Adding Groups - 1

Groups are used to determine **Permissions** in the application.

A **User** must belong to a **Group**. Permissions are assigned to the group.

The application comes with three default groups:

1. **Administrator** - An administrator can do anything

2. **Communicator** - A communicator can own objectives and metrics, update actual values, write notes, set alerts and create tasks

3. **Viewer** - A viewer can view the system

You can add as many groups as you like.

In the following example we will set up a Group for the Marketing Department and give them a restricted set of Communication User permissions.
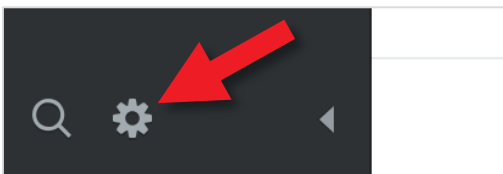
Click on the small cog at the bottom left hand side of the screen to open the **Administration** view.

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

Click on **Groups** under **Security** about half way down the Settings list. You will see the following:

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

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

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

The new group will appear in the Groups list (you may need to refresh the browser to see it).

In this case **Marketing**, has appeared in the list with a group type of Communication User.

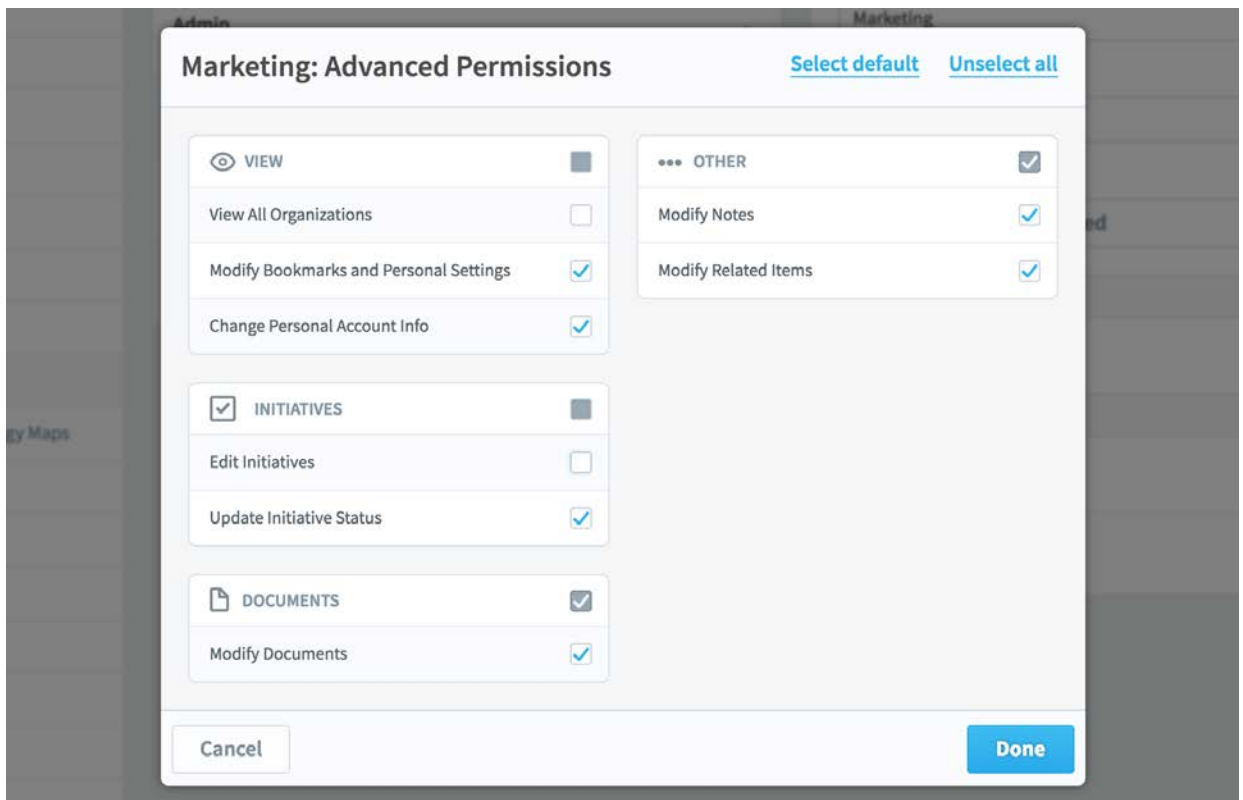Click on **Advanced** under **Permissions** in the right hand panel to open the Permissions dialogue.

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The **New Group: Advanced Permissions** dialogue will appear.

For the purposes of this guide we will do the following:

1. Restrict **View Access** to the Marketing Organization

2. Deny **Edit Access** to Initiatives

## 1. Restrict View Access to the Marketing Scorecard

By default, a Group can access all of the organizations in the system. To restrict access the **View All Organizations** check-box has to be **un-checked.**

Click the check box for **View All Organizations** and ensure the check-tick is **not** visible. Click the blue **Done** button.

The Marketing Group has now been denied access to **everything**. To allow the Marketing Group to see the scorecards, dashboards, reports etc. in the Marketing Organization, click on **Organization** next to the Advanced button:
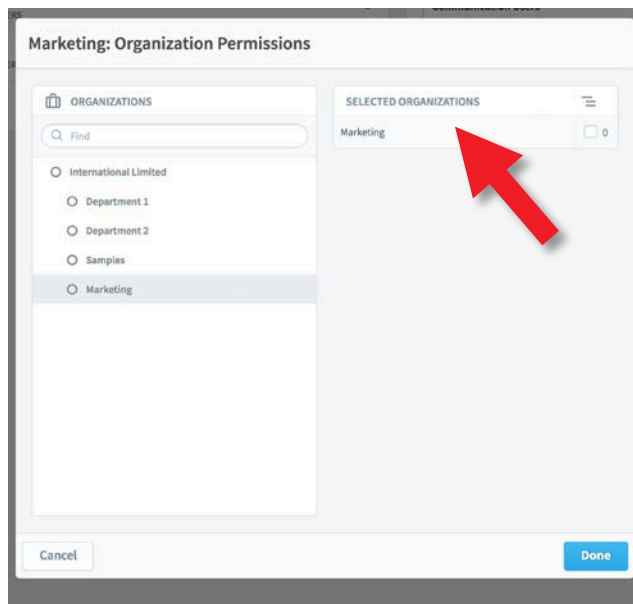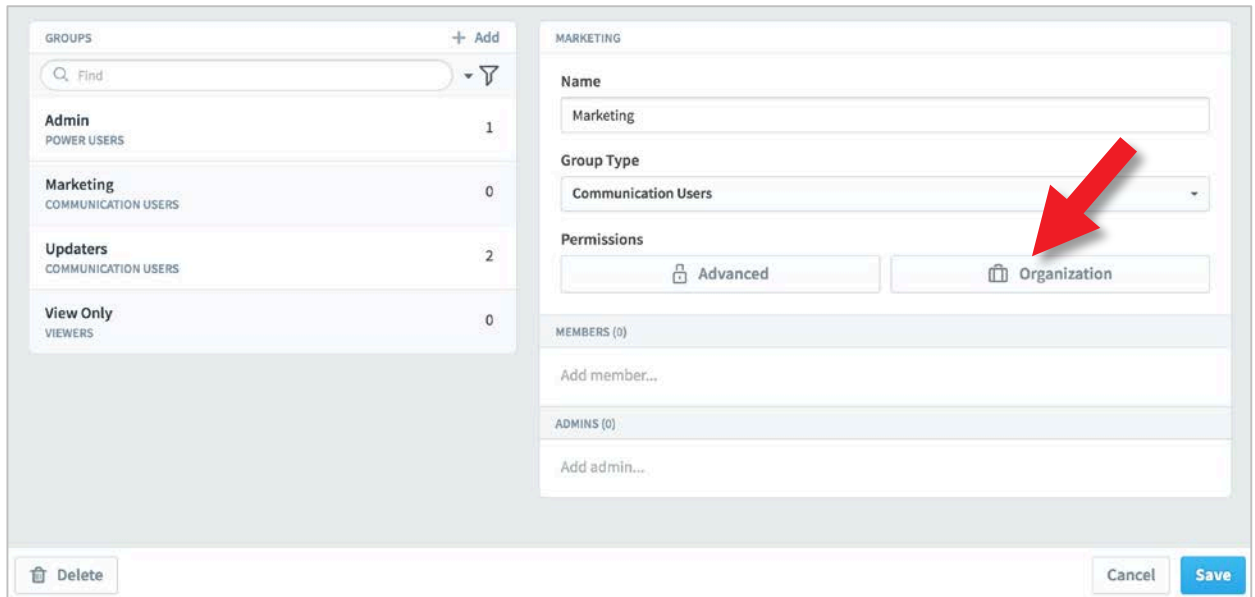
The **Marketing: Organization Permissions** dialogue will appear together with the Organizations.

Click on **Marketing** in the list.

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

The Organization will appear in the list to the right.
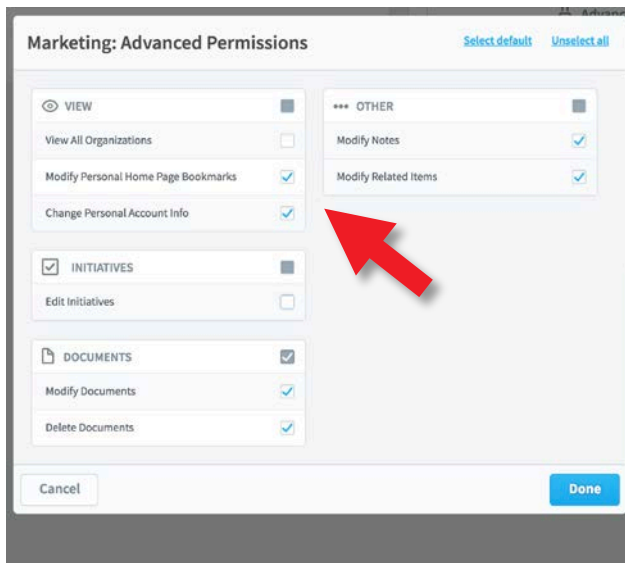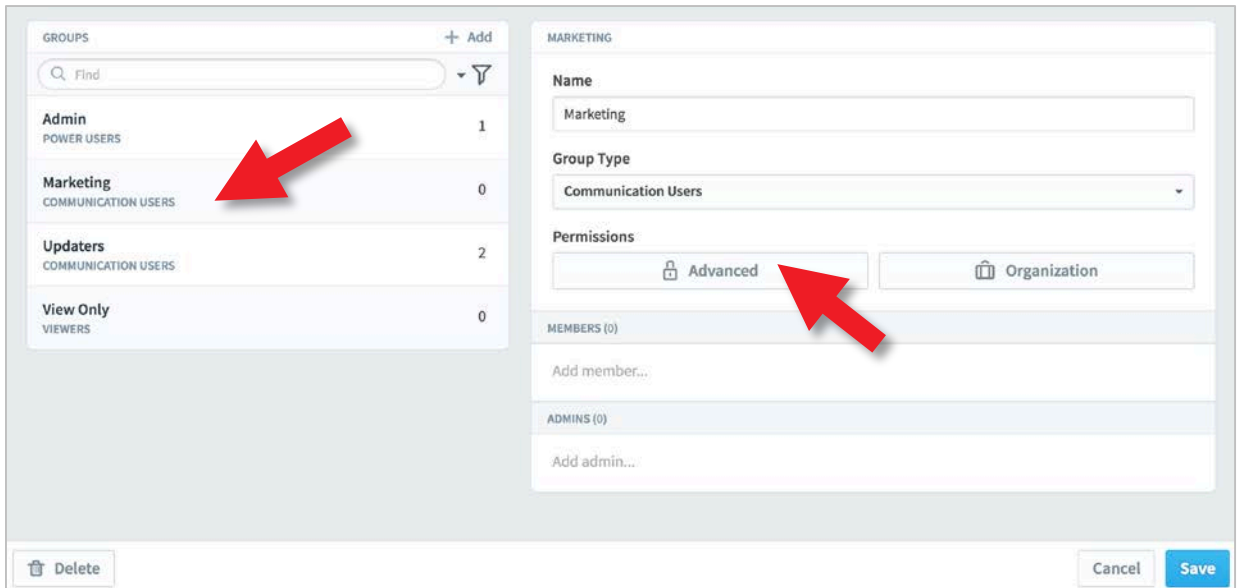
Click on the blue **Done** button.

If you now add a User to the Marketing Group their access will be restricted to the Marketing 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).

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2. Denying Edit Access (in this case to Initiatives) - denying access to a specific function is very easy. Go back to **Administration** and Click on **Groups** and highlight the **Marketing** group that you have just created, click on **Advanced**.

The **Marketing: Advanced Permissions** dialogue will appear.

Click on the **Edit Initiatives** check box and ensure the check-tick is **not** visible.

Click on the blue **Done** button

The Marketing group will no longer be able to edit **Initiatives.**

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).

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