# (i) Adding Groups- 1

Groups are used to determine Permissions in the application.

A User must belong to a Group and permissions are assigned to the group

Your trial system 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:

GROUPS	+ Add
Q Find	
Administrator POWER USERS	2
Communicators COMMUNICATION USERS	2
Views Only VIEWERS	2

### Click on + Add to add a Group

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## Adding Groups - 2

The **New Group** dialogue box will appear to the right. Give the **Group** a name (Marketing) and click on the **Group Type** drop-down and select **Communication Users.** Click on **Advanced** under the word Permissions

GROUPS	+ Add	NEW GROUP		
Q Find		Name		
Administrator POWER USERS	2	Marketing		
Communicators COMMUNICATION USERS	2	Communication Users		
Views Only Viewers	2	Permissions		
		ADMINS (0)		
		Add admin		
		MEMBERS (0)		
		Add member		

New Group: Advanced Perm	issions		<u>Select default</u>	Unselect all
(a) VIEW		and OTHER		
View All Organizations		Modify Notes		
Madify Parranal Hama Page Rookmarks		Modify Polated Itoms		
Change Deserved Association		Mouny Related items		
Change Personal Account Info				
✓ INITIATIVES				
Edit Initiatives				
DOCUMENTS				
Modify Documents				
Delete Documents				
Cancel				Done

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

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

- 1. Restrict Access (to the Marketing Scorecard)
- 2. Deny Access (to Edit Initiatives)

#### 1. Restrict Access (to the Marketing Scorecard)

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

Click the check box for View All Organisations and ensure the check-tick is <u>not</u> visible. Click the blue Done button

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## (i) Adding Groups - 3

The Marketing Group has now been denied access to <u>everything</u>. To allow the Marketing Group to see the Marketing scorecard, click on **Organization** next to the Advanced button:

GROUPS	+ Add	MARKETING
Q Find		Name
Administrator POWER USERS	2	Marketing
Communicators COMMUNICATION USERS	2	Group Type Communication Users
Marketing COMMUNICATION USERS	1	Permissions
Views Only VIEWERS	2	ADMINS (1)
		Add admin
		Redgrave, Colin
		MEMBERS (0)
		Add member

Image: Constraint of the second se	Marketing: Organization Permissions		
International Limited       Department1       Department2       Samples		SELECTED ORGANIZATIONS	
<ul> <li>International Limited</li> <li>Department 1</li> <li>Department 2</li> <li>Samples</li> <li>Marketing</li> </ul>	Q Find	Marketing	0
	<ul> <li>International Limited</li> <li>Department 1</li> <li>Department 2</li> <li>Samples</li> <li>Marketing</li> </ul>		
Cancel	Cancel		Done

The Marketing: Organization Permissions dialogue will appear together with the Organizations (Scorecard) tree.

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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## Adding Groups - 4

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

GROUPS	+ Add	MARKETING
Q Find		Name
Administrator POWER USERS	2	Marketing
Communicators COMMUNICATION USERS	2	Communication Users
Marketing COMMUNICATION USERS	1	Permissions
Views Only VIEWERS	2	ADMINS (1)
		Add admin
		Redgrave, Colin
		MEMBERS (0)
		Add member

Marketing: Advanced Permis	ssions		Select default	Unselect :	all
		••• OTHER			
View All Organizations		Modify Notes			
Modify Personal Home Page Bookmarks		Modify Related Items			
Change Personal Account Info					
INITIATIVES Edit Initiatives					
Modify Documents					
Delete Documents					
Cancel				Done	2

The Marketing: Advanced Permissions dialogue will appear.

Click on the **Edit Initiatives** check box and ensure the check-tick is <u>not</u> 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).

