

Feature Guide: Group & Content Category Permissions



ONPOINT

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Introduction

In OnPoint's Release Version 5.4 a Site Administrator will now have the ability to assign Groups and Content Categories to all Course Manager roles with the exception of Document Administrators.

Why might this be useful?

This new function will add an additional level of access restriction for individual administrators, beyond what their role provides them. It is designed to control the access administrators have to particular user groups as well as specific categories of content.

As an example, let's say you have several unique groups sharing one slice of the LMS database. Group Alpha's authors and admins should see their own lists of user groups and content categories, but not see Group Beta's users or content. This permissions feature allows you to set up each of the authors and admins of the Alpha group, to only see and be able to edit users that are members of the groups assigned to them. When these admins go into Course Manager, their 'lists' will be filtered to expose only those users and content items that are appropriate.

In this example, it doesn't preclude some groups or content categories from being viewed by both the Alpha and Beta groups. For instance, perhaps there is a Company History course that should be able to be viewed and assigned by either group of administrators. In that case, the category that the Company History falls under, say "Company Information," would be 'assigned' to both the Alpha and Beta administrators respectively.

The information and screen shots below will take you step by step through the process of setting permissions for Administrators.

1.0: Assigning Permissions to Admins

Group Permissions

1. In the OnPoint Course Manager application you will need to first select the Users & Groups main menu, then choose Users & Managers from the dropdown (Figure 1). Locate the name of the admin to be updated. Use the Show Roles – Manager filter to narrow your list to manager roles only, or use any of the additional filter options to narrow your list further, if necessary. Select the manager name from the list.

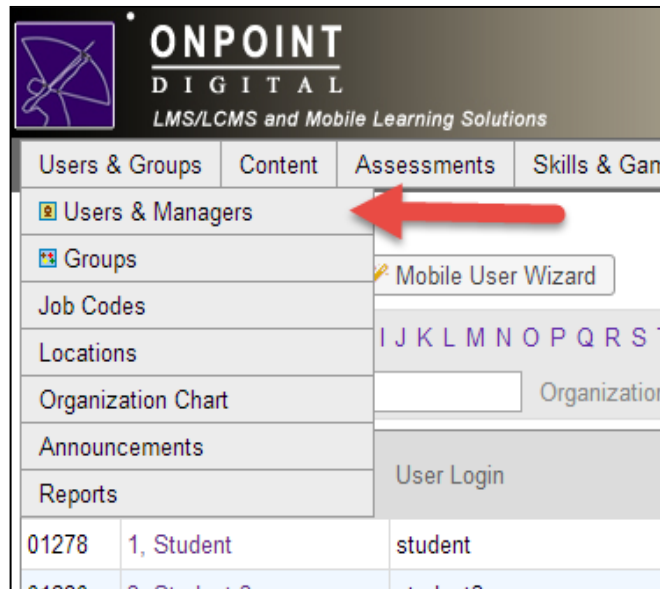


Figure 1

2. Once inside the manager's record, select the Management subtab to view the list of available groups and categories to be assigned (Figure 2).

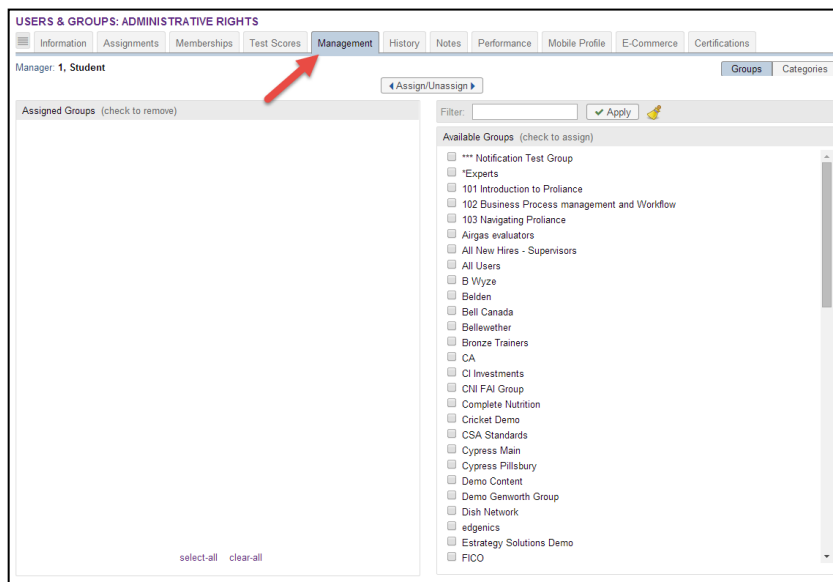


Figure 2

Note: If the assigned groups is left blank then the administrator will have access to all groups. In order for there to be limitations there must be groups listed in this column.

3. Check that the page display filter in the upper right hand corner is set to Groups (Figure 3). [This is the default setting.] This displays all the Available, Active Groups to choose from. Select the checkbox next to each group that you want add management access rights to, then click the Assign/Unassign action button in the center to move your selection(s) over to the Assigned Groups column. These will now be the only groups that this Admin will have access to in Course Manager.

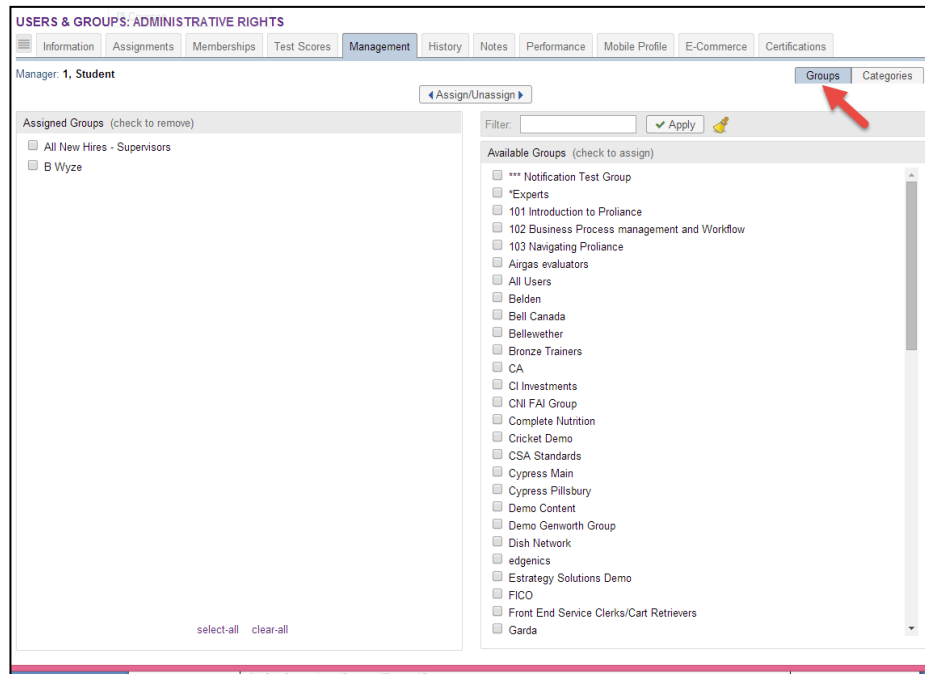


Figure 3

4. Use the Filter at the top of the Available Groups list to narrow the list by Group name.

Category Permissions

1. To limit an Admin's access to specific content categories, click the Categories page display filter in the top right (Figure 4). This displays all the Available, Active Categories in the system to choose from. Click the checkbox next to each category you want to add management access rights to, then click the Assign/Unassign action button in the center to move them over to the Assigned Categories column. These will now be the only categories this Manager will have access to in Course Manager.

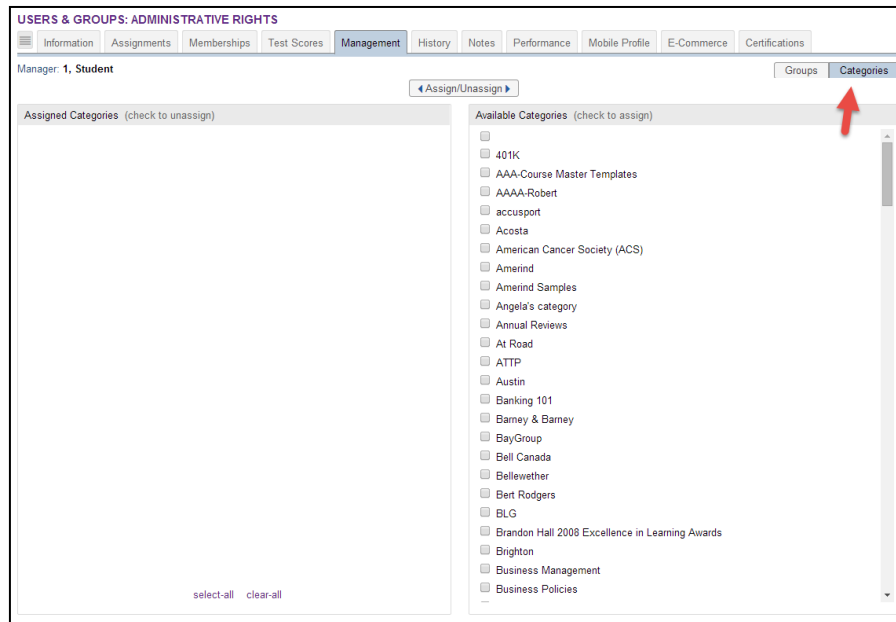


Figure 4

2. Use the Filter at the top of the Available Categories list to narrow the list by Category name.

Note: If the assigned categories is left blank then the administrator will have access to all categories. In order for there to be limitations there must be categories listed in this column.

2.0: Assigning Permissions to Performance (Reporting) Managers

Group Permissions

1. In the OnPoint Course Manager application you will need to first select the Users & Groups main menu, then choose Users & Managers from the dropdown (Figure 5). Locate the name of the admin to be updated. Use the Show Roles – Manager filter to narrow your list to manager roles only, or use any of the additional filter options to narrow your list further, if necessary. Select the manager name from the list.

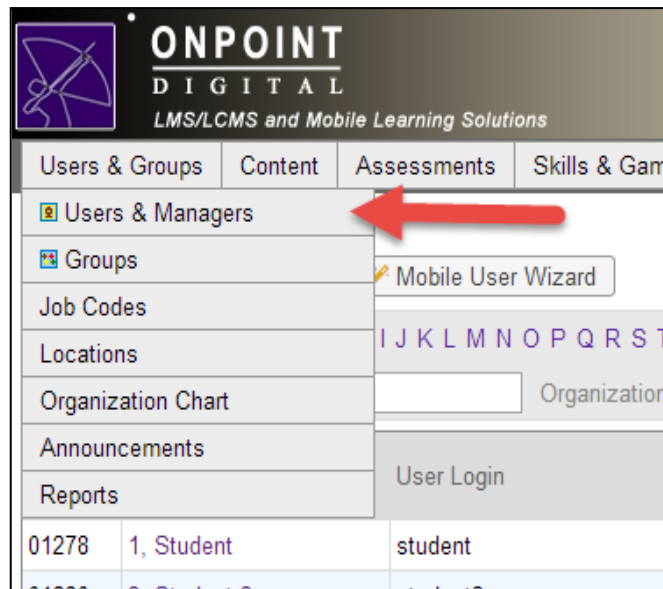


Figure 5

2. Once inside the manager's record, select the Management subtab to view the list of available groups, categories, and mentored users to be assigned (Figure 6).

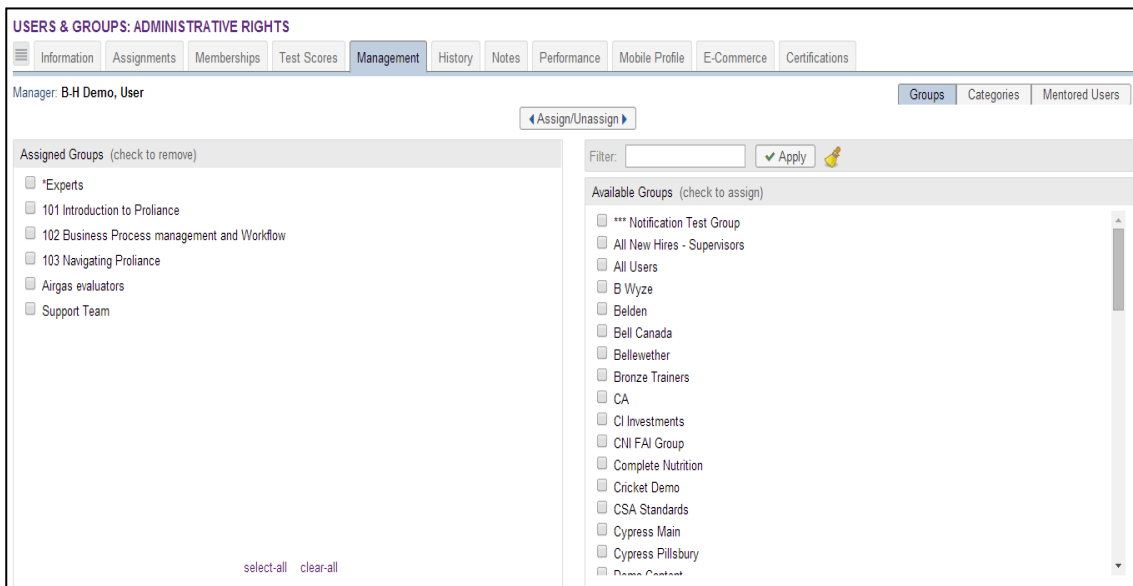


Figure 6

Note: If the assigned groups is left blank then the administrator will have access to all groups. In order for there to be limitations there must be groups listed in this column.

3. Check that the page display filter in the upper right hand corner is set to Groups (Figure 7). [This is the default setting.] This displays all the Available, Active Groups to choose from. Select the checkbox next to each group that you want to add management access rights to, then click the Assign/Unassign action button in the center to move your selection(s) over to the Assigned Groups column. These will now be the only groups that this Admin will have access to in Course Manager.

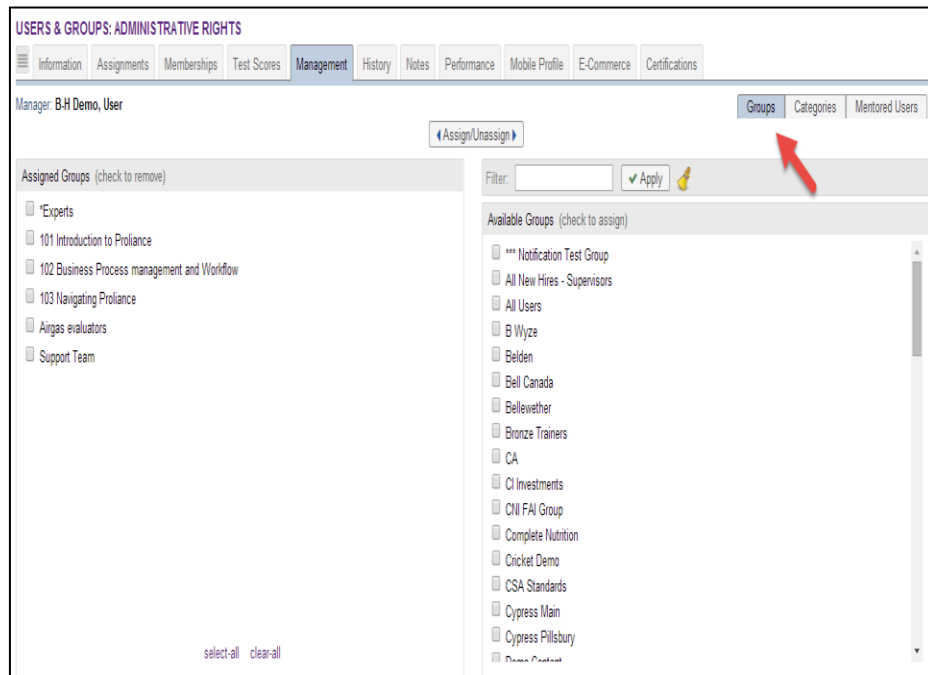


Figure 7

4. Use the Filter at the top of the Available Groups list to narrow the list by Group name.

Category Permissions

1. To limit an Admin's access to specific content categories, click the Categories page display filter in the top right (Figure 8). This displays all the Available, Active Categories in the system to choose from. Click the checkbox next to each category you want to add management access rights to, then click the Assign/Unassign action button in the center to move them over to the Assigned Categories column. These will now be the only categories this Manager will have access to in Course Manager.

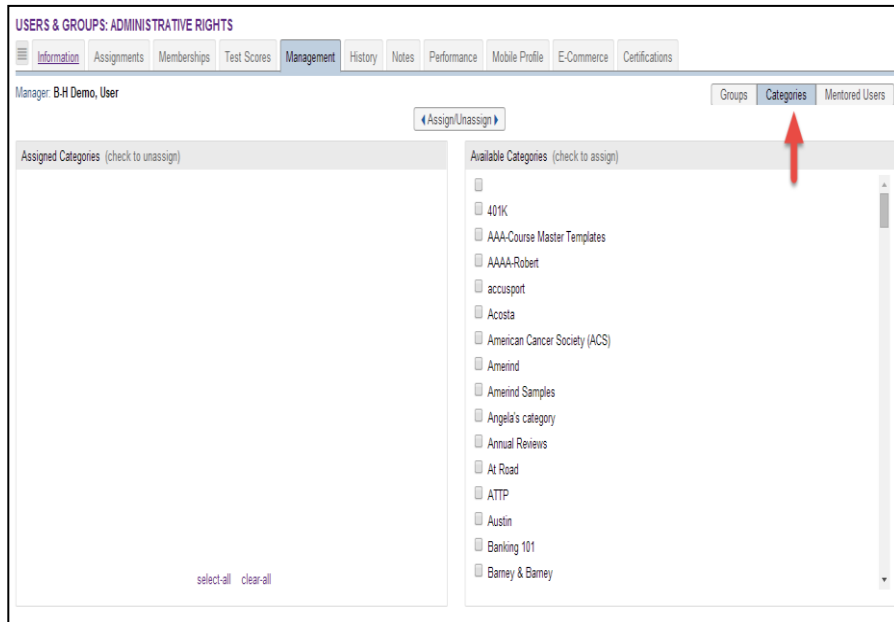


Figure 8

2. Use the Filter at the top of the Available Categories list to narrow the list by Category name.

Note: If the assigned categories is left blank then the administrator will have access to all categories. In order for there to be limitations there must be categories listed in this column.

Mentored Users

1. The Management option will now also allow Administrators to assign a Manager as a “mentor” to one or more users in the system. Click the Mentored Users page display filter in the top right (Figure 9).

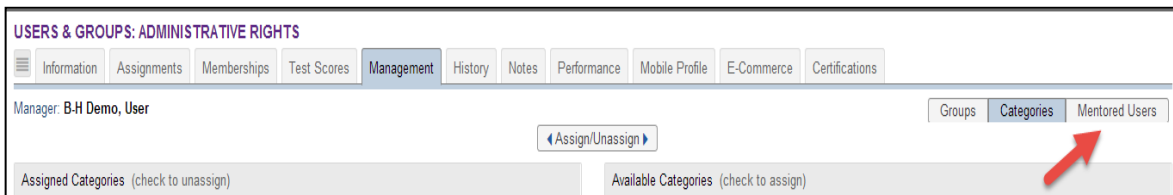


Figure 9

2. This displays all the Available, Active Users in the system to choose from (Figure 10). Click the checkbox next to the User you want to add to another as a mentor, then click the Assign/Unassign action button in the center to move them over to the Assigned Users column. These will now list the names of the Users that this Manager will have listed as being a mentor to.

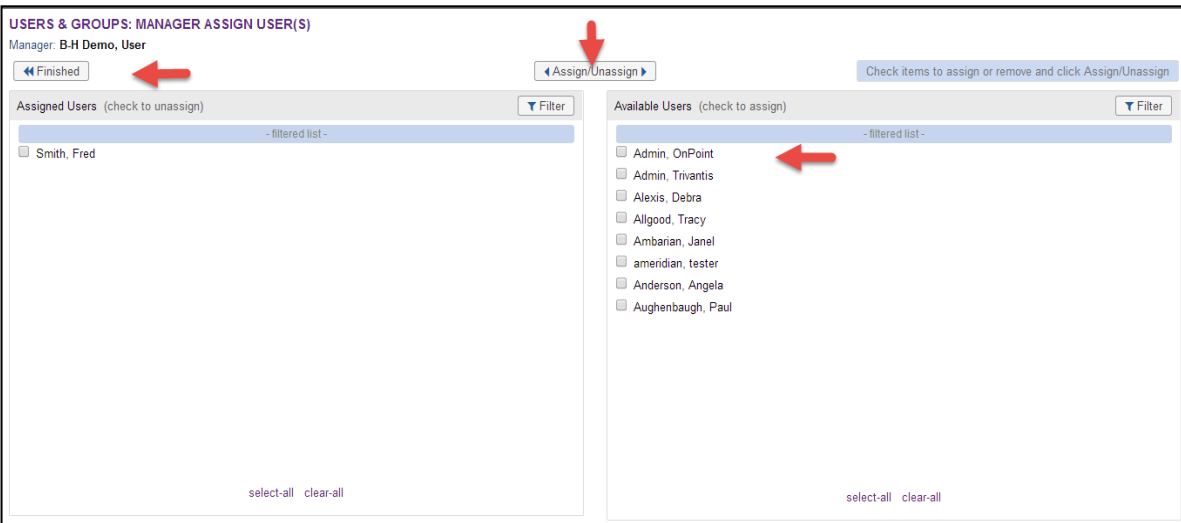


Figure 10

3. Once a Manager has had a user(s) assigned to him/her to mentor, the Manager can view dashboard reporting information and run standard reports for any assigned mentees via OnPoint's Performance Manager module.
4. Use the Filter at the top of the Available Categories list to narrow the list by Category name.

Note: While any Manager may mentor multiple users, each user can only have one mentor.

3.0: Assigning Permissions to Performance (Group) Managers

Group Permissions

1. In the OnPoint Course Manager application you will need to first select the Users & Groups main menu, then choose Users & Managers from the dropdown (Figure 11). Locate the name of the admin to be updated. Use the Show Roles – Manager filter to narrow your list to manager roles only, or use any of the additional filter options to narrow your list further, if necessary. Select the manager name from the list.

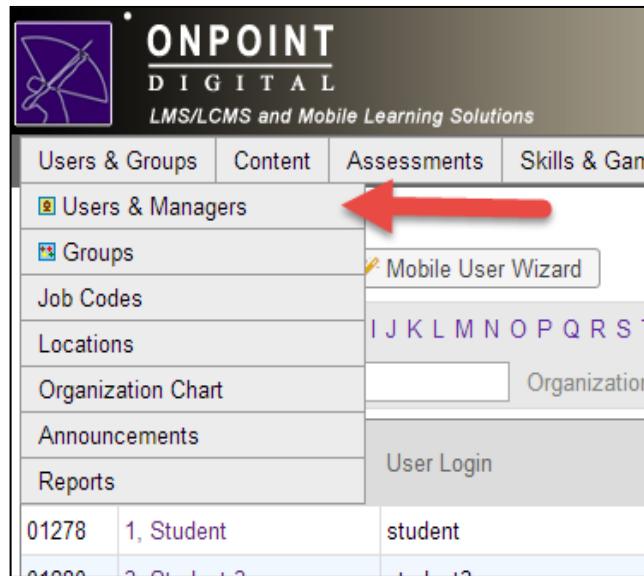


Figure 11

2. Once inside the manager’s record, select the Management subtab to view the list of available groups, categories, and mentored users to be assigned (Figure 12).

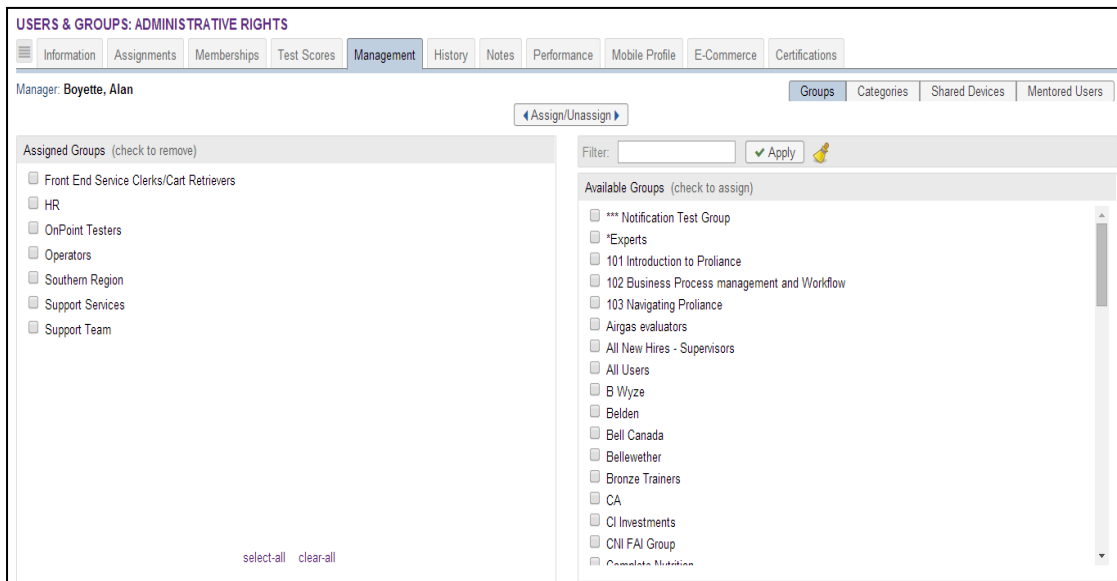


Figure 12

Note: If the assigned groups is left blank then the administrator will have access to all groups. In order for there to be limitations there must be groups listed in this column.

3. Check that the page display filter in the upper right hand corner is set to Groups (Figure 13). [This is the default setting.] This displays all the Available, Active Groups to choose from. Select the checkbox next to each group that you want to add management access rights to, then click the Assign/Unassign action button in the center to move your selection(s) over to the Assigned Groups column. These will now be the only groups that this Admin will have access to in Course Manager.

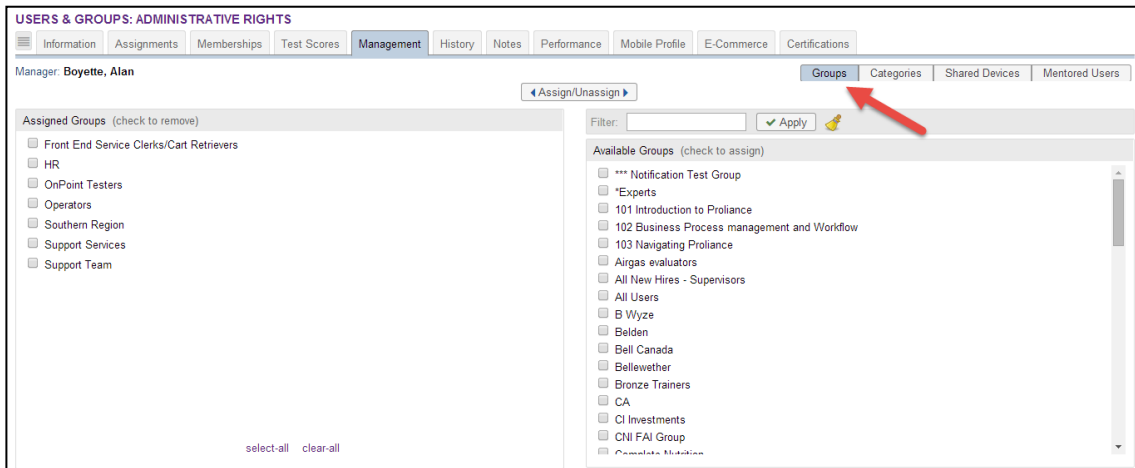


Figure 13

4. Use the Filter at the top of the Available Groups list to narrow the list by Group name.

Category Permissions

1. To limit an Admin's access to specific content categories, click the Categories page display filter in the top right (Figure 14). This displays all the Available, Active Categories in the system to choose from. Click the checkbox next to each category you want to add management access rights to, then click the Assign/Unassign action button in the center to move them over to the Assigned Categories column. These will now be the only categories this Manager will have access to in Course Manager.

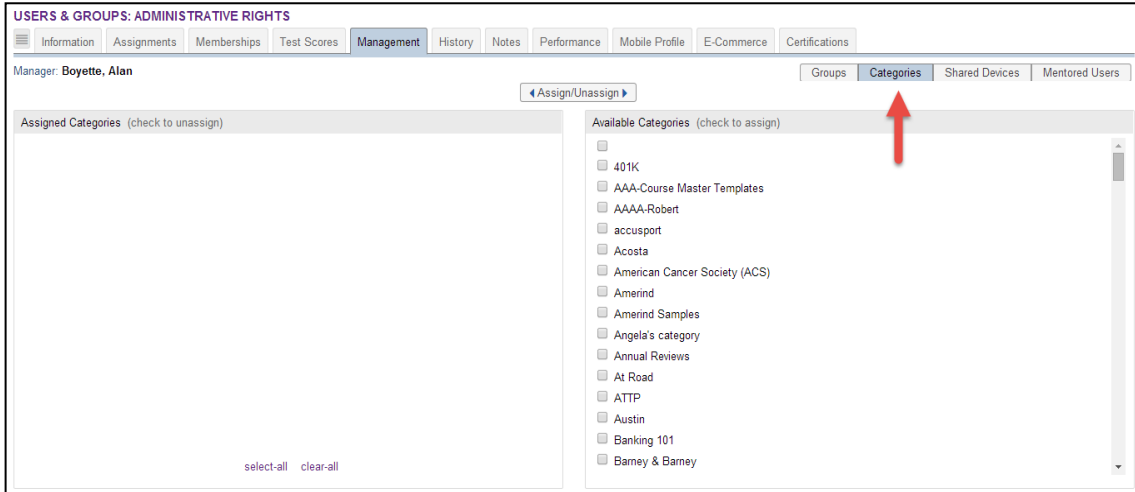


Figure 14

2. Use the Filter at the top of the Available Categories list to narrow the list by Category name.

Note: If the assigned categories is left blank then the administrator will have access to all categories. In order for there to be limitations there must be categories listed in this column.

Shared Device Permissions

1. To limit an admin's access to specific shared device groups created, click the Shared Devices page display filter in the top right (Figure 15). This displays all the Available, Active Shared Devices in the system to choose from. Click the checkbox next to each device you want to add management access rights to, then click the Assign/Unassign action button in the center to move them over to the Assigned devices column. These will now be the only devices this Manager will have access to.

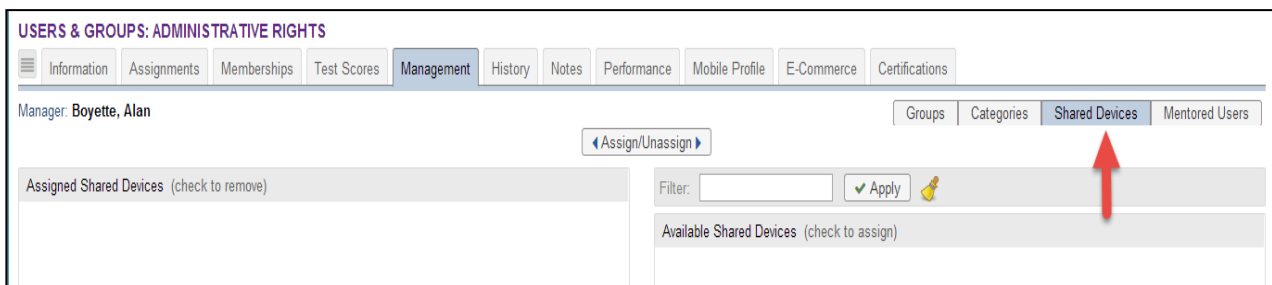


Figure 15

2. Use the Filter at the top of the Available Shared Devices list to narrow the list by Device name

Mentored Users Permissions

1. The Management option will now also allow Administrators to assign a Manager as a “mentor” to one or more users in the system. Click the Mentored Users page display filter in the top right (Figure 16).

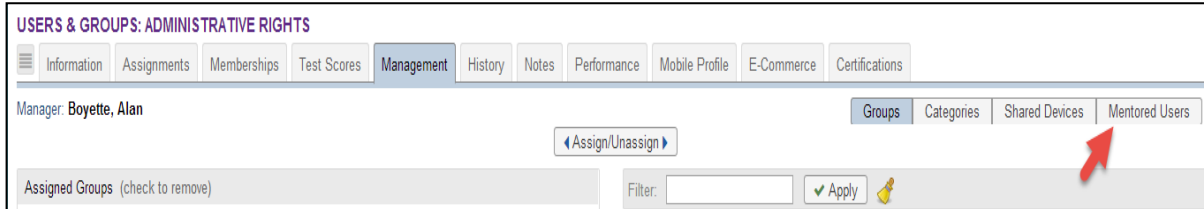


Figure 16

2. This displays all the Available, Active Users in the system to choose from (Figure 17). Click the checkbox next to the User you want to add to another as a mentor, then click the Assign/Unassign action button in the center to move them over to the Assigned Users column. These will now list the names of the Users that this Manager will have listed as being a mentor to.

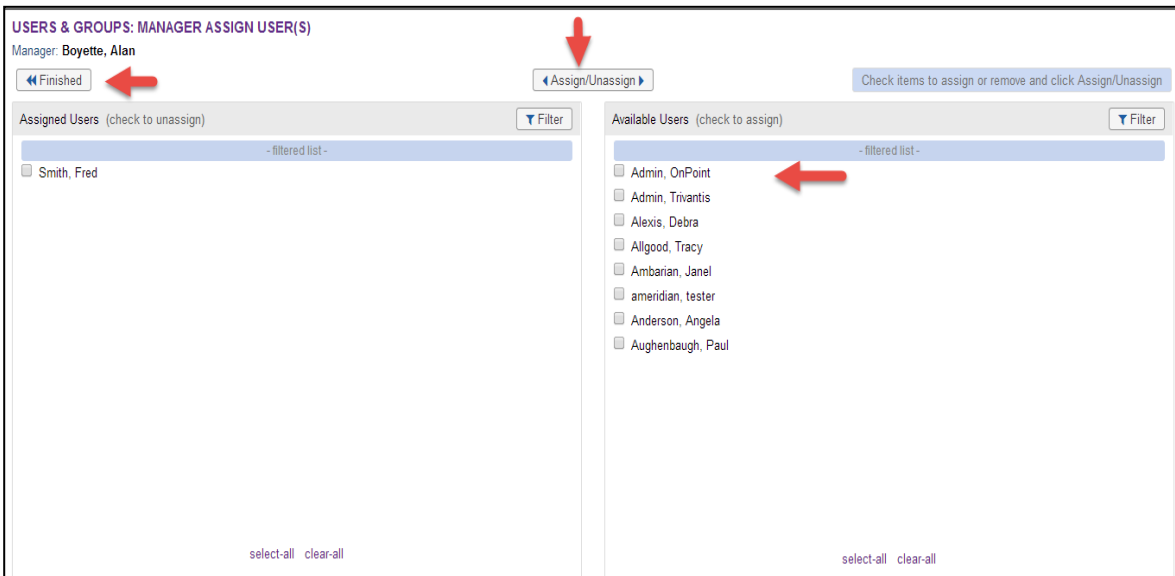


Figure 17

3. Once a Manager has had a user(s) assigned to him/her to mentor, the Manager can view dashboard reporting information and run standard reports for any assigned mentees via OnPoint’s Performance Manager module.
4. Use the Filter at the top of the Available Categories list to narrow the list by Category name.

Note: While any Manager may mentor multiple users, each user can only have one mentor.

4.0: Editing Permissions

1. If an update needs to be made to the assigned groups, categories, shared devices, or mentored users that an Admin can access, follow these simple steps:
 - Check that your page filter choices are selected as desired
 - Mark any Assigned items from the left-hand list, then click the Assign/Unassign action button to unassign those items (Figure 18)
 - Mark any additional Available items from the right-hand list, then click the Assign/Unassign action button to assign those items

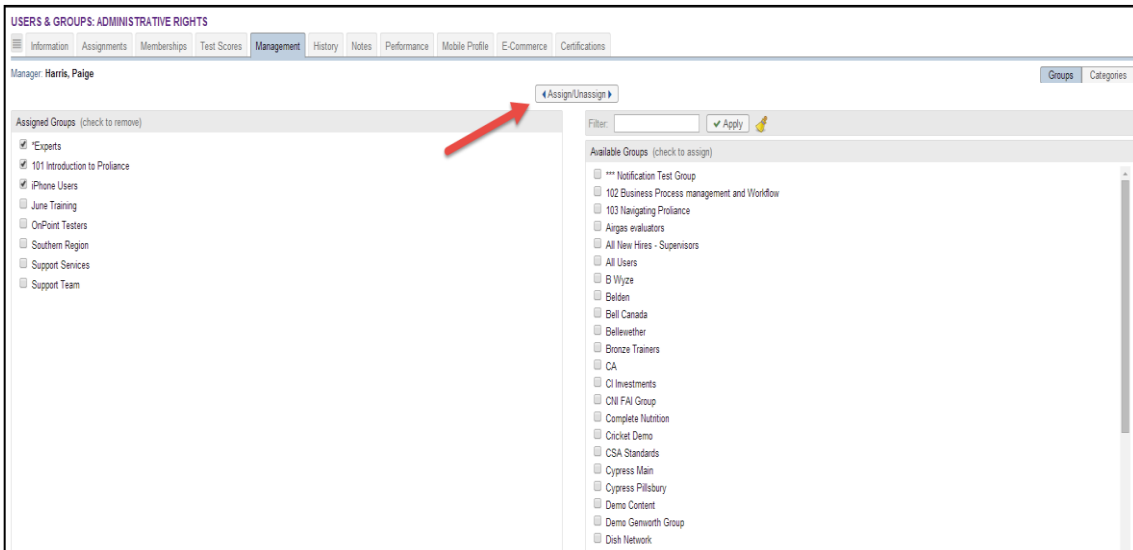


Figure 18

Tip Use the 'select-all' and 'clear-all' links at the bottom of lists to assist with wholesale marking of checkboxes.

Tip: For best results, perform any (click to remove) or (click to assign) functions as independent actions, rather than attempting to unassign and assign items simultaneously.