

Manage Users - Subgroup Access

Subgroup Access

In this section, a user is given access to specific subgroups. By default, a user has no access to all subgroups unless he is explicitly set up to have access to one or more. Refer to the [Subgroups](#) section for more information on how to manage a subgroup.

- Open the List of Users screen and select the user to assign subgroup access for.
- Select **Subgroup Access** from the side menu bar to display the list of subgroups a user currently has access to.

image not found or type unknown



- The **Subgroup List screen** allows for the following functionality when managing Subgroup Access:
 - **Add Subgroup:** A new subgroup can be created
 - **Refresh Subgroups:** All the applicable system tables for all the modules are refreshed.
 - **Set Preferred Subgroup:** Use this setting to setup the default subgroup for a user.
 - **Clear Preferred Subgroup:** Remove the preferred subgroup.
 - **Delete:** Remove subgroup access.

NOTE: The Refresh Subgroup action is very important after subgroups access were amended.

image not found or type unknown



How to Define Permissions on a Subgroup

Click on the **View/Edit Permissions** link in the **Action** dropdown of the selected subgroup in the Subgroup List.

There are more than one area that specific permissions can be set up for. These are:

- Employee Records (includes the Manage Employees module)
- Query Builder
- (includes the Job profiler module)
- Switch to another user's profile

Setting up Permissions for Employee Records

To set up permissions for the employee records, tick the **Access to Employee Records** checkbox. This will open the following sections where detailed access can be specified per section. Go through the sections and indicate to which the user should have view and/or edit rights. Click **Save Subgroup Rights** to save the changes.



Setting up Permissions for Query Builder

To allow full permission on the *Query Builder* module, tick the appropriate check box as shown below.

image not found or type unknown



Setting up Permissions for Profiles

To allow full permission on *Profiles*, tick the appropriate check box as shown below.

image not found or type unknown



Allow an Administrator user to Switch to Another User's Profile

- The system allows administrator users or users in suitably responsible positions to support other users by physically logging in as them. In this way the administrator user can see and do what the user is seeing and doing, thus giving practical and topical assistance.
- Be careful when assigning this right to any user since the administrator can see and do anything the user is able to see and do.
- All actions performed by the administrator are logged against the name of the administrator.

To allow full permission on *Switch to another user's Profile*, tick the appropriate check box as shown below.

image not found or type unknown



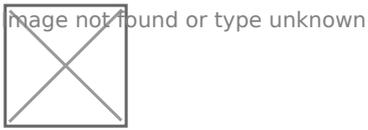
Switching to Another User's Profile

When an administrator user, who was given Switch User rights, logs into the system he will have access to the **Switch user** functionality from the system portal as shown below.

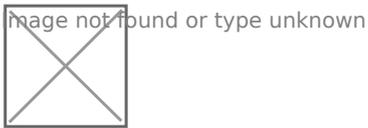
image not found or type unknown



- Ensure that the appropriate subgroup is activated, search for the user to be supported and click to display all employees matching the search criteria.
- Locate the applicable user and click the "**Switch to ...**" button in the **Action** column.



Acknowledge the conditions of the switch action.



- The session is changed to that of the selected user and from now on all actions are logged against the administrator not against the user.
- To return to the administrator's own profile, click the **Switch user** functionality from the system portal.
- Acknowledge the switch back to your own profile.

Revision #4

Created 27 March 2021 12:13:37 by Lizette Lotter

Updated 24 November 2022 09:24:23