



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**.

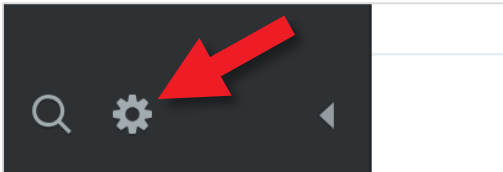
A Typical configuration might look something like this:

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 activities

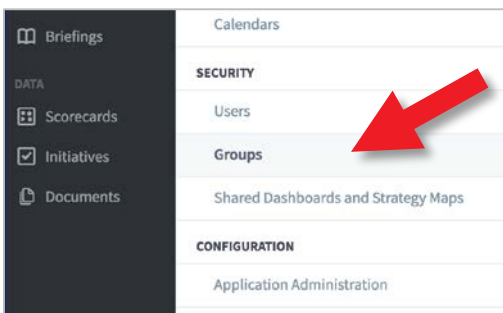


Permissions - 2

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



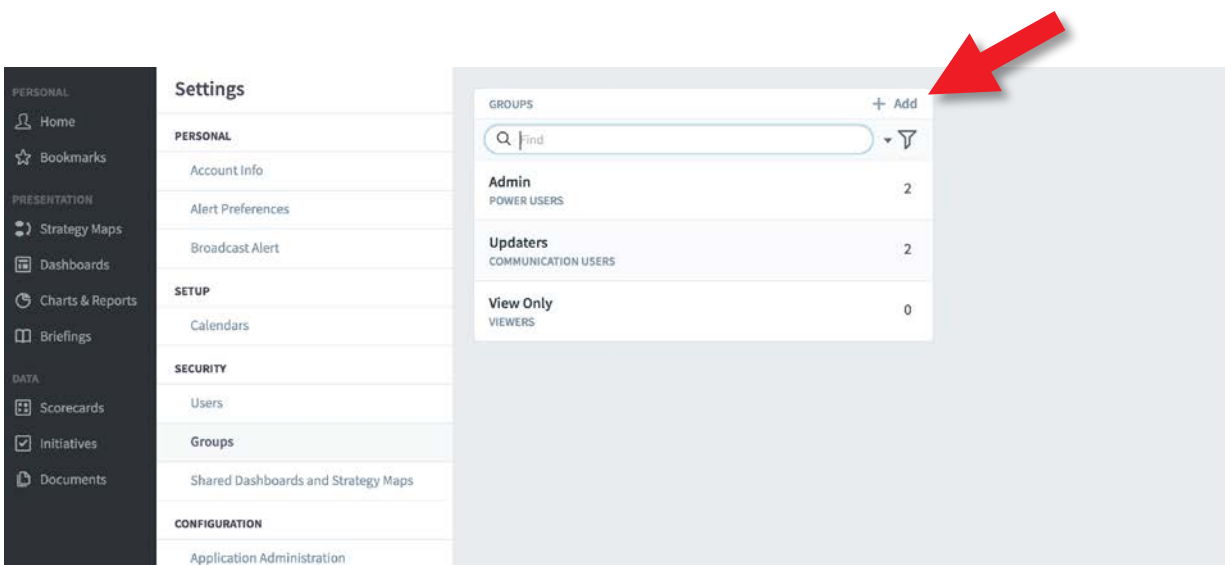
Click on the small cog at the bottom left hand side of the screen to open the **Administration** view.



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**.





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 the group type we have selected Communication Users.

GROUPS	+ Add
Admin POWER USERS	1
Updaters COMMUNICATION USERS	2
View Only VIEWERS	0

NEW GROUP

Name: Sales

Group Type: Communication Users

Permissions: Advanced, Organization

MEMBERS (0): Add member...

ADMINS (1): Add admin...

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Cancel Save

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

GROUPS	+ Add
Admin POWER USERS	1
Sales COMMUNICATION USERS	0
Updaters COMMUNICATION USERS	2
View Only VIEWERS	0

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

In this case Sales, 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.



Permissions - 4

The Permissions dialogue box will appear. By default **everything** 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** in the **Sales** Group.

Sales: Advanced Permissions [Select default](#) [Unselect all](#)

Category	Permission	Checked
VIEW	View All Organizations	<input type="checkbox"/>
	Modify Personal Home Page Bookmarks	<input checked="" type="checkbox"/>
	Change Personal Account Info	<input checked="" type="checkbox"/>
INITIATIVES	Edit Initiatives	<input type="checkbox"/>
DOCUMENTS	Modify Documents	<input type="checkbox"/>
	Delete Documents	<input type="checkbox"/>
OTHER	Modify Notes	<input checked="" type="checkbox"/>
	Modify Related Items	<input checked="" type="checkbox"/>

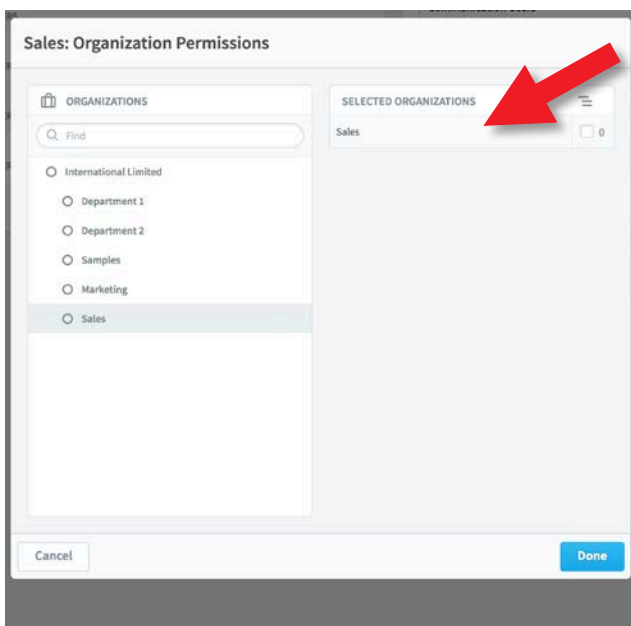
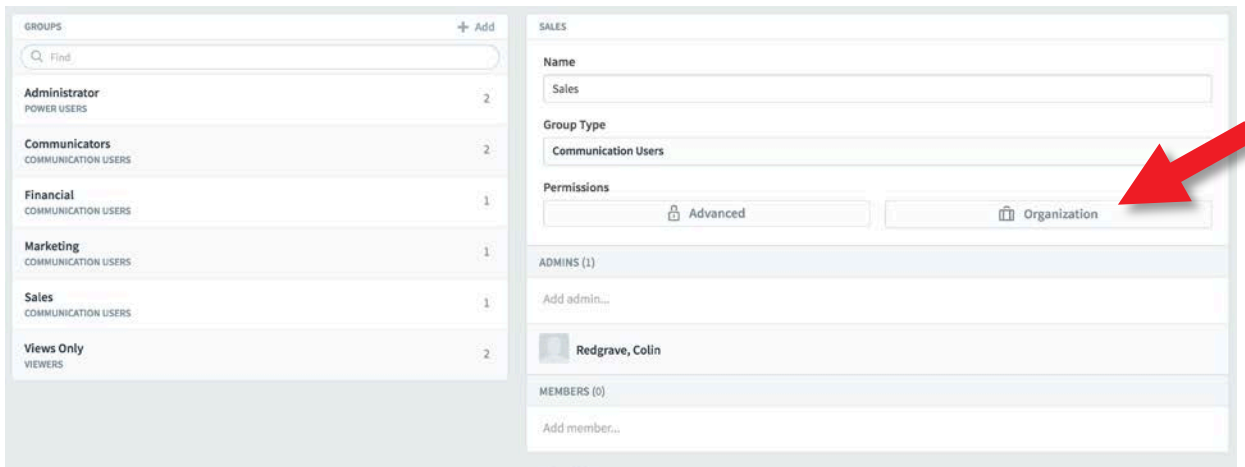
To restrict access, click on the check boxes and remove the check-ticks. In this example we have un-checked View All Organizations, Edit Initiatives, Modify Documents and Delete Documents and have therefore severely restricted access for the Sales group. Important: Click **Done** and **Save**.

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



Permissions - 5

The Sales Group has now been denied access to view **all** 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.

Highlight 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:

The screenshot displays the 'Admin: Advanced Permissions' configuration page. At the top right, there are links for 'Select default' and 'Unselect all'. The permissions are organized into several sections, each with a category icon and a master checkbox, followed by individual permission items with their own checkboxes. All checkboxes are currently checked.

Category	Item	Status
<input checked="" type="checkbox"/> VIEW	View All Organizations	<input checked="" type="checkbox"/>
	Modify Bookmarks and Personal Settings	<input checked="" type="checkbox"/>
	Change Personal Account Info	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> UPDATE MEASURES	Update All Viewable Measure Actual Values	<input checked="" type="checkbox"/>
	Update All Viewable Scoring Threshold Values	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> INITIATIVES	Edit Initiatives	<input checked="" type="checkbox"/>
	Update Initiative Status	<input checked="" type="checkbox"/>
	Archive Initiatives	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> DOCUMENTS	Modify Documents	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> REPORTS	Modify Reports	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> BRIEFINGS	Modify Briefings	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> OTHER	Modify Notes	<input checked="" type="checkbox"/>
	Modify Owners and Updaters	<input checked="" type="checkbox"/>
	Modify Related Items	<input checked="" type="checkbox"/>
	Modify Scorecard Overview	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> ADMINISTRATION	Create + Edit Users in Groups They Administer	<input checked="" type="checkbox"/>
	Delete Users in Groups They Administer	<input checked="" type="checkbox"/>
	Modify Organization/Scorecard Structure	<input checked="" type="checkbox"/>
	Modify Dashboards and Strategy Maps	<input checked="" type="checkbox"/>
	Modify Shared Dashboards and Strategy Maps	<input checked="" type="checkbox"/>
	Modify View Organization Permissions	<input checked="" type="checkbox"/>
	Import Data	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> SUPER ADMINISTRATION	Modify Calendars	<input checked="" type="checkbox"/>
	Administer All Groups	<input checked="" type="checkbox"/>
	Administer Application	<input checked="" type="checkbox"/>

At the bottom of the interface, there are 'Cancel' and 'Done' buttons.

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.