



# One Analytics

## Setting Up New Users

### Importing One Users into One Analytics

If a Capita One user needs the ability to view, edit or create visualisations in One Analytics, a One Analytics account must be created. One users must belong to the One Analytics user group in One v4 in order to be imported into One Analytics. This user group only provides access to the One Analytics system. Access to data and content is determined by permissions assigned within One Analytics after users have been imported and added to groups.

**NOTE:** The One user group can be named anything, not necessarily One Analytics. However, the group name must be entered as the **GroupName** value in the settings.ini file.

To import users from One:

1. In the One v4 Client, add all users requiring a One Analytics account to the One Analytics user group. For more information on assigning users to a group in the v4 Client, refer to the *Managing Groups in v4* chapter of the *System - Managing Users, Groups & Permissions* handbook, available from the One Publications website ([www.onepublications.com](http://www.onepublications.com)).

The add user routines usually run overnight, and your changes will be reflected the next day. However, you can run the routines manually to update user accounts immediately.

2. If you must update the user account details immediately, run the Sysadmin ETL process to populate the user details in the One Analytics data warehouse.
3. Run the Add Users scheduled task to create the user accounts within One Analytics.

User access to data and content within One Analytics is determined by the site role assigned to the user and the permissions assigned to the content. Site roles determine the overall level of interaction users have with the One Analytics system. The content permissions control which users or user groups can access the individual items and how they can use them. You should assign each new One Analytics user to a site role, and place them into One Analytics user groups. One Analytics Desktop users also need a new password creating. One Analytics Console users log in with their current One credentials.

### Assigning Site Roles

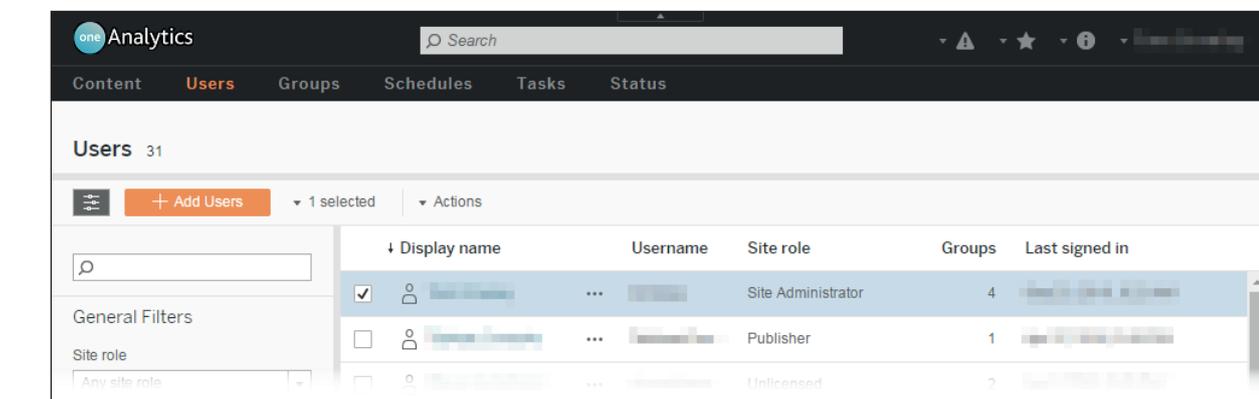
Site roles determine how users interact with the One Analytics system. The **Interactor** site role enables users to access self-service reporting, and should only be given to users authorised to use this function. The **Viewer** site role enables users to access dashboards without being able to interact with them.

To permit users to apply filters to dashboards, but prevent them from accessing self-service reporting, assign them the **Viewer** site role, and then augment their permissions to include filtering and any other required functionality at a project or workbook level using content permissions.

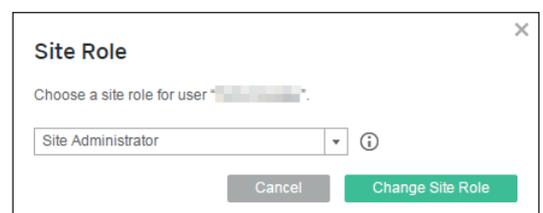
To assign site roles to users:

1. In One Analytics Server, select the **Users** tab.
2. Select the users to whom you want to apply the site role.

Site role	Web access	Interact	Publish	Manage
Server Administrator	✓	✓	✓	✓
Site Administrator	✓	✓	✓	✓
Publisher	✓	✓	✓	
Interactor	✓	✓		
Viewer	✓			
Unlicensed				
<hr/>				
Viewer (can publish)	✓		✓	
Unlicensed (can publish)			✓	



3. From the **Actions** drop-down, select **Site Role** to display the **Site Role** dialog.
4. Select the required site role.
5. Click the **Change Site Role** button to assign the selected role to the users.





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### Adding Users to Groups

Users inherit permissions assigned to all groups to which they belong, within the boundaries set by their site role. Assigning permissions to groups enables you to control users' access permissions by adding or removing them from the appropriate groups. If the appropriate group does not exist, you must first create it.

#### Creating New Groups

To create a new group:

1. In One Analytics Server, select the **Groups** tab.
2. Click the **New Group** button to display the **New Group** dialog.
3. Enter a name for the group and click the **Create** button to add the group to the list.

The 'New Group' dialog box has a title bar with a close button. Below the title is the text 'Enter a name for this group' followed by a text input field. At the bottom right are two buttons: 'Cancel' and 'Create'.

#### Adding Users to Groups

To add users to groups:

1. In One Analytics Server, select the **Users** tab.
2. Select the users you want to assign to the groups.
3. From the **Actions** drop-down, select **Group Membership** to display the **Group Membership** dialog.
4. Select the groups to which you want to assign the users.
5. Click the **Save** button to assign the users to the groups.

**NOTE:** You can also add users by opening the group and using the **Add Users** button to select users from a list.

The 'Group Membership' dialog box has a title bar with a close button. Below the title is the text 'Assign groups to the user [redacted]'. There is a dropdown menu set to 'All groups' and a search box labeled 'Search groups'. Below this is a table with two columns: 'Group' and 'Members'. The table contains three rows: 'All Users' (checked, 31 members), 'Group 1' (unchecked, 7 members), and 'Group 2' (unchecked, 2 members). At the bottom right are two buttons: 'Cancel' and 'Save'.

Group	Members
<input checked="" type="checkbox"/> All Users	31
<input type="checkbox"/> Group 1	7
<input type="checkbox"/> Group 2	2

### Creating New Passwords for Desktop Users

One Analytics users cannot use their One password to log in via the One Analytics Desktop application. You must create a new password for desktop users so that they can open data sources and workbooks in One Analytics Desktop, and publish from One Analytics Desktop to the One Analytics server. This replaces the random password created with the One Analytics account. Desktop users can still use their One username and password to access One Analytics through the One Analytics Console.

To assign a new password:

1. In One Analytics Server, select the **Users** tab.
2. Select the required user from the list to display the **User** screen.
3. In the **Settings** tab, click the **Change Password** hyperlink to display the **New password** and **Confirm password** fields.
4. Enter the new password in the **New Password** and **Confirm password** fields.
5. Click the **Save Password** button to update the password.

The screenshot shows the 'User' settings page in One Analytics. The user is 'USER' with a site role of 'Unlicensed' and a last sign-in time of '10:43 AM'. There are statistics for Workbooks (11), Views (42), Data Sources (0), and Subscriptions (0). The 'Settings' tab is active, showing fields for 'Email', 'New password', and 'Confirm password', each with a corresponding 'Save' button.

**NOTE:** Desktop users should change their password to something more memorable when they first access the system.