Adding Groups- 1

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

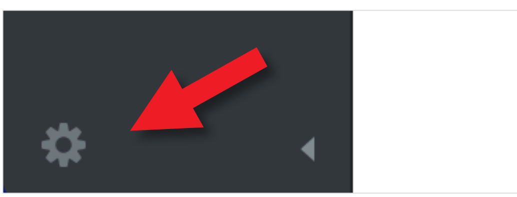
A **User** must belong to a **Group** and permissions are assigned to the group

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.

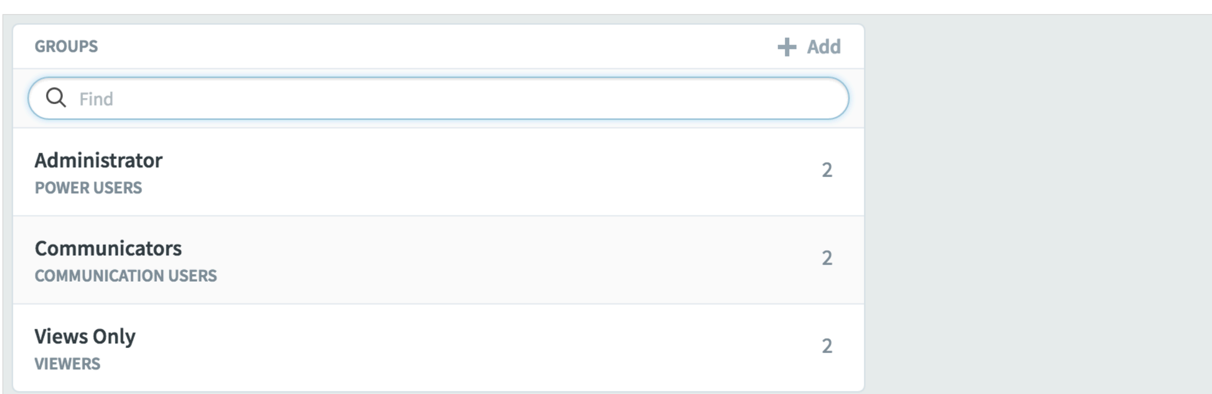
In the following example we will set up a Group for the Marketing Department and give them a restricted set of Communication User permissions



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:



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

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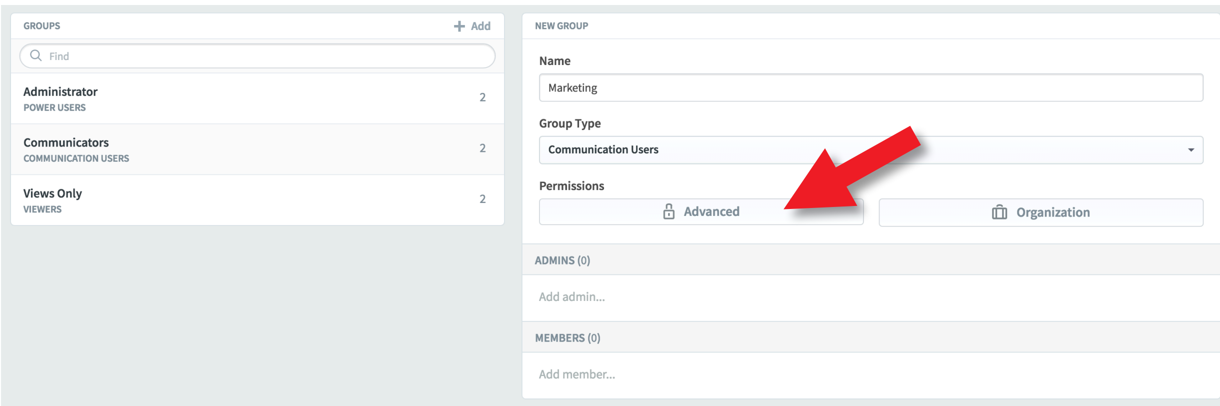
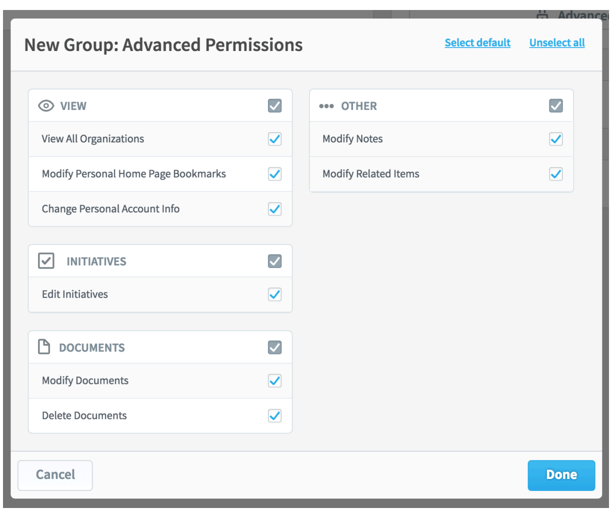
Adding Groups - 2

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





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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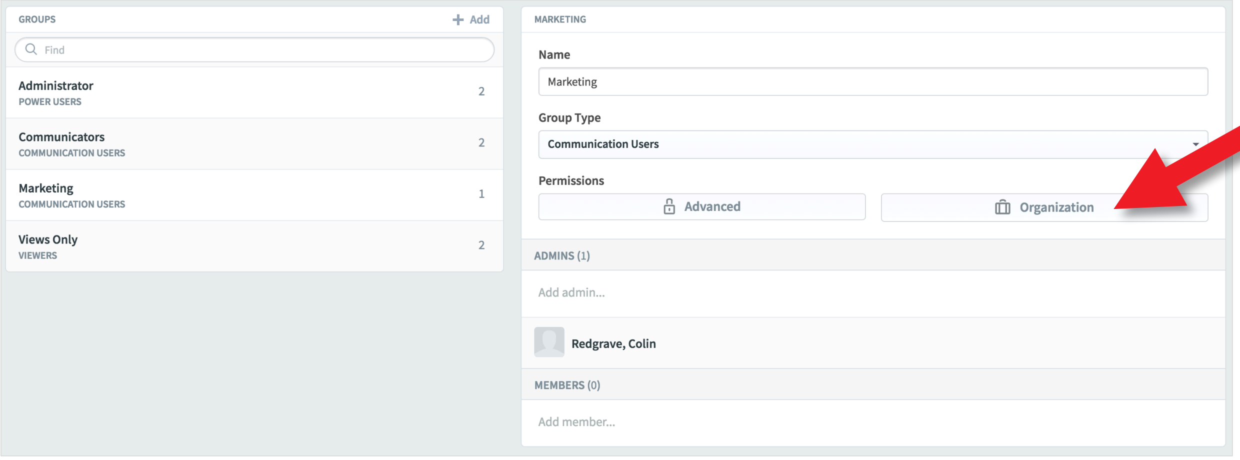
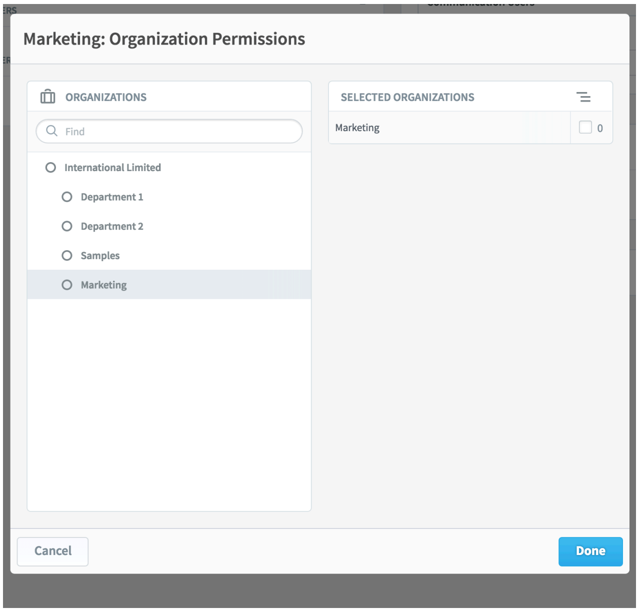
Adding Groups - 3

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:





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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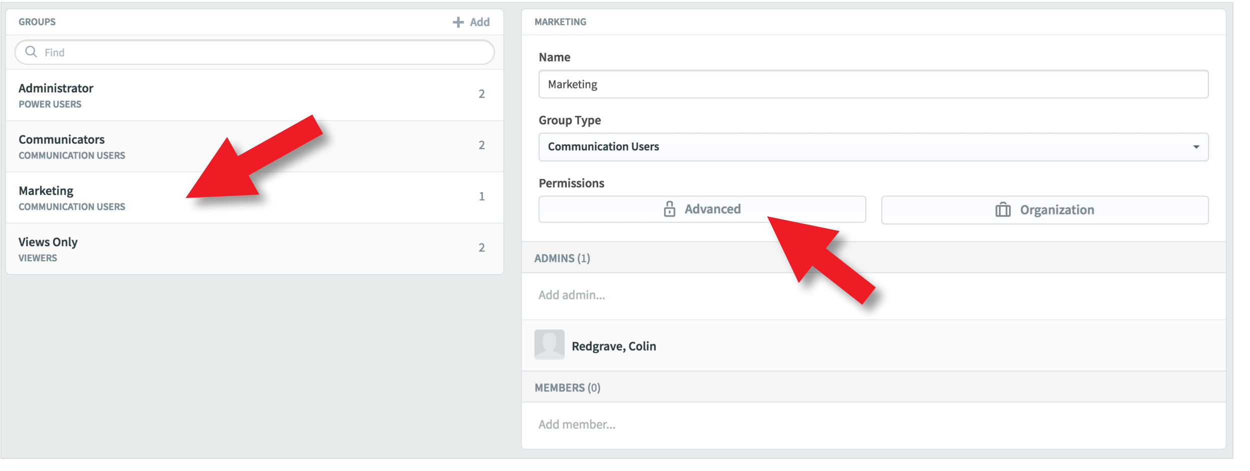
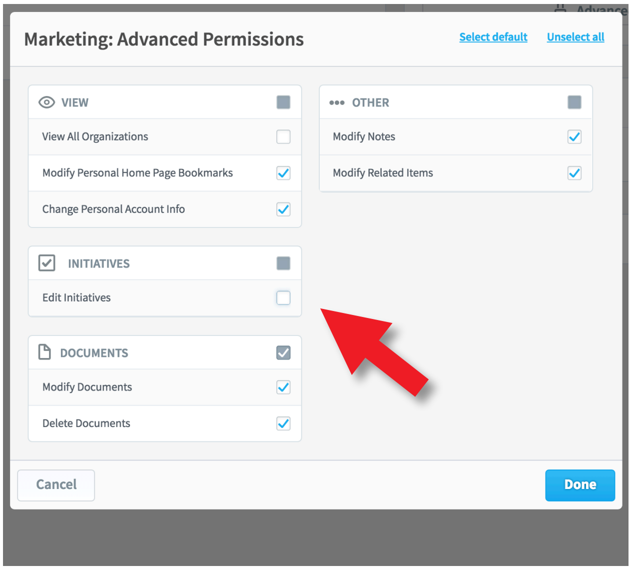
Adding Groups - 4

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**.





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).