Feature Guide:

Administrative Matrix

ONPOINT

August 2014

Table of Contents

Administrative Matrix Introduction

The Administrative Matrix is designed primarily to allow a Root Administrator to define and manage administrative rights and views for a particular administrative role within the OnPoint Course Manager. This will allow the Root Administrator to limit which menus and features will be viewable and available based upon the specific administrative role such as a Systems Administrator, Content Administrator, Course Coordinator, and or an Event Manager.

How might this be useful?

The Administrative Matrix will allow a Root Administrator to define by the user type a type of hierarchy as a natural way of organizing roles to reflect authority, responsibility, and capabilities. The user can be given no more privilege than is necessary to perform their job. Permissions determine the data and applications that may be accessed and each role is assigned the set of permissions that are necessary for the role type to perform his/her required tasks. Using the Administrative Matrix to determine and manage access permissions allows Root Administrators to better incorporate least privilege and separation of duties into administrative policies.

Section 1: Locating the Administration Rights Matrix in OPCM

As the Root Administrator you will log into the OnPoint Course Manager application from the online Portal – Manager Options area. Click the link to open Course Manager.

Once in the Course Manager application, you will see the options available to you across the top of the screen. In order to review and set the permissions for the Administration Matrix you will need to go to the Administration tab, System Administration, then Administration Matrix.
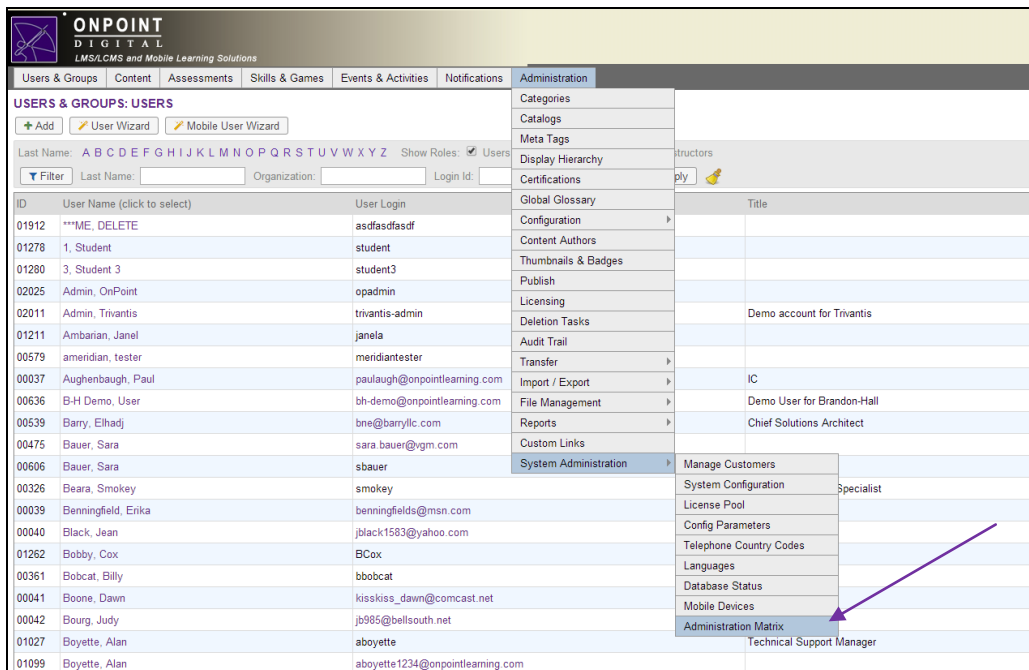
Section 2: Administration Rights Matrix-Main Menu

The first tab of the Administration Rights Matrix is the Main Menu. This is where you can define by manager type (System Administrator, Content Administrator, Course Coordinator, and Event Manager) the menu(s) that they will have access to within OnPoint Course Manager. The options are split up just as they are divided up into tabs across the top within the application. The choices to the menu(s) allow the Root Admin to select specific functions within those menu(s) to grant access to these user types. For example: as an Event Manager I may never need to have access to create or change users however I may need to create a group of specific users for an event that I am putting together. This would mean that the Root Admin would mark the Groups with a check but the Users and Groups they would leave unchecked.

Note: It is important to remember that the Main Menu tab drives the actual menu and not all the individual functions within the menu. To define which specific functions within that menu the user would have access to you would need to further define that in the Administrative Rights tab.

Just check or uncheck the boxes based on the user type as to the menu(s) they will have access to.

For our example please note that the EM would only have a check mark on the Groups under the Users and Groups

ADMINISTRATION: RIGHTS MATRIX

Main Menu | Administrative Rights

Users & Groups	SA	CA	CC	EM
Main Menu - Users & Groups	✔	✔	✔	✔
Users & groups	✔	✔	✔	✔
Groups	✔	✔	✔	✔
Job codes	✔	✔	✔	✔
Locations	✔	✔	✔	✔
Organization chart	✔	✔	✔	✔
Announcements	✔	✔	✔	✔
User & group reports	✔	✔	✔	✔

Content	SA	CA	CC	EM
Main Menu - Content	✔	✔	✔	✔
Courses	✔	✔	✔	✔
Topics	✔	✔	✔	✔
Pages	✔	✔	✔	✔
Assets	✔	✔	✔	✔
Nuggets	✔	✔	✔	✔
Content Hierarchy	✔	✔	✔	✔
Wizards	✔	✔	✔	✔
Library	✔	✔	✔	✔
Content reports	✔	✔	✔	✔

Assessments	SA	CA	CC	EM
Main Menu - Assessments	✔	✔	✔	✔
Assessment sets	✔	✔	✔	✔
Tests	✔	✔	✔	✔
Questions	✔	✔	✔	✔
Review feedback	✔	✔	✔	✔
Performance	✔	✔	✔	✔
Assessment reports	✔	✔	✔	✔
Skills & Games	**SA**	**CA**	**CC**	**EM**
Main Menu - Skills & Games	✔	✔	✔	✔
Skill profiles	✔	✔	✔	✔
Equivalency	✔	✔	✔	✔
Skill sets	✔	✔	✔	✔
Skills	✔	✔	✔	✔
Competencies	✔	✔	✔	✔
Games	✔	✔	✔	✔
Skill reports	✔	✔	✔	✔
Events & Activities	**SA**	**CA**	**CC**	**EM**
Main Menu - Events & Activities	✔	✔	✔	✔
Master event calendar	✔	✔	✔	✔
Instructor led training events	✔	✔	✔	✔
Webinar events	✔	✔	✔	✔
Live streaming events	✔	✔	✔	✔
Event Session Wizard	✔	✔	✔	✔
Event resources	✔	✔	✔	✔
Event registrations	✔	✔	✔	✔
Event locations	✔	✔	✔	✔
Activities	✔	✔	✔	✔
Activity completion	✔	✔	✔	✔
Event & activity reports	✔	✔	✔	✔
Notifications	**SA**	**CA**	**CC**	**EM**
Main Menu - Notifications	✔	✔	✔	✔
Send notifications	✔	✔	✔	✔
Standard notifications	✔	✔	✔	✔
Notification queue	✔	✔	✔	✔
Notification series	✔	✔	✔	✔
Email queue	✔	✔	✔	✔
Send SMS message	✔	✔	✔	✔
Forums	✔	✔	✔	✔

Administration	SA	CA	CC	EM
Main Menu - Administration	✔	✔	✔	✔
Categories	✔	✔	✔	✔
Catalogs	✔	✔	✔	✔
Metatags	✔	✔	✔	✔
Mobile shortcuts	✔	✔	✔	✔
Page layouts	✔	✔	✔	✔
Time zones	✔	✔	✔	✔
Global glossary	✔	✔	✔	✔
Configuration	✔	✔	✔	✔
Content authors	✔	✔	✔	✔
Custom fields	✔	✔	✔	✔
Thumbnails & badges	✔	✔	✔	✔
Bulk publishing	✔	✔	✔	✔
Licensing	✔	✔	✔	✔
Deletion tasks	✔	✔	✔	✔
Audit trail	✔	✔	✔	✔
Content transfer	✔	✔	✔	✔
Imports & exports	✔	✔	✔	✔
File management	✔	✔	✔	✔
Manage reports	✔	✔	✔	✔
Custom links	✔	✔	✔	✔
Certifications	✔	✔	✔	✔
System administration	✔	✔	✔	✔
Customers	✔	✔	✔	✔
System configuration	✔	✔	✔	✔
License pool	✔	✔	✔	✔
Configuration parameters	✔	✔	✔	✔
Telephone country codes	✔	✔	✔	✔
Languages	✔	✔	✔	✔
Database status	✔	✔	✔	✔
Mobile devices	✔	✔	✔	✔

The below two examples will show what the user experience will be when logging into the system based on the settings within the Administrative Rights Matrix: Main Menu. These examples will display the screen and how they will appear to the user when they access the OnPoint Course Manager application. The examples will display both scenarios to the user showing both with access and without access to a specific menu or function within the system.

The first example will show the user type of an Event Manager with access to the Users & Groups: Menu and then the Groups option.

The Event Manager Group setting under the User & Groups Menu in the Administration Rights: Main Menu Matrix is checked to be active.

The Groups menu selection appears under the Users & Groups Menu heading and allows the Event Manager access into the option to perform any available functions that are previously approved in the Administrative Rights options of the Administrative Rights Matrix.

The next example shows the user type of an Event Manager with access to the Users & Groups: Menu but without access to the Groups option within the Users & Groups Menu.

The Event Manager Group setting under the User & Groups Menu in the Administration Rights Matrix is un-checked in this case to be shown as not active.

The Groups menu selection no longer appears under the Users & Groups Menu heading and will no longer allow the Event Manager access into this option to perform any available functions.

Section 3: Administration Rights Matrix-Administrative Rights

The next tab of the Administration Rights Matrix is the Administrative Rights. This is where you can define by manager type (System Administrator, Content Administrator, Course Coordinator, and Event Manager) the rights that they are being given within the specific menu(s) function that they have been given access to within the Main Menu Administrative Rights selection process. The options are split up just as they are listed up under each of the tabs at the top within the Course Manager application.

The choices to the functions within the menu(s) allows the Root Admin to select the specific items within those menu(s) to grant access to these user types. For example: above we mentioned as an Event Manager I may never need to have access to create or change users however I may need to create a group of specific users for an event that I am putting together. I have been given access to the Group option in the Main Menu Administrative Rights. Now here in the Administrative Rights under the Users and Groups the Root Admin will need to set the features and rights where I have access. For this example the Root Admin would give this Event Manager access to the Add/Edit Groups and the Make Assignments to Groups but will not give access to the Add/Edit Users since they should not have access to do this function.

ADMINISTRATION: RIGHTS MATRIX

| Main Menu | Administrative Rights |

Home Page	SA	CA	CC	EM
Home page license information	✔	✔	✔	✔
Home page pending links	✔	✔	✔	✔
Users & Groups	SA	CA	CC	EM
Add/edit users	✔	✔	✔	✔
Make assignments to users	✔	✔	✔	✔
Add/edit groups	✔	✔	✔	✔
Make assignments to groups	✔	✔	✔	✔
Add/edit job codes	✔	✔	✔	✔
Add/edit locations	✔	✔	✔	✔
Make assignments to location	✔	✔	✔	✔
Add/edit organization charts	✔	✔	✔	✔
Make assignments to organization charts	✔	✔	✔	✔
Add/edit announcements	✔	✔	✔	✔
Content	SA	CA	CC	EM
Add/edit courses	✔	✔	✔	✔
Make assignments to courses	✔	✔	✔	✔
Add/edit topics	✔	✔	✔	✔
Make assignments to topics	✔	✔	✔	✔
Add/edit pages	✔	✔	✔	✔
Make assignments to pages	✔	✔	✔	✔
Add/edit assets	✔	✔	✔	✔
Add/edit nuggets	✔	✔	✔	✔
Make assignments to nuggets	✔	✔	✔	✔
Add/edit library	✔	✔	✔	✔
Make assignments to library	✔	✔	✔	✔

For our example please note that the EM would only have a check mark on the Add/Edit Groups and the Make Assignments to Groups .

Just check or uncheck the boxes based on the user type as to the functions within the specific menu(s) they will have access to.

Assessments	SA	CA	CC	EM
Add/edit assessment sets	☑	☑	☑	☑
Make assignments to assessment sets	☑	☑	☑	☑
Add/edit tests	☑	☑	☑	☑
Make assignments to tests	☑	☑	☑	☑
Add/edit questions	☑	☑	☑	☑
Add/edit performance	☑	☑	☑	☑
Make assignments to performace	☑	☑	☑	☑

Skills & Games	SA	CA	CC	EM
Add/edit skill profiiles	☑	☑	☑	☑
Make assignments to skill profiles	☑	☑	☑	☑
Add/edit skill sets	☑	☑	☑	☑
Make assignments to skill sets	☑	☑	☑	☑
Add/edit skills	☑	☑	☑	☑
Make assignments to skills	☑	☑	☑	☑
Add/edit games	☑	☑	☑	☑
Make assignments to games	☑	☑	☑	☑

Events & Activities	SA	CA	CC	EM
Add/edit events	☑	☑	☑	☑
Make assignments to events	☑	☑	☑	☑
Add/edit event resources	☑	☑	☑	☑
Add/edit event locations	☑	☑	☑	☑
Add/edit activities	☑	☑	☑	☑
Make assignments to activities	☑	☑	☑	☑

Administration	SA	CA	CC	EM
Add/edit categories	☑	☑	☑	☑
Add/edit cataglogs	☑	☑	☑	☑
Make assignments to catalogs	☑	☑	☑	☑
Add/edit time zones	☑	☑	☑	☑
Add/edit glossary	☑	☑	☑	☑
Add/edit content authors	☑	☑	☑	☑
Add/edit reports	☑	☑	☑	☑
Update reports	☑	☑	☑	☑
Add/edit hierarchy nodes	☑	☑	☑	☑

The below two examples will show what the user experience will be when logging into the system based on the settings within the Administrative Rights Matrix: Administrative Rights. These examples will display the screen and how they will appear to the user when they access the OnPoint Course Manager application. The examples will display both scenarios to the user showing both with access and without access to a specific menu or function within the system.
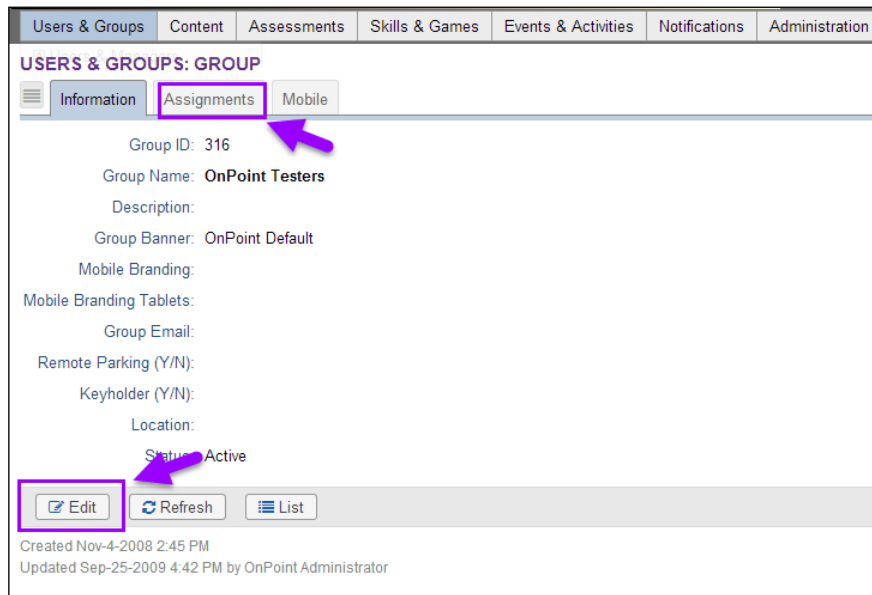
The first example will show the user type of an Event Manager with access to the Users & Groups: Menu and then the Groups option with the ability to Add/Edit groups as well as to make assignments to the groups.

The Event Manager Group setting under the User & Groups Menu in the Administration Rights: Administrative Rights Matrix is checked to be active.

The Groups Menu selection appears under the Users & Groups and the user has the ability to click on and select a group from the list that is shown.

After the user makes the selection the next screen to appear allows the user to perform Edits or make Assignments if needed. Both of these options appear for this user based on the settings within the Administration Rights being checked for an Event Manager.
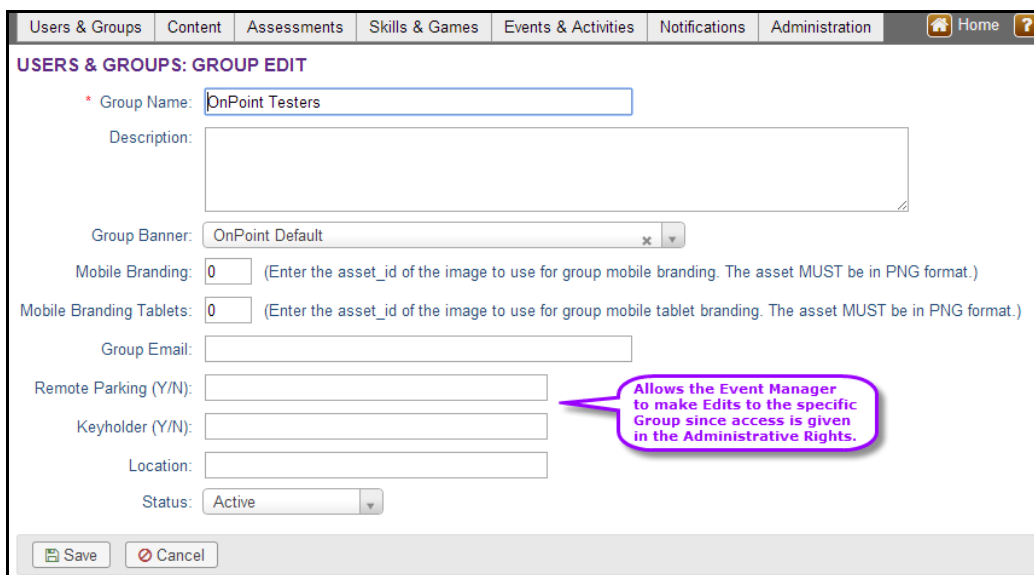
If the user chooses the Edit then the Edit screen will appear and they can make any changes needed and save.
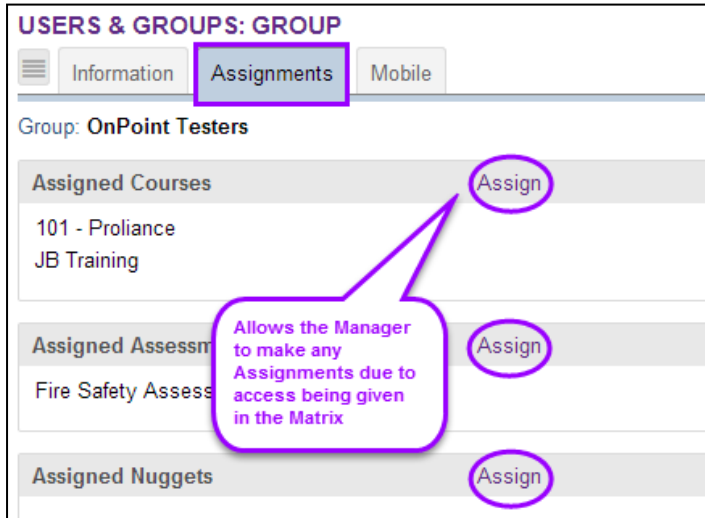
If the user chooses the Assignments then the Assignments options will appear and they can make any changes needed and save.

The next example shows the user type of an Event Manager with access to the Users & Groups: Menu but without access to the Groups: Add/Edit groups as well as to make assignments to the groups.

The Event Manager Group setting under the User & Groups Menu in the Administration Rights Matrix is un-checked in this case to be shown as not active.

The Event Manager will still have access to see the available Groups in this example. However; once the Group is selected the options for what the Event Manager can do will be different than in Example 1.
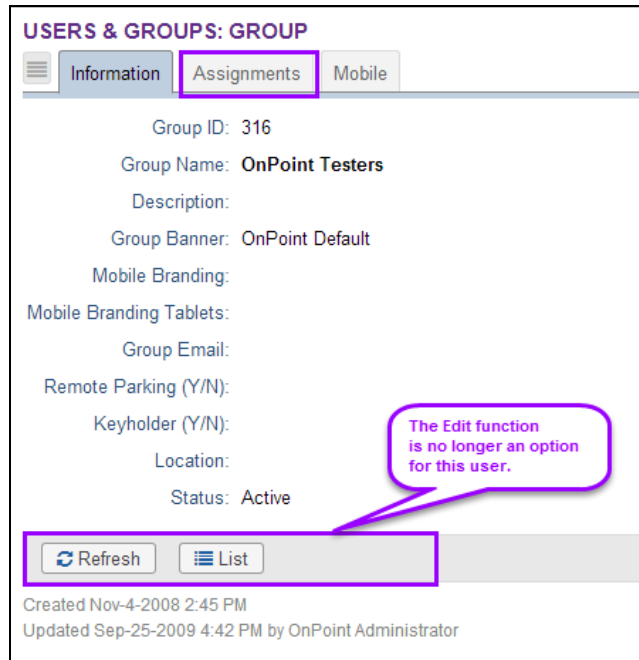
The above image shows that the Event Manager no longer has access to the Edit button within the Users & Groups: Group Menu. This is based on the settings within the Administration Matrix: Administrative Rights.
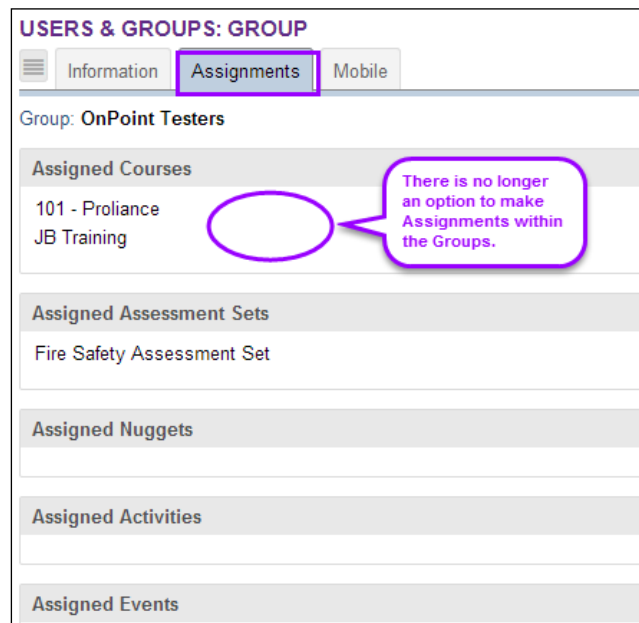
The above image shows that the Event Manager no longer has access to make Assignments within the Users & Groups: Group Menu. This is based on the settings within the Administration Matrix: Administrative Rights.

Section 4: System Defaults and Removing Rights

In addition to defining the roles and permissions to specific individual menu(s) and functions the Root Admin also has the ability within the Administration Rights Matrix to either reset the user type to the system default settings, or to remove all the rights from a specific user type leaving them without rights and permission levels to features within the system. This basically wipes the user type clean and allows the Root Admin to start over with assigning full permissions.

These functions can be done both at the Main Menu level and also at the Administrative Rights level.

Defaults and Removing Rights: Main Menu

Go to the Administration Rights Matrix and Select the Main Menu tab. On the right hand side of this tab there is a section that will list out the four types of users to include the Site Administrator, Content Administrator, Course Coordinator, and Event Manager along with the option to Use Defaults or Remove all Rights. The Root Admin has the option by user type to select to Use the System Default or to Remove all the setting that are currently assigned to that user type. To do so the Root Admin will select the option next to the user type. A prompt will appear asking the user to confirm. Once confirmed the screen values will change based on the option selected. If the defaults were chosen then the settings will change to what the current system values are, and if the remove all rights was selected then all values will now be unchecked.

Example if all rights were removed for the System Administrator for Main Menu items.

> **Note:** This will change the settings based on the menu level. This will take away the access to the user type to be able to access this specific menu.

Defaults and Removing Rights: Administrative Rights

Go to the Administration Rights Matrix and Select the Administrative Rights tab. On the right hand side of this tab there is a section that will list out the four types of users to include the Site Administrator, Content Administrator, Course Coordinator, and Event Manager along with the option to Use Defaults or Remove all Rights. The Root Admin has the option by user type to select to Use the System Default or to Remove all the rights that are currently assigned to that user type. To do so the Root Admin will select the option next to the user type. A prompt will appear asking the user to confirm. Once confirmed the screen values will change based on the option selected. If the defaults were chosen then the settings will change to what the current system values are, and if the remove all rights was selected then all values will now be unchecked.

Example if all rights were removed for the System Administrator for features within menu(s).

Note: This will change the settings based on the features within each of the menu(s). This will remove the access to the user type to be able to access these specific functions within the menu. Although the menu itself can be accessed certain functions within the menu may not be accessible to the user type.