

MTAC User Group 4

**Weekly Meeting for
January 27, 2016**

- 1) IV Company User Permissions structure**
- 2) Update on IMb Tracing**
 - a) System Update**
 - b) BPM STIDs**
 - c) Reply Mail STIDs**
- 3) AOB**



MTAC UG4

COMPANY PERMISSIONS THROUGH INFORMED VISIBILITY™

December 2015



- Overview
- Company Permissions within IV
- Company Profiles and Preferences
- User Profile and Preferences

- Access to IV will be managed through the Business Customer Gateway
- Company roles/permissions will be managed in IV
- The Business Service Administrator (BSA) has overall administrative privileges for company
- The BSA can assign one or more company roles to a user within IV. For example:
 - Assign the Company Role Manager role to one or more users, who can manage roles for all users within the a company
 - Assign the Company Data Delegation Manager to one or more users, who can delegate company data to other companies

Certain users may be assigned company administrative roles by the BSA or Company User Role/Permissions Manager



Company User Role/Permissions Manager – Assigns which users have company administrative roles. Manages which company attributes users can access

Company Data Delegation Manager – Grant other companies access to company data.

Company Address Book Manager – Maintains company address book and distribution lists

Company Subscriptions Manager – Manages report and query subscriptions at the company level

Company Report Manager – Creates and manages access to reports and queries on behalf of the company

Company User Site Preference Manager – Sets the default company homepage and customizes content and view

Companies can create and maintain their profile and set preferences for data through Informed Visibility



Company Address Book

- Email addresses
- Email distribution lists
- SMS text numbers
- Text distribution lists
- Server IP addresses for FTP/SFTP



Company Subscriptions

- Reports, queries, and alerts subscribed to at the company level and sent to a company email distribution list, text distribution list, server, or IV homepage



Company Reports, Queries, and Alerts

- Items created at the company level
- Items that have been shared with company
- Company items that have been shared publically or with users outside the company



Company Data Delegation

- Delegate data to another company
- View what has been delegated from the company
- View what has been delegated to the company
- Change or remove delegation
- Social media share approach



Company Site Preferences

- Set default homepage content and view for company users

Individual users can customize their experience by creating and maintaining profiles and setting preferences for data



My Address Book

- My email address - My SMS text numbers - My server IP addresses



My Subscriptions

Reports, queries, and alerts personally created to be sent to email, text, server, or homepage



My Reports, Queries, Alerts

Items created on behalf of myself, not my company
Items shared by me or made public
Items shared with me



My Favorites

Favorite Reports, queries, dashboards



My Site Preferences

Manage preferences
Change default homepage and views (landing page, multiple reports, etc.)

Update on IMb Tracing

Any Other Business
