

Groups and Privileges: A User Guide

Introduction

This document is a step-by-step guide to set up Groups to restrict how users access Inventory through limiting visibility to entire Inventories and granting rights to specific metadata values through Privileges.

What are Groups?

Groups are optionally used to limit or restrict access to Inventory in a few ways. In Unify Records, groups control two different points of access:

- **Restrictions** – granting or limiting access to individual Inventories. Checking the box next to the inventory name, restricts or limits the users' ability to see that inventory.
- **Privileges** – granting or limiting access to individual metadata values in a specific field. Checking individual metadata values, grants or allows the users' ability to only see records that have those values.

Prerequisites

Before using Groups, confirm that you have access to the relevant Settings and permission to manage Groups. Available actions may vary depending on your role.

Before you begin

Screenshots provided in this set up guide may appear different than your Unify Records screens, either due to different permissions, field configurations, or browser settings.

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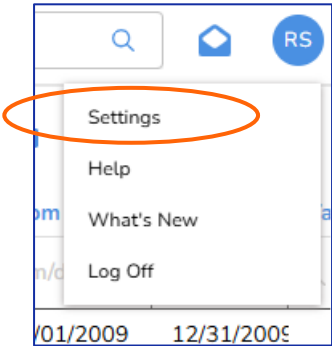
Creating and assigning Groups

This section will walk through creating groups and assigning those groups to users.

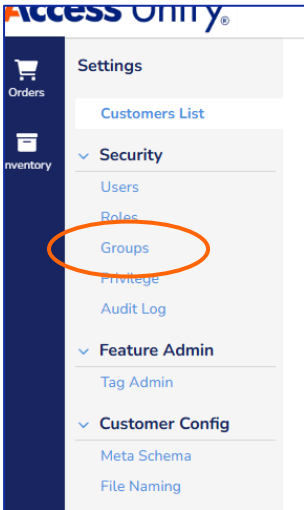
Actions – creating a group

Action Log into Unify, if not already logged in

Action Navigate to the User Menu by clicking on your initials, and click on 'Settings'

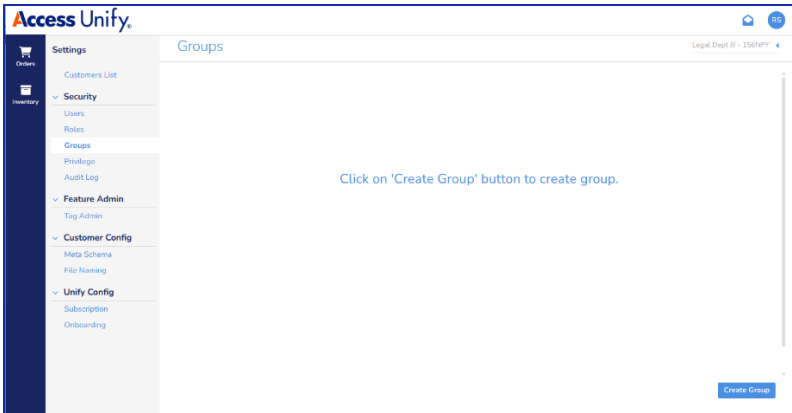


Action Click Groups in the side panel.

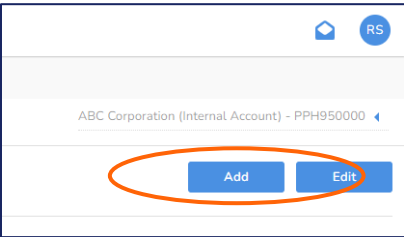


Orientation The Groups page will be presented with the existing Groups listed in the left panel, if any, and the details of the selected group in the content area on the right.

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Action If you don't have any pre-existing groups, click 'Create Group' at the bottom of the screen. Otherwise, click 'Add' toward the top right of the screen.



Action Enter a 'Group Name' and 'Description' for the group you want to create.

SUGGESTION: Name the group something so it is clear and understandable for users.

Group Name **Description**

Action Under the section for 'Restricted Items', click the checkboxes next to each Inventories listed for your situation.

NOTE: Check the boxes for the Inventories that you do not want a user to have. In this situation, we want the user to have the Inventory for Employee Records but not Invoices or Receipts. Therefore, Invoices and Receipts are checked, indicating we are restricting those Inventories.

Restrictions - Check the Inventories users should **not** have access to

Employee Invoices Receipts

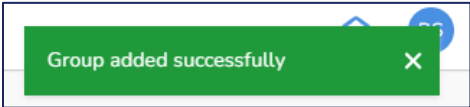
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NOTE: Your list of inventories will be specific to your organization and may look different than the screen shot above.

Action On the bottom right of the screen, click 'Save'

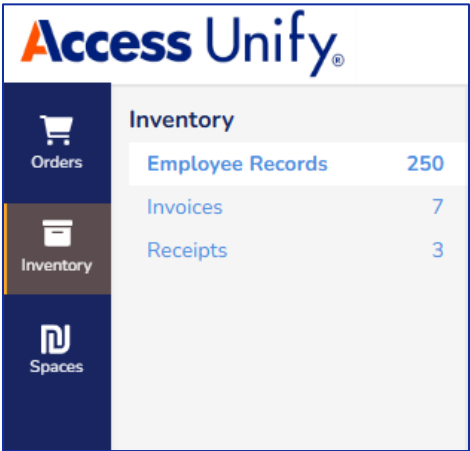


Action Verify you received a 'Group added successfully' message and that the newly created group is in the list of existing groups.



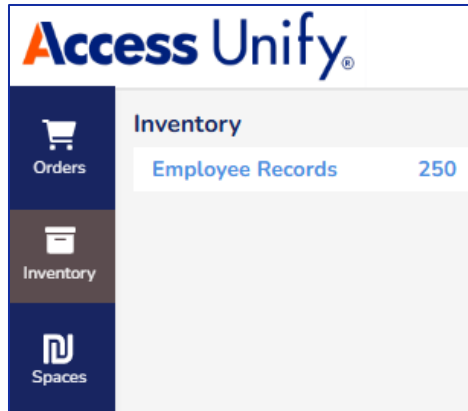
INFORMATION: This new group can now be assigned to users.

Orientation This is the users' access before belonging to the new group that was created above.



Orientation This is the users' access after assigning the group created above to them. As noted, the intent was to restrict the user from having access to the Invoices and Receipts inventories.

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Using Privileges

This section will walk through using privileges. In Unify Records, privileges allow for row-level management of records for a specific Inventory.

Information

When using privileges in Unify Records, there are two steps:

- **Privileges** – used to define which column(s) of metadata will have the values which you want to privilege
- **Groups** – in Groups, selecting which values of the metadata that you want to grant access to users

NOTE: Privileges can be defined in Groups by themselves or in conjunction with Restrictions.

In our example below, we will be using an inventory of Employee Records which have a metadata column of 'City'. We will define that column as a privileged column and then select the individual city values we want to grant to our user.

Actions – using privileges

Action Log into Unify, if not already logged in

Orientation This is the users' view prior to adding privileges.

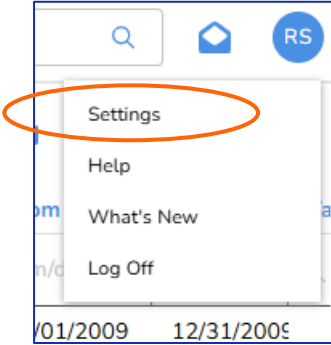
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The screenshot shows the 'Employee Records' table in the Access Unify interface. The table has columns for Type, Bo., Att., First Name, Last Name, Hire Date, Ter., Emplo., City, Cou., and File Ty. The City column contains various values such as Whistler Village, Kansas City, Colorado Springs, Berkeley, New Orleans, Baton Rouge, Portland, Atlanta, Columbus, Montgomery, Grand Rapids, Midland, Winston Salem, Aurora, Roanoke, and Jamaica. An orange oval highlights the City column.

| Type | Bo. | Att. | First Name | Last Name | Hire Date | Ter. | Emplo. | City | Cou. | File Ty. |
|------|-----|------|------------|-------------|------------|-----------|--------|------------------|-------------|----------|
| | | | Ross | Crassweller | 08/28/2014 | | 447763 | Whistler Village | United Stat | W4 |
| | | | Denna | Alves | 7/16/2006 | | 14568 | Kansas City | United Stat | W4 |
| | | | Erena | Boulsher | 10/19/2017 | | 66134 | Colorado Springs | United Stat | W4 |
| | | | Melisa | Ainsby | 7/8/2005 | | 37500 | Berkeley | United Stat | Training |
| | | | Berte | Paolozzi | 12/27/2007 | | 764825 | New Orleans | United Stat | Training |
| | | | Lucie | Raithby | 4/27/2013 | | 101809 | Baton Rouge | United Stat | Training |
| | | | Alexandro | Duding | 1/16/2020 | | 65825 | Portland | United Stat | Training |
| | | | Leodora | McGahy | 8/29/2009 | | 51236 | Atlanta | United Stat | Training |
| | | | Tillie | Tunmore | 3/9/2006 | | 55997 | Atlanta | United Stat | Training |
| | | | De | Gretlier | 9/20/2017 | | 43761 | Columbus | United Stat | Training |
| | | | Shelley | Lockery | 6/8/2019 | | 53487 | Montgomery | United Stat | Training |
| | | | Elvira | Gosson | 5/6/2013 | 5/24/2021 | 419372 | Grand Rapids | United Stat | Training |
| | | | Mycah | Barthrop | 1/9/2019 | | 11319 | Midland | United Stat | Training |
| | | | Laurence | Clinton | 4/12/2020 | | 87781 | Winston Salem | United Stat | Training |
| | | | Fayette | Zoane | 10/28/2007 | | 14328 | Aurora | United Stat | W4 |
| | | | Stu | Asals | 3/17/2017 | | 721008 | Roanoke | United Stat | Training |
| | | | Norman | Geeves | 2/16/2019 | 11/4/2021 | 523440 | Jamaica | United Stat | Training |
| | | | Mathias | Cauldie | 03/12/2011 | | 640013 | File | United Stat | Training |

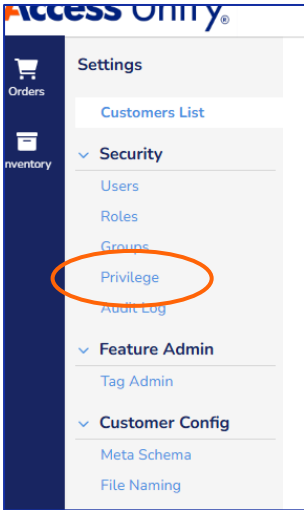
INFORMATION: As you can see in the screen shot, the user has access to multiple city values.

Action Navigate to the User Menu by clicking on your initials, and click on 'Settings'

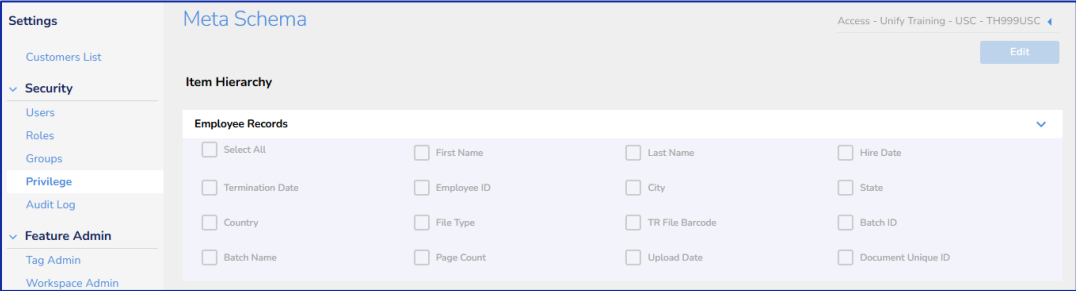


Action Click Privilege in the side panel.

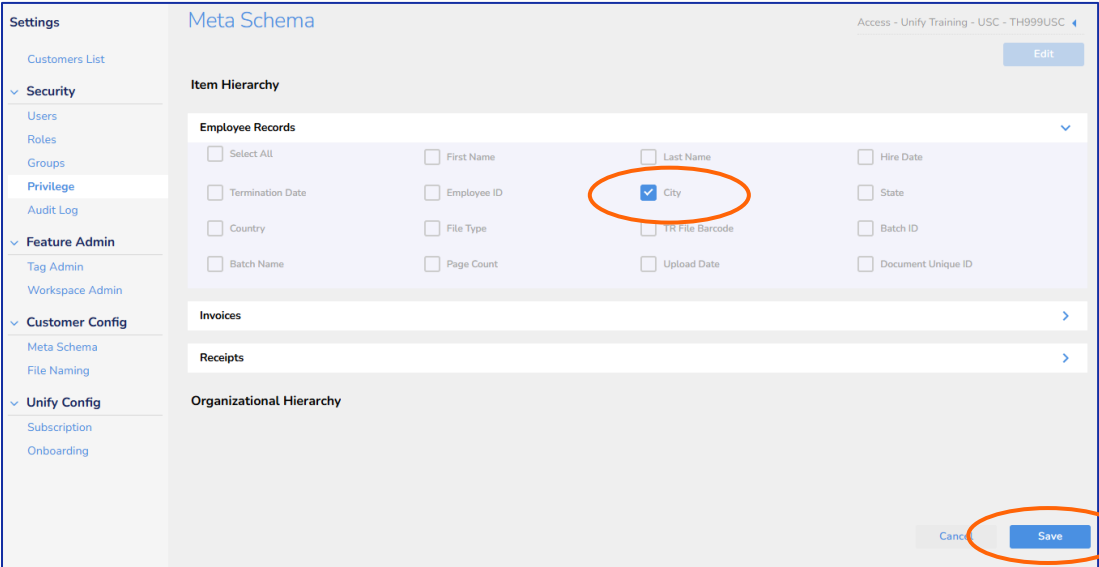
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Action Expand the Inventory and click 'Edit'.



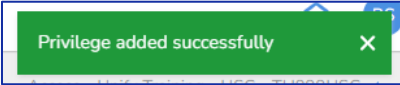
Action Select one or more columns and click 'Save'.



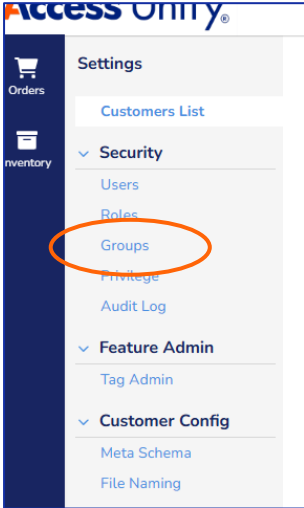
INFORMATION: Your unique configuration will look different.

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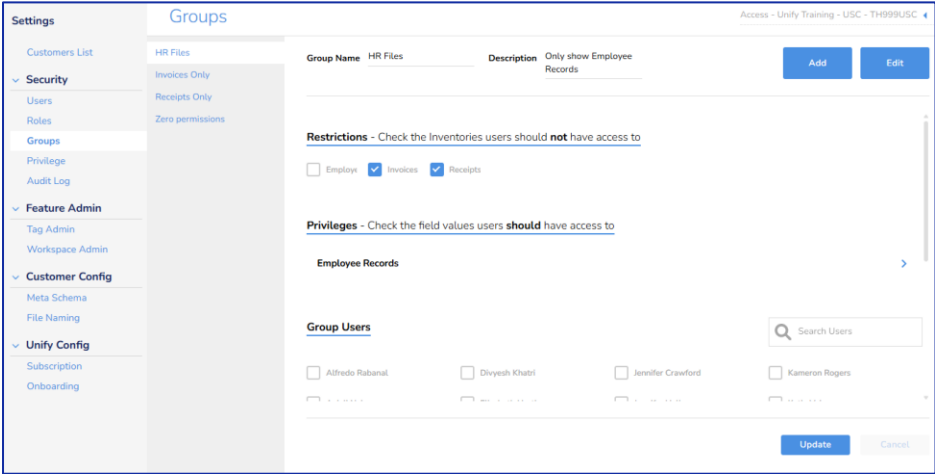
Action Verify you received a 'Privilege added successfully' message.



Action Click Groups in the side panel.



Action Either create a new group as we did previously or select an existing group to add the privilege to.



INFORMATION: You should now see entries below the Privileges section of the group indicating there are available privileges to be added.

Action Click 'Edit' and expand the entry below the privileges section.

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Group Name: HR Files | Description: Only show Employee Records

Restrictions - Check the Inventories users should **not** have access to

Employe Invoices Receipts

Privileges - Check the field values users **should** have access to

Employee Records

CITY

- Albany
- Anaheim
- Arlington
- Asheville
- Atlanta

Update | Cancel

Orientation A unique list of values for that column are now visible.

Action Select one or more values that you want the user to have access to and click 'Update'.

Group Name: HR Files | Description: Only show Employee Records

- Pittsbourgn
- Plano
- Pompano Beach
- Port Saint Lucie
- Portland
- Provo
- Raleigh
- Roanoke
- Rochester
- Rockville
- Round Rock
- Sacramento
- Saint Petersburg
- Salt Lake City
- San Antonio

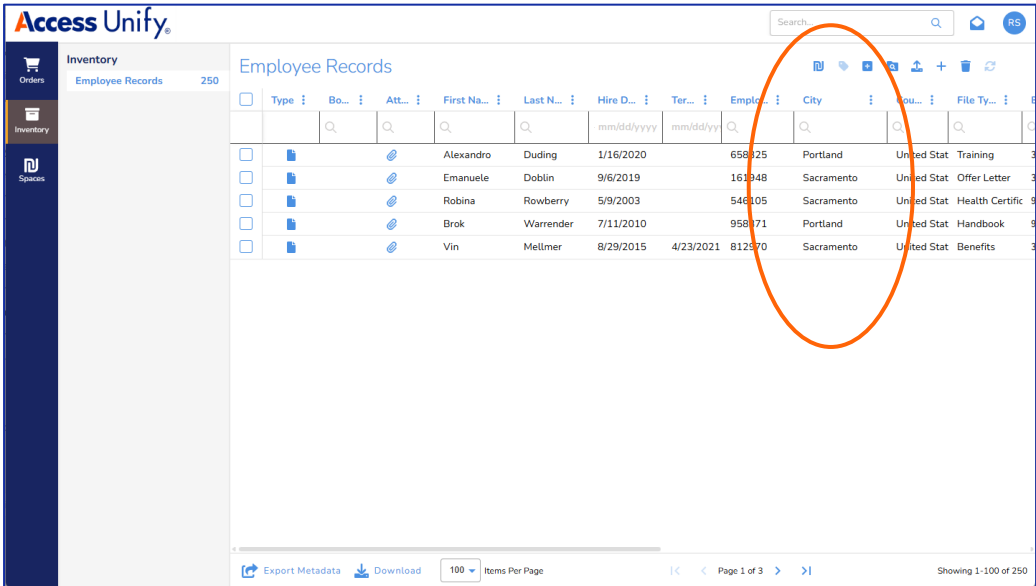
Update | Cancel

INFORMATION: Your unique configuration will look different.

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Action Assign this group to one or more users. For users already assigned to the group, the privileges will be applied upon the next log in.

Orientation This is the users' view after adding privileges. Reminder, we granted access to values 'Portland' and 'Sacramento'.



INFORMATION: As you can see in the screen shot, the user only has access to the city values we granted.

SUCCESS! You have successfully learned about Groups and Privileges.