

# Roles

An administrator can assign roles to users and groups in CardioLog. These roles can then be assigned permissions in various aspects of the CardioLog System, including [Reports](#) and [Analysis](#).

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Name	Information Worker	Analyst	Administrator	Last seen
<input type="checkbox"/> Administrator	✓	✓	✓	Never
<input type="checkbox"/> BSIA-OOSD-JBZX-DGBM-HGUW-ATXI-ZOKS-PACL	✓	✓		Apr 12 2016 2:51PM
<input type="checkbox"/> ERQM-CEHS-EXZY-ETXI-JBUN-UEVJ-BAEH-BMRN	✓	✓		Mar 3 2016 10:55AM
<input type="checkbox"/> JNZQ-BTOZ-XQPU-CKGR-IMJZ-TNIT-PGXY-GRDC	✓	✓		Mar 30 2016 3:27PM
<input type="checkbox"/> VM1A3B71E\Administrator	✓	✓	✓	Feb 28 2017 2:38PM
<input type="checkbox"/> VM1A3B71E\Bright	✓	✓		Jun 23 2016 10:42AM
<input type="checkbox"/> VM1A3B71E\Celtis	✓	✓		Jun 30 2016 8:43AM
<input type="checkbox"/> VM1A3B71E\grigoriy	✓	✓	✓	Jan 16 2017 1:41PM
<input type="checkbox"/> VM1A3B71E\Jay	✓	✓		Mar 3 2017 2:31PM
<input type="checkbox"/> VM1A3B71E\preston	✓	✓		Feb 8 2017 6:06PM
<input type="checkbox"/> vm1A3B71E\Karl	✓	✓		Jan 17 2017 12:41PM
<input type="checkbox"/> VM1A3B71E\Liuba	✓	✓		Jul 18 2016 7:58PM
<input type="checkbox"/> VM1A3B71E\Marlee	✓	✓	✓	Feb 21 2017 9:11AM
<input type="checkbox"/> VM1A3B71E\Michael	✓	✓	✓	Mar 1 2017 12:46PM
<input type="checkbox"/> VM1A3B71E\Nikki	✓	✓	✓	Mar 1 2017 6:47PM
<input type="checkbox"/> VM1A3B71E\Omirie	✓	✓		Mar 3 2017 3:17PM
<input type="checkbox"/> VM1A3B71E\Penelope	✓	✓		Feb 28 2017 2:06PM

### Roles Main Window

## Role Types and Information

An Administrator role is automatically assigned to the user who installs the product. By default, access to the CardioLog UI is denied for users and groups that are not assigned with a system role. Additionally, by default, access is denied to those who are not defined in the Active Directory. User names and group names are retrieved by the [Active Directory Updates Service](#).

There are three types of role assignments available that have default permissions assigned to them.

### Information Worker

This role is specifically designed for content administrators, managers, and analysts of regular reports. Only the [Report Center](#) is visible in the navigation pane, and they can set permissions for reports they create. Reports are exported and distributed via:

- Automatic production of scheduled reports that are distributed through Email
- Publication of reports within SharePoint using a Web Part
- Publication of reports within SharePoint via the "Site Actions" menu
- Exporting reports to Microsoft Excel and PDF
- The CardioLog user interface

The reports presented to Information Workers are clear and concise. No prior knowledge of CardioLog, excluding the CardioLog user interface, is required.

## Analyst

This role is designed for both the administrators of the monitored environments, as well as other IT managers who have been given the responsibility of creating and distributing scheduled reports. Analysts are able to create and view real-time reports for all items and pages in the monitored environments, as long as they are granted individual file permissions. They have access to the [Visitor Engagement](#) tools and can create [surveys](#), [message bars](#), [SEO reports](#) and personalized data. Everything except [Administration](#) is visible in navigation pane.

## Administrator

Those who are designated with the administrator role are given the responsibility of setting login permissions for the different levels of the system. Those in the administrator role also set read permissions for the objects in the monitored environments, and define criteria for event monitoring and the [Black List](#). All sections are visible in the navigation pane.

**Note:** The user who installs the product is automatically assigned with the Administrator Role.

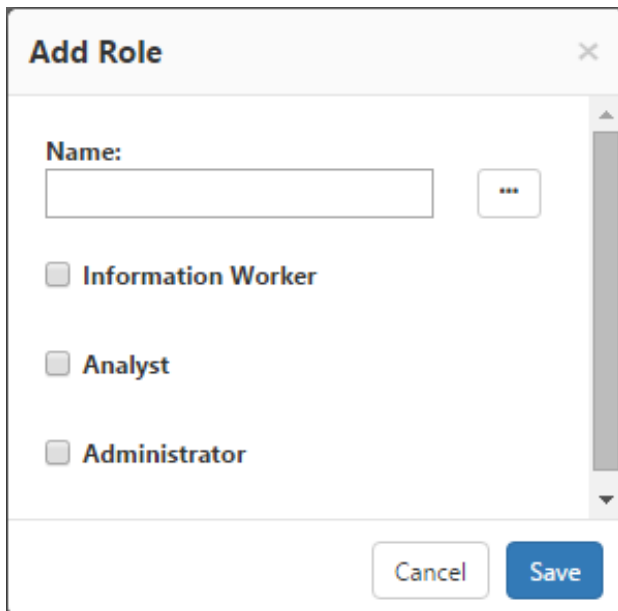
## Last Seen

The last seen column indicates the last time the listed user was logged into the CardioLog application. This feature will only appear for individual users and does not apply to groups.

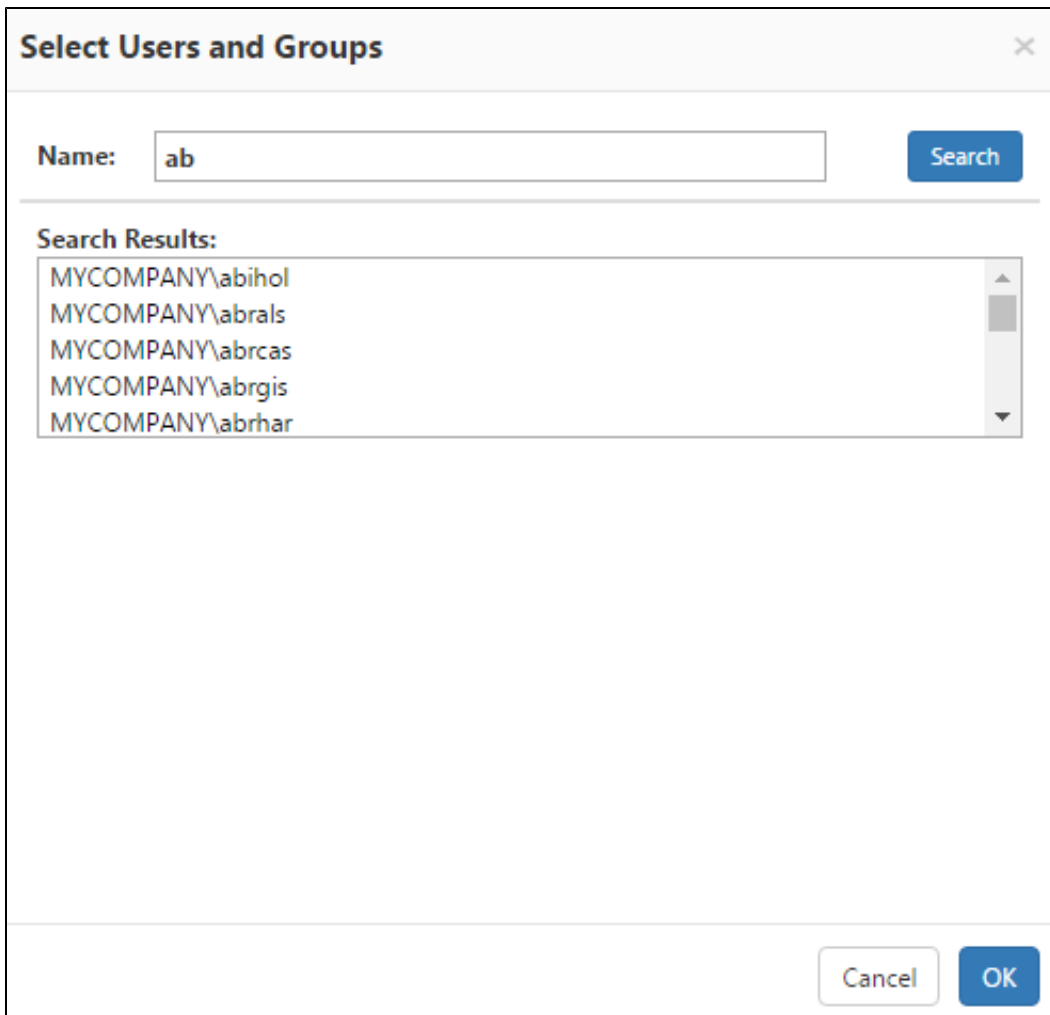
## How to Add New System Roles

1. In the Navigation pane, under Administration, click **Roles**.
2. In the bottom left hand corner, click **Add**.
3. In the Add Role dialog, enter a user/group name in the **Name** text box.
4. While entering the user/group name, click on Browse (...) to search for a user or group.
5. Select the check boxes to assign permissions to the user or group.
6. Click **Save**.

**Note:** User permissions precede group permissions.

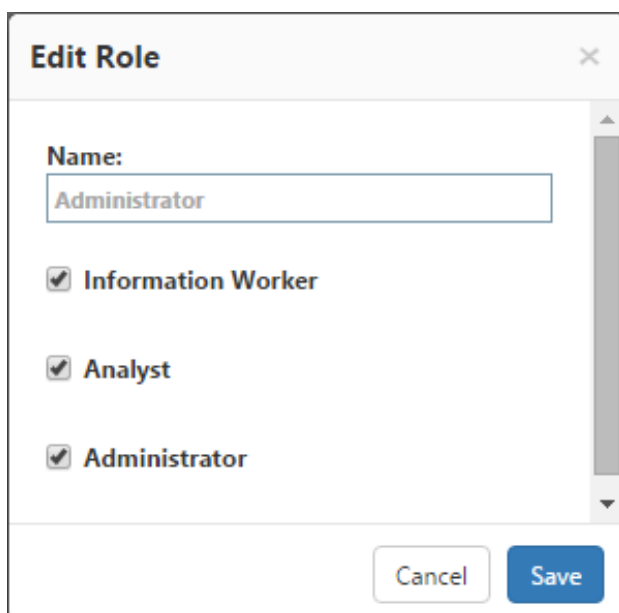


*Add Role Dialog*



Select Users and Groups Dialog

7. To edit a role, click on it.

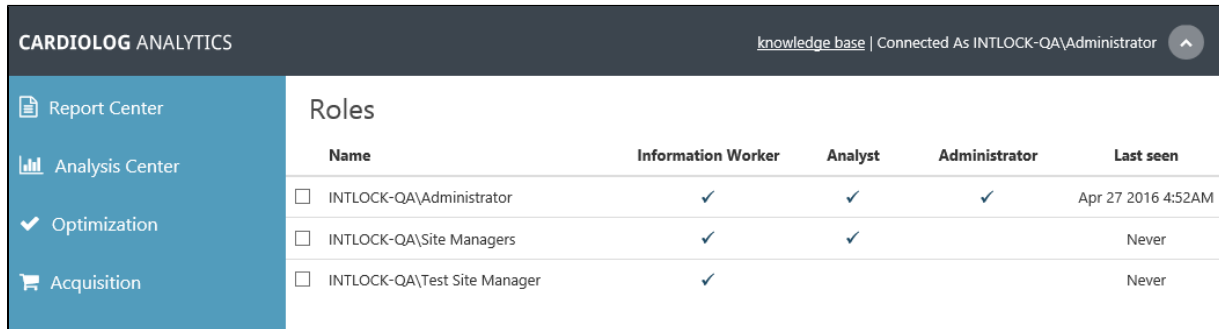


Edit Role Dialog

8. To remove a role, select it using the check box to the left of the role and click **Remove** in the bottom left hand corner of the central area.

## Permission Assignment Examples

1. If you wanted to grant permissions in the Analysis Center to all users in the "INTLOCK-QA\Site Managers" group except for a specific user, you would use the following permissions accordingly:
  - a. Click on the "INTLOCK-QA\Site Managers" group to edit it.
  - b. In the Edit Role Dialog select the **Analyst** and **Information Worker** roles to the group.
  - c. Add the user from the "INTLOCK-QA\Site Managers" group you would like to limit permissions for, and in the Add Role dialog select only **Information Worker** and click **Save**.

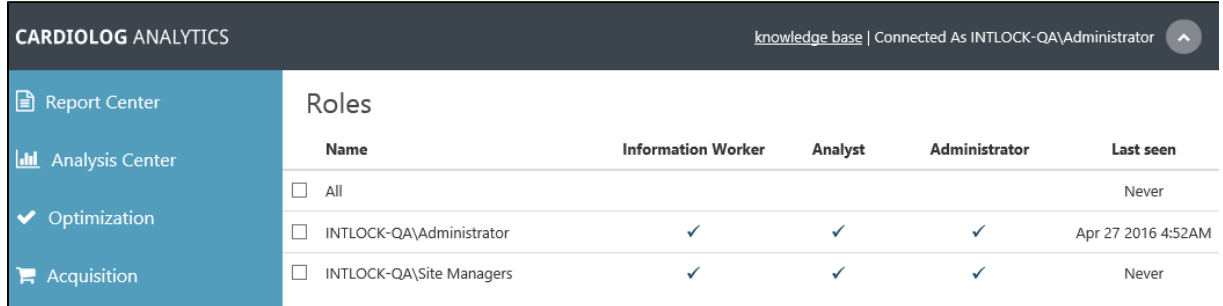


The screenshot shows the 'Roles' window in the CARDIOLOG ANALYTICS interface. The left sidebar contains navigation options: Report Center, Analysis Center (selected), Optimization, and Acquisition. The main area displays a table of roles assigned to groups. The table has columns for Name, Information Worker, Analyst, Administrator, and Last seen. Three rows are visible, each with a checkbox in the Name column.

Name	Information Worker	Analyst	Administrator	Last seen
<input type="checkbox"/> INTLOCK-QA\Administrator	✓	✓	✓	Apr 27 2016 4:52AM
<input type="checkbox"/> INTLOCK-QA\Site Managers	✓	✓		Never
<input type="checkbox"/> INTLOCK-QA\Test Site Manager	✓			Never

### Permission Assignment

2. The default group "All" is used to assign roles to all users. To prevent all users from accessing all of CardioLog, and to assign a specific group permissions to use the system, set the following permissions accordingly:
  - a. Make sure there are at least two groups available in the Roles window
  - b. Check all roles you would like to assign to a specific group or groups
  - c. Un-check all roles for the "All" group



The screenshot shows the 'Roles' window in the CARDIOLOG ANALYTICS interface. The left sidebar contains navigation options: Report Center, Analysis Center (selected), Optimization, and Acquisition. The main area displays a table of roles assigned to groups. The table has columns for Name, Information Worker, Analyst, Administrator, and Last seen. Three rows are visible, each with a checkbox in the Name column. The 'All' group is selected.

Name	Information Worker	Analyst	Administrator	Last seen
<input checked="" type="checkbox"/> All				Never
<input type="checkbox"/> INTLOCK-QA\Administrator	✓	✓	✓	Apr 27 2016 4:52AM
<input type="checkbox"/> INTLOCK-QA\Site Managers	✓	✓	✓	Never

### Using the "All" default group to assign permissions to all users in Active Directory