

# User Settings Menu of the Admin Panel

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## Before you go on...

Much of this article assumes an understanding of the workings of and the differences between Profiles, Roles, and Programs in Fluxx.

For background materials to understand these differences, please see our [Roles, Program, and Profiles \(or Portals\) Definitions Page](#).

Additionally, Fluxx has two great articles discussing many of the things found in this article. This article deals with explaining [Profiles, Roles, and Permissions](#) explicitly.

A second article discusses [Editing Profile Permissions](#), which should be a key takeaway from this page.

## Profiles

The Profiles tab contains the several different Profiles available for selection from within our system, allowing you to Edit/Create/Delete Profiles. When you select a Profile from this screen, there are four different subtabs that allow you to edit specific pieces of functionality for each given profile.

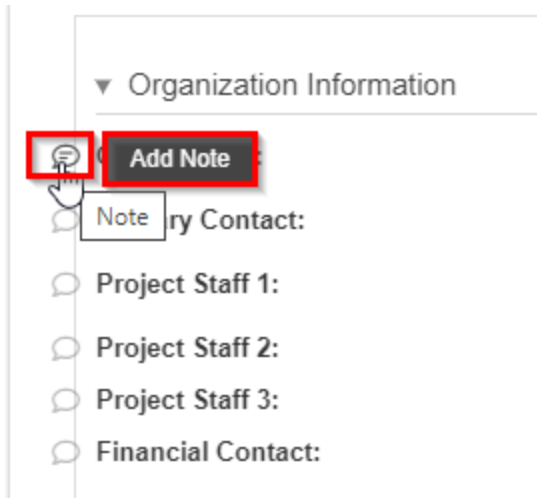
The four subtabs are:

1. The **Attributes** Tab – Controls high-level attributes, such as the Profile name and the exact Portal that will be presented to users who sign in with this Profile.
2. The **Rights** Tab – Controls what **Rights** users with this Profile have within the system, i.e. being able to view or edit or create records of a specific type.
3. The **Delegate Rights** Tab – Not currently used by the WPP; allows extended functionality by allowing the embedding of a dynamic card in the Grantee Portal with permissions based off of the parent record this embedded child card is related to.
4. The **Permissions+** Tab – Extended Profile settings with a series of checkboxes that control other user **Permissions** not covered in the **Rights** tab.

## Attributes Tab

The Attributed Tab allows you to edit high-level information about the [Profiles](#) available for users. See the screenshot below for highlighted items from the **Attributes Tab** and see beneath the screenshot for descriptions of said items.

1. **Box # 1:** Shows the **User Settings** Admin Panel menu currently selected.
2. **Box # 2:** Shows the **Profiles** tab currently selected.
3. **Box # 3:** Shows the **Profile** that you currently have selected. You can tell which **Profile** is currently selected NOT ONLY based off of the name (match name of Profile with "**Description**" from box # 5), BUT ALSO from the **slim green line** that appears to the **LEFT** of the Profile name.
4. **Box # 4:** Shows the multiple tabs of user settings available from within the single Profile selected. Currently selected is the **Attributes** tab. This lets you change high-level information about the profile selected, such as the profile name and the profile category. Other tabs allow for other changes to be made (see below for explanations of the other tabs).
5. **Box # 5:** Shows the name of the Profile selected. This can be edited and will not break the system; however, please avoid doing so unless absolutely necessary as we've training staff on the current Profile names.
6. **Box # 6:** Shows the **Category** that the profile falls into. This partially dictates functionality; selecting the **Employee** category will force the profile to behave like an **Employee-type** profile, whereas selecting the **Reviewer** category will force the profile to behave like a **Reviewer-type** profile. For newly created, non-default profiles (such as our **PERC Progress Report Reviewer**), a category is not necessarily needed (as they need their own special functionality).
7. **Box # 7:** Shows the **Dashboard theme selector**.
  - a. There are three options for selection here:
  - b.
  - c. **Fluxx Dashboard:** The default option, **Fluxx dashboard** is essentially the **Employee view of the system** (where the user has a Default dashboard, plus shared dashboards and the Organization-specific Dashboard Templates).
  - d. **External Portal (Old):** No longer used; used to be used for external portals (i.e. Grantee and Reviewer Portals).
  - e. **Branded Portal (New):** The new version of the External Portal; this will force the user to have 1 portal view based on the **Dashboard Template** selected for **Box # 8**. This prevents the user from creating their own dashboard/adding new cards that they shouldn't have access to (as is desired for external users like Grantees, Reviewers, and PERC Progress Report Reviewers).
8. **Box # 8:** Shows where you can select the **Dashboard Template**. You only need to select a **Dashboard Template** **IF** you selected "**Branded Portal (New)**" as the Dashboard theme selector from Box # 7. Otherwise, if you selected "**Fluxx Dashboard**" this field can be left unaltered.
9. **Box # 9:** Shows two checkboxes that determine some functionality for this **Profile**.
  - a. **Prevent Users from Adding or Removing Dashboards (users will only be able to use the dashboards selected above):** If checked, will prevent the user from being able to add or remove Dashboards; they will be restricted to only having the Dashboards checked in **Box # 8**. This is mainly used when the **Dashboard Theme selector** is set to **Fluxx Dashboard**, as those with the **Branded Portal (new)** are always prevented from being able to add/remove dashboards. Still, you can check this box for new portals built for external users (non-employees) to make absolutely sure they are prevented from adding new dashboards.
  - b. **Disable Workflow Notes:** When clicked, users will be unable to add **Workflow Notes**, i.e. notes directly on the record that can be left as you're completing your workflow.
    - i. Example of what being **able to leave a workflow note** looks like in the system. If this checkbox is checked, then the **Add Note** button found below will be **completely removed** and users will not be able to see/leave these notes.



ii.

10. **Box # 10:** Shows where you can **Delete** this User Profile. This is **highly dangerous!** Please only delete profiles that were created in error and are not attached to any user accounts; deleting any User Profiles that are in use will result in users **immediately losing the Portal Access and permissions that they need to complete their work.**
11. **Box # 11:** Shows where you can **Save** your changes to this profile. If you've made **any** changes, you **must** hit the save button in order for your changes to be effectuated. Otherwise, **your changes will be discarded.**
12. **Box # 12:** Shows where you can **create a New Profile.** This is useful if you need to create a new Portal, as the WPP needed to do when we created the **Progress Report Reviewer Profile.**

## Rights Tab

See the screenshot below for highlighted, important items from the **Rights Tab** can be found in the screenshot below. See beneath the screenshot for descriptions of said items.

| Model                   | Permission      | Allowed |
|-------------------------|-----------------|---------|
| Client Stores           | All Permissions | ✓       |
| Config Model Documents  | View            | ✓       |
| Documents               | Create          | ✓       |
| Documents               | Update          | ✓       |
| Geo Places              | Create Own      | ✓       |
| Geo Places              | Delete Own      | ✓       |
| Geo Places              | Update Own      | ✓       |
| Geo Places              | View Own        | ✓       |
| Geo Place Relationships | Create Own      | ✓       |
| Geo Place Relationships | Delete Own      | ✓       |
| Geo Place Relationships | Update Own      | ✓       |
| Geo Place Relationships | View Own        | ✓       |
| Grantee Budgets         | Create          | ✓       |
| Grantee Budgets         | Delete Own      | ✓       |
| Grantee Budgets         | List            | ✓       |
| Grantee Budgets         | Update          | ✓       |
| Grantee Budgets         | View            | ✓       |
| Lois                    | Update          | ✓       |
| Model Attributes        | All Permissions | ✓       |
| Model Attribute Choices | All Permissions | ✓       |
| Model Attribute Values  | All Permissions | ✓       |
| Model Documents         | Create Own      | ✓       |
| Model Documents         | Delete Own      | ✓       |
| Model Documents         | List            | ✓       |
| Model Documents         | View Own        | ✓       |
| Model Document Types    | List            | ✓       |
| Organizations           | List            | ✓       |
| Organizations           | Update Own      | ✓       |

1. **Box # 1:** Shows the **Profile** that's currently selected. You can tell which **Profile** is currently selected from the **slim green line** that appears to the **LEFT** of the Profile name.
2. **Box # 2:** Shows the **Rights tab** that's currently selected.
3. **Box # 3:** Shows a single **Rights** line; each line represents a set of permissions that are either **Allowed** or **Not-Allowed**.
  - a. The Word on the **left-hand side** of Box # 3 under the column "**Model**" represents the **Record Type** that the permissions are applied for (e.g. Grant Requests, Reviews, Requirements, Documents, etc.).
  - b. The word in the middle under the column "**Permission**" describes what type of permission is granted for this record type. In this example, the permission given is **Create**, which means that this profile can **Create** records in the Record Type specified under the **Model** column.

- c. The **Symbol** under the "**Allowed**" column specifies whether the action described for the given Record Type is **Allowed** (represented by the ✓ **checkmark**) or **Not-Allowed** (represented by the 0 symbol that looks like the number 0).
- d. Any permissions line can be deleted by clicking on the - symbol on **right-hand side** of Box # 3.
4. **Box # 4:** Shows where the **Scroll Bar** lives on this screen. You'll need to make use of the scroll bar here, as there are often more permissions lines than can fit in one screen, so users will typically have to **scroll** down this screen to see all of the permission lines.
5. **Box # 5:** Shows the **Delete button** where you can delete the Profile you currently have selected. This is **highly dangerous!** Please only delete profiles that were created in error and are not attached to any user accounts; deleting any User Profiles that are in use will result in users **immediately losing the Portal Access and permissions that they need to complete their work**.
6. **Box # 6:** Shows where you can **Save** your changes to this profile. If you've made **any** changes, you **must** hit the save button in order for your changes to be effectuated. Otherwise, **your changes will be discarded**.

## Delegate Rights Tab

Not currently used by the WPP. See this Fluxx article if you need information on the Delegate Rights tab: <https://fluxxdev.atlassian.net/servicedesk/customer/portal/1/article/1692303561?src=14367399>

## Permissions+

Before you read this section, please see this Fluxx article that discusses the **Permissions+** tab and lays out what each of these options truly entails: <https://fluxxdev.atlassian.net/servicedesk/customer/portal/1/article/1796049373>

Under the **Permissions+** tab, a series of checkboxes which act as toggles for specific user functionalities can be found. See the screenshot below for highlighted items from the **Permissions+** tab and beneath the screenshot for descriptions of said items.

1. **Box # 1:** Shows the **Permissions+** tab currently selected.
2. **Box # 2:** Shows the first batch of functionality toggles. Most have names that sufficiently describe what the toggle does. Descriptions:
  - a. **Allow Monitoring the Email Queue:** Checking this box will allow this profile to approve or delete emails from the queue. Since this is for monitoring the email queue **without Admin Permissions**, you'll need to use the **Table View to Monitor the Email Queue**.
  - b. **Allow Monitoring the Job Queue:** Checking this box will allow this profile users to take actions on the jobs queue. Again, since this is for monitoring the jobs queue **without Admin Privileges**, you'll need use the **Table View to Monitor the Job Queue**.
  - c. **Hide Universal Search:** Checking this box removes the universal search feature from this profile.
  - d. **Allow batch/bulk update:** Checking this box shows the individual bulk actions available for this profile.
    - i. Please note checking this box does not give users the ability to perform bulk update actions until individual settings are checked
    - ii. To enable all bulk update actions, each individual bulk update setting must be checked
    - iii. Sub-options that become available upon clicking this checkbox:

|                                        |                                                                                       |
|----------------------------------------|---------------------------------------------------------------------------------------|
| 1. <b>Allow bulk update attributes</b> | Checking this box will allow this profile to bulk update fields of the records        |
| <b>Allow bulk update status</b>        | Checking this box will allow this profile to bulk update the state of the records     |
| <b>Allow sending bulk email alerts</b> | Checking this box will allow this profile to bulk send an email alert for the records |

|                                           |                                                                                         |
|-------------------------------------------|-----------------------------------------------------------------------------------------|
| <b>Allow generating documents in bulk</b> | Checking this box will allow this profile to generate a letter template for the records |
| <b>Allow bridger status check in bulk</b> | Checking this box will allow this profile to run a bridger status check on the records  |
| <b>Allow scheduling payments in bulk</b>  | Checking this box will allow this profile to assign payments for the records            |
| <b>Allow scheduling reports in bulk</b>   | Checking this box will allow this profile to assign reports for the records             |

- e. **Allow accessing the dedupe tool:** Checking this box will allow this profile to utilize and take action on the dedupe tool (**used to merge duplicative records**).
- f. **Allow editing payment contingencies:** Checking this box will allow this profile to edit the payment contingencies on a granted record.
- g. **Allow editing funding sources:** Checking this box will allow this profile to edit existing Funding Source Records and create new Funding Source Records.
  - i. Requires that the User Role assigned has access to that workflow state.
- h. **Allow editing request funding sources on active grants:** Checking this box will allow this profile to edit the Request Funding Source on a granted request record.
- i. **Allow editing and deleting Ad-hoc and Excel Reports:** Checking this box will allow this profile to edit or delete existing Ad-hoc Report and Excel records.
- j. **Allow editing of select (dropdown) fields:** Checking this box will allow this profile to edit select field values from the form.
- k. **Allow Theme Switching:** Allows the user to use the **Component** Theme-Switcher on Grant Request records. This allows the user to switch the Form type after the record has been created.
3. **Box # 3:** Shows the second batch of functionality toggles. These toggles are all related to User credentials and security. Descriptions:
  - a. **Allow updating users' login:** Checking this box will allow this profile to edit a user's login.
    - i. Login fields will be available on the user record.
    - ii. Login fields will appear in the LOI (Registration) Connect modal.
    - iii. This means if a user with this permission connects a user to the system via the **Connect** component, the New User Email (if enabled) will trigger.
  - b. **Allow updating users' password:** Checking this box will allow this profile to edit a user's password.
  - c. **Allow updating users' SSO UID:** Checking this box will allow this profile to edit the sso\_uid core field.
    - i. If SSO is configured for your site, then the SSO UID is treated like a password. Enabling this option will allow the user to access other users SSO UID fields on the user record.
  - d. **Allow impersonating grantees:** Checking this box will allow this profile to impersonate any profile with the "Grantee" category.
4. **Box # 4:** Shows the **Delete** button where you can delete the Profile you currently have selected. This is **highly dangerous!** Please only delete profiles that were created in error and are not attached to any user accounts; deleting any User Profiles that are in use will result in users **immediately losing the Portal Access and permissions that they need to complete their work**.
5. **Box # 5:** Shows where you can **Save** your changes to this profile. If you've made **any** changes, you **must** hit the save button in order for your changes to be effectuated. Otherwise, **your changes will be discarded**.

## Roles

The **Roles** tab allows you to create/edit/delete **User Roles** within the system. See the screenshot below for highlighted important items and beneath the screenshot for descriptions of said items.

The screenshot displays the FLUXX Roles management interface. The top navigation bar includes tabs for Profiles, Roles (highlighted with Box 1), Security, and Groups. The left sidebar lists various settings categories. The main table lists roles with columns for Name, Roleable type, and a checkbox. The 'Finance' role is highlighted with Box 2. The 'Attributes' panel on the right shows fields for Roleable type (Program, highlighted with Box 3) and Name (Finance, highlighted with Box 4). At the bottom, there is a 'New Role' button (Box 5) and buttons for Delete, Save, and a numeric input field.

1. **Box # 1:** Shows the **Roles** tab currently selected.

- Box # 2:** Shows the **Role** that's currently selected. You can tell which **Role** is currently selected from the **slim green line** that appears to the **LEFT** of the Profile name and by matching the **Role** name with the name shown in **Box # 4**.
- Box # 3:** Shows the **Roleable Type** dropdown selection box. There are four possible options to selected here:

- This field determines which **Program** (or sublevel below program) is available for selection at the **Programs level when selecting a user's User Role**. The WPP always leaves this field set at the **Program-level** (and then we always enter 'All Programs' at the specific program selection menu).
- Box # 4:** Shows the configurable name of the Role type. This can be changed at any time without breaking anything in the system. However, please **avoid doing so**, as we've trained employees on the current names of the **Roles** we've configured.
  - Box # 5:** Shows the **Delete** button where you can delete the **Role** you currently have selected. This is **highly dangerous!** Please only delete roles that were created in error and are not attached to any user accounts; deleting any **Roles** that are in use will result in users **immediately losing the permissions that they need to complete their work** (i.e. being unable to submit an application).
  - Box # 6:** Shows the **Save** button where you can save any changes made to the **Role**. If you've made **any** changes, you **must** hit the save button in order for your changes to be effectuated. Otherwise, **your changes will be discarded**.
  - Box # 7:** Shows the **New Role** button where you can create a new **Role** if needed.

## Security

The **Security Tab** contains several different settings allowing you to control features like the minimum password length required, the ability to control whether users can use multiple Profiles, multi-factor authentication, etc.

### Before you go on...

Fluxx has a great article that discusses the ins and outs of the **Security Tab**. See the article here: <https://fluxxdev.atlassian.net/servicedesk/customer/portal/1/article/1422295246?src=-168973113>

### The Security Tab

The main settings used from with the **Security Tab** are found within the **Security Settings** item, as shown from the screenshot below. Please see the screenshot for highlighted items from this screen and beneath the screenshot for descriptions of said items.

- Box # 1:** Shows the **Security Tab** as currently selected.
- Box # 2:** Shows the **Settings Menu** that's currently selected. You can tell which **Settings Menu** is currently selected from the **slim green line** that appears to the **LEFT** of the **Settings** name.
- Box # 3:** Shows several settings related to **User Passwords** within Fluxx.

- a. **Minimum Password Length:** This feature controls the minimum required password length. Options range from 3-15 Characters, which includes all letters, numbers, and symbols (e.g. ^,\*,&, etc.).
  - b. **Don't allow passwords to contain/match the login:** Unchecking this box allows a password to match the user's sign in user name (i.e. Login name; at WPP this is the user's **email address** 99% of the time). If this box **IS** checked, then the password CANNOT contain the user's login within the password.
  - c. **Don't allow passwords to contain more than this number of repeated characters in a row:** This feature controls the number of characters that can be repeated in a row within the password. Options range from 2-10 Repeated Characters ALLOWED within the password; any number of repeated characters that **exceeds** the number listed here will result in the password being declared **invalid**.
4. **Box # 4:** Shows several options relating to user's failing to enter their password correctly and a setting for the maximum duration that a password can be used for.
  - a. **Number of failed login attempts before account lockout:** This feature controls the number of times a user can incorrectly enter their password before their account is temporarily locked. Options range from 2-20 times.
  - b. **Account lockout ban duration:** This feature controls the amount of time a user is temporarily locked out of their account for after entering their password incorrectly the required number of times. Options range from 0 minutes - 24 hours.
  - c. **Ensure the same password was not used within at least this number of changes:** This feature controls how many password changes until a previous password can be used again. Options range from 2-10 Password Changes before an old password can be re-used.
  - d. **Maximum Password Age Policy:** The number of days a password can be utilized before it expires. Options range from 30 - 120 days (or blank, i.e. no maximum number of days). When a password expires, the user will be required to set a new password.
5. **Box # 5:** Shows three checkboxes that can require certain characters to be used within the password that a user sets. If **any** of these checkboxes are checked and a user fails to include the character(s) specified in the checked checkbox, then the password will result as an **invalid password** when they attempt to set it.
  - a. **Uppercase letter (A through Z):** As the name implies, this requires that the password contain at least **1 uppercase letter**.
  - b. **Lowercase letter (a through z):** As the name implies, this requires that the password contain at least **1 lowercase letter**.
  - c. **Number (0 through 9):** As the name implies, this requires that the password contain at least **1 number value (0 - 9)**.
6. **Box # 6:** Shows the **Cancel** button. Clicking on this button will **Discard** any unsaved changes made to the current settings menu.
7. **Box # 7:** Shows the **Save** button. If you've made **any** changes, you **must** hit the save button in order for your changes to be effectuated. Otherwise, **your changes will be discarded**.

The other security settings offer other options as well, but nothing particularly relevant to the WPP. See the [Fluxx Security Settings](#) article for more information on these.

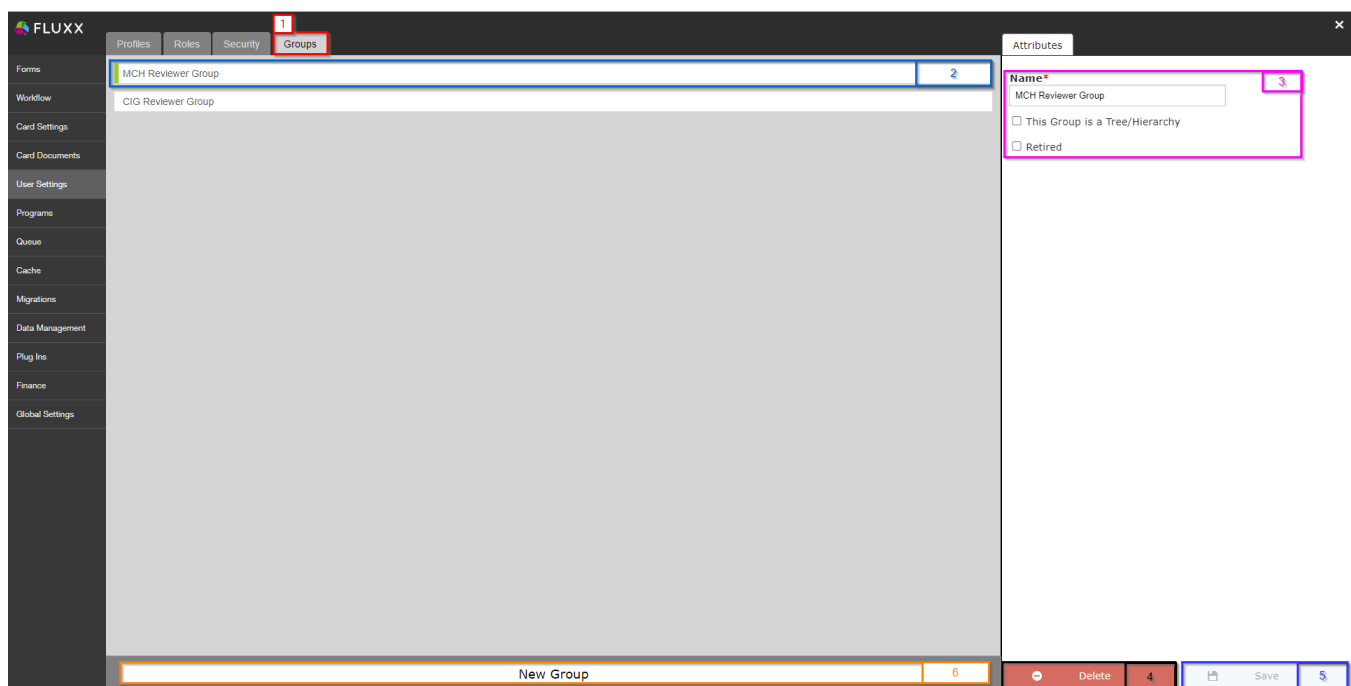
## Groups

### Before you go on...

Fluxx has an article that discusses how groups are used and how to manage them. Please read through that article as well, here: <https://fluxxdev.atlassian.net/servicedesk/customer/portal/1/article/1795885766?src=964446319>

### The Groups Tab

The **Groups Tab** allows you to manage, create, and edit **User Groups**, which are primarily used when scheduling **Reviews**. See the screenshot below for highlighted items and beneath the screenshot for descriptions of said items.



1. **Box # 1:** Shows the **Groups** tab as currently selected.

2. **Box # 2:** Shows the **Group** that is currently selected. You can tell which **Group** is currently selected from the **slim green line** that appears to the **LEFT** of the Group name and by matching the **Group** name with the name shown in **Box # 3**.
3. **Box # 3:** Shows three attributes for each user group:
  - a. **Name:** This is the Configurable name of this user group. This can be edited at any time without breaking anything, but keep in mind that we train Employees on the names of these user groups so please do not change these without a good reason to do so.
  - b. **This group is a Tree/Hierarchy:** Essentially, this allows this group to be a "Parent Group" for subgroupings **underneath** this user group. WPP does not use this functionality at this time.
  - c. **Retired:** If this box is checked, this group will be considered **Retired** and will no longer be available for selection from the normal spots where user groups are used.
4. **Box # 4:** Shows the **Delete** button. This allows you to **Delete** the user group selected. **Be careful about doing this!** Deleting user groups that will be used for Reviews can screw up the workflow of the Employees who are creating the reviews, so please only do this if the User Group was created in error.
5. **Box # 5:** Shows the **Save** button. If you've made **any** changes, you **must** hit the save button in order for your changes to be effectuated. **Otherwise, your changes will be discarded.**
6. **Box # 6:** Shows the **New Group** button that, when clicked, will create a new User Group. You can then change the name/settings on that user group as desired.