PUBLIC SECTOR INVESTMENT DATABASE FOR LESOTHO

(PSID LESOTHO)

USER MANAGEMENT

ADMINISTRATOR'S GUIDE

Version 1.1

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1. INTRODUCTION

This document describes the *User Management* console in the *Public Sector Investment Database for Lesotho (PSID Lesotho)* application. It provides the necessary instructions which the administrators and/or users granted with administrative rights should follow in order to ensure successful user management.

2. OVERVIEW

The *Public Sector Investment Database for Lesotho (PSID Lesotho)* is an automated information management system which is designed to improve efficiency and coordination of the efforts made by the Ministry of Planning of the Kingdom of Lesotho with the aim of tracking the external projects funded by the Development Partners and country government. The system serves as the main database and data collection and reporting tool for MoP as it ensures effective access to development data as well as provides an insight into the external projects and programs currently being implemented in the country.

The main objective of *PSID Lesotho* is to serve as a reliable and credible source of information on external projects implemented in Lesotho to support the Government in effectively monitoring the progress and performance of projects and programs and ensuring the their alignment with the Government's development goals, priorities, and strategies. Moreover, *PSID Lesotho* promotes transparency and accountability of funds, improves governance, supports project implementation, and facilitates results-based decision-making on development assistance in Lesotho.

The *PSID Lesotho* application incorporates business intelligence and data management solutions with comprehensive application administration functions. As such, it is equipped with a number of administrative tools, which aim at providing the application administrators with the possibility of performing their daily assignments in an easily manageable way.

One of the administrative tools that *PSID Lesotho* is incorporated with is the *User Management* console. The *User Management* console is a space within *PSID Lesotho* that allows the application administrators to add new users, edit or delete existing users, create new user groups and assign members under them, delete user groups, grant the users with permissions to view / add / edit / delete records in the application, etc.

PSID Lesotho provides a web-based user interface and requires a web browser pre-installed.

3. USER MANAGEMENT CONSOLE

User management is a critical part of maintaining a secure system. Ineffective user and privilege management often lead many systems into being compromised. Therefore, it is important that you clearly define the user account management techniques that you will use to outline the user access rights to the system resources as well as grant or revoke them permissions to perform certain actions over the resources they can handle. This is why the control of users, user groups and roles is a core element of the *PSID Lesotho* system administration.

This chapter describes the *User Management* console under the *Settings* section, where you can perform your user management functions. You may organize the system users, add new users, edit or delete existing users, create new user groups and assign members under them, delete user groups, grant the users with permissions to view / add / edit / delete projects, etc.

3.1 Accessing the User Management Console

For accessing the *User Management* console, go to Settings → User Management (Figure 1).

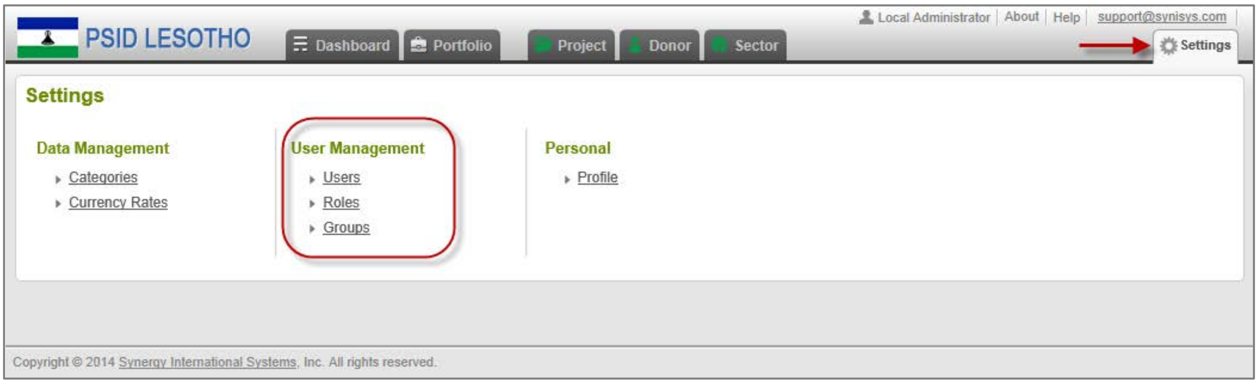

Figure 1: User Management Console

The *User Management* console consists of the following sections:

- **Users** – to manage the users recorded in the system.
- **Roles** – to manage the roles that the users can be assigned to.
- **Groups** – to manage the user groups created.

3.2 Viewing the Section Item Details

In order to view the details of the selected section item (user, role, or group), click the item name for which the information needs to be viewed. The details of the selected section item will display on the screen (Figure 2).

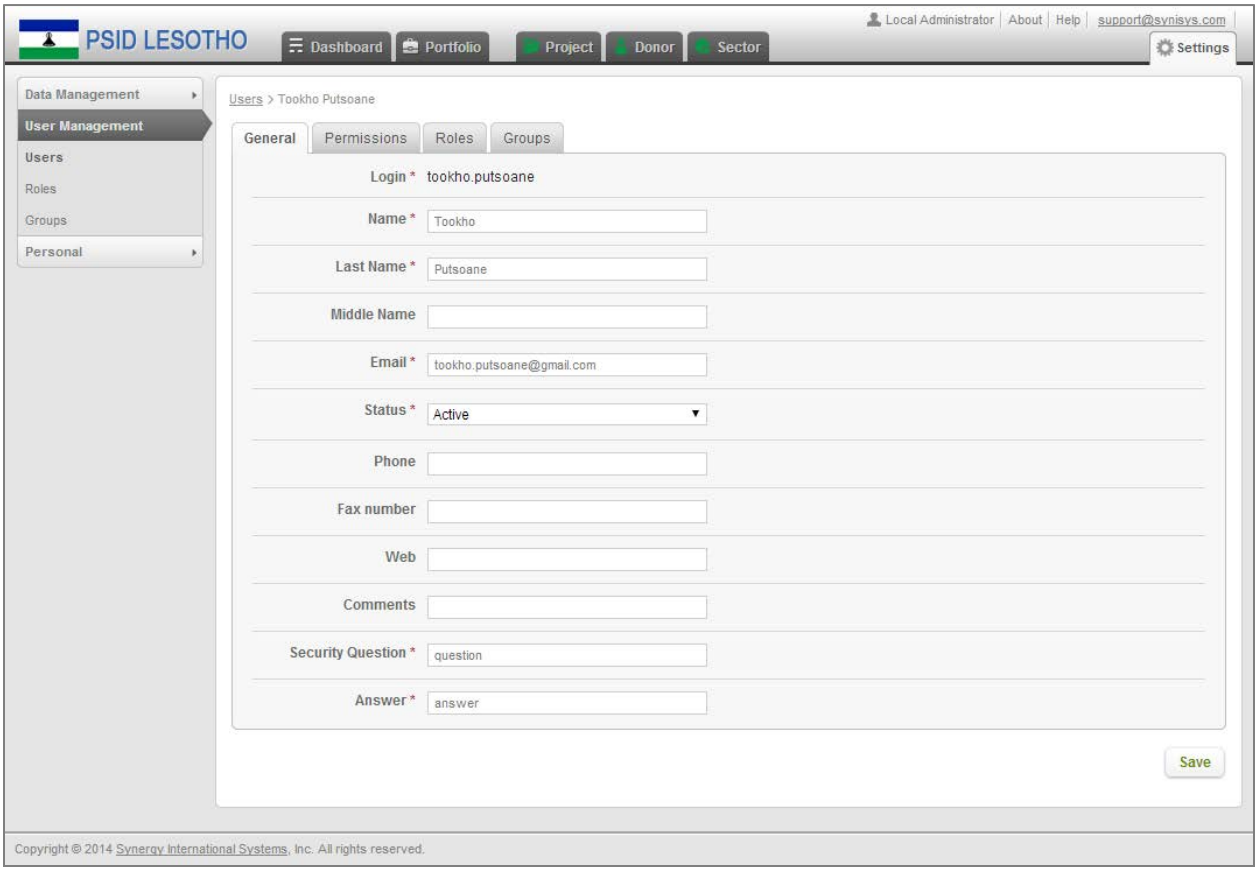

Figure 2: Viewing Details of the Selected Item

To go back to the section where all items are listed, you can make use of the navigation control (breadcrumb trail) found at the top of the screen.

3.3 Searching for an Item

The *User Management* console is equipped with a powerful search mechanism that allows looking for any records stored in the respective sections. The simple search interface is available to find any relevant information quickly and easily within the integrated content. Simple search implies that you can type search criteria directly into the search box present in each section.

In order to search for an item, follow the steps below:

1. Go to the section where you want to find an item.
2. Type the keyword into the search box. Please note that the search engine will return all the data that contains any of the letters or numbers you have typed (Figure 3).

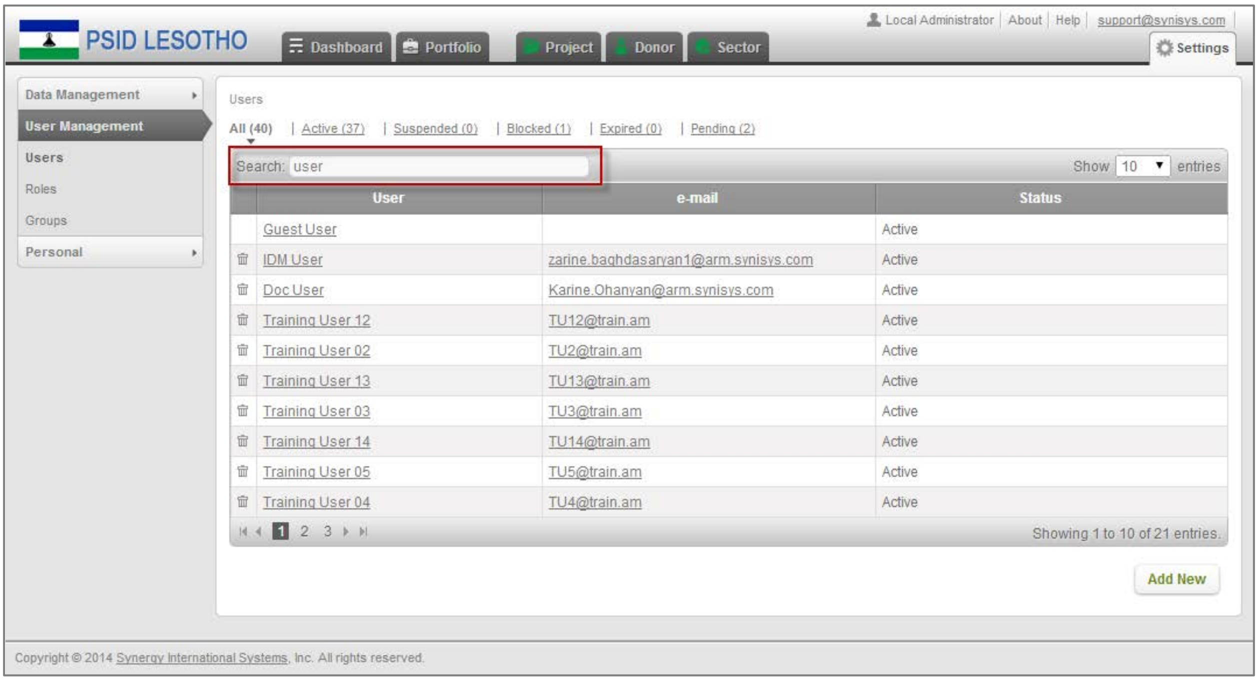

Figure 3: Performing Simple Search

3.4 Setting the Number of Entries per Page

By default, each section is set to display ten entries per page to ensure fast page loading. However, you can define to view a greater number of entries per page. Please note that setting a higher number of entries to display on each page can potentially impact page load time since you will load more data with each page.

In order to set the number of entries per page, follow the steps below:

1. Go to the section where you want to change the number of items to be displayed.
2. Select the preferred number from the **Show…entries** drop-down list in the upper right corner of the section table. The exact number of items will immediately be displayed on the screen according to your selection (Figure 4).

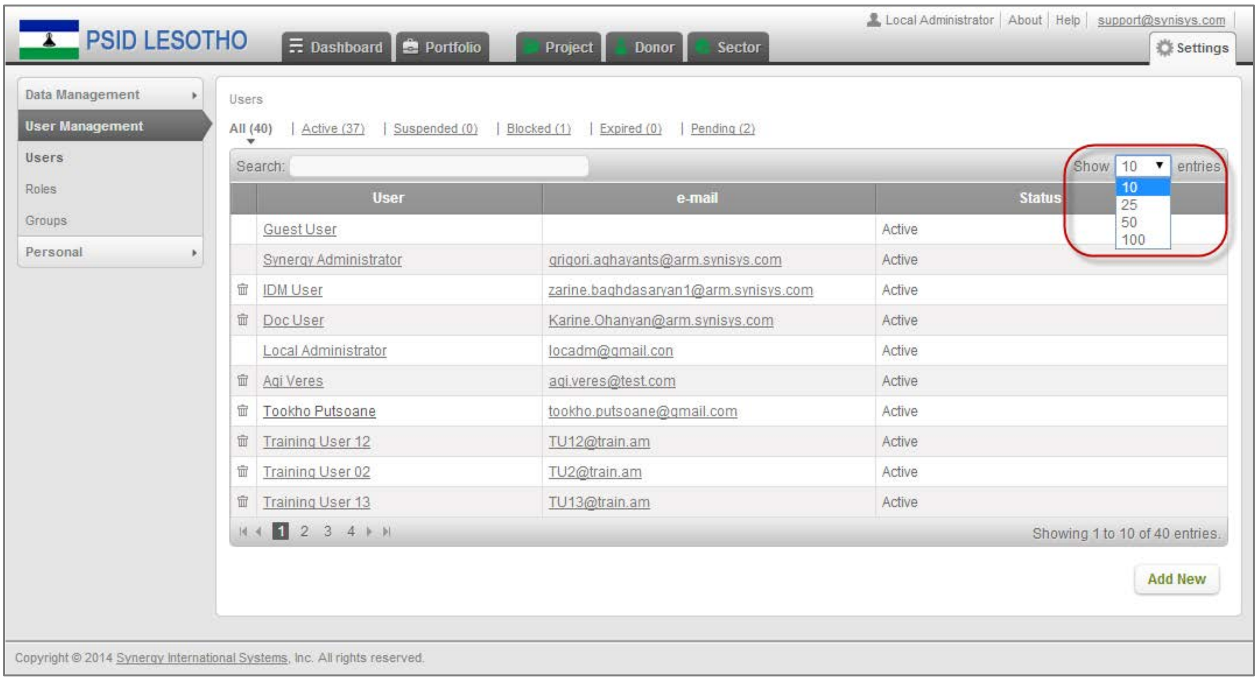

Figure 4: Setting Number of Entries per Page

Note: Even if you limit the number of displayed items within the table, the simple search tool will find the searched element from the entire list of items.

3.5 Browsing Pages

You can browse among the pages in each section by clicking the link of the page number to which you want to navigate. The **Previous** and **Next** as well as **First** and **Last** arrows can be used to move to the required page (Figure 5).

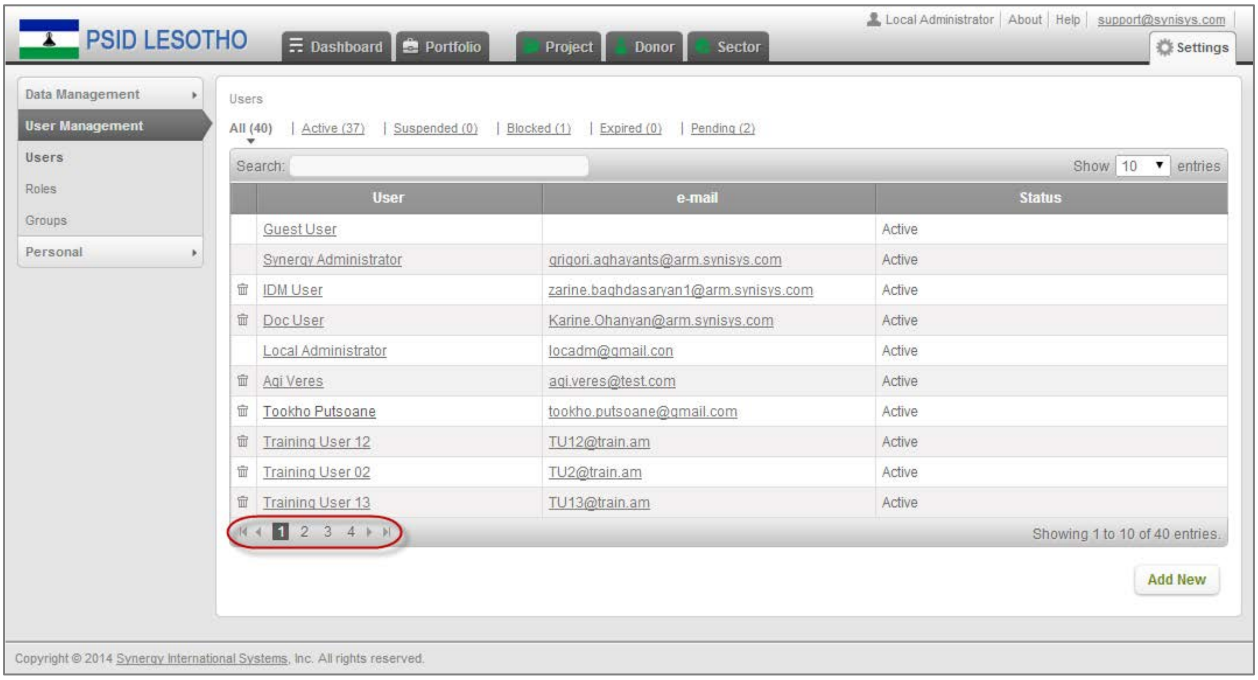

Figure 5: Browsing Pages

3.6 Defining the Sorting Order for Items

In the *User Management* console, you have the possibility of sorting the items listed in each section alphabetically, numerically or chronologically in an ascending or descending order.

In order to define the sorting order for the section items, follow the steps below:

1. Go to the section for which you want to define the sorting order different from the default one.
2. Click the arrow that appears in the header of the column according to which you want to sort the section items. Clicking the arrow once again will sort the items in the list in reverse order (Figure 6).

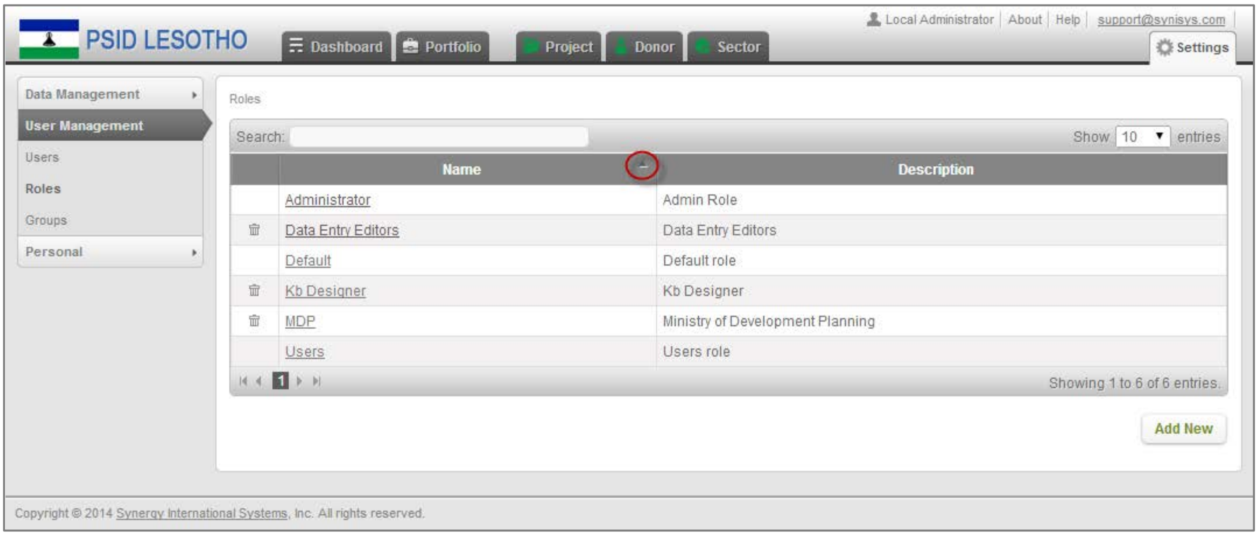

Figure 6: Defining Sorting Order

4. MANAGING USERS

A user is an individual or application program identity that has been defined in *PSID Lesotho* and has access to the system. A user can have associated with that identity a set of roles that entitle the user to access all resources protected by those roles. Users are often associated with a group, which simplifies the allocation of permissions and/or privileges.

In *PSID Lesotho*, users are managed in the *Users* section of the *User Management* console.

4.1 Accessing the Users Section

The *Users* section can be accessed at Settings → User Management → Users (Figure 1).

Once you access the *Users* section, you will be presented with the list of all users recorded in the application (Figure 7).

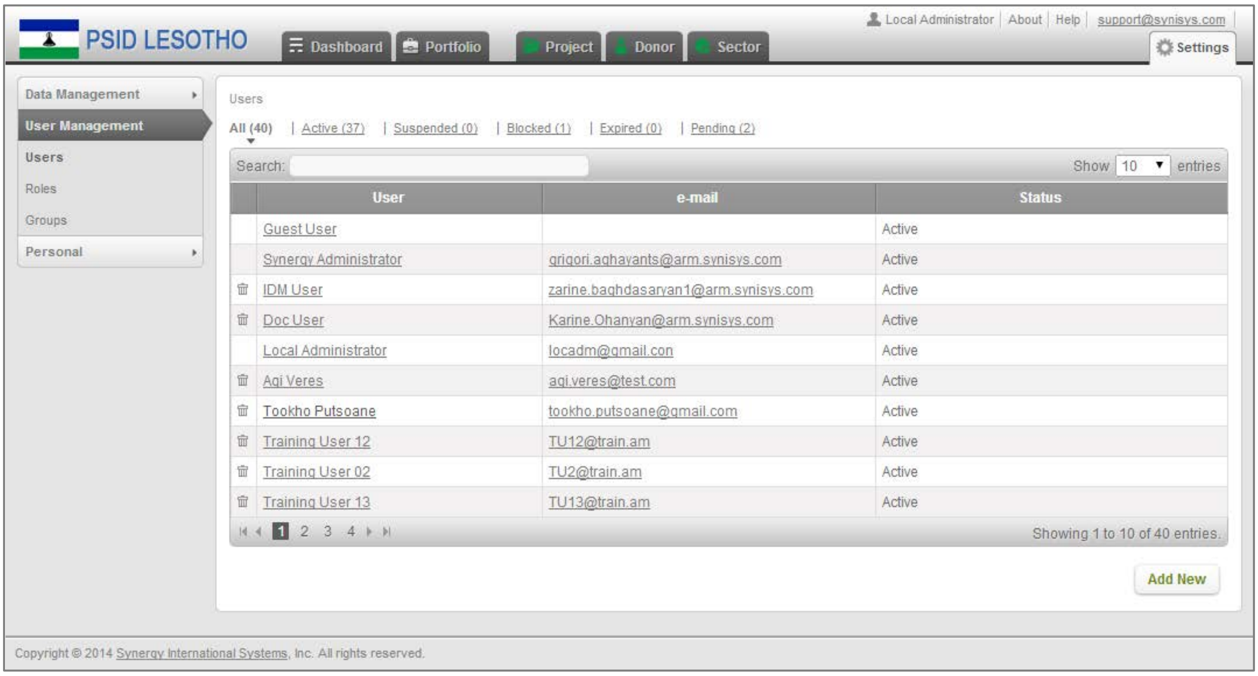

Figure 7: Users Section

The information displayed for each user includes the following:

Column Name	Description
User	Name of the user account that the user should provide when logging into the system.
e-mail	E-mail address associated with the user account and provided during registration.
Status	User's current status which may be set to either active or inactive.

In this section, you can either view the entire list of users who have registered for an account to gain authorized access to *PSID Lesotho*. Or, you can view a sub-set of users divided into several groups according to their status. The users can fall under the following groups:

- Active
- Suspended
- Blocked
- Expired
- Pending

To filter the list of users according to their status, you need to click the name of the respective group. The number standing next to the group name indicates the number of users in that group.

4.2 Adding a User

It is possible to add new users who will be able to access the system. In order to add a new user, follow the steps below:

1. Go to Settings → User Management → Users.
2. Click the **Add New** button (Figure 8). You will be directed to the *New user* sub-section where the data entry form for adding a new user will be displayed.
3. Provide the information requested in the following tabs of the data entry form:
   - General
   - Permissions
   - Roles
   - Groups
4. Click the **Save** button to finalize the process of creating a new user.

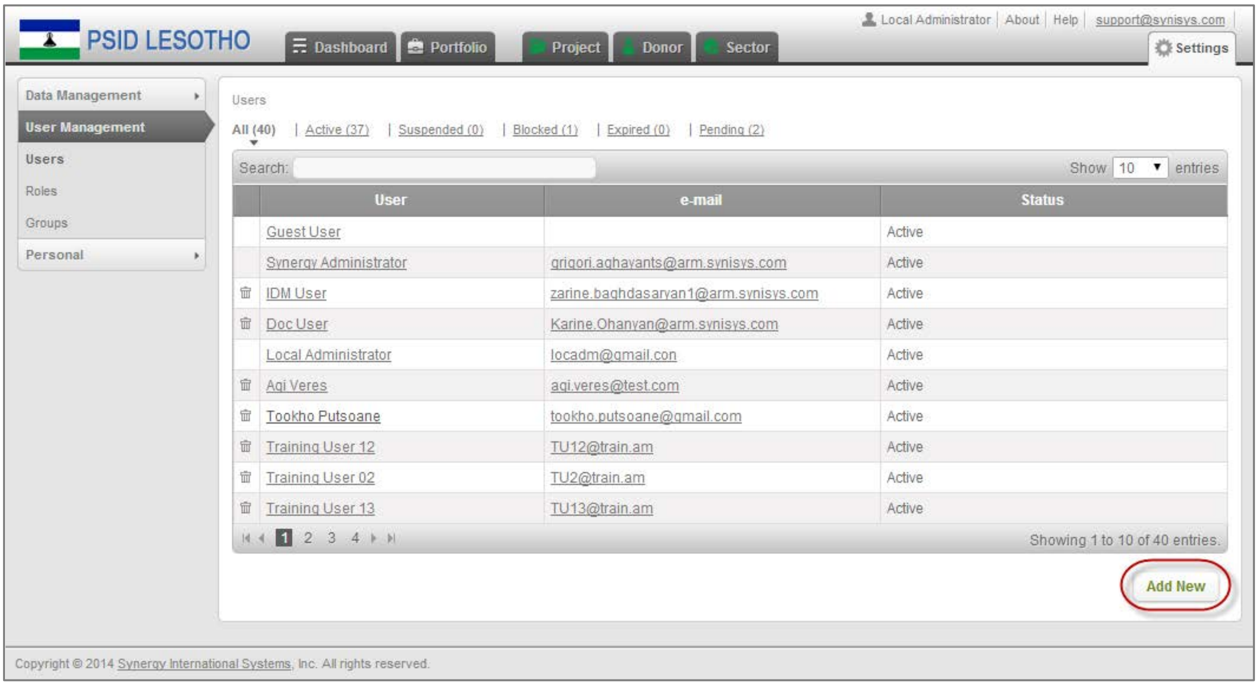

Figure 8: Add New Button in the Users Section

4.2.1 General

In the *General* tab (Figure 9) of the new user data entry form, you are requested to provide such information about the user as user's name, last name, e-mail address, etc. For more details on how to provide the information requested in the *General* tab, refer to the table below:

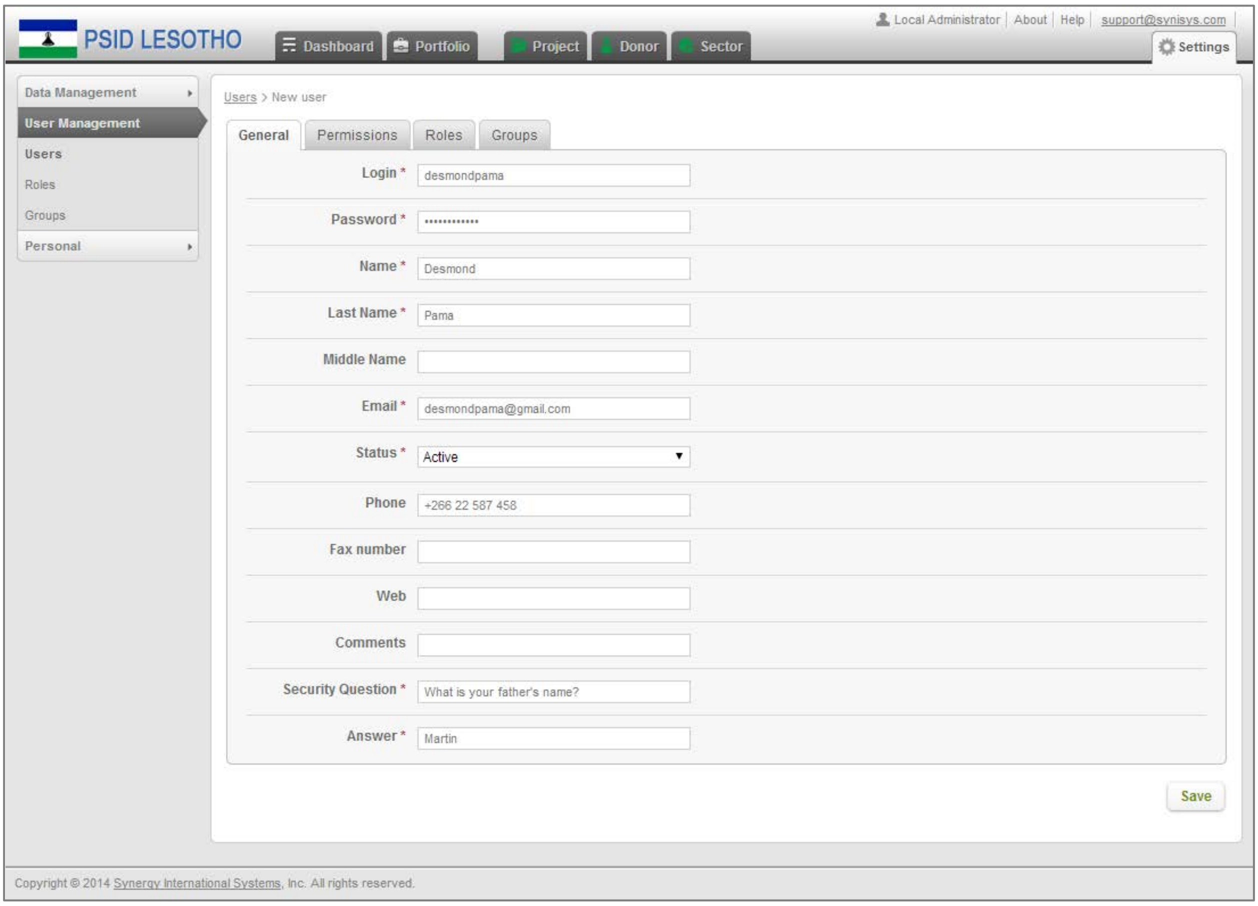

Figure 9: Adding a New User

Note: Some fields in this form are mandatory to be filled in. They are marked with an asterisk.

Column Name	Description
Login	Indicate the **Login** name that the user will need for logging into the system. *This field is mandatory*.
Password	Enter the **Password** that the user will need to insert when logging into the system. *This field is mandatory*.
Name	Indicate the user's **Name**. *This field is mandatory*.
Last Name	Indicate the user's **Last Name**. *This field is mandatory*.
Middle Name	Indicate the user's **Middle Name**.
Email	Enter the **Email** address of the user. *This field is mandatory*.
Status	Select the user's **Status**. The following options are available: • Active • Suspended

	• Blocked • Expired • Newly Registered *This field is mandatory*.
Phone	Enter the user's **Phone** number.
Fax Number	Enter the user's **Fax Number**.
Web	Indicate the **Web** contacts for the user.
Comments	Enter additional **Comments**, if any.
Security Question	Indicate the **Security Question** for the user. It will be used for user authentication during the password retrieval process. *This field is mandatory*.
Answer	Indicate the **Answer** to the security question. *This field is mandatory*.

4.2.2 Permissions

In the *Permissions* tab (Figure 10), you can assign permissions to individual users to perform certain operations.

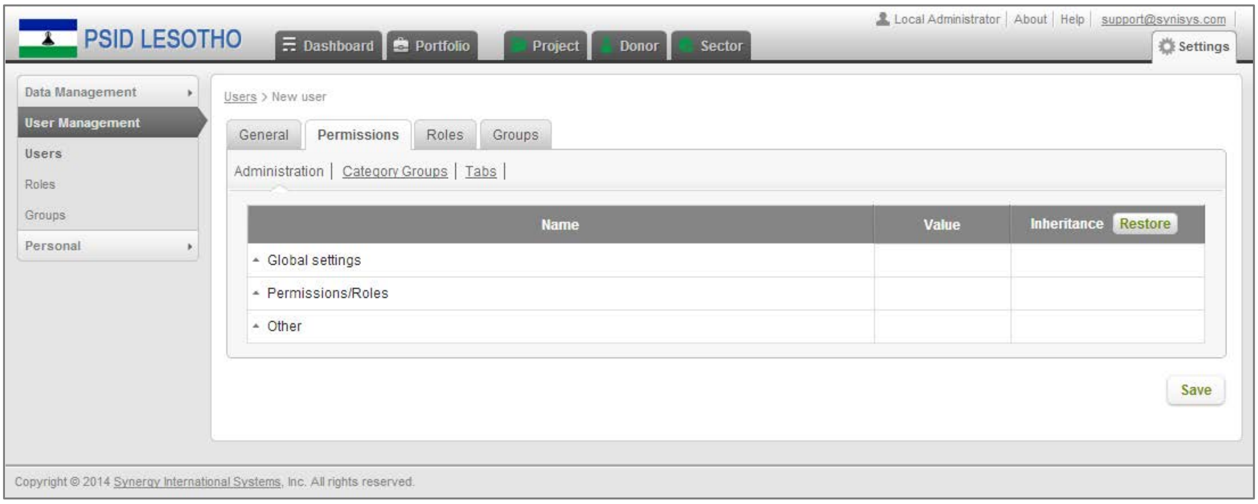

Figure 10: Setting User Permissions

Note: By default, users are set to inherit permissions defined for the *Guest User* (i.e. an unregistered user that can only view a sub-set of data available to the general public) that is associated with the *Users* role. In order to be able to define individual permissions for the user, you will have to break the inheritance of the permissions and grant or revoke the user with the appropriate ones. As soon as the user is assigned group membership or a role, they will inherit the permissions propagated to them from the selected group and role. If there are conflicts between the permissions assigned and inherited, they are resolved according to the security rule applied to the application.

In order to assign permissions to a user, follow the steps below:

1. In the *Administration* sub-tab, define whether the user will have the right to perform administration tasks in each section of *PSID Lesotho*. For more details, see Setting Administration Permissions.

2. In the *Category Groups* sub-tab, define whether the user will have the right to manage the categories and category groups defined for the application. For more details, see Setting Category Group Permissions.
3. In the *Tabs* sub-tab, define whether the user will have access to the application tabs. Please note that the sub-tab will list all tabs and sub-tabs defined for the application. For more details, see Setting Tab Permissions.

Note: If you want to reinstate the default values, click the **Restore** button (Figure 10). The user's permissions will be set to the ones inherited from the *Guest User* associated with the *Users* default role.

4.2.2.1 Setting Administration Permissions

In order to define the appropriate administration permissions, follow the steps below:

1. Expand the appropriate section in the *Administration* sub-tab to view the sub-sections listed under it in the *Name* column (Figure 11).

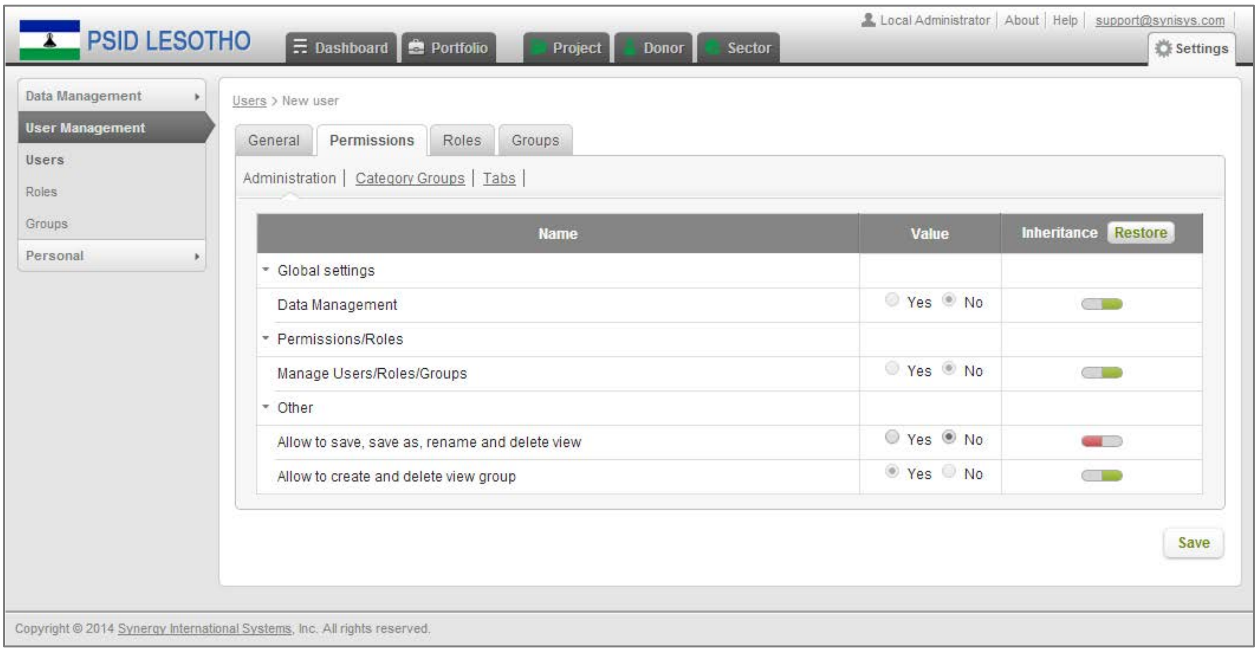

Figure 11: Setting User Administration Permissions

2. Break the inheritance of permissions from the *Guest User* by turning it off in the *Inheritance* column.
3. For each sub-section, define the user's access rights by activating the respective **Yes** or **No** radio button in the *Value* column.

4.2.2.2 Setting Category Group Permissions

In order to define the category group permissions, follow the steps below:

1. Define whether you want to make changes in the category permissions in the currently deployed application or the local copy by selecting the appropriate instance from the drop-down list above the screen. This is done to see how the changes will affect the data in the application before deploying them.

2. For each category group, turn off the **Inheritance** option and define the user's rights to **Add**, **Edit**, **View**, and **Delete** the item by ticking the respective checkboxes (Figure 12).
   Note: Ticking the checkbox in the respective column header will grant the user with permissions to perform the action over all category groups for which the inheritance of permissions has been broken.

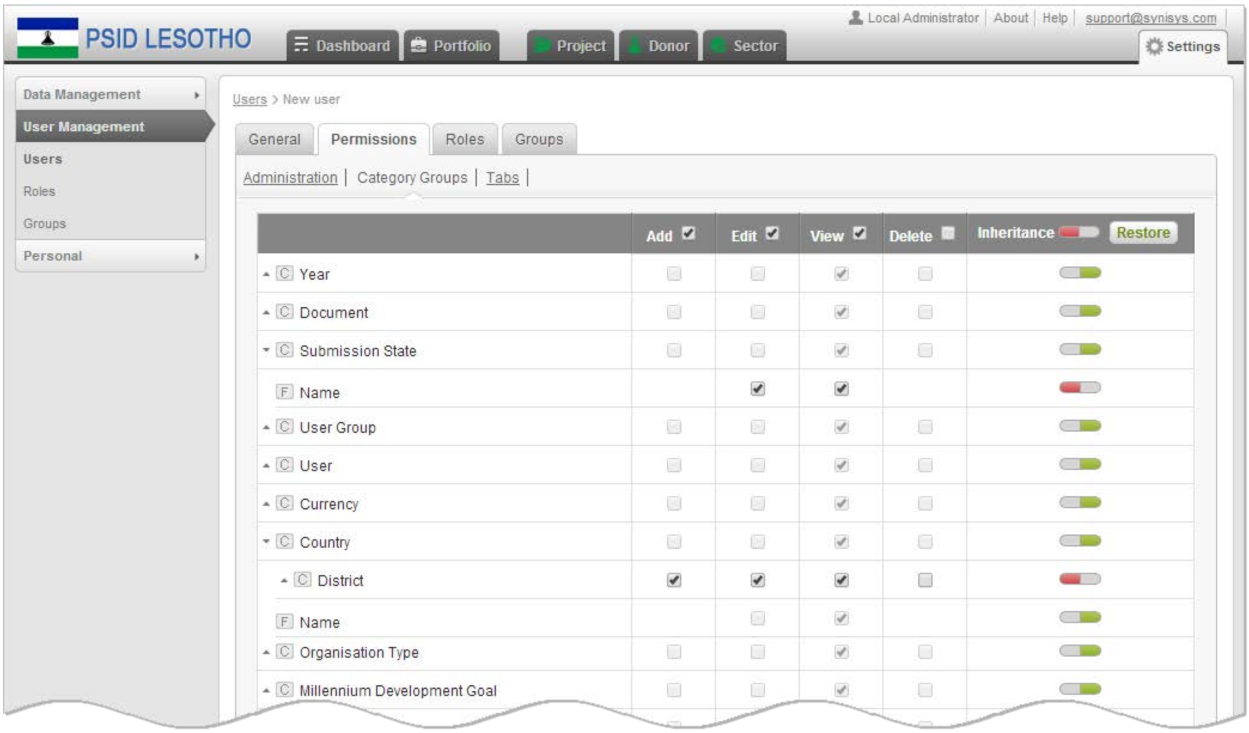

Figure 12: Setting User Category Groups Permissions

3. Expand the category group to view the categories listed under it in the *Name* column.
4. For each category, define whether it should inherit permissions from its parent object by turning the **Inheritance** option on. The category will be assigned the same user permissions as the category group it is listed under.
   Note: If the **Inheritance** option is turned off, then you will have to define individual user permissions for each category listed under the category group.

Note: Clicking the **Restore** button will enable permission inheritance.

4.2.2.3 Setting Tab Permissions

In order to define the tab permissions, follow the steps below:

1. Define whether you want to make changes in the category permissions in the currently deployed application or the local copy by selecting the appropriate instance from the drop-down list above the screen. This is done to see how the changes will affect the data in the application before deploying them.
2. For each tab, turn off the **Inheritance** option and define whether the user will have access to the tab by activating the respective **Show/Hide** radio button (Figure 13).

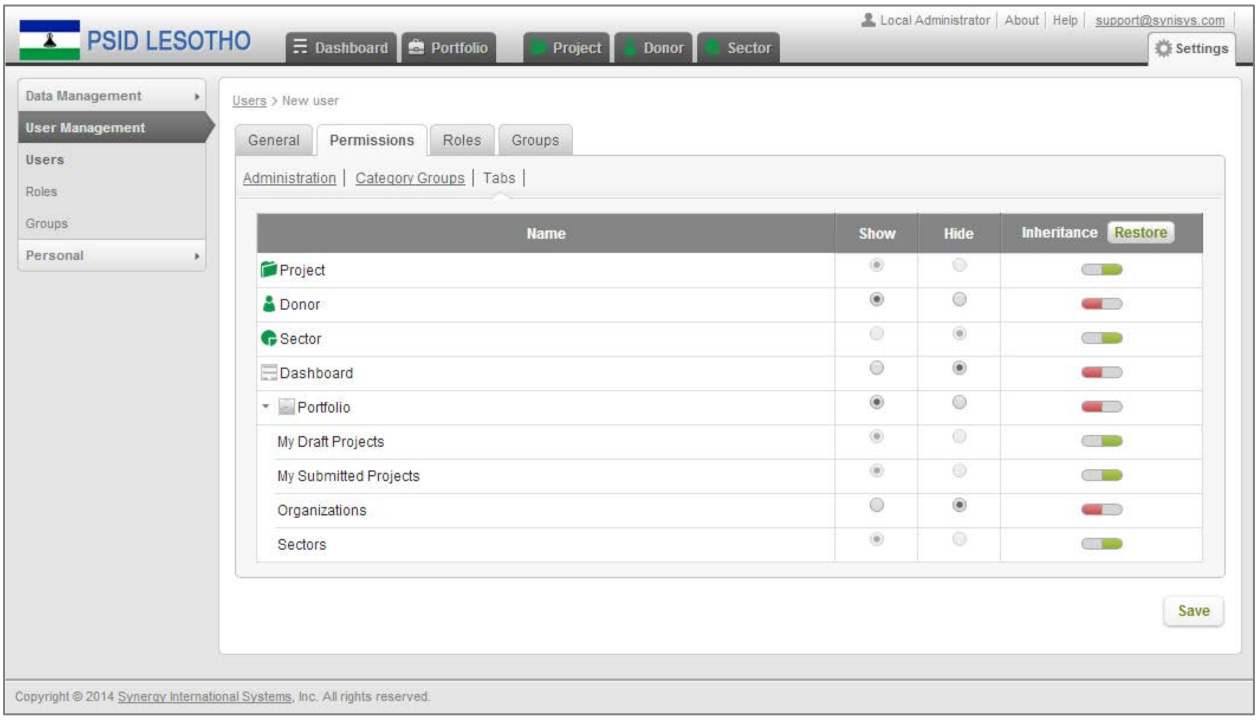

Figure 13: Setting User Tabs Permissions

3. Expand the tab to view the sub-tabs, if any, listed under it in the *Name* column.
4. For each sub-tab, define whether it should inherit permissions from its parent object by turning the **Inheritance** option on. The sub-tab will be assigned the same user permissions as the tab it is listed under.
   Note: If the **Inheritance** option is turned off, then you will have to define individual user permissions for each sub-tab listed under the tab.

Note: Clicking the **Restore** button will enable permission inheritance.

4.2.3 Roles

In the *Roles* tab, you may select the roles for the user (Figure 14).

In order to select a role, follow the steps below:

1. Indicate the **Role** that you want to assign to the user by selecting the appropriate instance in the *Available* list.
2. Click the **(Move Right)** button. The selected role will appear in the *Selected* list.

In order to remove a role, follow the steps below:

1. Select the **Role** that you want to remove in the *Selected* list.
2. Click the **(Move Left)** button. The selected role will appear in the *Available* list.

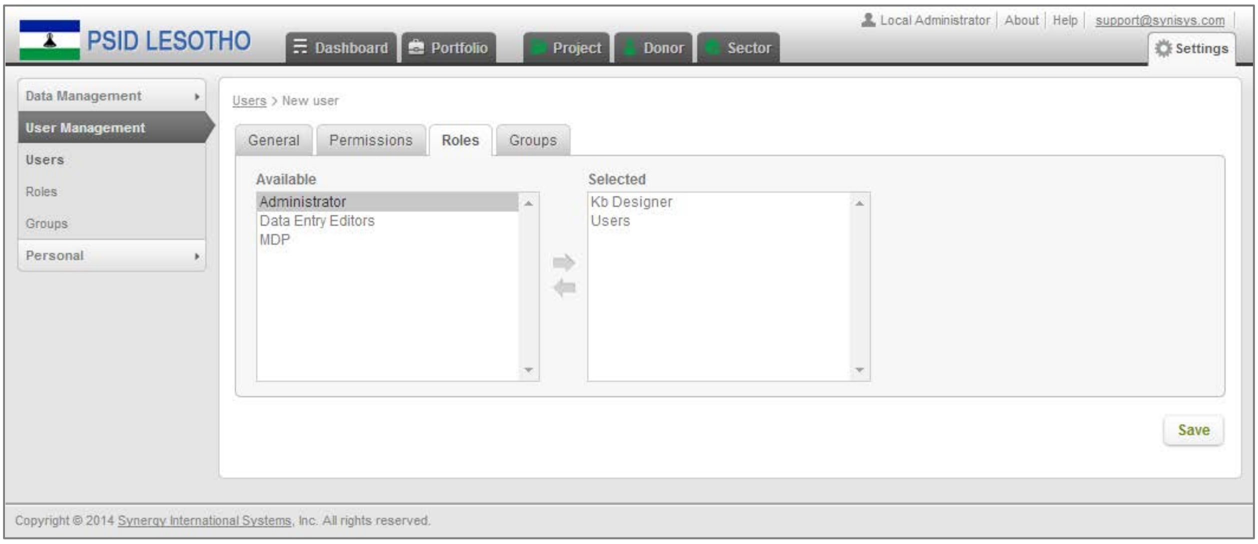

Figure 14: Selecting Roles for the User

4.2.4 Groups

In the *Groups* tab, you may select the groups that the user belongs to (Figure 15).

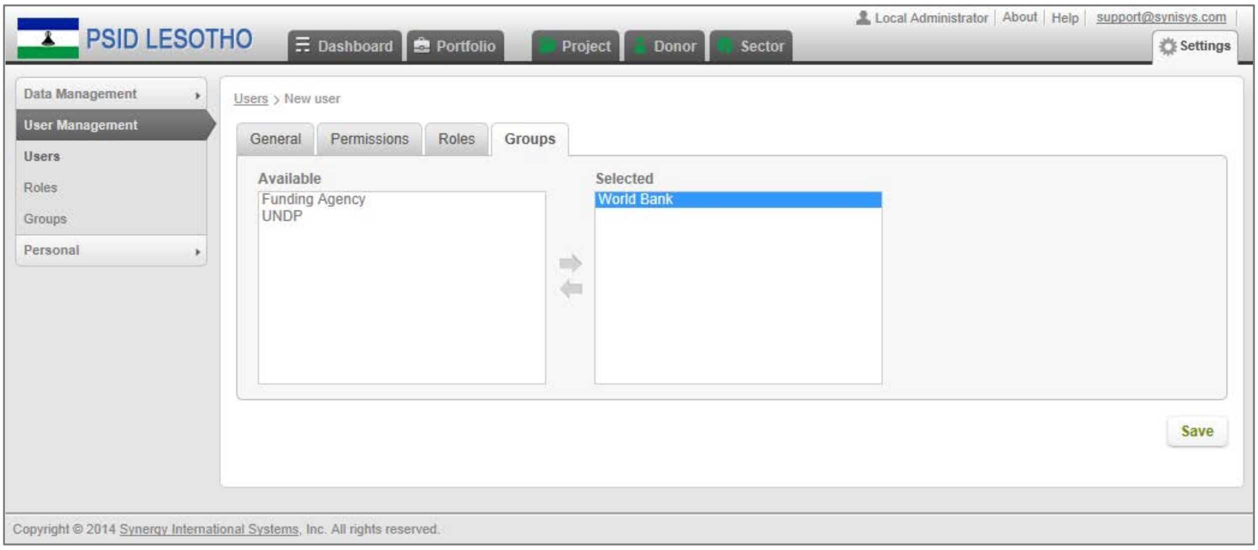

Figure 15: Assigning Users under Groups

In order to select a group for the user, follow the steps below:

1. Indicate the **Group** that you want to assign to the user by selecting the appropriate instance in the *Available* list.
2. Click the **(Move Right)** button. The selected group will appear in the *Selected* list.

In order to terminate the user's membership in a certain group, follow the steps below:

1. Select the **Group** that you want to remove in the *Selected* list.
2. Click the **(Move Left)** button. The selected group will appear in the *Available* list.

4.3 Editing Users

In order to edit an existing user, follow the steps below:

1. Go to Settings → User Management → Users.
2. Click the name of the user that you want to edit. You will be directed to the sub-section where the selected user details will display.
3. Make the appropriate changes in the data displayed.
4. Click the **Save** button to apply the changes made.

4.4 Deleting Users

In order to delete a user, follow the steps below:

1. Go to Settings → User Management → Users.
2. Click the 🗑 **(Delete)** icon to the left of the user record.
3. Click the **OK** button in the *Confirmation* window to delete the user.

Note: The Guest User and Administrator user records cannot be removed from the system.

5. MANAGING ROLES

A role is an abstract name for the permission to access a particular set of resources in an application, i.e. a role is directly linked to permissions associated with it. Permissions and roles in *PSID Lesotho* determine the features, capabilities, and tasks for application users.

Permissions for performing certain operations are assigned to individual roles in the process of adding or editing them. Role permissions can apply to all users or only a sub-set of them. In addition to role-based permissions, users may be assigned individual permissions (see Adding a User) or group permissions (see Adding a New Group).

In *PSID Lesotho*, roles are managed in the *Roles* section of the *User Management* console.

5.1 Accessing the Roles Section

The *Roles* section can be accessed at Settings → User Management → Roles (Figure 1).

Once you access the *Roles* section, you will be presented with the list of all existing roles (Figure 16).

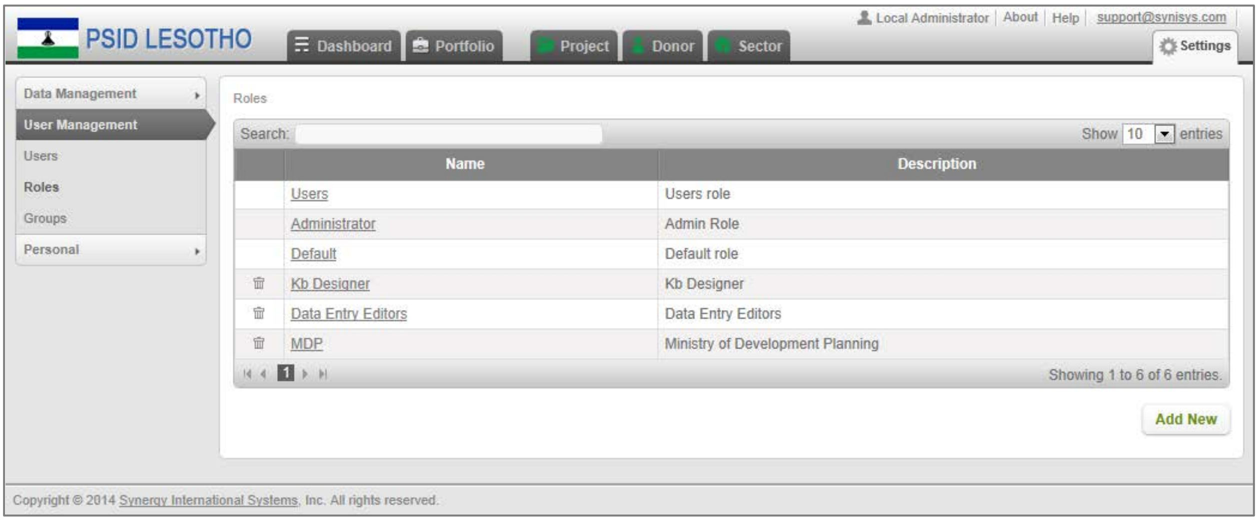

Figure 16: Roles Section

The information displayed for each role includes the following:

Column Name	Description
Name	Name of the role as assigned to it during the role registration process.
Description	Brief overview of the role and the privileges it gives.

5.2 Adding a Role

It is possible to add new roles that will outline the capabilities of users having the role. In order to add a new role, follow the steps below:

1. Go to Settings → User Management → Roles.

2. Click the **Add New** button (Figure 17). You will be directed to the *New role* sub-section where the data entry form for adding a new role will be displayed.
3. Provide the information requested in the following tabs of the data entry form:
   - General
   - Permissions
   - Users
   - Groups
4. Click the **Save** button to finalize the process of creating a new role.

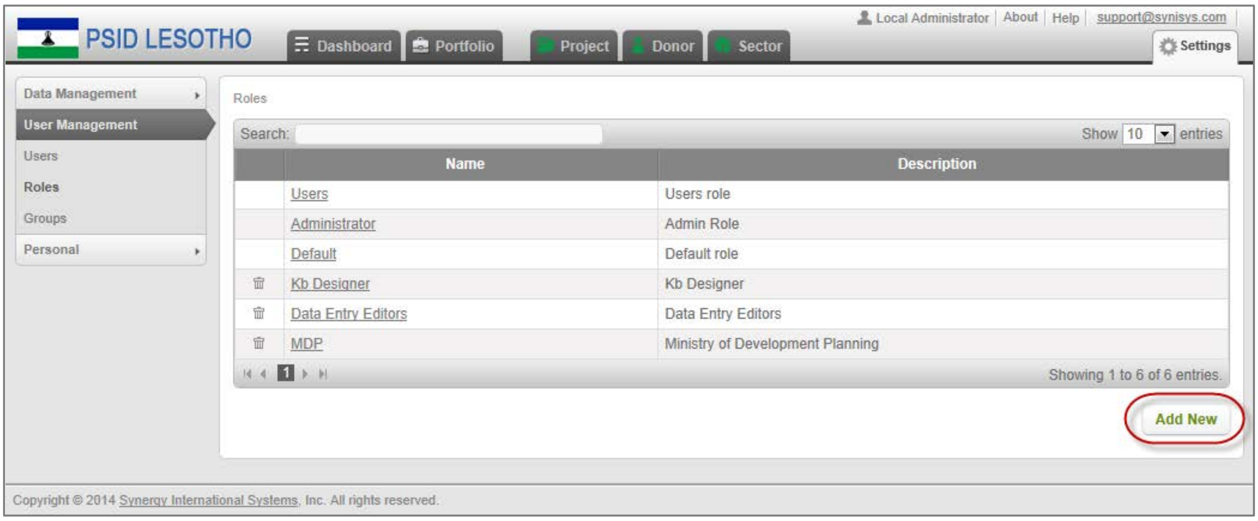

Figure 17: Add New Button in the Roles Section

5.2.1 General

In the *General* tab (Figure 18) of the new role data entry form, you are requested to provide such information about the role as the role name and description. For more details on how to provide the information requested in the *General* tab, refer to the table below:

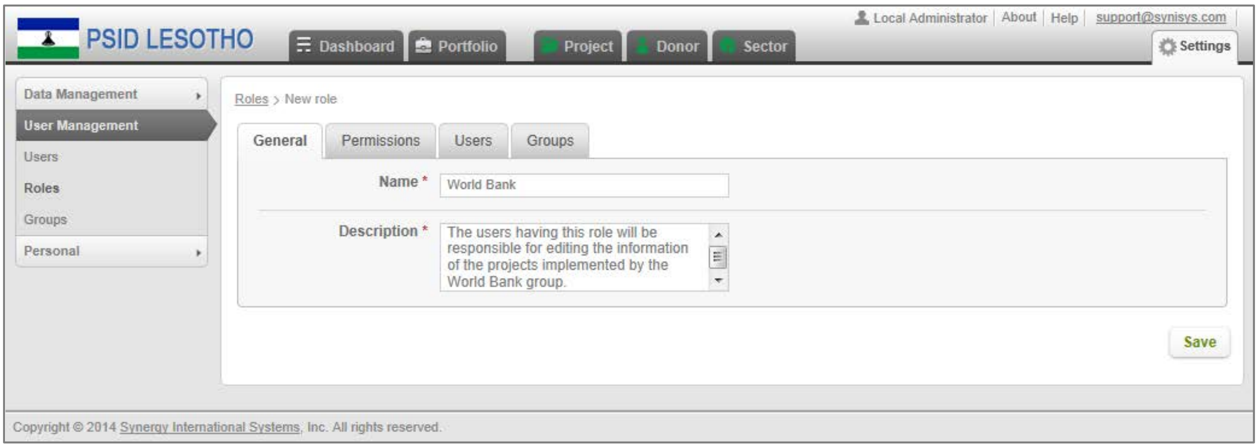

Figure 18: Adding a Role

Note: Some fields in this form are mandatory to be filled in. They are marked with an asterisk.

Column Name	Description
Name	Indicate the **Name** for the role. *This field is mandatory*.
Description	Enter a brief overview of the role that will outline the capabilities that the role will provide. *This field is mandatory*.

5.2.2 Permissions

In the *Permissions* tab (Figure 19), you can define the role's capabilities to administer *PSID Lesotho* sections and sub-sections, category groups and tabs.

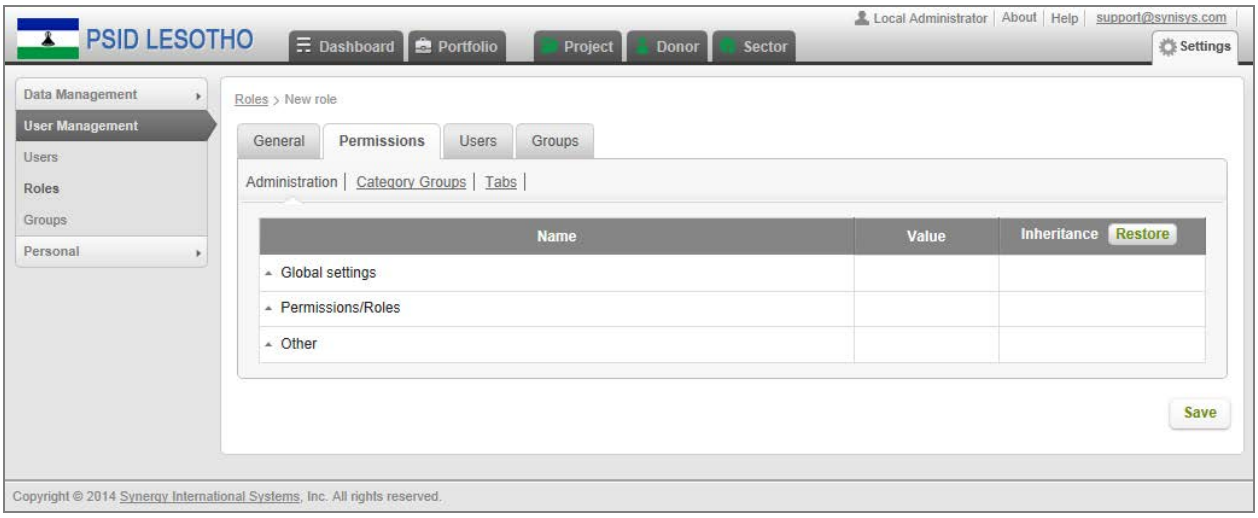

Figure 19: Setting Role Permissions

In order to assign permissions to a role, follow the steps below:

1. In the *Administration* sub-tab, define whether the role will have the right to perform administration tasks in each section of *PSID Lesotho*. For more details, see Setting Administration Permissions.
2. In the *Category Groups* sub-tab, define whether the role will have the right to manage the categories and category groups defined for the application. For more details, see Setting Category Group Permissions.
3. In the *Tabs* sub-tab, define whether the role will have access to the application tabs. Please note that the sub-tab will list all tabs and sub-tabs defined for the application. For more details, see Setting Tab Permissions.

Note: If you want to reinstate the default values, click the **Restore** button (Figure 19). The role permissions will be set to the ones inherited from the *Default* role.

5.2.2.1 Setting Administration Permissions

In order to define the administration permissions, follow the steps below:

1. Expand the appropriate section in the *Administration* sub-tab to view the sub-sections listed under it in the *Name* column (Figure 20).
2. For each sub-section, define the role's access rights by activating the respective **Yes** or **No** radio button in the *Value* column.

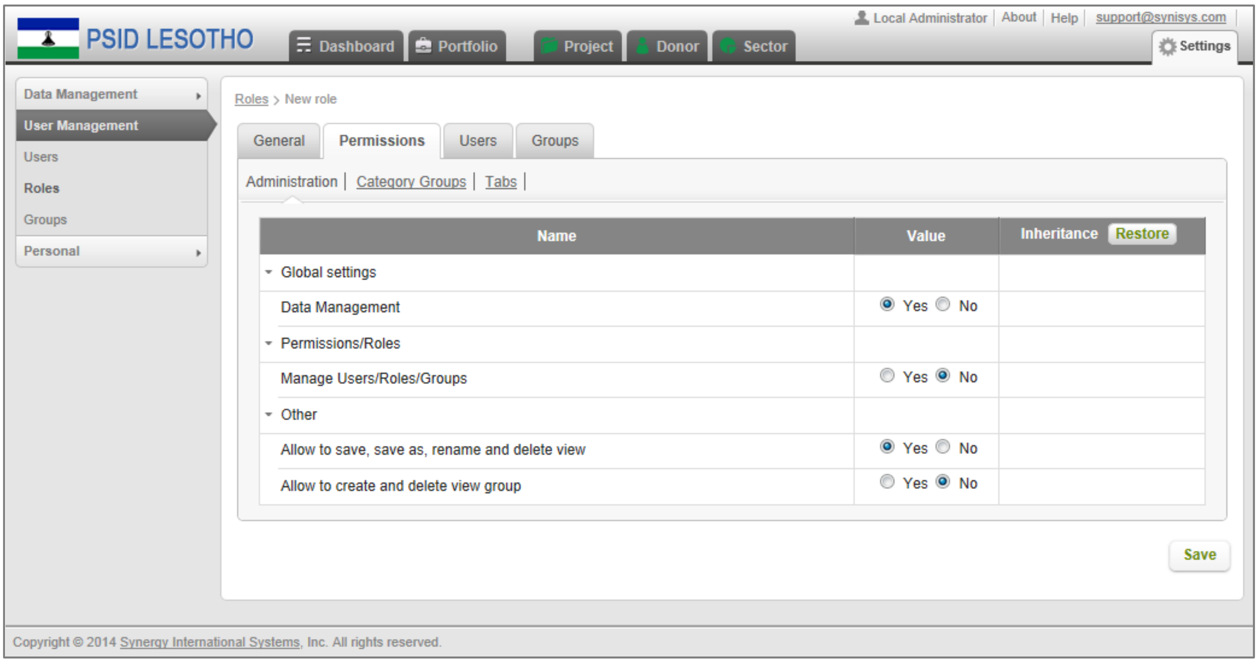

Figure 20: Setting Role Administration Permissions

Note: If you want to reinstate the initial values, click the **Restore** button (Figure 20).

5.2.2.2 Setting Category Group Permissions

In order to define the category group permissions, follow the steps below:

1. Define whether you want to make changes in the category permissions in the currently deployed application or the local copy by selecting the appropriate instance from the drop-down list above the screen. This is done to see how the changes will affect the data in the application before deploying them.
2. For each category group, define the role's rights to **Add**, **Edit**, **View**, and **Delete** the item by ticking the respective checkboxes (Figure 21).
   Note: Ticking the checkbox in the respective column header will grant the role with permissions to perform the action over all category groups for which the inheritance of permissions has been broken.
3. Expand the category group to view the categories listed under it in the *Name* column.
4. For each category, define whether it should inherit permissions from its parent object by turning the **Inheritance** option on. The category will be assigned the same user permissions as the category group it is listed under.
   Note: If the **Inheritance** option is turned off, then you will have to define individual role permissions for each category listed under the category group.

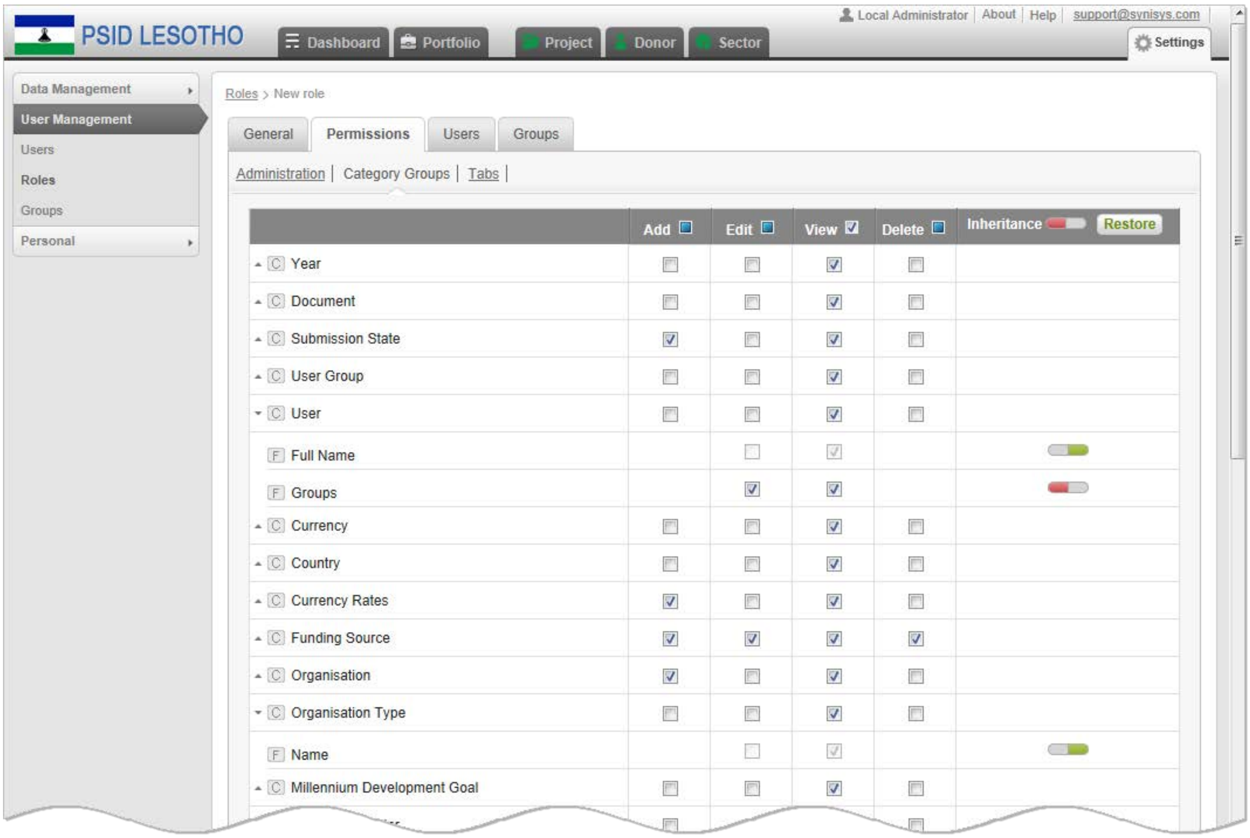

Figure 21: Setting Role Category Groups Permissions

Note: If you want to reinstate the initial values, click the **Restore** button (Figure 21).

5.2.2.3 Setting Tab Permissions

In order to define the tab permissions, follow the steps below:

1. Define whether you want to make changes in the category permissions in the currently deployed application or the local copy by selecting the appropriate instance from the drop-down list above the screen. This is done to see how the changes will affect the data in the application before deploying them.
2. For each tab, turn off the **Inheritance** option and define whether the role will have access to the tab activating the respective **Show**/**Hide** radio button (Figure 22).

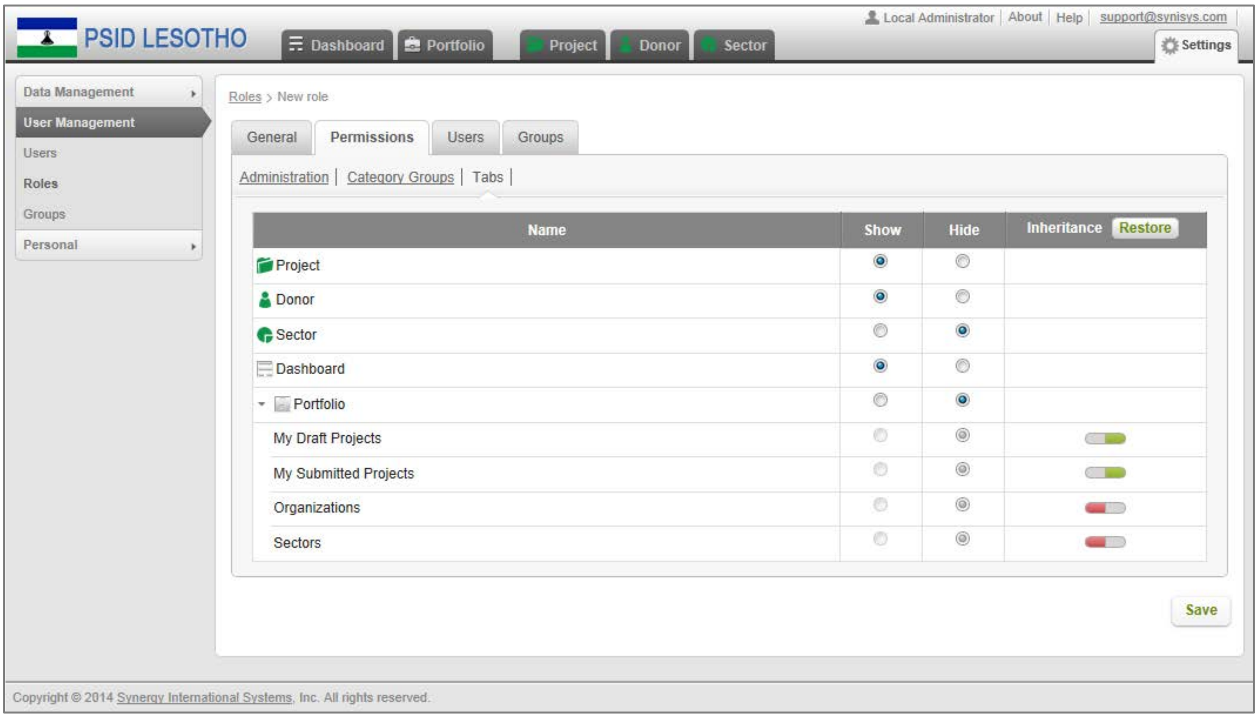

Figure 22: Setting Role Tabs Permissions

3. Expand the tab to view the sub-tabs, if any, listed under it in the *Name* column.
4. For each sub-tab, define whether it should inherit permissions from its parent object by turning the **Inheritance** option on. The sub-tab will be assigned the same role permissions as the tab it is listed under.
   Note: If the **Inheritance** option is turned off, then you will have to define individual role permissions for each sub-tab listed under the tab.

Note: If you want to reinstate the initial values, click the **Restore** button (Figure 22).

5.2.3 Users

In the *Users* tab, you may select the users that will be assigned the role being created (Figure 23).

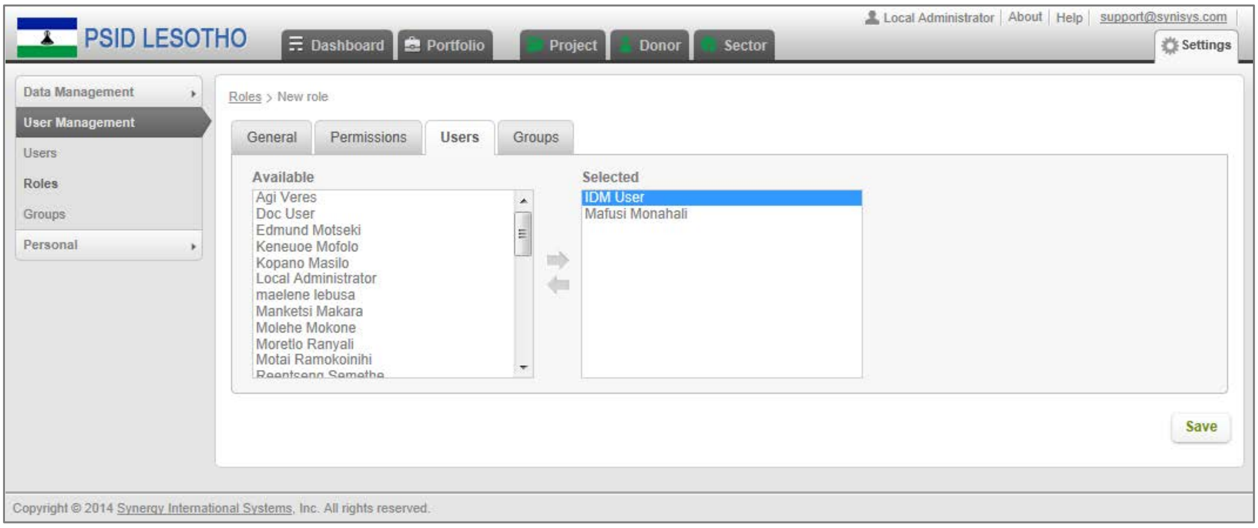

Figure 23: Assigning Users to the Role

In order to assign users to the role, follow the steps below:

1. Indicate the **User** to whom you want to assign the role by selecting the appropriate instance in the *Available* list.
2. Click the **(Move Right)** button. The selected user will appear in the *Selected* list.

In order to remove a user that was assigned the role, follow the steps below:

1. Select the **User** that you want to remove in the *Selected* list.
2. Click the **(Move Left)** button. The selected user will appear in the *Available* list.

5.2.4 Groups

In the *Groups* tab, you may select the groups for the role (Figure 24).

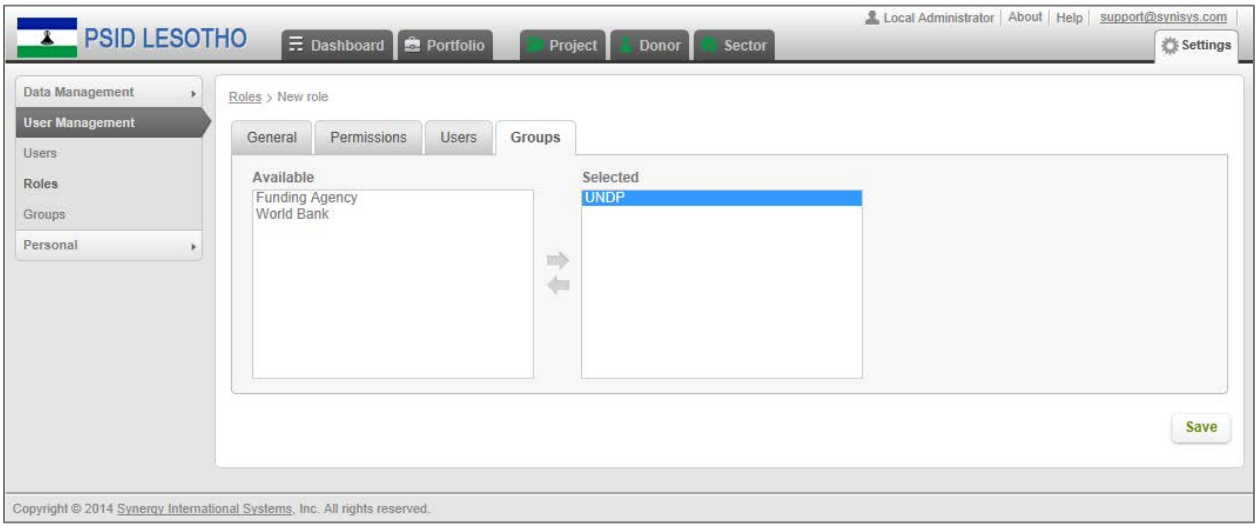

Figure 24: Assigning Groups to the Role

In order to select a group, follow the steps below:

1. Indicate the **Group** that you want to assign to the user by selecting the appropriate instance in the *Available* list.
2. Click the **(Move Right)** button. The selected group will appear in the *Selected* list.

In order to remove a group, follow the steps below:

1. Select the **Group** that you want to remove in the *Selected* list.
2. Click the **(Move Left)** button. The selected group will appear in the *Available* list.

5.3 Editing Roles

In order to edit an existing role, follow the steps below:

1. Go to Settings → User Management → Roles.
2. Click the name of the role that you want to edit. You will be directed to the sub-section where the selected role details will display.
3. Make the appropriate changes in the data displayed.

4. Click the **Save** button to apply the changes made.

5.4 Deleting Roles

In order to delete a role, follow the steps below:

1. Go to the Settings → User Management → Roles
2. Click the **(Delete)** icon to the left of the role record.
3. Click the **OK** button in the *Confirmation* window to delete the role.

Note: The Users, Administrator, and Default role records cannot be removed from the system.

6. MANAGING GROUPS

A group is a collection of authenticated users, classified by common traits, such as job title or organization profile. Each user is a member of the group. The primary purpose of a group is to provide multiple users with the same privileges.

In *PSID Lesotho*, groups are managed in the *Groups* section of the *User Management* console.

6.1 Accessing the Groups Section

The *Groups* section can be accessed at Settings → User Management → Groups (Figure 1).

Once you access the *Groups* section, you will be presented with the list of all existing groups (Figure 25).

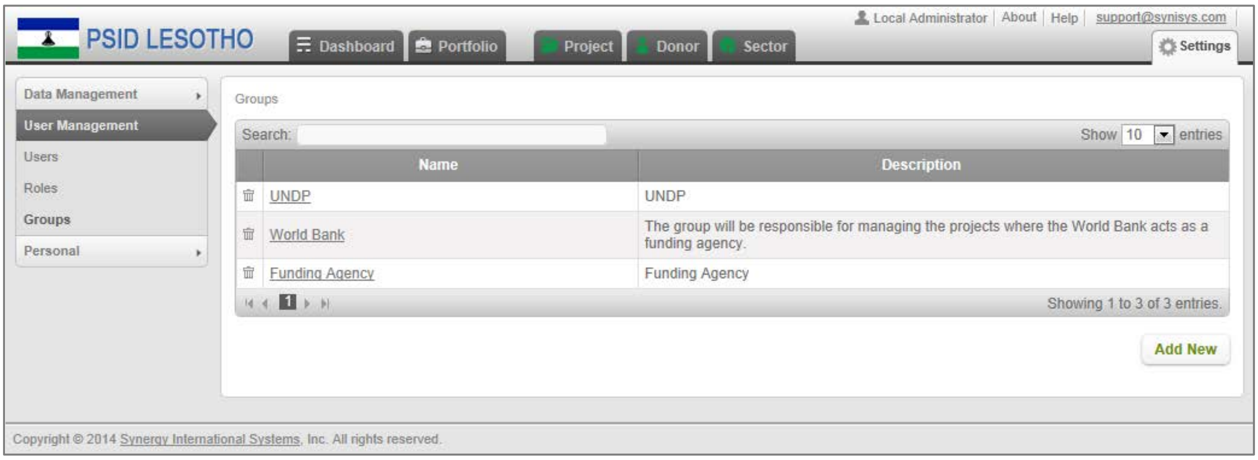

Figure 25: Groups Section

The information displayed for each group includes the following:

Column Name	Description
Name	Name of the group
Key	Short description of the group and its purpose

6.2 Adding a New Group

It is possible to add new groups that will classify users according to their interests, countries or regions they represent, etc. In order to add a new group, follow the steps below:

1. Go to Settings → User Management → Groups.
2. Click the **Add New** button (Figure 26). You will be directed to the *New group* sub-section where the data entry form for adding a new group will be displayed.
3. Provide the information requested in the following tabs of the data entry form:
   - General
   - Permissions
   - Users

- Roles

4. Click the **Save** button to finalize the process of creating a new group.

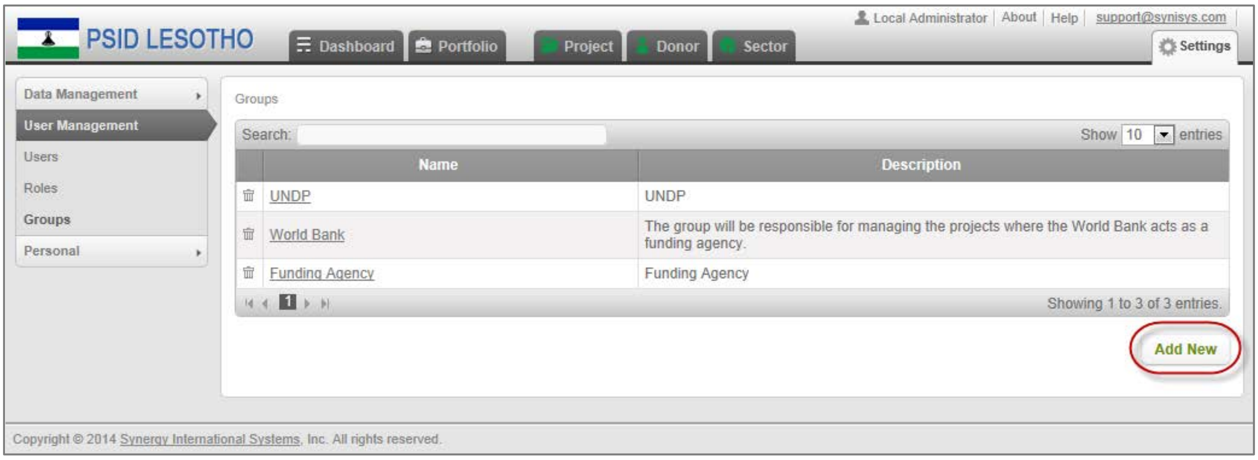

Figure 26: Add New Button in the Groups Section

6.2.1 General

In the *General* tab (Figure 27) of the new group data entry form, you are requested to provide such information about the group as the group name and description. For more details on how to provide the information requested in the *General* tab, refer to the table below:

Note: Some fields in this form are mandatory to be filled in. They are marked with an asterisk.

Column Name	Description
Name	Indicate the **Name** for the group. *This field is mandatory*.
Description	A brief overview of the group that will outline the principle of classifying members in it. *This field is mandatory*.

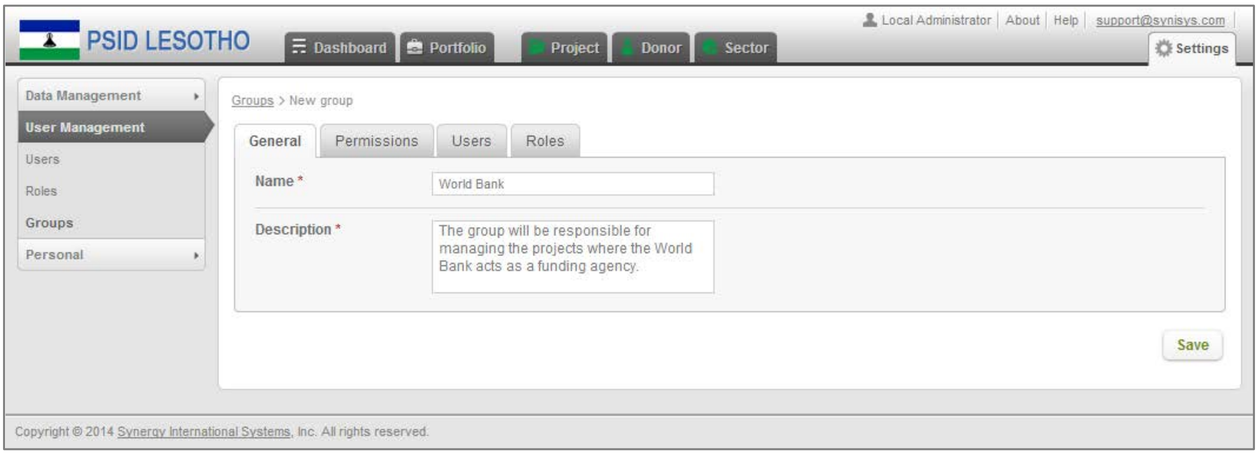

Figure 27: Adding a Group

6.2.2 Permissions

In the *Permissions* tab (Figure 28), you can define the group's permissions to administer *PSID Lesotho* sections and sub-sections, category groups and tabs.

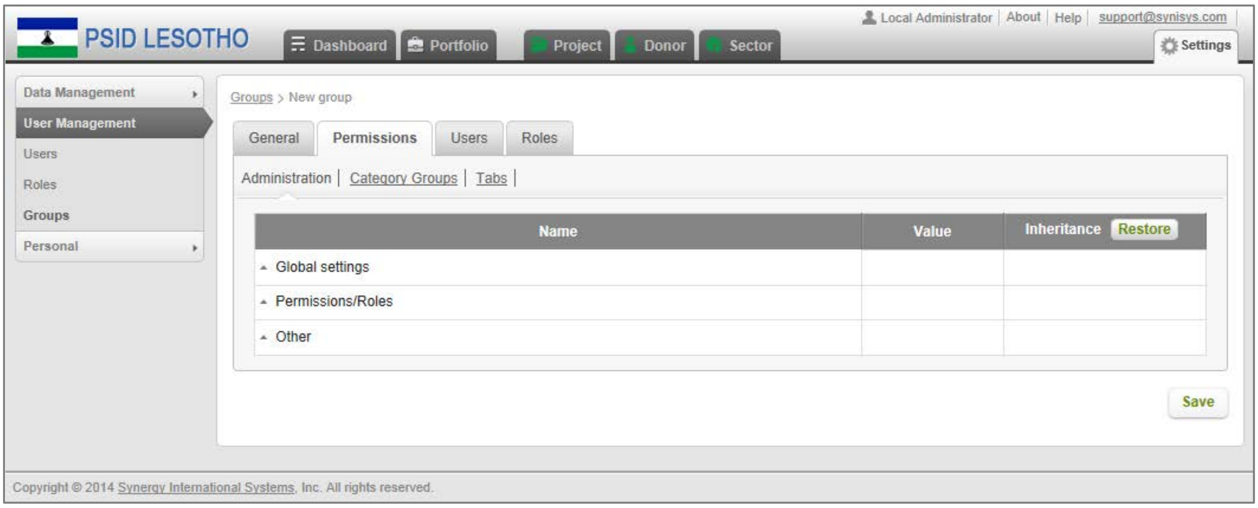

Figure 28: Setting Group Permissions

Note: By default, groups are set to inherit permissions from the role associated with the group. In order to be able to define individual permissions for the group, you will have to break the inheritance of the permissions and grant or revoke the group with the appropriate ones. In this case, groups will not inherit permissions propagated to them from the selected role. If there are conflicts between the permissions assigned and inherited, they are resolved according to the security rule applied to the application.

In order to assign permissions to a group, follow the steps below:

1. In the *Administration* sub-tab, define whether the group will have the right to perform administration tasks in each section of *PSID Lesotho*. For more details, see Setting Administration Permissions.
2. In the *Category Groups* sub-tab, define whether the group will have the right to manage the categories and category groups defined for the application. For more details, see Setting Category Group Permissions.
3. In the *Tabs* sub-tab, define whether the group will have access to the application tabs. Please note that the sub-tab will list all tabs and sub-tabs defined for the application. For more details, see Setting Tab Permissions.

Note: Clicking the **Restore** button will reinstate the default values. The group permissions will be set to the initial ones.

6.2.2.1 Setting Administration Permissions

In order to define the administration permissions, follow the steps below:

1. Expand the appropriate section in the *Administration* sub-tab to view the sub-sections listed under it in the *Name* column (Figure 29).

2. For each sub-section, define whether it should inherit permissions from the associated role by turning the **Inheritance** option on. The category will be assigned the same user permissions as the category group it is listed under.
   Note: If the **Inheritance** option is turned off, then you will have to define individual group permissions for each sub-section by activating the respective **Yes** or **No** radio button in the *Value* column.

Note: If you want to reinstate the initial values, click the **Restore** button (Figure 29).

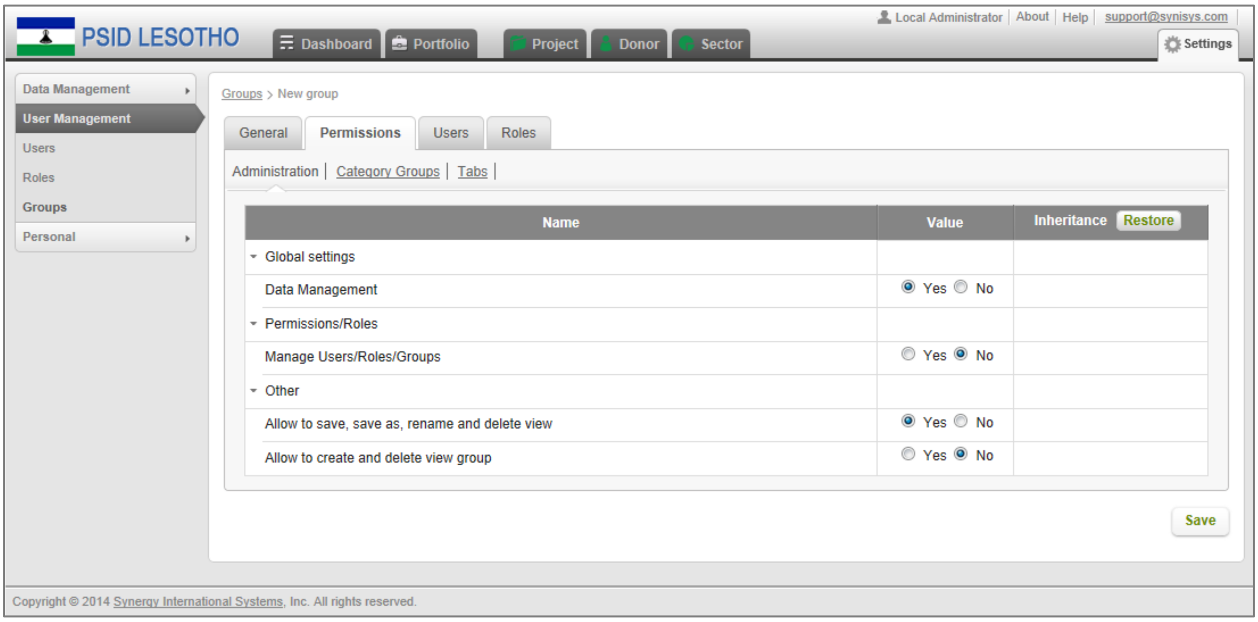

Figure 29: Setting Group Administration Permissions

6.2.2.2 Setting Category Group Permissions

In order to define the appropriate rights, follow the steps below:

1. Define whether you want to make changes in the category permissions in the currently deployed application or the local copy by selecting the appropriate instance from the drop-down list above the screen. This is done to see how the changes will affect the data in the application before deploying them.
2. For each category group, turn off the **Inheritance** option and define the group's rights to **Add**, **Edit**, **View**, and **Delete** the item by ticking the respective checkboxes (Figure 30).
   Note: For some category groups, it is possible to define advances access permissions. For more details, see Setting Advanced Group Permissions for Categories.
3. Expand the category group to view the categories listed under it in the *Name* column.
4. For each category, define whether it should inherit permissions from its parent object by turning the **Inheritance** option on. The category will be assigned the same group permissions as the category group it is listed under.
   Note: If the **Inheritance** option is turned off, then you will have to define individual group permissions for each category listed under the category group.

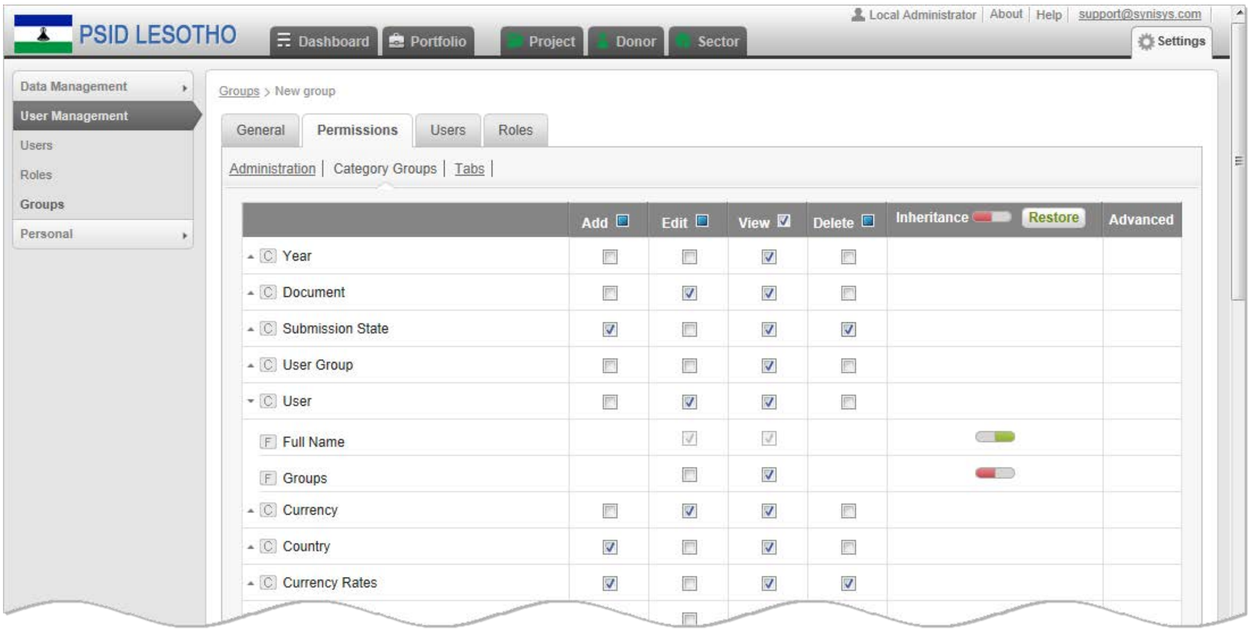

Figure 30: Setting Group Category Groups Permissions

Note: If you want to reinstate the initial values, click the **Restore** button.

6.2.2.3 Setting Tab Permissions

In order to define the tab permissions, follow the steps below:

1. Define whether you want to make changes in the category permissions in the currently deployed application or the local copy by selecting the appropriate instance from the drop-down list above the screen. This is done to see how the changes will affect the data in the application before deploying them.
2. For each tab, turn off the **Inheritance** option and define whether the group will have access to the tab by activating the respective **Show**/**Hide** radio button (Figure 31).
3. Expand the tab to view the sub-tabs, if any, listed under it in the *Name* column.
4. For each sub-tab, define whether it should inherit permissions from its parent object by turning the **Inheritance** option on. The sub-tab will be assigned the same group permissions as the tab it is listed under.
   Note: If the **Inheritance** option is turned off, then you will have to define individual group permissions for each sub-tab listed under the tab.

Note: If you want to reinstate the initial values, click the **Restore** button (Figure 31).

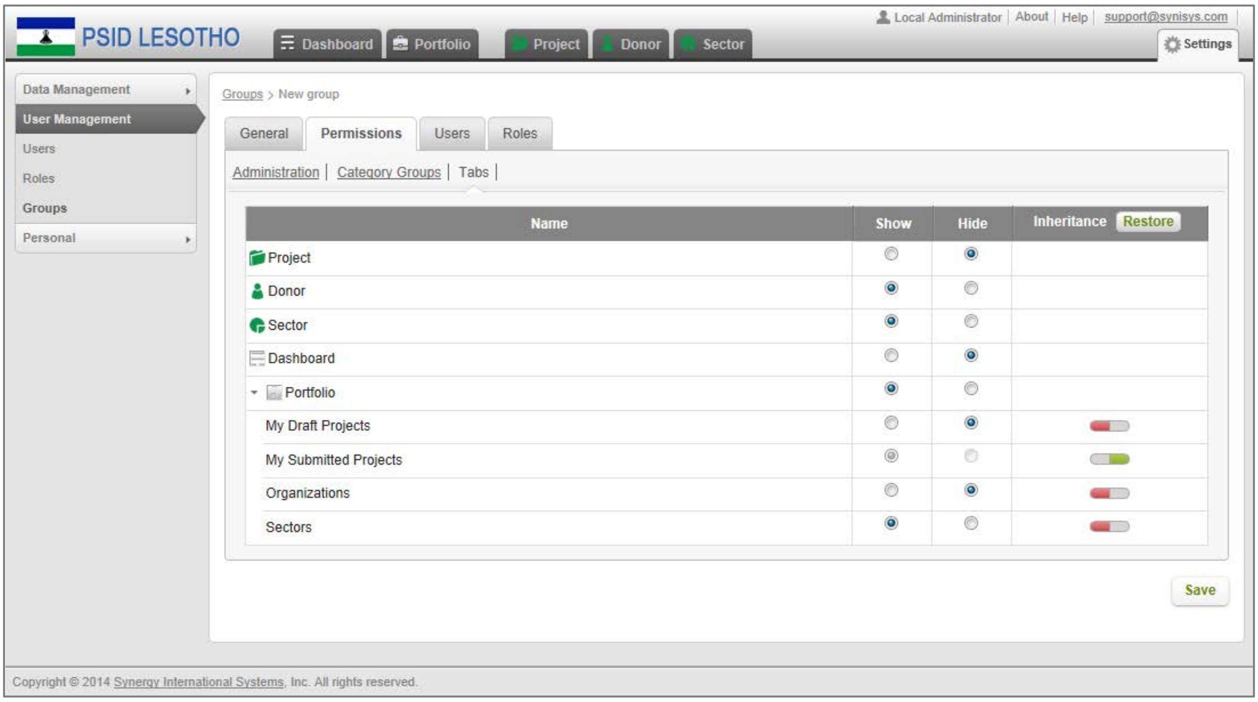

Figure 31: Setting Group Tabs Permissions

6.2.2.4 Setting Advanced Group Permissions for Categories

Some category groups (e.g. Project, etc.) used in the application can contain sensitive information, so it is essential to set stricter editing and deleting permissions for them to ensure that this information is not compromised. In order to define advanced access permissions for certain category groups, you can take advantage of the fine-grained access control that *PSID Lesotho* provides.

Note: Categories that allow defining advanced access permissions for them are marked with the icon in the *Advanced* column (Figure 30).

In order to define advanced access permissions for category groups, follow the steps below:

1. Click the icon in the Advanced column. A popup window for setting advanced permissions will appear.
2. Specify whether the group members will have the right to administer **All** category group items or only a sub-set of them defined according to a **Custom** criteria (Figure 32).
3. If the **Custom** option is selected, specify the principle(s) that will be used to define group's permissions to administer (edit or delete) category group items. These principles are as follows:
   - **My** – group will have editing/deleting permissions over a sub-set of the category items created by the user. This sub-set is comprised by the category items that meet a certain condition.
   - **Group** – group will have editing/deleting permissions over a sub-set of the category items created by its members. This sub-set is comprised by the category items that meet a certain condition.

- **Criteria** – group will have editing/deleting permissions over a sub-set of all category items recorded in the application. This sub-set is comprised by the category items that meet a certain condition.

4. Create filtering criteria by selecting the **Category**, **Condition** and **Value** from the respective drop-down lists.
5. Click the **Add Condition** link at the bottom of the screen to define more condition members.
6. Select the operator that will be used to combine the filtering criteria and condition that the category items should meet for the group members to be able to administer them.
7. Click the **View Condition** link and define the condition for the category items by specifying the **Category**, **Condition** and **Search Value** for it.

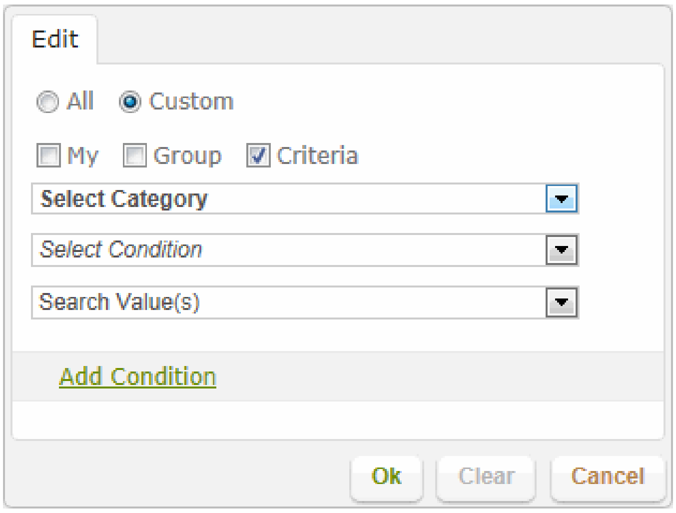

Figure 32: Setting Advanced Group Permissions

8. Click the **Ok** button to apply the filtering criteria. Or, click **Cancel** to terminate the operation. Clicking the **Clear** button will remove all conditions created.

6.2.3 Users

In the *Users* tab, you may select the users that will be assigned to the group being created (Figure 33).

In order to assign a user to the group, follow the steps below:

1. Indicate the **User** to whom you want to assign the group by selecting the appropriate instance in the *Available* list.
2. Click the **(Move Right)** button. The selected user will appear in the *Selected* list.

In order to remove a user that was assigned to the group, follow the steps below:

1. Select the **User** that you want to remove in the *Selected* list.
2. Click the **(Move Left)** button. The selected user will appear in the *Available* list.

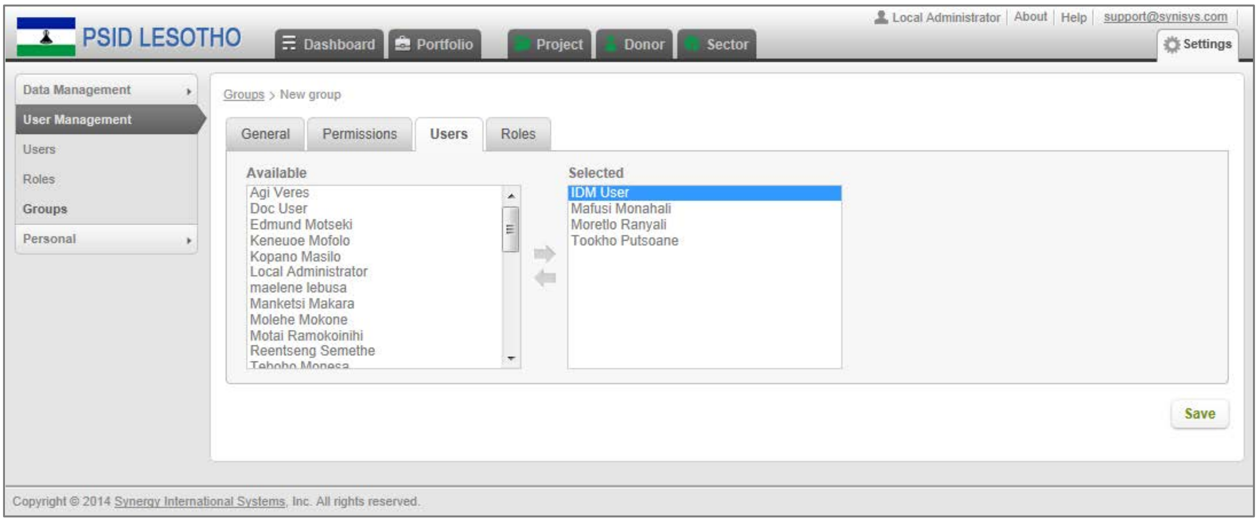

Figure 33: Assigning Users under Group

6.2.4 Roles

In the *Roles* tab, you may select the roles for the group (Figure 34).

In order to select a role, follow the steps below:

1. Indicate the **Role** that you want to assign to the group by selecting the appropriate instance in the *Available* list.
2. Click the **(Move Right)** button. The selected role will appear in the *Selected* list.

In order to remove a role, follow the steps below:

1. Select the **Role** that you want to remove in the *Selected* list.
2. Click the **(Move Left)** button. The selected role will appear in the *Available* list.

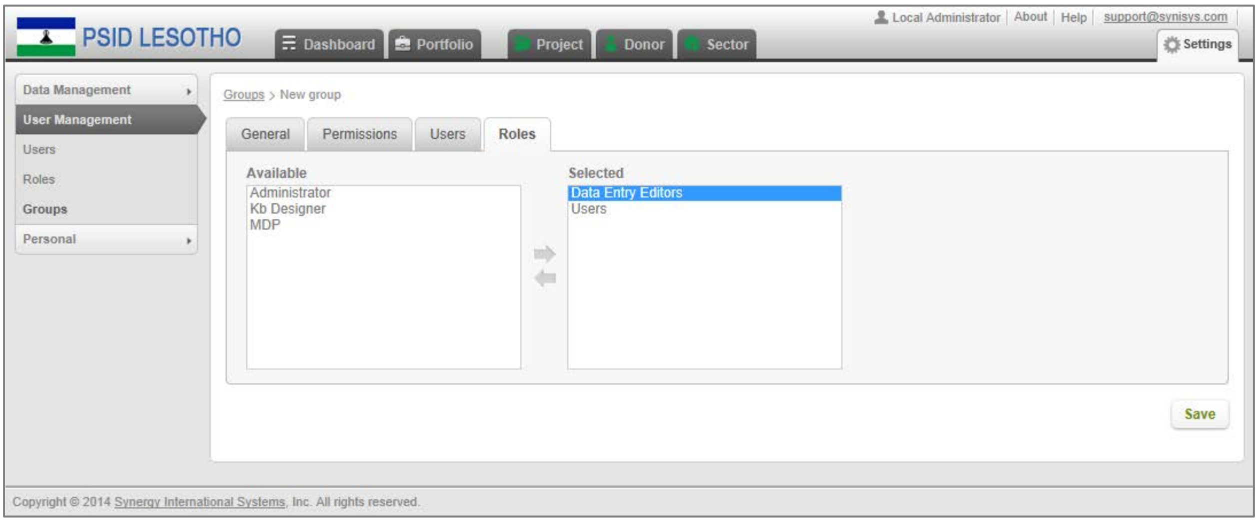

Figure 34: Selecting Roles for the Group

6.3 Editing Groups

In order to edit an existing group, follow the steps below:

1. Go to Settings → User Management → Groups.

2. Click the name of the group that you want to edit. You will be directed to the sub-section where the selected group details will display.
3. Make the appropriate changes in the data displayed.
4. Click the **Save** button to apply the changes made.

6.4 Deleting Groups

In order to delete a group, follow the steps below:

1. Go to Settings → User Management → Groups.
2. Click the **(Delete)** icon to the left of the group record.
3. Click the **OK** button in the *Confirmation* window to delete the group.

7. REFERENCES

Please refer to the following PSID Lesotho related documents:

- PSID Lesotho Analytical Interface User Manual
- PSID Lesotho Data Management Administrator's Guide
- PSID Lesotho Project Application User Manual
- PSID Lesotho Sector Application User Manual
- PSID Lesotho Donor Application User Manual