



**ADMINISTRATION MODULE  
USER GUIDE**

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# **organise*it* ADMINISTRATION MODULE USER GUIDE**

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## HOW TO READ THIS MANUAL

This manual uses the following conventions to describe, identify and highlight terms and operating procedures.

### Keys

The keyboard keys are used in the text to describe many computer operations. Icons identify the key as they appear on the keyboard, when used in procedures. For example  identifies the **[Enter]** key. When keyboard keys are referred to in body text of the document, they will be identified in text, such as **[Back]** or **[Next]**.

### Key Operations




Some of the operations require you to simultaneously use two or more keys. We identify such operations by an icon of the key separated by a plus sign (+). For example,  +  indicates that you must hold down the **[Ctrl]** key on the keyboard and at the same time press the letter **[C]**.

If three keys are used, hold down the first two keys and then press the third key. Be careful to only press the third key once; do not hold it down also, as this will repeat the action.

**ABC** When procedures require an action such as entering text, the text you are to type is represented in the type face you see to the left.

**ABC** When procedures require an action such as selecting an item (perhaps from a list) or ticking/un-ticking an option, then the label against such an option is represented in the type face you see on the left.

### Buttons

The buttons will be shown as an image. For example the **[Next]** button will be indicated by . If a button has a shortcut key then the letter of the button is underlined. For example, the letter **N** in the **[Next]** button is underlined, indicating that the button can be invoked by pressing  + .

### Messages

Messages are used in this manual to bring important information to your attention. Each type of message is identified as:

**CAUTION:** Pay attention! A caution informs you that improper use of software or failure to follow instructions may cause data loss.

**NOTE:** *Please read. A note is a hint or advice that helps you make best use of the software and/or it may also inform about the changes (addition or modification) that the software has carried out to the environment and may be important for proper running of the software.*



## INTRODUCTION

### *Overview*

The main purpose of this module is to provide user level security for the organise*it* main application.

This module facilitates:

- creation of the companies (databases), groups and users
- association of users with groups
- configuration of the Permissions of the users and groups, on the organise*it* Folder Hierarchy in each company

The major objects of this module are:

- Company (Database)
- User
- Group
- organise*it* Folder

organise*it* is a multi-company application i.e. the user can create as many companies as required and can log in to them. The data stored in each company is locally available to that company only.

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## CHAPTER 1:

## LOGGING IN TO THE ADMINISTRATION MODULE

The following chapter looks at the login procedure and describes the resulting screens. This will cover:

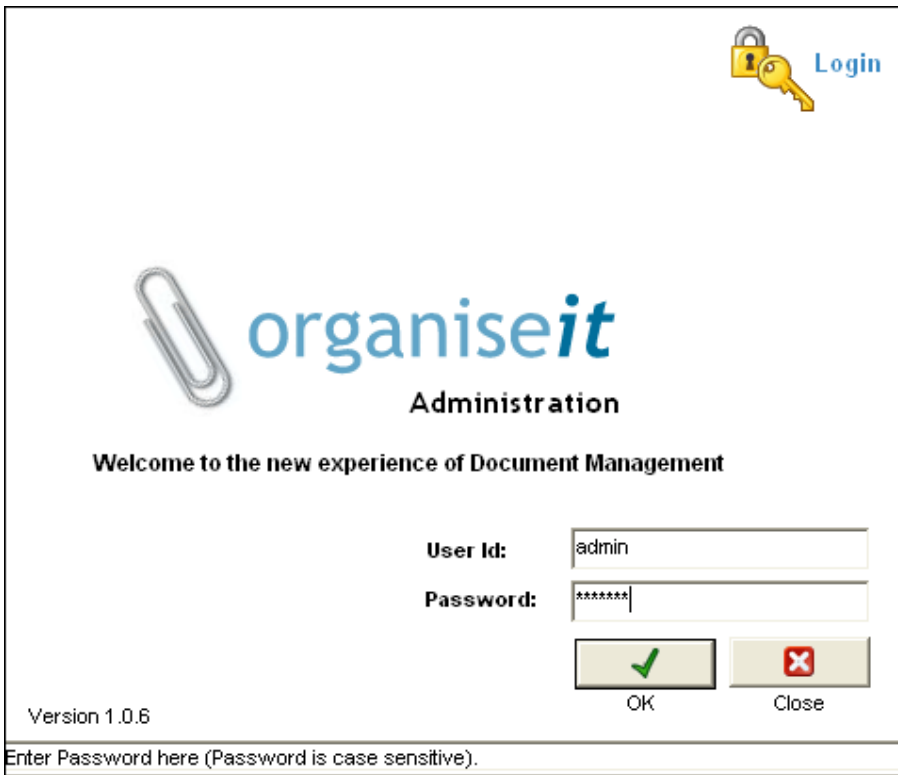
- logging in
- the main screen
- the *Company Administration* wizard


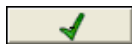
## 1.1 LOGGING IN

Logging in to the *organiseit Administration Module* is the first step in enabling you to access the functionality. To log in to the module, you will need a valid user name and password. The intended users of this module are the user *Admin* and *Supervisors* (a supervisor is a user that can manage a Group).


- 1 Locate and double-click on the *organiseit Administration Module* icon

*You will now see the organiseit Administration Login screen. The built-in organiseit user Admin and a user who is a Supervisor are the only valid users to execute this application...*



- 2 Ensure that *User ID* displays *admin* or a user who is a *Supervisor*, then press  to move to the *Password* field
- 3 Type in a valid password and click on *Ok*  to continue

OR

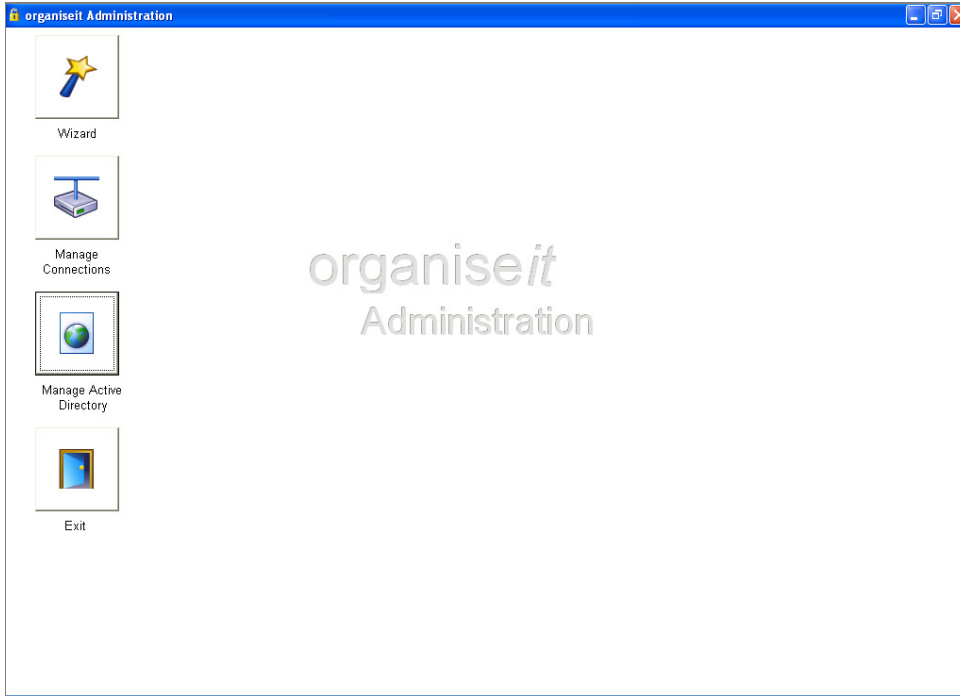
Click on *Close*  to cancel the log in and exit the application

*On successful validation of the User ID and Password, the organiseit Administration main screen is displayed.*





## 1.2 THE organiseit ADMINISTRATION MAIN SCREEN

On successful login, the user will be presented with the following screen. This is the main screen where the following broad-level options are available to the user:

- Company Administration Wizard
- Manage Connections
- Manage Active Directory




The icons presented in this screen are described in the following table:

Screen Option	Description of Use
	Click on the <b>Wizard</b> button to start the <b>Company Administration Wizard</b>
	Click on the <b>Manage Connections</b> button to display the <b>Manage Connections</b> screen and to change the License Key
	Click on the <b>Manage Active Directory</b> button to manage the Active Directory Group ( <b>oitDmnGroup</b> )
	Click on the <b>Exit</b> button to exit the application

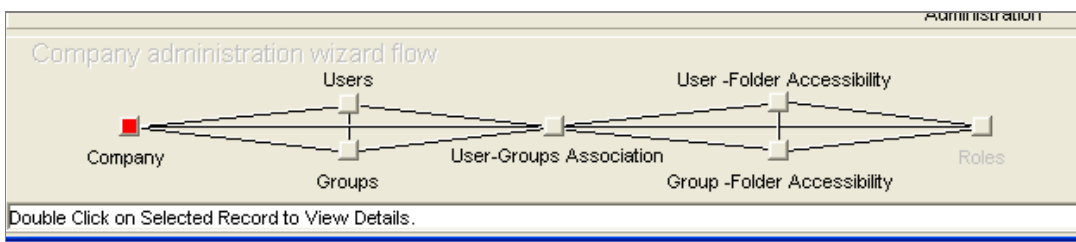
**NOTE:** the **Manage Connections** and **Manage Active Directory** options are available only to the user **Admin**

## 1.3 THE COMPANY ADMINISTRATION WIZARD FLOW

The *Company Administration Wizard* enables the user to create and maintain companies, users and groups.

- 1 Click on the **Wizard** icon  to activate the **Company** screen

Let's look at the options displayed in the **Company administration wizard flow** element located at the bottom of the screen...



The flow options presented in the wizard are described in the following table:

Screen Option	Description of Use
<b>Company</b>	Click on this button to display the <b>Company</b> screen. Through the options in this screen, the user <b>Admin</b> is able to <b>Create/Maintain</b> organiseit companies.
<b>Users</b>	Click on this button to display the <b>Users</b> screen. Through the options in this screen, the user <b>Admin</b> is able to <b>Create/Maintain</b> organiseit users.
<b>Groups</b>	Click on this button to display the <b>Groups</b> screen. Through the options in this screen, the user <b>Admin</b> is able to <b>Create/Maintain</b> organiseit groups.
<b>User-Groups Association</b>	Click on this button to display the <b>User-Groups Association</b> screen. Through the options in this screen, the user <b>Admin</b> or a <b>Supervisor</b> is able to associate/disassociate organiseit users to groups.
<b>User-Folder Accessibility</b>	Click on this button to display the <b>User-Folder Accessibility</b> screen. Through the options in this screen, the user <b>Admin</b> or a <b>Supervisor</b> is able to <b>Grant/Revoke</b> permissions on the folders in an organiseit company to a user.
<b>Group-Folder Accessibility</b>	Click on this button to display the <b>Group-Folder Accessibility</b> screen. Through the options in this screen, the user <b>Admin</b> or a <b>Supervisor</b> is able to <b>Grant/Revoke</b> permissions on the folders in an organiseit company to a group.

**NOTE:** The button highlighted in the wizard flow diagram indicates the step of the **Company Administration wizard** that you are currently at.

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## CHAPTER 2:

## CHANGING THE LICENSE KEY AND MANAGING APPLICATION SESSIONS

The following chapter looks at changing the License Key and managing application sessions. This will cover:

- looking at the elements of the *Connection Management* screen

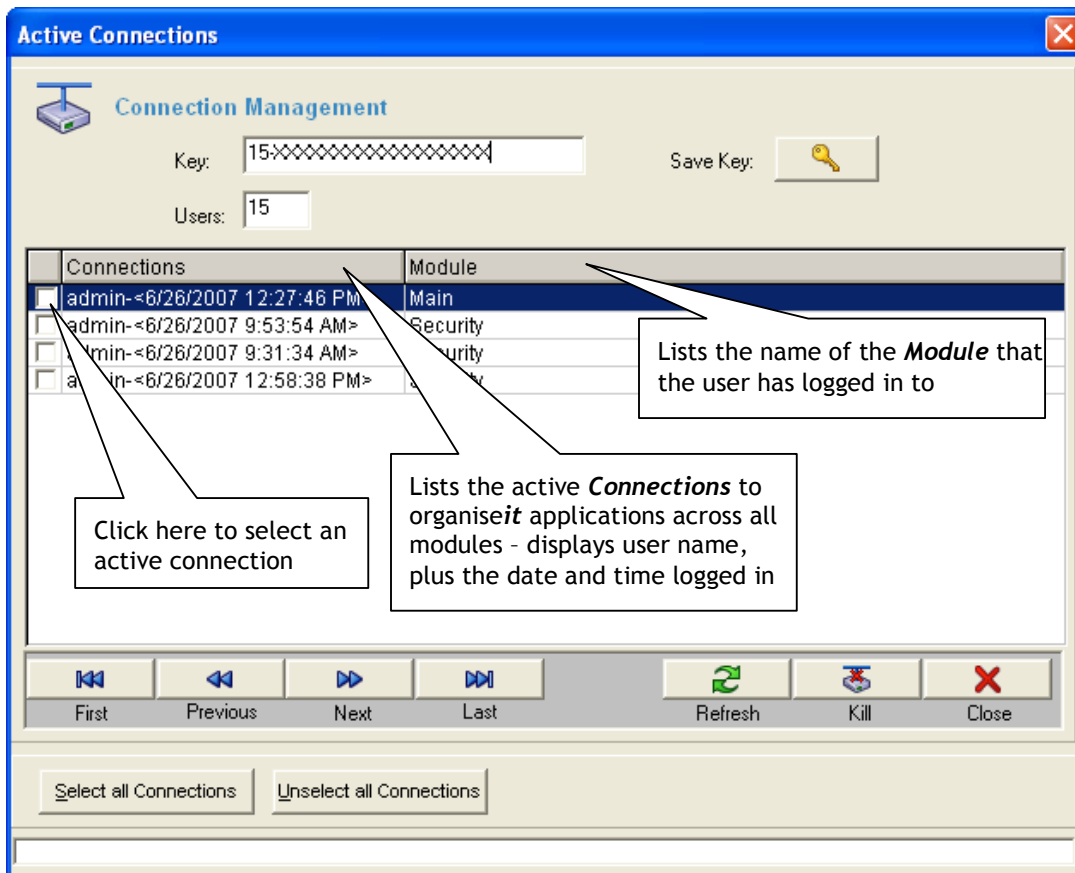
## 2.1 THE CONNECTION MANAGEMENT SCREEN

### 2.1.1 Description

This screen lets the user **Admin** change the **License Key** and kill application sessions. At times, the Client Module abnormally terminates and under such circumstances the **organiseit** system will still assume that it is a live session. **Admin** can then kill such sessions (also called Ghost sessions) by logging in to the Administration Module and navigating to this screen.

This option can also be used when **Admin** wants to carry out routine maintenance and would like to forcefully log off all users from the **organiseit** application.










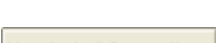
- 1 Click on the **Manage Connections** icon  to activate the **Connection Management** screen



**NOTE:** this screen is available to the user **Admin** only.

### 2.1.2 User Actions

The options and tools presented in the **Connection Management** screen are described in the following table:

Screen Option	Description of Use
<b>Key</b> field	Type in the <b>License Key</b> provided by Organise IT Pty Ltd
<b>Users</b> field	This field displays the number of users for which the license is purchased from Organise IT
	Click on the <b>Save</b> button to initially change the License Key and then click on it again to save the change
	Click on the <b>First</b> button to go to the first record in the <b>Connections</b> list
	Click on the <b>Previous</b> button to go to the previous record in the <b>Connections</b> list
	Click on the <b>Next</b> button to go to the next record in the <b>Connections</b> list
	Click on the <b>Last</b> button to go to the last record in the <b>Connections</b> list
	Click on the <b>Refresh</b> button to refresh the active <b>Connections</b> list
	Click on the <b>Kill</b> button to terminate the selected connection(s) in the list
	Click on the <b>Close</b> button to close this window and return to the main screen
	Click on this button to select all of the connections in the <b>Connections</b> list
	Click on this button to deselect all of the connections in the <b>Connections</b> list

### 2.1.3 Fields

The following fields are presented in the **Connection Management** screen:

- **Key** - this is the License Key provided by Organise IT Pty Ltd
- **Connections** - this lists the active connections to organiseit applications, across all modules - it displays the name of the user, plus the date and time logged in
- **Module** - this is the name of the module that the user has logged in to

### 2.1.4 Behaviour of Fields in an Operation

The behaviour of these fields is described in the following table:

<b>Field</b>	<b>Entry Mode</b>	<b>Validations</b>
<b>(License) Key</b>	Key-in	Unique
<b>Connections</b>	Read Only	NA
<b>Module</b>	Read Only	NA

---

## CHAPTER 3: COMPANIES

The following chapter looks at the administration of organise*it* Companies. This will cover:

- the elements of the *Company* screen
- working with the *Company* list
- *Company* maintenance

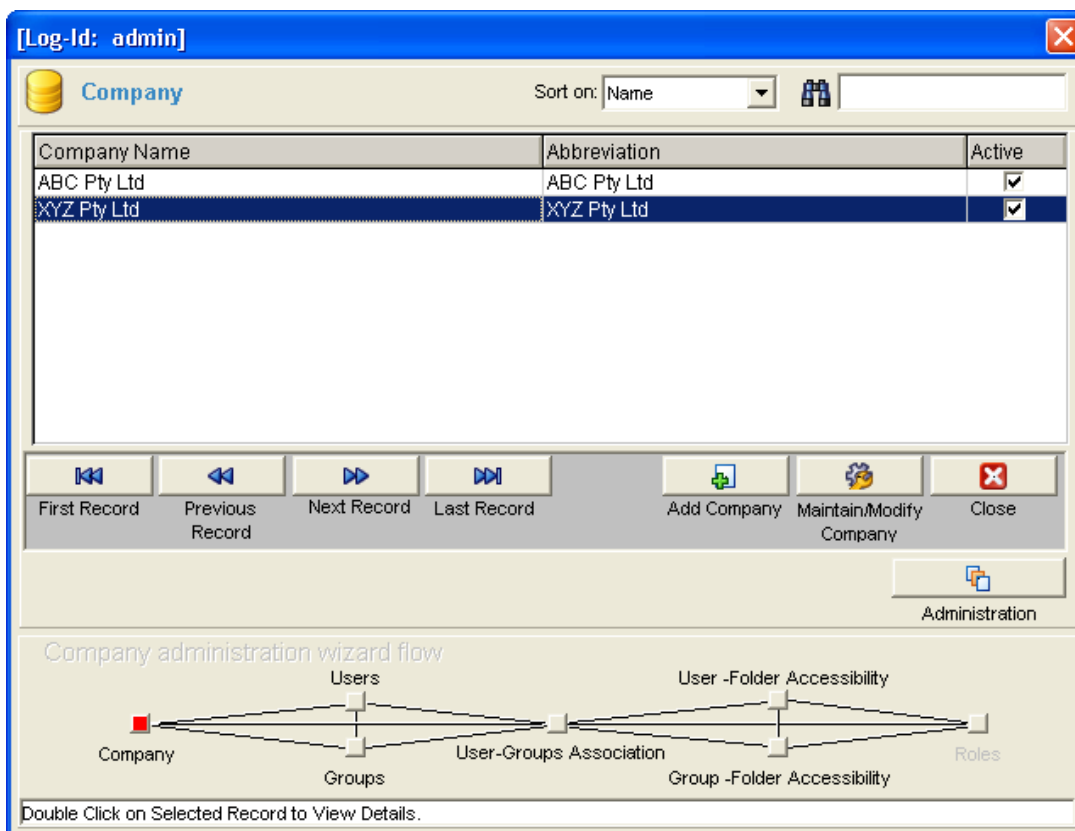
## 3.1 THE COMPANY SCREEN

### 3.1.1 Description

The **Company** screen lists the company(s) created in *organiseit*. The user will be able to sort the **Company** list either on **Company Name** or **Abbreviation**. The user will also be able to search for a company by typing the company name in the **Search** field.

Additionally, the **Company** screen enables the user to create an *organiseit* company and manage or modify the company's details. When there is no company defined in the *organiseit* application, the system will prompt the user to create a company, on navigating to this screen.

- 1 Click on the **Wizard** icon  to activate the **Company** screen



[Log-Id: admin]

**Company** Sort on: Name

Company Name	Abbreviation	Active
ABC Pty Ltd	ABC Pty Ltd	<input checked="" type="checkbox"/>
XYZ Pty Ltd	XYZ Pty Ltd	<input checked="" type="checkbox"/>

First Record Previous Record Next Record Last Record Add Company Maintain/Modify Company Close

Administration

Company administration wizard flow

```






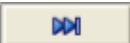



graph LR
    Company[Company] --> Users[Users]
    Company --> Groups[Groups]
    Users --> UGA[User-Groups Association]
    Groups --> UGA
    UGA --> UFA[User-Folder Accessibility]
    UGA --> GFA[Group-Folder Accessibility]
    UFA --> Roles[Roles]
    GFA --> Roles
  
```

Double Click on Selected Record to View Details.

**NOTE:** this screen is available to the user **Admin** only.

### 3.1.2 User Actions

The options and tools presented in the **Company Management** screen are described in the following table:

Screen Option	Description of Use
Sort on field	Click on the drop arrow  and select a <b>Column Name</b> from the list to determine the sort order in the <b>Company</b> list
	Click in the <b>Search</b> field and type the criteria on which to search the <b>Company</b> list
	Click on the <b>First Record</b> button to go to the first record in the <b>Company</b> list
	Click on the <b>Previous Record</b> button to go to the previous record in the <b>Company</b> list
	Click on the <b>Next Record</b> button to go to the next record in the <b>Company</b> list
	Click on the <b>Last Record</b> button to go to the last record in the <b>Company</b> list
	Click on the <b>Add Company</b> button to create a new company
	Click on the <b>Maintain/Modify Company</b> button to modify a company's details
	Click on the <b>Close</b> button to close the window

### 3.1.3 Fields

The following fields are presented in the **Company** screen:

- **Company Name** - this column displays the name of the company
- **Abbreviation** - this column displays the abbreviated name of the company
- **Active** - this column displays the status of the company; whether the company is active (ticked) or inactive (not ticked)

### 3.1.4 Behaviour of Fields in an Operation

The behaviour of these fields is described in the following table:


<b>Field</b>	<b>Entry Mode</b>	<b>Validations</b>
<b>Company Name</b>	Read Only	NA
<b>Company Abbreviation</b>	Read Only	NA
<b>Active</b>	Read Only	NA

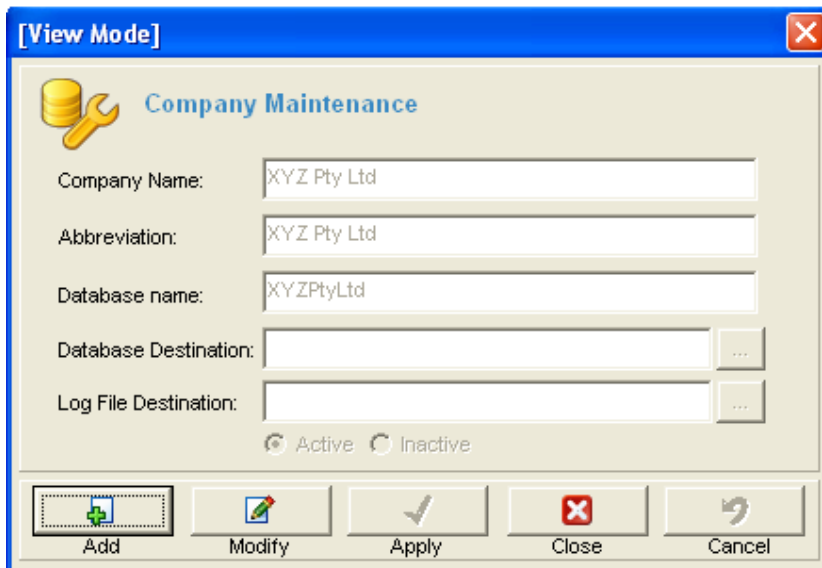
## 3.2 THE COMPANY MAINTENANCE SCREEN

### 3.2.1 Description

The **Company Maintenance** screen facilitates the user **Admin** to create a company and/or modify the company's details. Once a company is created, you can create a new **User** for the company or associate an existing **User** with this new company. Alternatively you can create a **Group** for this company or associate an existing **Group** to this company. The user **Admin** will be the first user associated to a company whenever it is created.

Once a company is created, **Admin** can log in to this company and create **Sites**, **Filing Cabinets** and **Folders** and then, using this module, could grant permissions to these sites, cabinets and folders to the users associated with this company.

- 1 Ensure that the **Company** screen is currently active
- 2 Click on **Maintain/Modify Company**  to display the **Company Maintenance** screen



[View Mode] Company Maintenance

Company Name: XYZ Pty Ltd

Abbreviation: XYZ Pty Ltd

Database name: XYZPtyLtd

Database Destination: ...







Log File Destination: ...

Active  Inactive

Add Modify Apply Close Cancel

### 3.2.2 User Actions

The options and tools presented in the *Company Maintenance* screen are described in the following table:

Screen Option	Description of Use
	Click on the <b>Add</b> button to switch to <b>Add Mode</b> enabling the creation of a company
	Click on the <b>Modify</b> button to switch to <b>Modify Mode</b> enabling the modification of a company's details
	Click on the <b>Apply</b> button to create a new company (when in <b>Add Mode</b> ) or to save the changes to a company (when in <b>Modify Mode</b> ) and then switch back to <b>View Mode</b>
	Click on the <b>OK</b> button to create a new company (when in <b>Add Mode</b> ) or to save the changes to a company (when in <b>Modify Mode</b> ) and then close this screen, to return to the <b>Company</b> screen
	Click on the <b>Close</b> button to close this screen and return to the <b>Company</b> screen
	Click on the <b>Cancel</b> button to cancel the changes and return to <b>View Mode</b> (must be clicked before <b>Apply</b> or <b>OK</b> is clicked)

### 3.2.3 Fields

The following fields are presented in the *Company Maintenance* screen:

- **Company Name** - type in the name of the company - this is the name that the user will see when logging in to organiseit
- **Abbreviation** - type in the abbreviated name of the company (for future versions of organiseit, this will appear in Reports)
- **Database Name** - type in the name of the database (the SQL server will create the new organiseit database using this name)
- **Database Destination** - type in the full path for the database file or click on  and browse the folders to locate and select it - the database files (.mdf) will be created at this location. **oitWebUser** should have access permissions on the destination folder
- **Log File Destination** - type in the full path for the database log file or click on  and browse the folders to locate and select it - the database log files (.ldf) will be created at this location. **oitWebUser** should have access permissions on the destination folder
- **Active/Inactive** - click on **Inactive** to deactivate a company or click on **Active** to reactivate an inactive company. User **Admin** may deactivate a company, if the company is no more in use or would like to prevent the users from logging in to it. Users (even **Admin**) will not be able to log in to a deactivated company, even if they have access permissions to that company. An inactive company may be made active any time by accessing **Modify Mode** then selecting the **Active** status and saving the changes.

### 3.2.4 Behaviour of Fields in an Operation

The behaviour of these fields is described in the following table:

<b>Field</b>	<b>Entry Mode</b>	<b>Validations</b>	<b>Add</b>	<b>Modify</b>
<b>Company Name</b>	Key-in	Unique. Maximum 255 characters	Required	Modifiable. Required
<b>Company Abbreviation</b>	Key-in	Maximum 255 characters	Optional	Modifiable. Optional
<b>Database Name</b>	Key-in	Unique. No empty spaces. No special characters. Max. 255 characters	Required	Not Modifiable
<b>Database Destination</b>	Key-in or use Browse button	Unique. <i>oitWebUser</i> must have access permissions on destination folder. Maximum 255 characters	Required	Not Modifiable
<b>Log File Destination</b>	Key-in or use Browse button	Unique. <i>oitWebUser</i> must have access permissions on destination folder. Maximum 255 characters	Required	Not Modifiable
<b>Active/Inactive</b>	Select		Disabled	Modifiable. Required

---

## CHAPTER 4:      **USERS**

The following chapter looks at the administration of *organiseit* Users. This will cover:

- the elements of the *Users* screen
- working with the *Users* list
- *User* maintenance

## 4.1 THE USERS SCREEN

### 4.1.1 Description

The **Users** screen is available to the user **Admin** only. This screen lists all of the users that have been created in **organiseit**. From here you can manage users: **Create**, **Modify**, **Associate** or **Disassociate** users from a company. In this screen you can sort the list either on **UserID** or **User Name**. You can also search for the user by typing the **UserID** in the **Search Field**. The users that are ticked are the users that are currently associated with the selected company.

Once a user is created, you can grant them appropriate permissions on the folders in **organiseit** database directly or alternatively add that user to a **Group** and grant permissions to that group. All the users of the group will inherit the permissions granted to the group.

Reasons for disassociating a user include:

- the user leaving the organization
- if you feel that the user should not have access to the database from some point of time
- if a user is on long leave and you would not like other users to utilise that user's credentials to work in **organiseit**.

Disassociating a user from **organiseit** does not revoke the permissions granted to the user on that database, but you are blocking the user from logging in to that **organiseit** database.

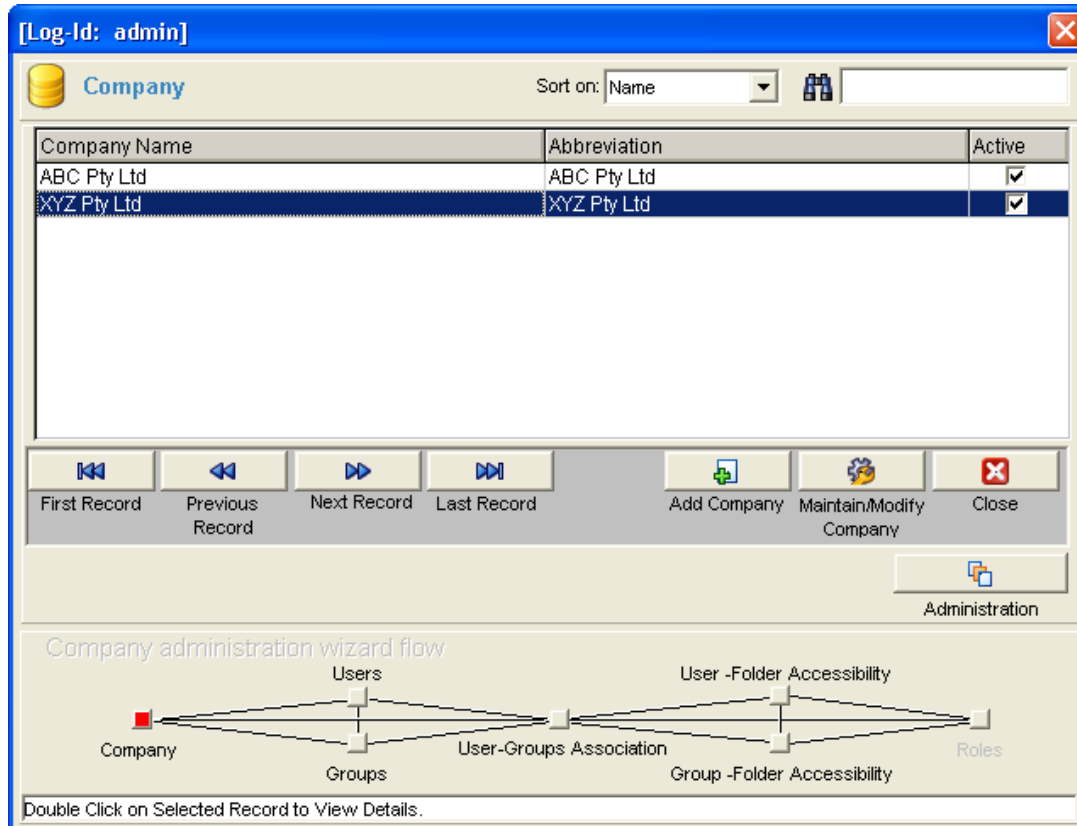
### Examples

- I. James is one of the users and is going on leave for a couple of weeks and he has access to an **organiseit** database. To prevent authorized users from logging in to the **organiseit** database using James' credentials, you disassociate James from that **organiseit** database. When James returns from his holiday you would then just re-associate James to that **organiseit** database and he will regain all the permissions that he had on that database prior to going on holiday.
- II. A user on an **organiseit** database requires access to the database on and off. Under such circumstances you would give the permissions once and then associate or disassociate the user from that **organiseit** database as and when required.

*Let's now display the Users screen:*

- 1 Click on the **Wizard** icon  to start the **Administration** wizard

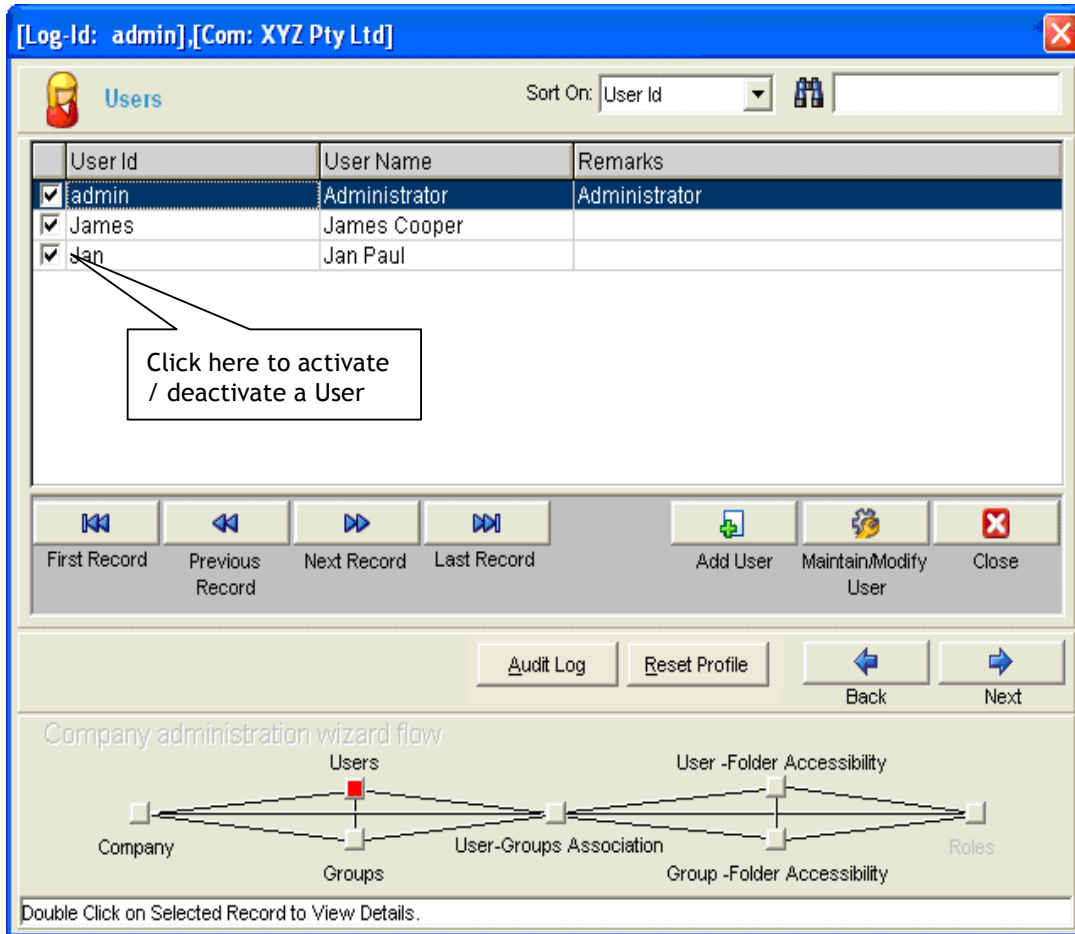
*This will display the Company screen of the wizard...*



- 2 Select a company in the **Company List**





*This is the company to which the user(s) belong...*










- 3 Click on the **Users** button in the **Company administration wizard flow** diagram at the bottom of the window, to display the **Users** screen



#### 4.1.2 User Actions

The options and tools presented in the **Users** screen are described in the following table:


Screen Option	Description of Use
Sort On field	Click on the drop arrow  and select a <b>User Id</b> from the list to determine the sort order in the <b>Users</b> list
	Click in the <b>Search</b> field and type the criteria on which to search the <b>Users</b> list
	Click on the <b>First Record</b> button to go to the first record in the <b>Users</b> list
	Click on the <b>Previous Record</b> button to go to the previous record in the <b>Users</b> list

Screen Option	Description of Use
	Click on the <b>Next Record</b> button to go to the next record in the <b>Users</b> list
	Click on the <b>Last Record</b> button to go to the last record in the <b>Users</b> list
	Click on the <b>Back</b> button to go to the previous step of the wizard
	Click on the <b>Next</b> button to go to the next step of the wizard
	Click on the <b>Add User</b> button to create a new user
	Click on the <b>Maintain/Modify User</b> button to manage the selected user
	Click on the <b>Close</b> button to close the <b>Users</b> screen and return to the <b>Company</b> screen
	Click on the <b>Audit Log</b> button to view the Audit Log of the selected user
	Click on the <b>Reset Profile</b> button to reset the selected user's profile to the <b>Default</b> setting

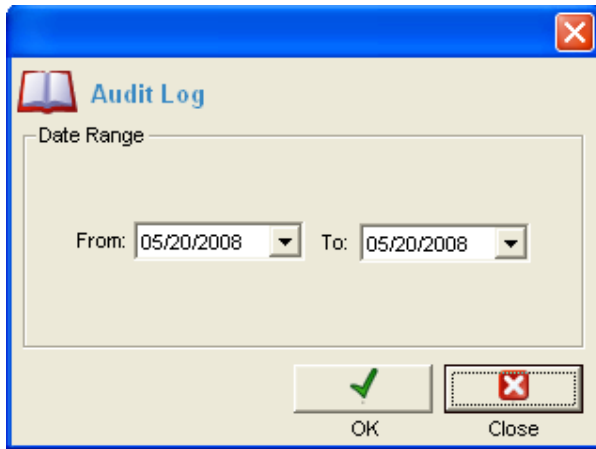
- 4 To activate/deactivate a user, click on the tick box to the left of the user in the **Users** list


**NOTE:** If the **User Id** displays a tick, then it is activated. If the **User Id** does not display a tick, then it is deactivated.

#### 4.1.2.1 View Log

- 1 Click on the **Audit Log**  to view the Audit Log of the selected user for the selected company


*This will display the screen for the Audit Log's Date Range selection...*



- 2 Select the *From* date and *To* date to view the Audit Log of the selected user within that date range, then click OK 

*The Audit Log screen is now displayed...*

Date Time	Audit Description	Value
20 May 2008	Marked As Keyword	False
20 May 2008	Folder Colour	Red
20 May 2008	Folder description	Z
20 May 2008	Folder < Z ( 1745 ) Created Under Folder < AtoZ ( 1719 ) > By User < admin >	
20 May 2008	Marked As Keyword	False
20 May 2008	Folder Colour	Red
20 May 2008	Folder description	Y
20 May 2008	Folder < Y ( 1744 ) Created Under Folder < AtoZ ( 1719 ) > By User < admin >	
20 May 2008	Marked As Keyword	False
20 May 2008	Folder Colour	Red
20 May 2008	Folder description	X
20 May 2008	Folder < X ( 1743 ) Created Under Folder < AtoZ ( 1719 ) > By User < admin >	
20 May 2008	Marked As Keyword	False
20 May 2008	Folder Colour	Red
20 May 2008	Folder description	w
20 May 2008	Folder < W ( 1742 ) Created Under Folder < AtoZ ( 1719 ) > By User < admin >	
20 May 2008	Marked As Keyword	False
20 May 2008	Folder Colour	Red
20 May 2008	Folder description	V


- 3 Click on the **Report**  to generate a log report in the Excel format at the location  
“MY Documents\MyOrganiseIT\LogReport”

#### 4.1.2.1.1 Fields

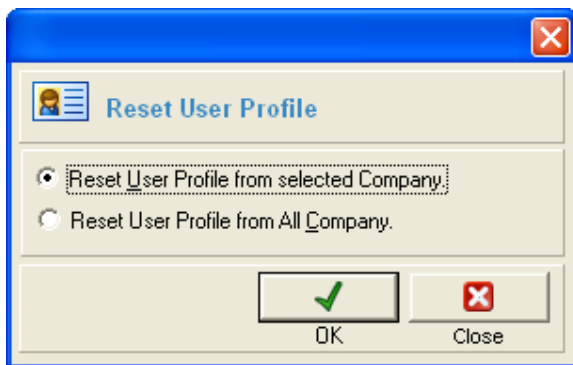
The following fields are displayed in the **Audit Log** screen

- **Date Time** - this column displays the date and time for every action performed by the selected user
- **Audit Description** - this column displays the list of actions performed by the selected user
- **Value** - this column displays the values for the actions performed by the selected user like attaching/detaching a keyword, creating/modifying folder/document description, marking folder description as keyword, changing folder colour
- **Date Order:- Ascending** - this option sorts the entries in the Audit Log’s fields in ascending order with respect to the Date  
**Descending** - this option sorts the entries in the Audit Log’s fields in descending order with respect to the Date

#### 4.1.2.2 Reset Profile

- 1 Click on the **Reset Profile**  to reset the selected user’s profile to the *Default* setting

This will display the screen having 2 options to **Reset User Profile...**



##### **Option 1** Reset User Profile from selected Company

This option resets the selected user’s profile (i.e. changes to default setting) for the selected company only.

##### **Option 2** Reset User Profile from All Company

This option resets the selected user’s profile (i.e. changes to default setting) from all the companies associated with the user.

### 4.1.3 Fields

The following fields are presented in the **Users** screen:

- **User Id** - this column displays the login ID of each user
- **User Name** - this column displays the name of the user
- **Remarks** - this column displays remarks related to the user

### 4.1.4 Behaviour of Fields in an Operation

The behaviour of these fields is described in the following table:

<b>Field</b>	<b>Entry Mode</b>	<b>Validations</b>
<b>User Id</b>	Read Only	NA
<b>User Name</b>	Read Only	NA
<b>Remarks</b>	Read Only	NA


## 4.2 USER MAINTENANCE

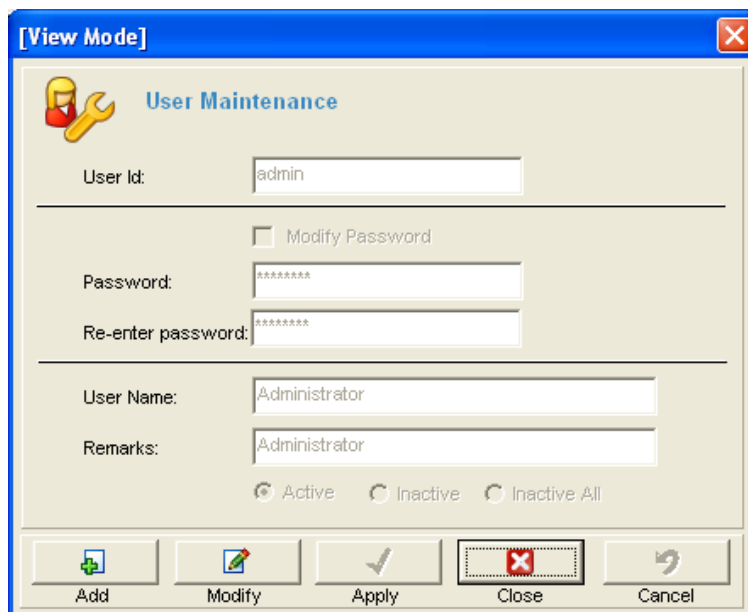
### 4.2.1 Description

The **User Maintenance** screen facilitates the user **Admin** to create a user and modify a user's details. By default, on creating a user, the system will associate it with the currently selected company. On creating a user, you could either add that user to a group, or grant permissions to it in the selected company.

- 1 Ensure that the **Users** screen is currently active (for more information, refer to “*The Users Screen*”, page 18)
- 2 Double-click on the user name in the **Users** screen

OR

Click on the user name in the **Users** screen, then click on **Maintain/Modify User**  to display the **User Maintenance** screen






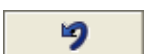


The screenshot shows a dialog box titled "[View Mode] User Maintenance". It contains the following fields and controls:

- User Id:** Text box containing "admin".
- Modify Password:** A checkbox that is currently unchecked.
- Password:** Text box containing "\*\*\*\*\*".
- Re-enter password:** Text box containing "\*\*\*\*\*".
- User Name:** Text box containing "Administrator".
- Remarks:** Text box containing "Administrator".
- Active/Inactive/Inactive All:** Three radio buttons. "Active" is selected.
- Buttons:** A row of five buttons: "Add", "Modify", "Apply", "Close", and "Cancel". The "Close" button is highlighted with a dashed border.

### 4.2.2 User Actions

The options and tools presented in the **User Maintenance** screen are described in the following table:

Screen Option	Description of Use
	Click on the <b>Add</b> button to switch to <b>Add Mode</b> enabling the creation of a user
	Click on the <b>Modify</b> button to switch to <b>Modify Mode</b> enabling the modification of a user's details
	Click on the <b>Apply</b> button to create a new user (when in <b>Add Mode</b> ) or to save the changes to a user (when in <b>Modify Mode</b> ) and then switch back to <b>View Mode</b>
	Click on the <b>OK</b> button to create a new user (when in <b>Add Mode</b> ) or to save the changes to a user (when in <b>Modify Mode</b> ) and then close this screen, to return to the <b>Users</b> screen
	Click on the <b>Close</b> button to close this screen and return to the <b>Users</b> screen
	Click on the <b>Cancel</b> button to cancel the changes and return to <b>View Mode</b> (must be clicked before <b>Apply</b> or <b>OK</b> is clicked)

### 4.2.3 Fields

The following fields are presented in the **Users** screen:

- **User Id** - type in the login ID of the user - this is the ID with which the user will log in to the **organiseit** application
- **Password** - type in the login password
- **Re-enter Password** - retype the login password to verify the password entered in the above field
- **User Name** - type in the user's name - this is the full name of the user
- **Remarks** - type in the remarks related to the user
- **Active / Inactive / Inactive All** - click on **Active** to associate a user with the selected company. Click on **Inactive** to disassociate a user from the selected company. Click on **Inactive All** to disassociate the user from ALL the companies it is associated with.

#### 4.2.4 Behaviour of Fields in an Operation

The behaviour of these fields is described in the following table:

<b>Field</b>	<b>Entry Mode</b>	<b>Validations</b>	<b>Add</b>	<b>Modify</b>
<b>User Id</b>	Key-in	Unique - no two users should have the same ID. Minimum 3 characters, maximum 255 characters. Single quote / apostrophe (') is not allowed	Required	Not modifiable
<b>Password</b>	Key-in	Minimum 6 characters, maximum 255 characters. Single quote / apostrophe (') is not allowed	Required	Modifiable. Required
<b>Re-enter password</b>	Key-in	Minimum 6 characters, maximum 255 characters. Single quote / apostrophe (') is not allowed	Required	Modifiable. Required
<b>User Name</b>	Key-in	Maximum 255 characters	Required	Modifiable. Required
<b>Remarks</b>	Key-in	Maximum 255 characters	Optional	Modifiable. Optional
<b>Active / Inactive / Inactive All</b>	Select	Cannot deactivate the user <i>Admin</i>	Disabled	Modifiable. Required

---

## CHAPTER 5:

## GROUPS

The following chapter looks at the administration of organise*it* Groups. This will cover:

- the elements of the *Groups* screen
- working with the *Groups* list
- *Group* maintenance

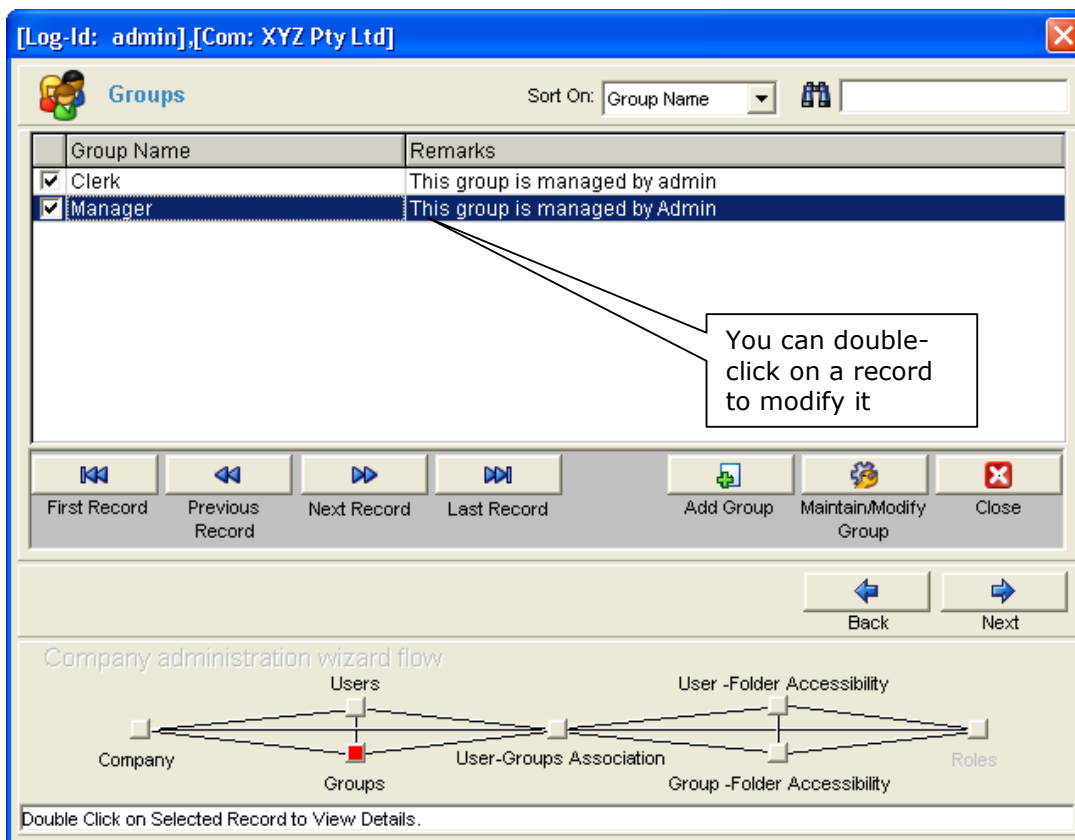
## 5.1 THE GROUPS SCREEN

### 5.1.1 Description

A group is a collection of user accounts that can be managed as a single unit. Users that belong to a particular group are referred to as group members.

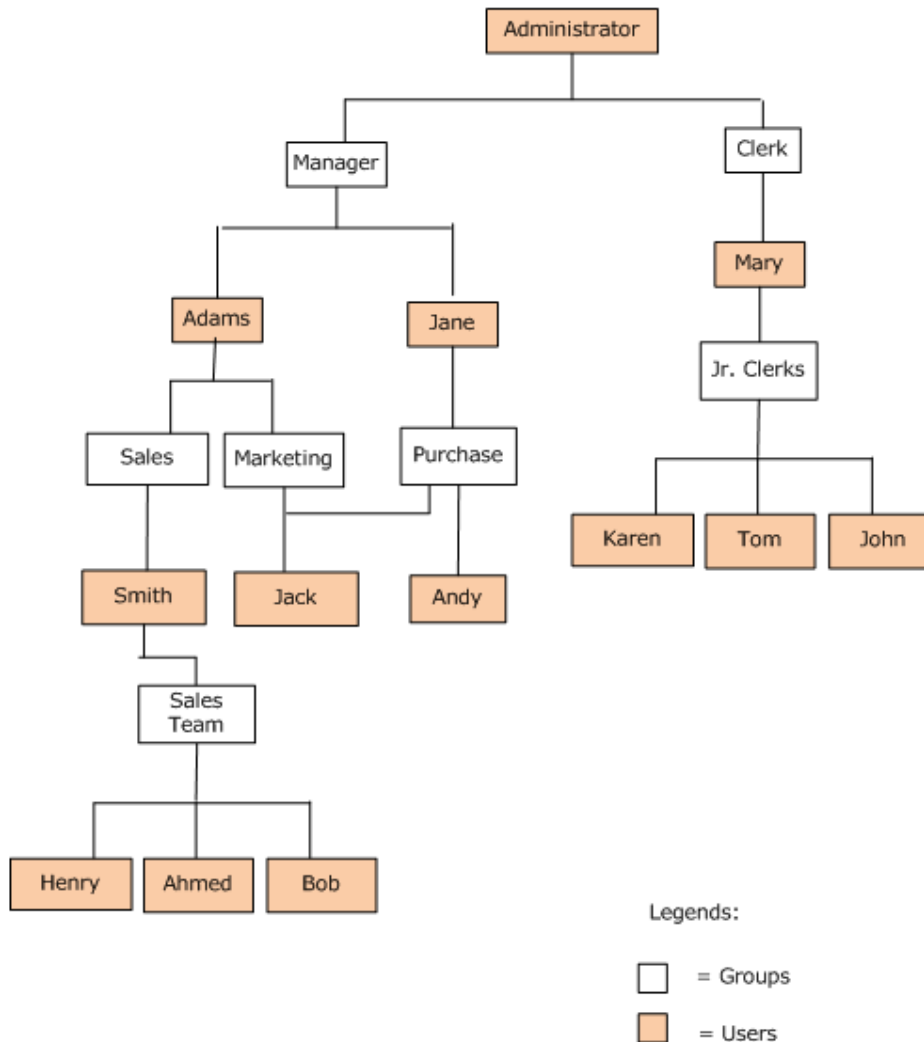
Using groups can simplify administration by assigning a common set of permissions to many accounts at once, rather than assigning permissions to each account individually. When a user is added to a group, it will inherit all the permissions that are assigned to that group. Similarly, when a user is removed from a group, it loses all those permissions that it has inherited by being a member of that group.

- 1 Ensure that the **Company** or **Users** screen is currently active (for more information, refer to “*The Company Screen*”, page 11 or “*The Users Screen*”, page 18)
- 2 Click on the **Groups** button in the **Company administration wizard flow** diagram at the bottom of the screen, to display the **Groups** screen



organiseit allows you to create any number of groups in the organiseit database. Each group will have a user that manages the group and is called the **Supervisor** of the group. A user can be **Supervisor** for more than one group. User **Admin** is an indirect **Supervisor** for all groups. You can create a group hierarchy of any depth in organiseit. One such hierarchy is shown below:

*Example (of a Group and User Hierarchy)*



Let's understand the structure:

- User **Admin** is at the top-most level
- User **Admin** is a direct **Supervisor** of the groups **Manager** and **Clerk**
- Adams and Jane are the members of the group **Manager**
- Adams is the **Supervisor** of groups **Sales** and **Marketing** while Jane is the **Supervisor** of the group **Purchase**
- Smith is the member of the **Sales** group, Andy is a member of **Purchase** and Jack is the member of both **Marketing** and **Purchase**
- Mary is the member of group **Clerk** and **Supervisor** of the group **Jr. Clerks**
- Karen, Tom and Jerry are members of the group **Jr. Clerks**

This screen is available to the user **Admin** only. This screen lists all the groups in the **organiseit** database. From here you can manage groups: **Create**, **Modify** groups and **Associate** or **Disassociate** groups from a company. The groups that are ticked are the groups that are currently associated with the selected company.








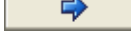



Once a group is created you can add users to the group and grant permissions to the group, on the folders in the *organiseit* database. All of the users of the group will inherit the permissions granted to the group.

You can associate a group from this screen to the selected company, by ticking the tick box. When a group becomes associated to a company in this manner, user *Admin* becomes the *Supervisor* of that group. To associate a group to the selected company and make a user other than *Admin* the *Supervisor* of the group, click on *Maintain/Modify Group* and select the appropriate user as the *Supervisor*.

You can disassociate a group from this screen by removing the tick from the tick box. When a group is disassociated from the selected company, then all the permissions assigned to that group are disabled but not revoked. Disabling the permissions has the same effect as revoking the permissions, with the exception that the permissions could be easily re-enabled by simply re-associating the group with the company.

### 5.1.2 User Actions

The options and tools presented in the *Groups* screen are described in the following table:

Screen Option	Description of Use
Sort on field	Click on the drop arrow  and select a <i>Group Name</i> from the list to determine the sort order in the <i>Groups</i> list
	Click in the <i>Search</i> field and type the criteria on which to search the <i>Groups</i> list
	Click on the <i>First Record</i> button to go to the first record in the <i>Groups</i> list
	Click on the <i>Previous Record</i> button to go to the previous record in the <i>Groups</i> list
	Click on the <i>Next Record</i> button to go to the next record in the <i>Groups</i> list
	Click on the <i>Last Record</i> button to go to the last record in the <i>Groups</i> list
	Click on the <i>Back</i> button to go to the previous step of the wizard
	Click on the <i>Next</i> button to go to the next step of the wizard
	Click on the <i>Add Group</i> button to create a new group
	Click on the <i>Maintain/Modify Group</i> button to manage the selected group
	Click on the <i>Close</i> button to close the <i>Groups</i> screen and return to the <i>Company</i> screen

### 5.1.3 Fields

The following fields are presented in the **Groups** screen:

- **Group Name** - this column displays the name of the group
- **Remarks** - This column displays the remarks related to the group

### 5.1.4 Behaviour of Fields in an Operation

The behaviour of these fields is described in the following table:

<b>Field</b>	<b>Entry Mode</b>	<b>Validations</b>
<b>Group Name</b>	Read Only	NA
<b>Remarks</b>	Read Only	NA

## 5.2 GROUP MAINTENANCE

### 5.2.1 Description

The **Groups Maintenance** screen facilitates the user **Admin** to create a new group, associate/re-associate an existing group with a company, modify group details and disassociate/deactivate an existing group from a company.

While creating a group you will have to nominate a **Supervisor** for that group. The **Supervisor** will be a user who will be managing the group: **Adding/Removing Users** to and from the group, **Granting/Revoking Permissions** to and from the group. By default, user **Admin** will be a **Supervisor** of any group. The **Supervisor** of a group cannot be changed (i.e. if you have nominated a user as a **Supervisor** of a group, you will not be able to replace that user with another user as a **Supervisor**).

**NOTE:** this is a **LIMITATION** of the **CURRENT VERSION**, in **FUTURE VERSIONS** you will be allowed to replace a supervisor.

- 1 Ensure that the **Groups** screen is currently active (for more information, refer to “*The Groups Screen*”, page 29)
- 2 Double-click on the group name in the **Groups** screen

OR

Click on the group name in the **Groups** screen, then click on **Maintain/Modify Group**









*The Groups Maintenance screen is now displayed...*

 A screenshot of the 'Groups Maintenance' dialog box. The window title is '[View Mode]'. The main area contains a 'Groups Maintenance' header with a wrench and screwdriver icon. Below the header are three input fields: 'Group Name' with the text 'Marketing', 'Remarks' (empty), and 'Supervisor' with a dropdown menu showing 'admin'. There are two radio buttons: 'Active' (selected) and 'Inactive'. At the bottom, there is a toolbar with five buttons: 'Add' (with a plus icon), 'Modify' (with a pencil icon), 'Apply' (with a checkmark icon), 'Close' (with a red X icon), and 'Cancel' (with a curved arrow icon).


### 5.2.2 User Actions

The options and tools presented in the **Groups Maintenance** screen are described in the following table:

Screen Option	Description of Use
	Click on the <b>Add</b> button to switch to <b>Add Mode</b> enabling the creation of a group
	Click on the <b>Modify</b> button to switch to <b>Modify Mode</b> enabling the modification of a group's details
	Click on the <b>Apply</b> button to create a new group (when in <b>Add Mode</b> ) or to save the changes to a group (when in <b>Modify Mode</b> ) and then switch back to <b>View Mode</b>
	Click on the <b>OK</b> button to create a new group (when in <b>Add Mode</b> ) or to save the changes to a group (when in <b>Modify Mode</b> ) and then close this screen, to return to the <b>Groups</b> screen
	Click on the <b>Close</b> button to close this screen and return to the <b>Groups</b> screen
	Click on the <b>Cancel</b> button to cancel the changes and return to <b>View Mode</b> (must be clicked before <b>Apply</b> or <b>OK</b> is clicked)

### 5.2.3 Fields

The following fields are presented in the **Groups Maintenance** screen:

- **Group Name** - type in the group name - this has to be unique
- **Remarks** - type in the remarks related to the group
- **Supervisor** - click on the drop arrow  and select a user from the list, to designate them as the supervisor of the group - the default supervisor is user **Admin**
- **Active / Inactive** - this enables the user to associate or disassociate a group with/from the selected company.

#### 5.2.4 Behaviour of Fields in an Operation

The behaviour of these fields is described in the following table:

<b>Field</b>	<b>Entry Mode</b>	<b>Validations</b>	<b>Add</b>	<b>Modify</b>
<b>Group Name</b>	Key-in	Unique	Required	Disabled
<b>Remarks</b>	Key-in	Alphanumeric. Maximum 255 characters	Optional	Modifiable. Optional
<b>Supervisor</b>	Key-in		Required	Disabled
<b>Active / Inactive</b>	Key-in		Disabled	Modifiable. Required

---

## CHAPTER 6:      **GROUPS & USERS**

The following chapter looks at the administration of organise*it* Groups & Users. This will cover:

- the elements of the *User-Groups Association* screen
- working with the *Users* and *Groups* lists

## 6.1 THE USER-GROUPS ASSOCIATION SCREEN

### 6.1.1 Description


The *User-Groups Association* screen lets both the users *Admin* and *Supervisor* associate/disassociate user(s) with/from group(s). Whilst *Admin* can view all active users of the selected company and all groups that are associated with the selected company, *Supervisor* can view only those groups which it supervises and all active users of the selected company except itself.

When a user is added to a group it will inherit the permissions assigned to the group and inherit new permissions as and when they are granted to the group. “Inherit” means they are not explicitly given to the user, but that they gain those permissions by being a member of the group and will continue to have those permissions while it is a member of that group.

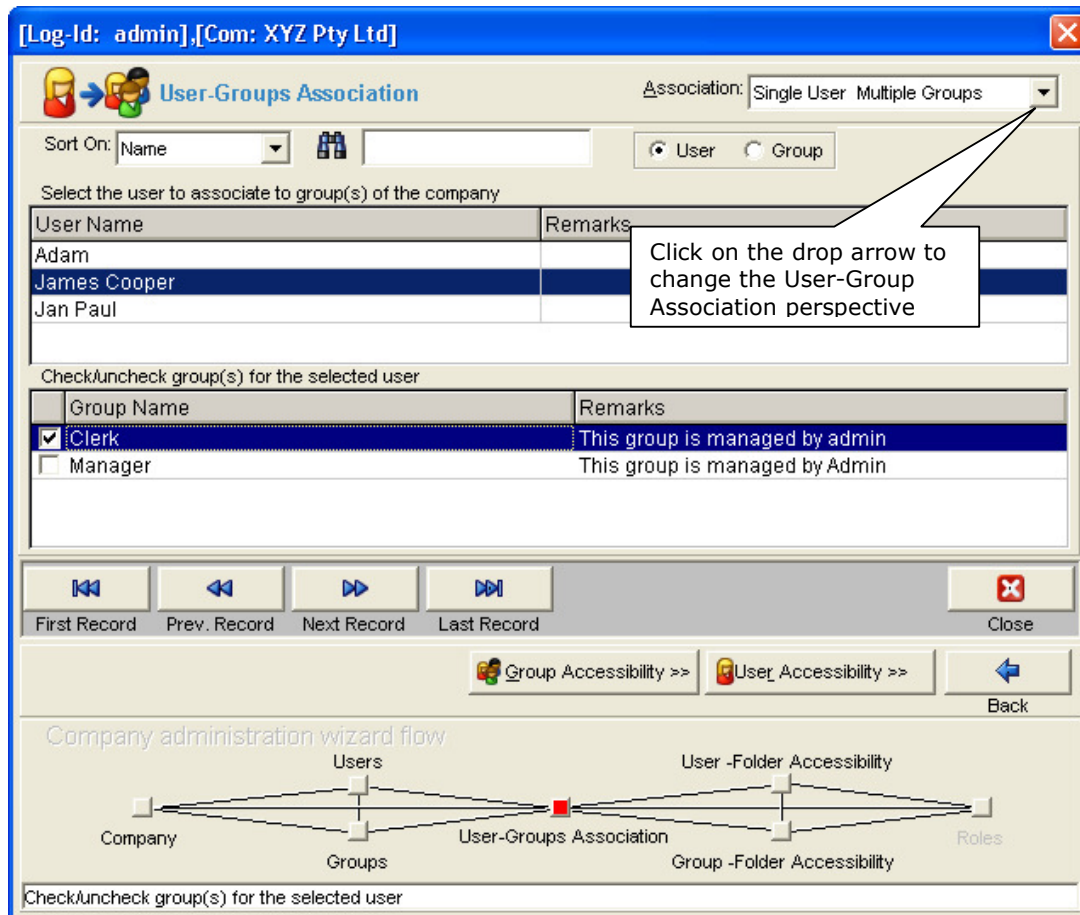
- 1 Ensure that the *Company* screen is currently active (for more information, refer to “*The Company Screen*”, page 11)

OR

Click on the *Wizard* icon  to activate the wizard

- 2 Click on the *User-Groups Association* button in the *Company administration wizard flow* diagram at the bottom of the screen, to display the *User-Groups Association* screen
- 3 Click on the drop arrow  for *Association* and select an option from the list to display either the *Single User Multiple Groups* perspective of the screen, or the *Single Group Multiple Users* perspective of the screen

### Single User Multiple Groups Association

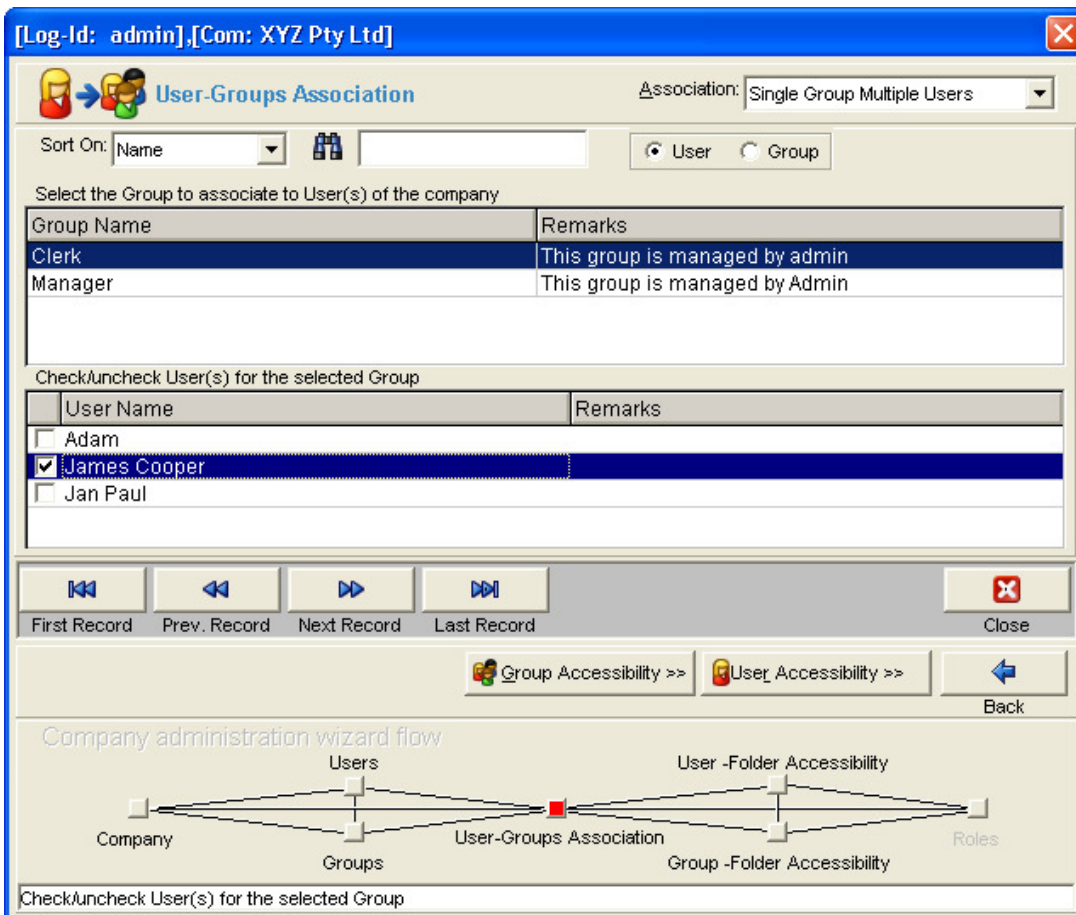


Using this option, the **Supervisor/Admin** can associate and disassociate one user at a time to/from all the available groups.

To add a selected user as a member of a group, the appropriate user has to be selected from the **User** list in the top grid and the appropriate group must be ticked in the **Groups** list in the bottom grid. To remove a user from a group remove the tick from the appropriate group.

Use this screen when you would like to add a user to more than one group.












*Single Group Multiple Users Association*



*In this screen, you will see the groups now appear in the top grid and the users in the bottom grid. Use this screen when you would like to simultaneously add more than one user to a single group.*

### 6.1.2 User Actions

The options and tools presented in the *User-Groups Association* screen are described in the following table:

Screen Option	Description of Use
Sort On field	Click on the drop arrow  and select a <b>Name</b> from the list to determine the sort order in the list
	Click in the <b>Search</b> field and type the criteria on which to search the list
User / Group option	Click on either of the options to select it, determining which list the <b>Search</b> will be based on
Association field	Click on the drop arrow  to select one of the perspectives: <b>Single user with single or multiple groups</b> or <b>Single group with single or multiple users</b>
	Click on the <b>First Record</b> button to go to the first record in the list
	Click on the <b>Previous Record</b> button to go to the previous record in the list
	Click on the <b>Next Record</b> button to go to the next record in the list
	Click on the <b>Last Record</b> button to go to the last record in the list
	Click on the <b>Back</b> button to go to the previous step of the wizard
	Click on the <b>Close</b> button to close the <i>User-Groups Association</i> screen and return to the <b>Company</b> screen
	Click on the <b>Group Accessibility</b> button to navigate to the <b>Group Accessibility</b> screen enabling the user to grant permissions to a group, on <i>organiseit</i> folders
	Click on the <b>User Accessibility</b> button to navigate to the <b>User Accessibility</b> screen, enabling you to grant permissions to a user on <i>organiseit</i> folders

### 6.1.3 Fields

The following fields are presented in the **User-Groups Association** screen:

- **User Name** - this column displays the list of users
- **Remarks** - this field displays remarks related to the user
- **Group Name** - this field displays the list of groups
- **Remarks** - this field displays remarks related to the groups

### 6.1.4 Behaviour of Fields in an Operation

The behaviour of these fields is described in the following table:

<b>Field</b>	<b>Entry Mode</b>	<b>Validations</b>
<b>User Name</b>	Read Only	NA
<b>Remarks</b>	Read Only	NA
<b>Group Name</b>	Read Only	NA
<b>Remarks</b>	Read Only	NA
<b>Association (of User and Group)</b>	Select	NA

---

## CHAPTER 7:

## GROUP & USER MANAGEMENT

The following chapter looks at the management of *organiseit* Groups and Users. This will cover:

- different Group-User hierarchical structures
- assigning and revoking permissions to and from a group
- assigning and revoking permissions to and from a user
- assigning and revoking permissions by and from a supervisor
- de-activating a user
- de-activating a supervisor
- de-activating a group

## 7.1 GROUP & USER MANAGEMENT

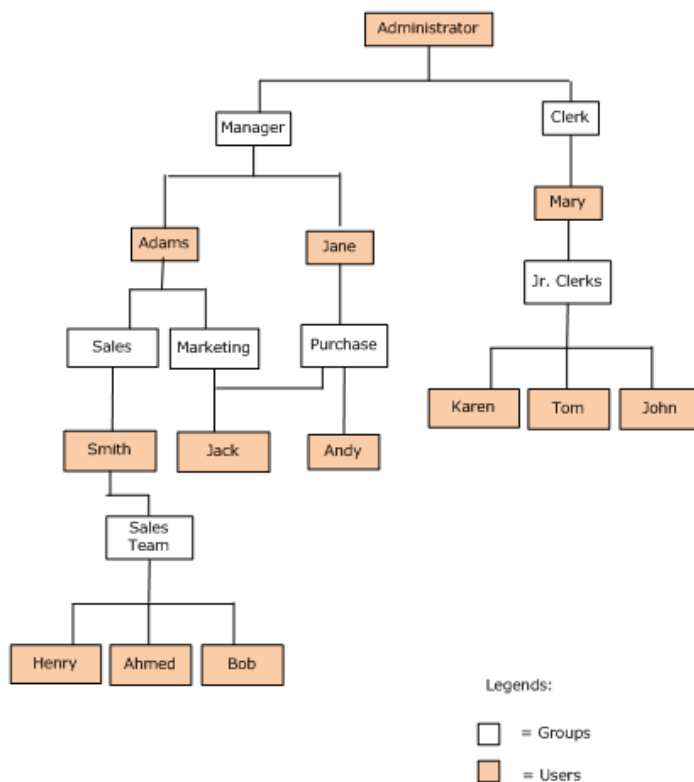
The *organiseit* application supports a hierarchical structure between users and groups. Shown below are some examples of such hierarchies.

Groups and users are distinct security objects in *organiseit*. Permissions can be assigned to either a group or a user or both.

To help understand more about groups and users in *organiseit*, let's consider the following examples:

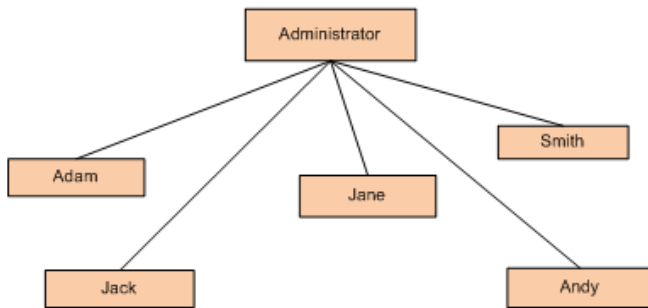
### 7.1.1 Examples

#### Scenario 1



- **Admin** is at the top-most level
- **Admin** is the explicit supervisor of the groups **Manager** and **Clerk**
- Adam and Jane are the members of the group **Manager**
- Adam is the explicit supervisor of groups **Sales** and **Marketing** while Jane is the supervisor of the group **Purchase**
- Smith is the member of **Sales** group, Andy is member of **Purchase** and Jack is the member of both **Marketing** and **Purchase**
- Mary is the member of group **Clerk** and supervisor of the group **Jr. Clerks**
- Karen, Tom and Jerry are the member of the group **Jr. Clerks**

Scenario 2

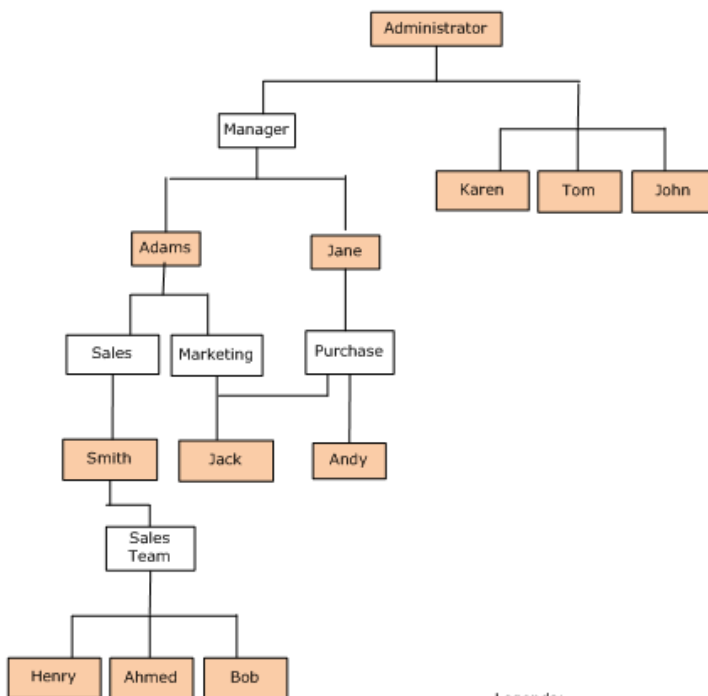


Legends

 = Users

- **Admin** is at the top-most level. All other users are under **Admin** and it is a flat structure. **Admin** will be the only user to grant/revoke permissions to/from these users.

Scenario 3



Legends:

 = Groups  
 = Users

This is a mix of Scenario 1 and 2. In this Scenario, there are some users who are only managed by **Admin** (forming a flat structure), while other users are managed by their **Supervisors** (forming a hierarchical structure).

Here we will use the term **Direct Supervisor** and **Indirect Supervisor**. What does “**Direct Supervisor**” mean? When a group is created, a user has to be nominated to manage the group; this user will then be called a **Direct Supervisor** of that group. This **Supervisor** will therefore be managing the group and its members.

The **Supervisor** will also be assigning/revoking permissions to/from the group, and adding/removing members to/from the group which it manages.

In Scenario (3):

- Smith is the **Supervisor** of the group **Sales Team**, which has members Henry, Ahmed and Bob
- Smith is the member of the group **Sales**, which is supervised by Adam
- Smith is the **Direct Supervisor** of the group **Sales Team**, while his **Supervisor** (of **Sales**) Adam is an **Indirect Supervisor** of **Sales Team** (since Adam is Smith’s **Supervisor**)

So, any user in the hierarchy who is not a **Direct Supervisor** of a group, but is a **Supervisor** to a parent group somewhere in the hierarchy, can become an **Indirect Supervisor** to child groups in the hierarchy. These **Indirect Supervisors** can manage the child groups in the same way as the **Direct Supervisor** of those groups. Thus, in Scenario 3, Adams and Smith can both manage the group **Sales Team**.

Whilst there can be only one **Direct Supervisor** for a group, there can be any number of **Indirect Supervisors** for a group. The number is based on the levels of hierarchy.

**Admin** is a **Supervisor** of all groups. It is a **Direct Supervisor** if no other user is **Supervisor** of that group and is an **Indirect Supervisor** if a user other than itself is the **Supervisor** of that group.

In the above Scenarios, **Admin** is a **Direct Supervisor** of groups **Manager** and **Clerk** and **Indirect Supervisor** of **Sales**, **Marketing**, **Purchase**, **Jr. Clerks** and **Sales Team**.

In Scenarios 1 and 3, groups **Sales Team**, **Sales**, **Marketing** and **Purchase** are called **child** groups to the group **Manager**, which is called the **parent** group. Similarly, **Sales Team** is a child group to **Sales**.

### 7.1.2 Assigning Permissions to a Group

- 1 Groups do not inherit permissions assigned to a **Supervisor**. Permissions are to be explicitly assigned to groups
- 2 **Admin**, a **Direct Supervisor** and an **Indirect Supervisor** can assign permissions to a group
- 3 The system will not allow duplicate permissions to be assigned explicitly (i.e. if either **Admin**, the **Direct Supervisor** or an **Indirect Supervisor** has already assigned a permission to a group, then the other two will not be able to re-assign the same permission to that group)
- 4 When a permission is assigned to a group, all the existing members of the group will immediately inherit the assigned permission
- 5 When a user is associated to a group, it will inherit all the permissions assigned to the group

### 7.1.3 Assigning Permissions to a User (Associated with at Least One Group)

- 1 When a user is associated with a group, it will inherit the permissions assigned to these groups
- 2 A user will inherit permissions from the groups it is associated with, as and when these groups are assigned new permissions
- 3 **Admin**, the **Direct Supervisor** and an **Indirect Supervisor** can give additional, explicit permissions to a user

- 4 The system will not allow duplicate permissions to be assigned explicitly (i.e. if either **Admin**, the **Direct Supervisor** or an **Indirect Supervisor** has already assigned a permission to a user, then the other two will not be able to re-assign the same permission to that user)
- 5 (However) A user can inherit duplicate permissions by being a member of more than one group and inheriting the same set of permissions from each of these groups

#### 7.1.4 Assigning Permissions to a User (not Associated with any Group)

- 1 Only **Admin** will be able to assign permissions to this user

#### 7.1.5 Assigning Permissions by a Supervisor (Direct or Indirect)

- 1 Groups do not automatically inherit permissions assigned to its **Supervisor** (either direct or indirect)
- 2 A **Supervisor** has to explicitly assign permissions to its group. A **Supervisor** can only assign those permissions which they hold themselves. A **Supervisor** can assign these permissions to a group (of which it is either a **Direct** or **Indirect Supervisor**) or a member of a group (of which it is either a **Direct** or **Indirect Supervisor**). A **Supervisor** cannot assign any permission that it does not hold
- 3 A **Supervisor** can explicitly assign permissions to a user who is a member of a group to which it is either a **Direct** or **Indirect Supervisor**. It can assign only those permissions it holds

#### 7.1.6 Revoking Permissions from a Group

- 1 A **Direct Supervisor** can revoke only those permissions that it has explicitly assigned to that group. It cannot revoke permissions assigned to the group by an **Indirect Supervisor** or **Admin**
- 2 An **Indirect Supervisor** can revoke only those permissions that either it has explicitly assigned to the group or any other **Supervisor** who is its subordinate (i.e. a **Supervisor** down the line) has explicitly assigned to the group. It cannot revoke permissions that are assigned to the group by its superiors (i.e. a **Supervisor** who is superior to it in the hierarchy) or **Admin**
- 3 **Admin** can revoke permissions assigned by it or by any **Supervisor**, from any hierarchy
- 4 When a permission is revoked from a group, all the members of that group will no longer inherit that permission (i.e. they will cease to hold that permission). If any member of a group is a **Supervisor** and has further assigned this inherited permission to its group, then that group will also no longer hold that permission (i.e. when a permission is revoked from a group, the permission will be revoked from all the **Supervisors** down the line, child groups and users who have either inherited the permissions or have been explicitly assigned)

#### 7.1.7 Revoking Permissions from a User (Associated with at Least One Group)

- 1 Permission inherited by a user by being associated with a group cannot be revoked explicitly. Such permissions are to be revoked from the group it is associated with. Once the permissions are revoked from a group, all the members of the group will no longer hold those permissions
- 2 Permissions explicitly assigned to a user by a **Direct Supervisor**, **Indirect Supervisor** or **Admin** can be explicitly revoked
- 3 A **Direct Supervisor** can revoke only those permissions that it has explicitly assigned to that user. It cannot revoke permissions assigned to the user by an **Indirect Supervisor** or **Admin**
- 4 An **Indirect Supervisor** can revoke only those permissions that either it has explicitly assigned to the user, or any other **Supervisor** who is its subordinate (i.e. a **Supervisor** lower in the hierarchy). It cannot revoke permissions that are assigned to the user by its superiors (i.e. a **Supervisor** who is superior to it in the hierarchy) or **Admin**

- 5 **Admin** can revoke permissions assigned by it or by any **Supervisor** from any hierarchy
- 6 Disassociating a user from the group will automatically revoke all the permissions it had inherited through being a member of that group

#### 7.1.8 Revoking Permissions from a User (not Associated with any Group)

- 1 Only **Admin** is able to revoke permissions from this user

#### 7.1.9 Revoking Permissions from a Supervisor

- 1 Permissions from a **Supervisor** can be revoked by other **Supervisors** who are superior to it (i.e. a **Supervisor** higher in the hierarchy) and **Admin**
- 2 **Admin** can revoke permissions assigned by it or by any **Supervisor** from any hierarchy
- 3 A **Supervisor** can revoke permissions from its subordinate **Supervisors**, provided those permissions are assigned by itself or someone lower in the hierarchy (i.e. a **Supervisor** cannot revoke permissions assigned by its superior or **Admin**)
- 4 Revoking permissions from a **Supervisor** that has been assigned to the group by that **Supervisor** will automatically revoke that permission from the group, child groups, subordinate **Supervisors** and users who have either inherited that permission or has been explicitly granted

#### 7.1.10 Deactivating a User (also known as Disassociating a User from the Company)

- 1 Only **Admin** can deactivate a user
- 2 When a user is deactivated, the permissions assigned to it are disabled (not revoked). When the user is reactivated, its permissions are enabled and it does not require re-assigning of permission
- 3 When a user is inactive, permissions cannot be assigned or revoked until it is active once again

#### 7.1.11 Deactivating a Supervisor

- 1 Only **Admin** can deactivate a **Supervisor**
- 2 When a **Supervisor** is deactivated, the effect will be same as that of a normal user
- 3 When a **Supervisor** is deactivated, its superior **Supervisors** or **Admin** can still manage the group
- 4 When a **Supervisor** is inactive, permissions cannot be assigned or revoked until it is active once again
- 5 Deactivating a **Supervisor** does not have any effect on the group. It will still hold the permissions assigned it

#### 7.1.12 Deactivating a Group (also known as Disassociating a Group from the Company)

- 1 Only **Admin** can deactivate a group
- 2 When a group is deactivated, all the permissions assigned to the group (and that have further been inherited or explicitly assigned to the sub-groups, subordinate supervisors and users) will be disabled. They will remain disabled until the group is active once again
- 3 Once a group is inactive, permissions cannot be assigned or revoked, until it is active once again

---

## CHAPTER 8:

## ASSIGNING PERMISSIONS TO GROUPS

The following chapter looks at the assignment of permissions to *organiseit* Groups. This will cover:

- looking at the functionality and use of the *Group-Folder Accessibility* screen

## 8.1 THE GROUP-FOLDER ACCESSIBILITY SCREEN

### 8.1.1 Description

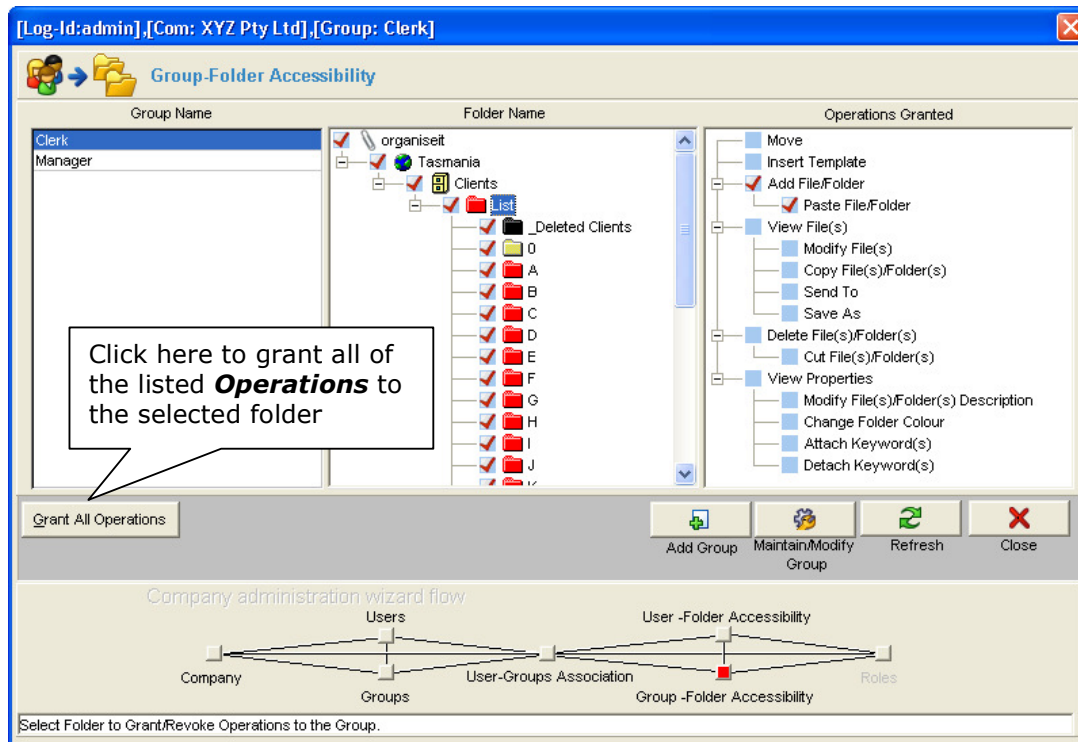
The **Group-Folder Accessibility** screen allows a **Supervisor** or the user **Admin** to assign permissions on a selected folder, of a selected company, to a group. Whilst **Admin** is able to assign any permissions to a group, a **Supervisor** will be able to assign only those permissions that it holds (i.e. the **Supervisor** will not be able to grant a permission on a folder that it does not hold itself).

- 1 Ensure that the **Company** screen is currently active (for more information, refer to “*The Company Screen*”, page 11)

OR

Click on the **Wizard** icon  to activate the wizard

- 2 Click on the **Group-Folder Accessibility** button in the **Company administration wizard flow** diagram at the bottom of the screen, to display the **Group-Folder Accessibility** screen



#### NOTES:

- I. A group does not automatically inherit a permission assigned to a **Supervisor**. Permissions have to be explicitly assigned to a group and once it is explicitly assigned to a group, the members of the group automatically inherit the same
- II. If user **Admin** has logged in to the module, then it will view all the available groups of the company. If a user that is a **Supervisor** of a group has logged in, then it will view only those groups of which it is a **supervisor**

- III. If user **Admin** logs in to the system, then it will be able to view the complete **organiseit** folder hierarchy. If a user that is a **Supervisor** of a group logs into the system, then it will view only that part of the hierarchy on which it has permissions

The **Group-Folder Accessibility** screen is divided into three columns:

- the first column lists all of the available groups
- the second column lists the folder hierarchy
- the third column lists all of the operations/permissions that are available in the **organiseit** application - listed in a hierarchical format

To understand how the security in **organiseit** will work, you will need to understand a few things first. Permissions/Operations in **organiseit** are designed such that it is a hierarchical format (i.e. the operations have peers and some of them also have child operations).

The **organiseit** permissions are displayed in the following table:

<b>Parent Operation</b>	<b>Child Operation</b>
Move	
Insert Template	
Add File / Folder	
	Paste File / Folder
View File(s)	
	Modify File(s)
	Copy File(s) / Folder(s)
	Send To
	Save As
Delete File(s) / Folder(s)	
	Cut File(s) / Folder(s)
View Properties	
	Modify File(s) / Folder(s) Description
	Change Folder Colour
	Attach Keyword(s)
	Detach Keyword(s)

**NOTE:** for details on the meaning of each operation, refer to the **organiseit User Guide**.

In the current context:

- **Move, Insert Template, Add File/Folder, View File(s), Delete File(s)/Folder(s)** and **View Properties** are peer permissions (i.e. they are the same level in the hierarchy)
- **Paste File/Folder** is a child permission/operation of **Add File/Folder**
- **Modify File(s), Copy File(s)/Folder(s), Send To** and **Save As** are peers and are child permissions/operations of **View File(s)**
- **Cut File(s)/Folder(s)** is a child permission/operation of **Delete File(s)/Folder(s)**
- **Modify File(s)/Folders Description, Change Folder Colour, Attach Keyword(s)** and **Detach Keyword(s)** are peer permissions/operations and are child operations of **View Properties**

To assign any child permission, it is necessary to assign the parent permission first (i.e. if the **Paste File/Folder** permission is to be assigned, then the **Add File/Folder** permission has to be assigned first.

Hence when a child permission is assigned, **organiseit** will verify whether a parent operation is already assigned; if not, the system will assign the parent operation automatically and then the child operation. Similarly, when parent permission is being revoked, the system will automatically revoke any child permissions that are assigned before revoking the parent operation.

If a child permission alone is revoked, then the parent permission will stay assigned. Similarly, if just a parent permission is assigned, then the child permission will not be automatically assigned.

A folder (i.e. **Site, Cabinet, Folder** and **Sub-Folder**) will always inherit permissions assigned to its parent folder. A child folder can have more permissions than its parent. If a folder has inherited any permission it will be shown in a grey colour. You cannot revoke inherited permissions from any folder. You will only be able to revoke those permissions that are explicitly assigned to that folder.

To assign permissions:

- 1 Select the group in the first column
- 2 Select the appropriate folder in the second column
- 3 Double-click the appropriate permission in the third column.

If you assign a permission that is a child permission, and the parent permission is not already assigned, then the system will assign the parent permission first and then the child permission.

Similarly, to revoke permission:





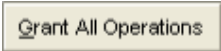
- 1 Select the group in the first column
- 2 Select the appropriate folder from which you would like to revoke the permission
- 3 Double-click on the permission that you would like to revoke.

If you revoke a permission that is a parent permission, and some or all of its child permissions are also assigned, then the system will first revoke all the child permissions and then revoke the parent permission.

You also have the facility to **Add** and **Maintain** the groups from this screen.

### 8.1.2 User Actions

The options and tools presented in the **Group-Folder Accessibility** screen are described in the following table:

Screen Option	Description of Use
	Click on the <b>Add Group</b> button to enable the creation of a group
	Click on the <b>Maintain/Modify Group</b> button to maintain the selected group
	Click on the <b>Refresh</b> button to refresh the folder hierarchy
	Click on the <b>Close</b> button to close this screen and return to the <b>Company</b> screen
	Click on the <b>Grant All Operations</b> button to assign all of the available permissions to the selected folder

### 8.1.3 Fields

The following fields are presented in the **Group-Folder Accessibility** screen:

- **Group Name** - this column displays the list of groups available
- **organiseit Folder Hierarchy** - this column displays the organiseit folder hierarchy on which the logged in user has permissions
- **List of Operations** - this column displays the permissions/operations in a hierarchical format

### 8.1.4 Behaviour of Fields in an Operation

The behaviour of these fields is described in the following table:

Fields	Entry Mode	Validations
<b>Group Name</b>	Select	NA
<b>organiseit Folder Hierarchy</b>	Select	NA
<b>List of Operations</b>	Double-click	NA

---

## CHAPTER 9:

## ASSIGNING PERMISSIONS TO USERS

The following chapter looks at the assignment of permissions to *organiseit* Users. This will cover:

- looking at the functionality and use of the *User-Folder Accessibility* screen

## 9.1 THE USER-FOLDER ACCESSIBILITY SCREEN

### 9.1.1 Description

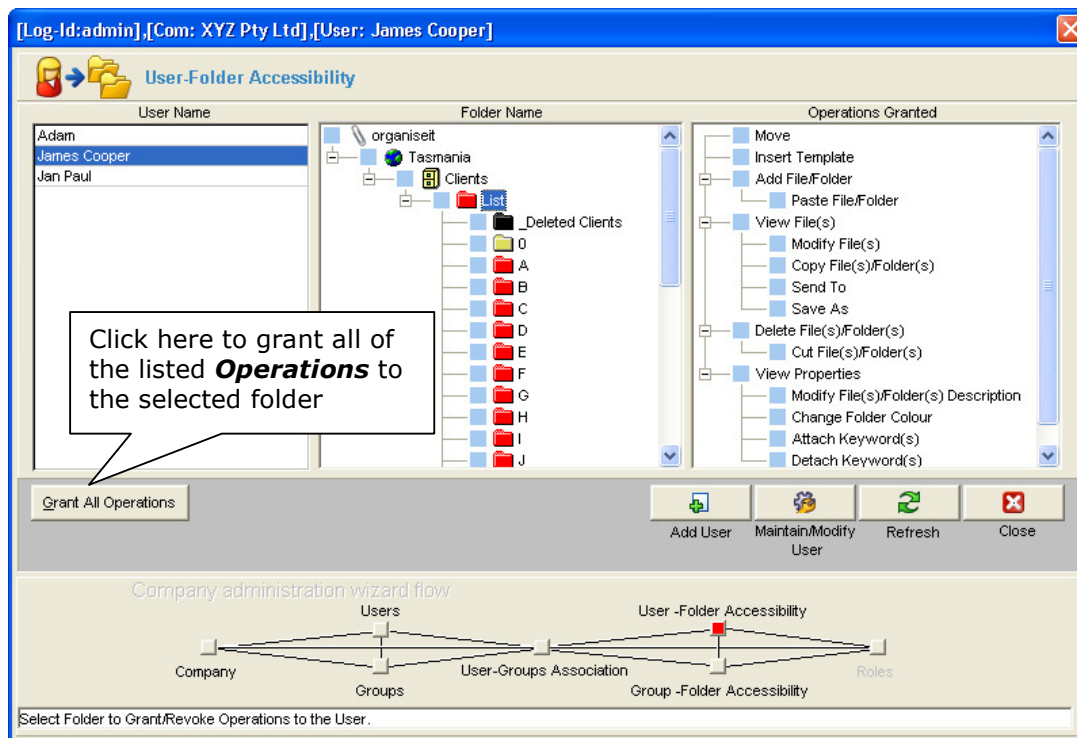
The *User-Folder Accessibility* screen allows a *Supervisor* or the user *Admin* to assign permissions on the selected folder, of the selected company, to a user. Whilst *Admin* is able to assign any permission to a user, a *Supervisor* will be able to assign from only those permissions that it holds (i.e. the *Supervisor* will not be able to grant a permission on a folder that it does not hold itself).

- 1 Ensure that the *Company* screen is currently active (for more information, refer to “*The Company Screen*”, page 11)

OR

Click on the *Wizard* icon  to activate the wizard

- 2 Click on the *User-Folder Accessibility* button in the *Company administration wizard flow* diagram at the bottom of the screen, to display the *User-Folder Accessibility* screen



#### NOTES:

- I. A *Supervisor* can either explicitly assign permissions to a group, or to members of its group (which it directly or indirectly supervises)
- II. If *Admin* has logged in to the module, then it will view all of the available users of the company. If a user that is a *Supervisor* of a group has logged in, then it will view only those users of which it is a *Direct* or *Indirect Supervisor*

III. If **Admin** logs in to the system, then it will be able to view the complete organise*it* folder hierarchy. If a user that is a **Supervisor** of a group logs in to the system, then it will view only that part of the hierarchy on which it has the permissions

The screen is divided into three columns:

- the first column lists all of the available users
- the second column displays the folder hierarchy
- the third column lists all of the operations/permissions that are available in the organise*it* application - listed in a hierarchical format

To understand how the security in organise*it* will work, you will need to understand a few things first. Permissions/Operations in organise*it* are designed such that it is a hierarchical format (i.e. the operations have peers and some of them also have child operations).

The organise*it* permissions are displayed in the following table:

<i>Parent Operation</i>	<i>Child Operation</i>
Move	
Insert Template	
Add File / Folder	
	Paste File / Folder
View File(s)	
	Modify File(s)
	Copy File(s) / Folder(s)
	Send To
	Save As
Delete File(s) / Folder(s)	
	Cut File(s) / Folder(s)
View Properties	
	Modify File(s) / Folder(s) Description
	Change Folder Colour
	Attach Keyword(s)
	Detach Keyword(s)

**NOTE:** for details on the meaning of each operation, refer to the organise*it* User Guide.

In the current context:

- **Move, Insert Template, Add File/Folder, View File(s), Delete File(s)/Folder(s)** and **View Properties** are peer permissions (i.e. they are the same level in the hierarchy)
- **Paste File/Folder** is a child permission/operation of **Add File/Folder**
- **Modify File(s), Copy File(s)/Folder(s), Send To** and **Save As** are peers and are child permissions/operations of **View File(s)**
- **Cut File(s)/Folder(s)** is a child permission/operation of **Delete File(s)/Folder(s)**
- **Modify File(s)/Folders Description, Change Folder Colour, Attach Keyword(s)** and **Detach Keyword(s)** are peer permissions/operations and are child operations of **View Properties**

To assign any child permission, it is necessary to assign the parent permission first (i.e. if the **Paste File/Folder** permission is to be assigned, then the **Add File/Folder** permission has to be assigned first.

Hence when a child permission is assigned, organiseit will verify whether a parent operation is already assigned; if not, the system will assign the parent operation automatically and then the child operation. Similarly, when a parent permission is being revoked, the system will automatically revoke any child permissions that are assigned before revoking the parent operation.

If a child permission alone is revoked, then the parent permission will stay assigned. Similarly, if just a parent permission is assigned, then the child permission will not be automatically assigned.

A folder (i.e. **Site, Cabinet, Folder** and **Sub-Folder**) will always inherit permissions assigned to its parent folder. A child folder can have more permissions than its parent. If a folder has inherited any permission it will be shown in a grey colour. You cannot revoke inherited permissions from any folder. You will only be able to revoke those permissions that are explicitly assigned to that folder.

To assign permissions:

- 1 Select the user in the first column
- 2 Select the appropriate folder in the second column
- 3 Double-click the appropriate permission in the third column.

If you assign a permission that is a child permission, and the parent permission is not already assigned, then the system will assign the parent permission first and then the child permission.

Similarly, to revoke permission:





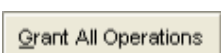
- 1 Select the user in the first column
- 2 Select the appropriate folder from which you would like to revoke the permission
- 3 Double-click on the permission that you would like to revoke.

If you revoke a permission that is a parent permission, and some or all of its child permissions are also assigned, then the system will first revoke all the child permissions and then revoke the parent permission.

You also have the facility to **Add** and **Maintain** the groups from this screen.

### 9.1.2 User Actions

The options and tools presented in the **User-Folder Accessibility** screen are described in the following table:

Screen Option	Description of Use
	Click on the <b>Add User</b> button to enable the creation of a user
	Click on the <b>Maintain/Modify User</b> button to maintain the selected user's details
	Click on the <b>Refresh</b> button to refresh the folder hierarchy
	Click on the <b>Close</b> button to close this screen and return to the <b>Company</b> screen
	Click on the <b>Grant All Operations</b> button to assign all of the available permissions to the selected folder

### 9.1.3 Fields

The following fields are presented in the **User-Folder Accessibility** screen:

- **User Name** - this column displays the list of users available
- **organiseit Folder Hierarchy** - this column displays the **organiseit** folder hierarchy on which the logged in user has permissions
- **List of Operations** - this column displays the permissions/operations in a hierarchical format

### 9.1.4 Behaviour of Fields in an Operation

The behaviour of these fields is described in the following table:

Field	Entry Mode	Validations
<b>User Name</b>	Select	NA
<b>Organiseit Folder Hierarchy</b>	Select	NA
<b>List of Operations</b>	Double-click	NA

---

## CHAPTER 10:    **MANAGING THE ACTIVE DIRECTORY GROUP**

The following chapter looks at managing the *Active Directory* group. This will cover:

- looking at the functionality and use of the *Active Directory Settings* screen

## 10.1 THE ACTIVE DIRECTORY SETTINGS SCREEN

### 10.1.1 Description

This screen is available when your network is in *Domain-Controller* mode and *oitDmnGroup* is created in the active directory. *oitDmnGroup* is the *organiseit Application* group.

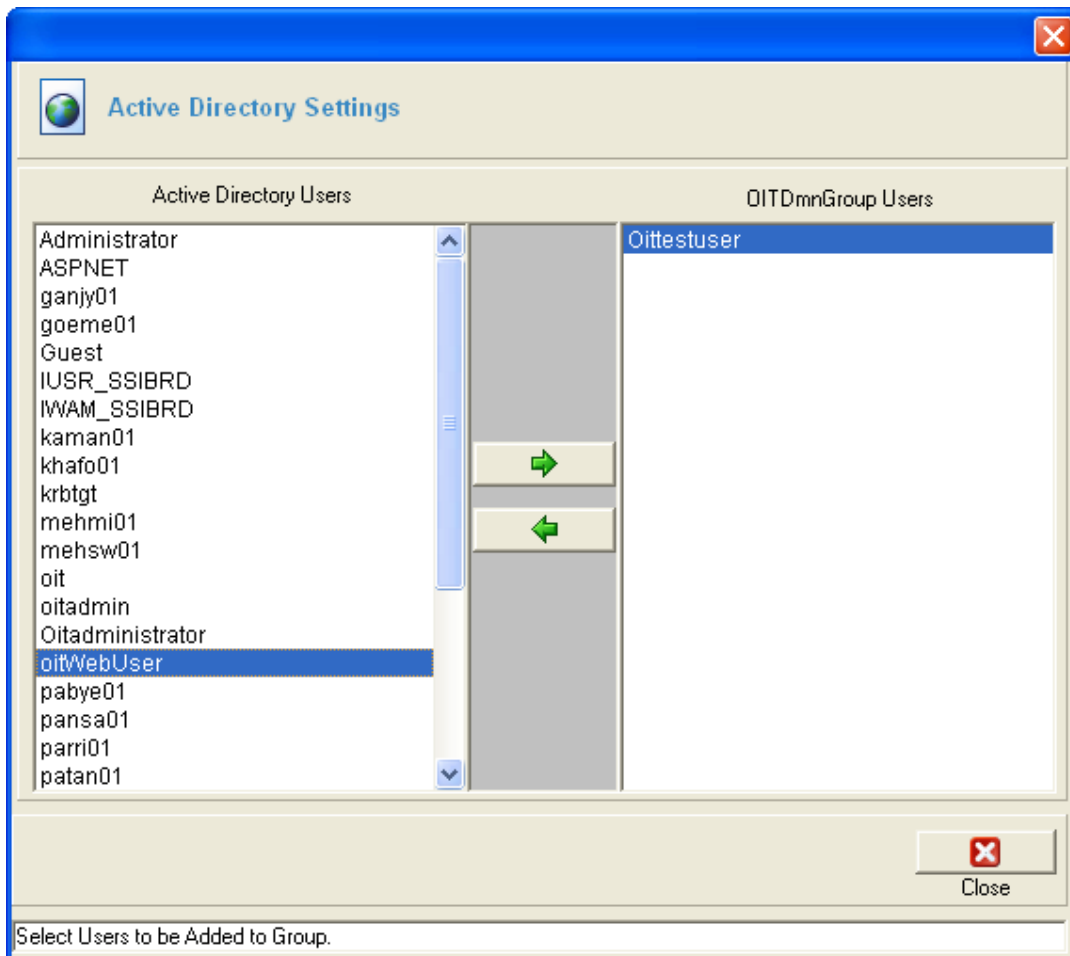
If, during the installation of the *organiseit Database Server Component* you selected the *Authentication Mode* as *Windows*, then you must add *Active Directory* users (who are going to log in to the *organiseit* application) to the *Application* group.

If a user is not added to the *Application* group, then the user will not be able to log in to *organiseit* and will get an *Authentication Error* message while trying to log in.

The *Active Directory Settings* screen will allow you to *Add/Remove* users from this group.




- 1 Ensure that the *organiseit Administration Main* screen is currently displayed (for more information, refer to “*Logging In*”, page 3)

- 2 Click on the *Manage Active Directory* button  to display the *Active Directory Settings* screen



### 10.1.2 User Actions

The options and tools presented in the **User-Folder Accessibility** screen are described in the following table:

Screen Option	Description of Use
 A rectangular button with a light beige background and a thin border, containing a green right-pointing arrow.	Click on the <b>Add Active Directory User</b> button to add the selected user (in the left-hand list) to the <b>oitDmnGroup Users</b> list
 A rectangular button with a light beige background and a thin border, containing a green left-pointing arrow.	Click on the <b>Remove Active Directory User</b> button to remove the selected <b>oitDmnGroup</b> user from the list (on the right-hand side)
 A rectangular button with a light beige background and a thin border, containing a red square with a white 'X' inside.	Click on the <b>Close</b> button to close the screen