right hand panel to open the Permissions dialogue

Permissions - 4

The Permissions dialogue box will appear. By default **<u>everything</u>** is selected. This is an important principle. By default, everyone can see everything in the system. To restrict access a positive action or actions need to be taken.

The following dialogue box is for **Communication Users**



To restrict access, click on the check boxes and remove the check-ticks. In this example we have un-checked View All Organisations, Edit Initiatives, Modify Documents and Delete Documents and have therefore severely restricted access for the Sales group. Important: Click **Done** <u>and</u> **Save**

Having restricted **View All Organisations**, we now need to grant access to **<u>specific</u>** Organizations/Scorecards, Dashboards, Reports etc.

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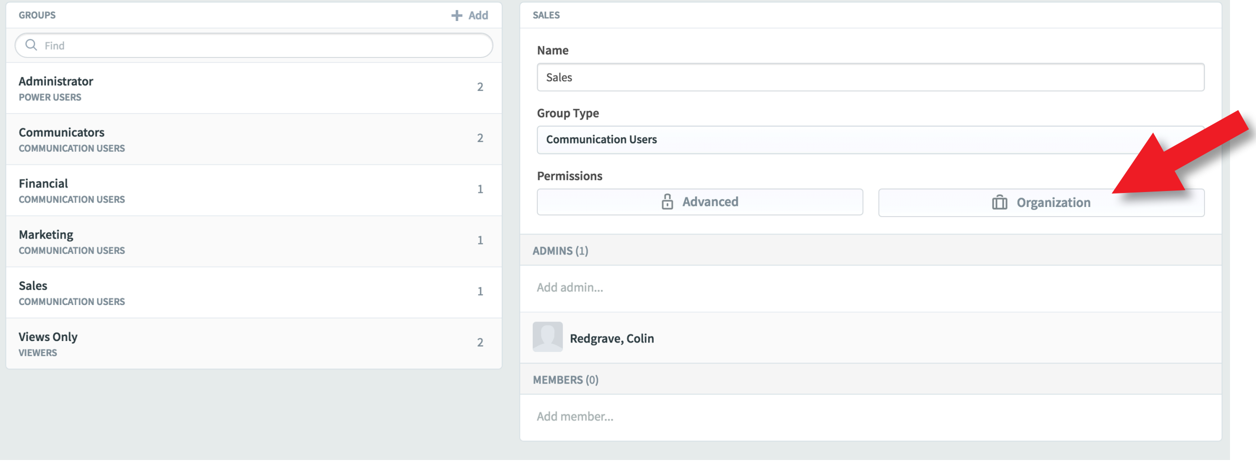
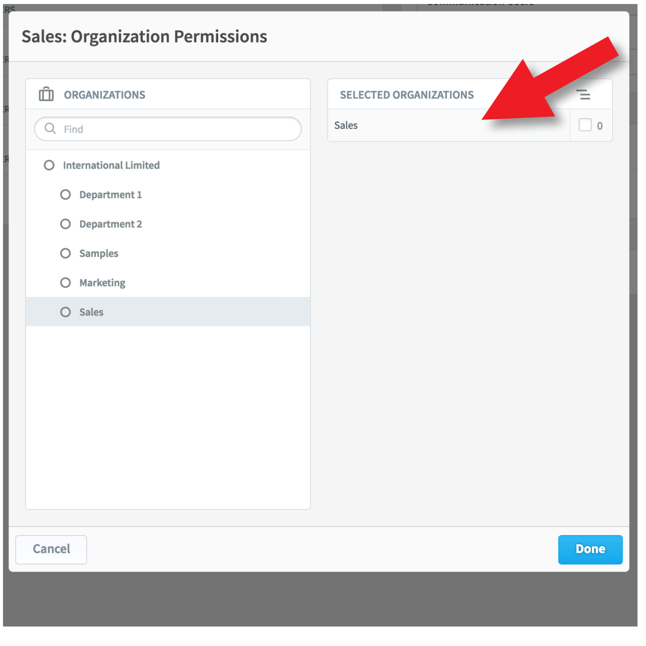
Permissions - 5

The Sales Group has now been denied access to view <u>**all**</u> Organizations. To allow the Sales Group to see the scorecards, dashboards, initiatives etc. in the Sales Organization, click on **Organization** next to the Advanced button:





The **Sales: Organization Permissions** dialogue will appear together with the Organization Tree.

Click on **Sales** in the list.

(if you have not added Sales, as part of this training, click on another Organization)

The Organization will appear in the list to the right

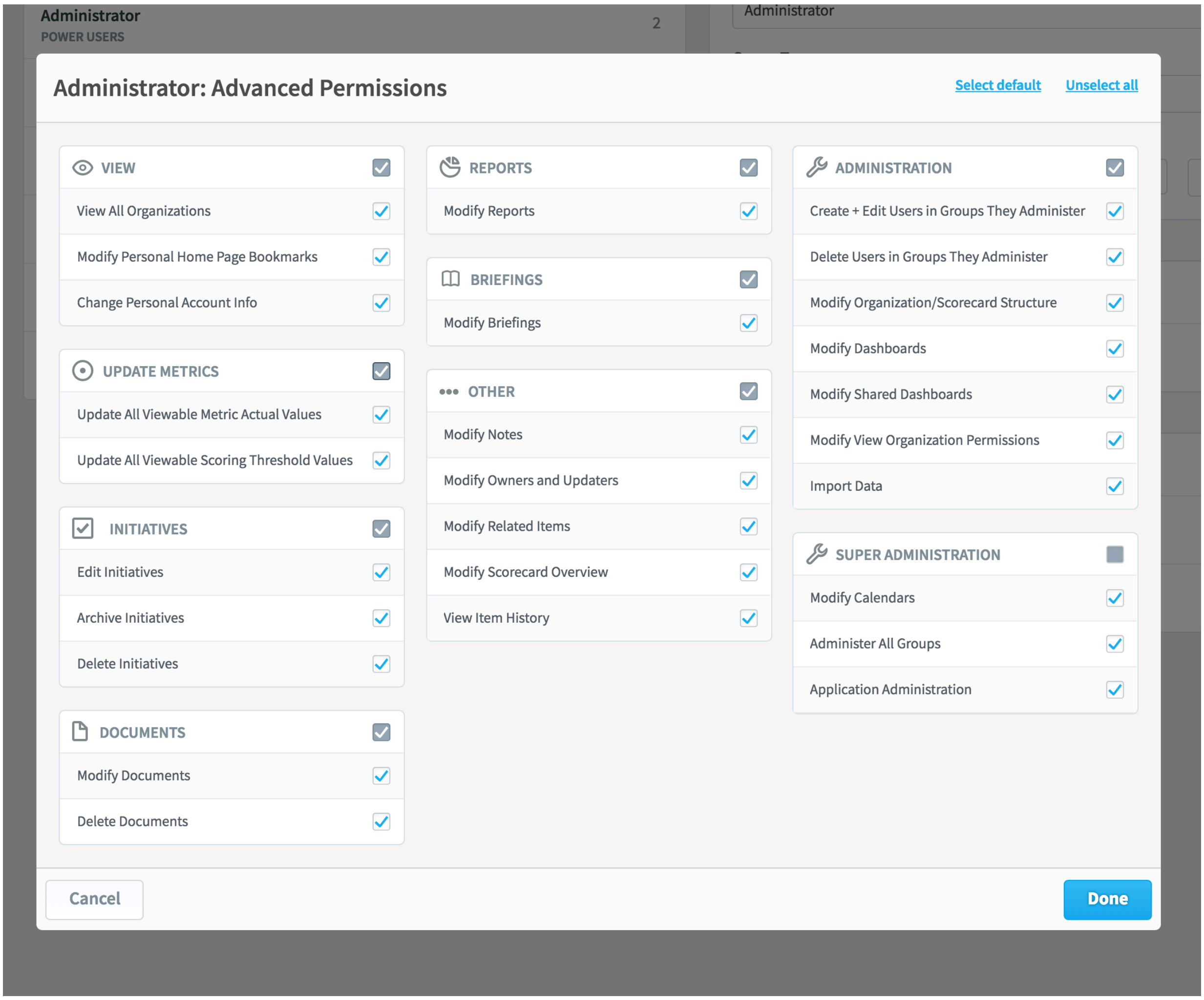
Click on the blue **Done** button

If you now add a User to the Sales Group their access will be restricted to the Sales Organization's data. When they sign on, that is all they will see.

Important Note: If a User is added to multiple groups, they will inherit **ALL** of the access permissions defined. To restrict access, you must ensure Users are assigned to the appropriate group(s).

Permissions - 6

When adding a Group to the Power User Group Type a different set of Permissions will be displayed (as will a much more restricted set if the Viewer Group Type is used). This is an example of the Power User permissions:



When adding Groups to the Power User group type great care must be taken to ensure the appropriate level of permissions are granted especially under the Administration and Super Administration sections.