



## Key Terms

**User:** An Employee who is required to log in to any part of IntegralCS (i.e. CS Competency, CS Human Resources or CS Access) to manage or administer the system.

Each User must have an associated Employee and is allocated Roles to determine their access.

**Employee:** A person listed in CS Human Resources.

**Role:** A group of permissions. Roles are selected for each User to determine what access they have to IntegralCS when they log in. Each User can have one many Roles.



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# 1 Introduction

CS Access regulates control to the suite of Integral CS applications, and also allows configuration of core aspects of the system that are shared between application.

There are 2 main sections within CS Access:

- Users
- Settings

In order to access any IntegralCS application, a person requires an appropriate CS Access User account.

# 2 Users

Users are managed and created from the Users tab. The image below is the User list page.

The screenshot shows the 'List User' interface. At the top, there are buttons for 'Add New' and 'Excel Export'. Below these is a navigation bar with letters A-Z and 'ALL'. A filter section includes 'Current Filter: Unsaved Filter', 'My Filters', and a search box. A table lists users with columns for Username, First Name, Last Name, and Created At. Each row has 'Edit' and 'Delete' icons. Callouts point to various features: 'Add New User' (button), 'Export User details to Excel' (button), 'Browse by first letter of Username' (navigation bar), 'Edit an existing User account' (edit icon), and 'Delete a User account' (delete icon). A bracket groups the 'First Name' and 'Last Name' columns, with callouts for 'Username' and 'Linked Employee'.

Username	First Name	Last Name	Created At
ADMINISTRATOR	ADMINISTRATOR	ADMINISTRATOR	11/06/2010
hansolo	Han	Solo	11/06/2010
leiaorgana	Leia	Organa	11/06/2010
darthvader	Darth	Vader	11/06/2010
jabbahutt	Jabba	Hutt	11/06/2010
landoalrissian	Lando	Calrissian	11/06/2010
wedgeantilles	Wedge	Antilles	11/06/2010

### 1.1 User Administrative Details

Click Add New on the User list page to create a new User. The following screen shows the administrative details.

The screenshot shows the 'Edit User' form with the following fields and callouts:

- Save** (green checkmark) and **Cancel** (red X) buttons at the top left.
- Linked Employee** dropdown menu showing 'Grant-smith, Peter' and an **Add New** button with a plus icon. Callout: 'Create a new Employee if not already present.'
- Username** text input field containing 'peterg'. Callout: 'Username (must be unique)'
- Email** text input field.
- New password** text input field.
- Confirm password** text input field. Callout: 'Password is not displayed when User account is edited. To reset a password, edit the account, enter the new password (twice) and Save.'

### 1.2 User Roles

Each User access is determined by the Roles that are selected for that user. The following screen displays how Roles are selected for each User (appears at the bottom of the edit User screen).

The screenshot shows the 'User Roles' selection screen with the following elements and callouts:







- Navigation tabs at the top: CS Access, CS Hr, CS Incident, CS Competency, CS Risk, CS Safework.
- Selected Role.** Callout pointing to the checked  next to **Administrator**.
- Choose** buttons (green arrow) for **Business Unit**, **Project**, and **Division**.
- Roles not selected.** Callout pointing to the unchecked checkboxes for **Manage Users**, **Manage Help Entry**, and **Users Settings**.

Any combination of Roles can be selected for each user. Roles for all applications can be viewed from the tabs - only select Roles for applications that the User needs to access.

The privileges defined by each Role are COMBINED to provide the user with access that equals the sum of all the selected Roles.

There are a number of 'Standard' Roles that IntegralCS uses when setting up new systems. You may use these unchanged, or you may request that we (or you may) changes these to other titles.

**The "Standard Roles" provided have the following functionality:**

Application	Role Title	Description
	Manage Users	Create and manage User accounts.
	Manage Settings	Update global lists such as Project, Division, and State.
	Training	Undertake linked training within CS Induction and view the My Training page.  <b>*Automatically allocated to all Employees added to CS Human Resources.</b>
	Manager	Manage Training Records, Needs run reports etc.
	Administrator	Configure site settings and manage the list of Capabilities.
	Administrator	Create and manage Employee details.
	Submit	Enter a new Issue.
	Responsible Manager	Include the User as a Responsible Manager.
	Closeout Manager	Include the User as a Closeout Manager.
	Manager	Manage Issues, run reports etc.
	Administrator	Configure site settings.
	User	Undertake online training.
	Manager	Configure site resources and setup (no deletion).
	Administrator	Configure site resources and setup.
	Manager	Create and manage Risk Registers.
	Administrator	Configure site settings and manage the Master Risk Register.

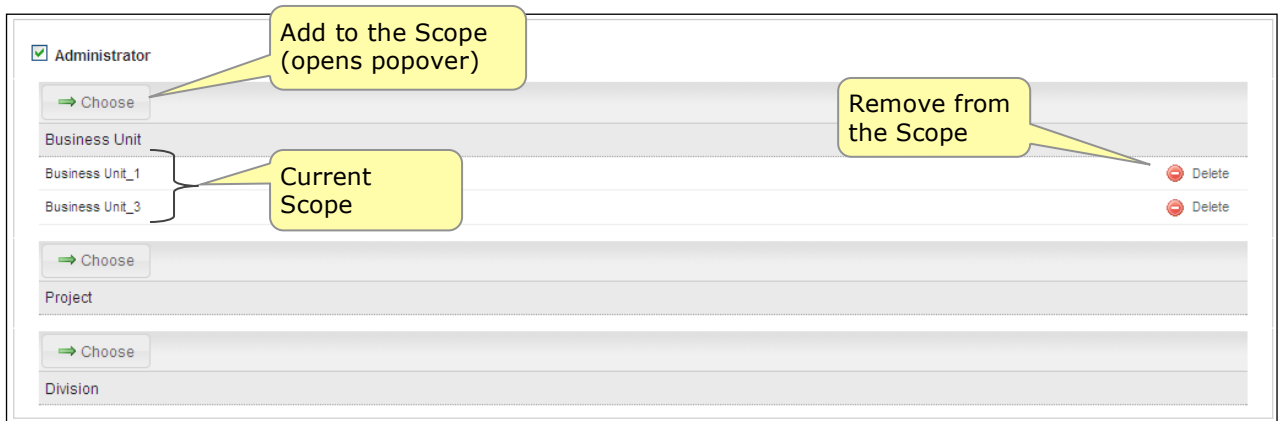
### 1.3 User Scoping

Scoping a User's access refers to restricting the User to only see certain Records. Scoping can be set by Business Unit, Project or Division, and is controlled separately for each Role.

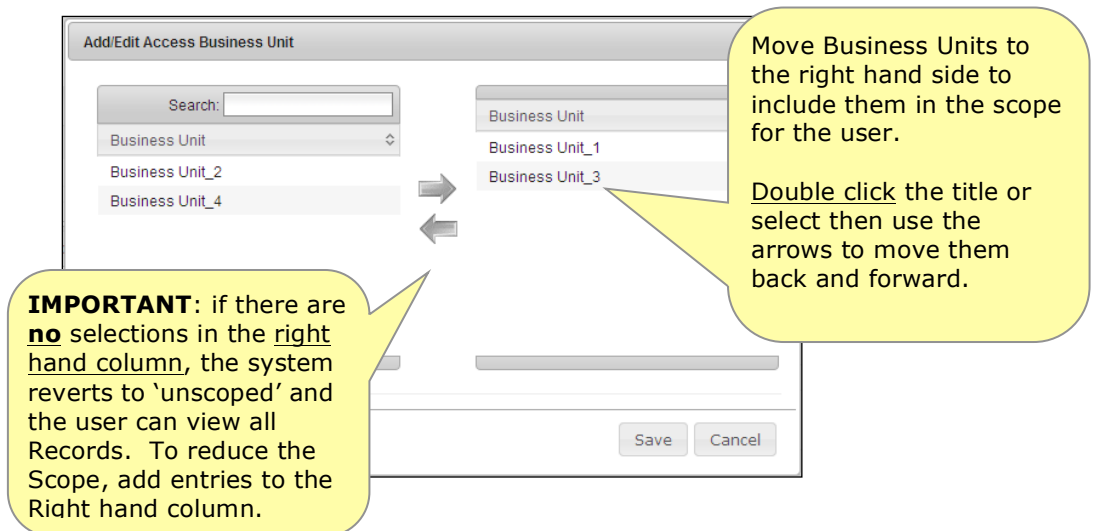
**By default, Users can see all records (they are 'unscoped'). When the Scoping popover is opened for the first time, it will show all entries on the Left Hand side. This is the default, and allows users to see all Records.**

In order to limit the users Scope move one or more entries to the right hand column. This limits the scope to those entries that were moved to the right.

In the example below, the User is Scoped to only see Business Unit\_1 and Business Unit\_3 for the Administrator Role.



Use the popover to change the selection as per the image below.



### 3 Settings

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The Settings tab allows a number of shared lists to be managed. These items typically are accessed by more than one IntegralCS application, and hence are centrally managed.

The items managed via this menu include:

- Division
- Location
- Business Unit
- Project
- State
- Country