

OrgChartHosting

TUTORIAL 8 - SECURITY

OrgChart Now Tutorials

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TUTORIAL 8

OVERVIEW

In this tutorial we will be walking through Security settings & access.

This training is for Administrators.

This tutorial will cover -

- Account Settings
- Security Profiles
- UI Profiles
- Access Groups
- Assigning Access Groups

These tutorials are part of a series of tutorials designed to provide you with a better understanding of the OrgChart Now solution.

OrgChart Viewer is one of the standard modules available in OrgChart Now.

The OrgChart Viewer displays the current master chart.

The master chart is a read only chart that is automatically synchronized with your source HR data.

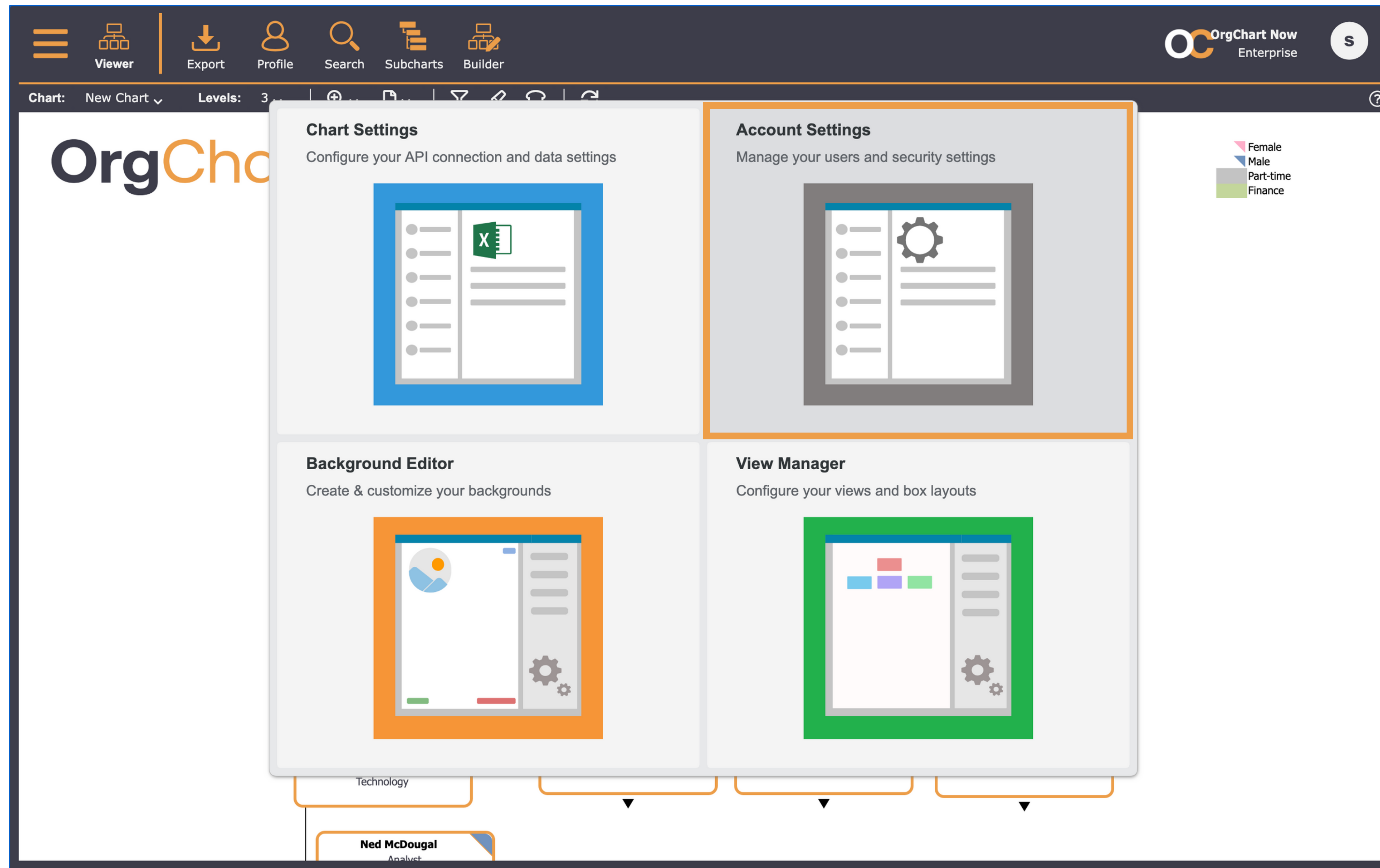
The Chart Builder allows you to take a snapshot of any subset of your master chart.

This snapshot is the starting point for a workforce plan.

The Workbench allows Administrators and Read/Write users to create and modify customized chart exports using their Master Chart data.

ORGCHART SECURITY – ACCOUNT SETTINGS

The settings configured in Account Settings are applied ubiquitously across the account.



1 Click on the  menu icon and select Setup.

2 Select Account Settings.

ORGCHART SECURITY – ACCOUNT SETTINGS

The settings configured in Account Settings are applied ubiquitously across the account.

Account Settings Panel

- **General:** Set which module is launched upon login, and view Administration details about your account.
- **Chart Management:** Create additional Master Charts, and oversee Chart Documents in Viewer.
- **Theme:** Customize various aspects of the OrgChart user interface.
- **Access Groups:** Create and modify groups, controlling access to functionality, folders, Master Charts, Views, Fields, and even Branches.
- **Security:** Create and modify Row-Level and Branch Level security_profiles that can be used when configuring Access Groups.
- **Authorization:** Configure Restricted Link access and automated Role and Access Group assignment.
- **Manage Users:** Create and modify users, as well as their user experience within OrgChart.
- **UI Profiles:** Create and modify profiles dictating the modules available for users to access.
- **Checkpoints:** Backup or restore Viewer configurations.

ORGCHART SECURITY – SECURITY PANEL

The Security panel allows an administrator to:

- Manage [Row-Level Security Profiles](#)
- Manage [Branch-Level Security Profiles](#)

Row Level Security

Row Level Security Profiles limit which fields a user can access on a row by row basis. For example, an Administrator can restrict a user (or group of users) so that they cannot see sensitive fields.

Branch Level Security

Branch Level Security Profiles limit which branches a user can access. For example, an Administrator can restrict a managers so that they can only see their own branch.

The screenshot displays the OrgChart Now Enterprise interface. At the top, there is a navigation bar with icons for Viewer, Export, Profile, Search, Subcharts, and Builder. Below this is a secondary bar with 'Chart: New Chart', 'Levels: 3', and various tool icons. The main content area is titled 'Account Settings' and features a sidebar menu with options: General, Chart Management, Theme, Access Groups, Security (highlighted with an orange circle), Authorization, Manage Users, UI Profiles, and Checkpoints. The 'Security' panel is open, showing two sections: 'Row Level Security' and 'Branch Level Security'. The 'Row Level Security' section includes a list of profiles: 'Limited Access Copy', 'Limited Access', and 'Branch Level', with a '+ Create New Profile' button. The 'Branch Level Security' section includes a 'Limit to Dept' field and another '+ Create New Profile' button. At the bottom of the panel, there are 'Reset', 'Save', and 'Exit' buttons. In the background, an organizational chart is visible, showing nodes for Lisa Weil (SVP, International Technology), Ned McDougal (Analyst), Manager, Marketing Marketing, Director, Operations Operations, and Director, Benefits Human Resources. A legend on the right side of the chart identifies colors for Female (pink), Male (blue), Part-time (grey), and Finance (green).

ORGCHART SECURITY – UI PROFILE

The UI Profiles panel allows Administrators to create and manage UI Profiles in OrgChart.

UI Profiles control a user's access to certain modules and menus within OrgChart.

UI Profiles are selected when configuring Access Group, which are later assigned to users in the Account Settings: Manage Users panel.

The screenshot displays the 'Account Settings' dialog box in the OrgChart Now Enterprise application. The 'UI Profiles' tab is active, showing a list of options with checkboxes. The 'UI Profiles' tab is highlighted with an orange circle. The background shows an organizational chart with users like Lisa Weil and Ned McDougal.

UI Profile Options

- Enable Excel Export: Allows export of chart data to Excel.
- Enable File Manager: Allow access to the File Manager in Workbench.
- Publish: Allow export of charts (to formats including: PDF, PowerPoint, SVG, PNG, or JPEG).
- Include Profile Panel: Allow access to the Profile panel.
- Include Subchart Panel: Allow access to the Subcharts panel.
- Search: Allow access to Search functionality.
- Directory: Enable access to Directory mode.
- Planning: Enable access to Planning mode. User must have a Read/Write or Administrator seat and the Planning module must be active.
- Enable Workbench: Allow access to Workbench mode.

And many more.

UI Profiles are set up during the implementation process with the Professional Services team.

ORGCHART SECURITY – ACCESS GROUPS

The Access Group panel allows Administrators to create and modify groups defining user access. Access Groups control access privileges to source data and application features. Access Groups are assigned to users in the [Account Settings: Manage Users](#) panel.

General Settings

The General Settings section allows Administrators to select application functionality and folder access for members of the selected Access Group.

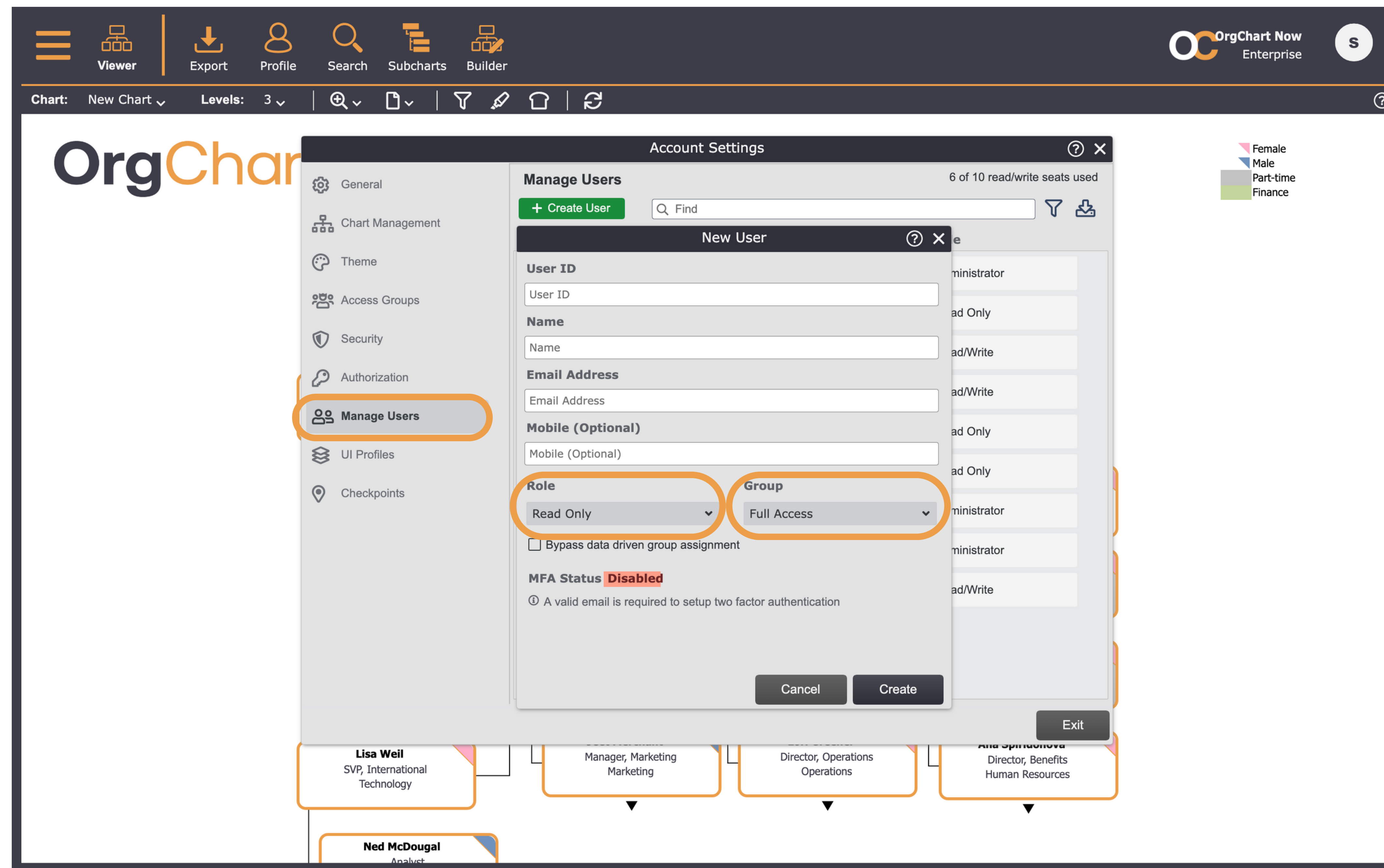
Master Chart Settings

The Chart Settings section allows Administrators to set Chart Access, Branch Level Security, and Allowed Views settings for each Master Chart.

ORGCHART SECURITY – ASSIGNING ACCESS GROUPS

The Manage Users panel allows an administrator to add new users, modify users' assigned Role and Access Group, and delete users from the app.

In accounts with Multi-Factor Authentication enabled, Admins can audit user MFA status, email MFA setup links, and override the MFA requirement for certain users.



Role

The following roles are available:

- Read Only – User can view, search, and export org charts but cannot modify org chart or change presentation options.
- Read/Write – All Read Only capabilities plus user can create charts, modify presentation options, participate in workforce planning (e.g. Planning) exercises, and manually refresh Master Charts.
- Administrator – All Read/Write capabilities plus access to all administrator functions (e.g. Manage Users, Chart Settings, and Account Settings).

Group

Access Group to be assigned to user. Access Groups control access to application functionality and data.

CONCLUSION

END OF TUTORIAL 8

In this interactive tutorial, we covered creating Security Roles, UI Profiles, Access Groups and Assigning Access Groups.

In the next tutorial we will learn about navigating the OrgChart Planning Module.



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make informed people decisions.**

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