

## Setting Up the App

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Access Policies sp Manager

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## Introduction

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Thank you for trying and/or purchasing Access Policies sp Manager. Before you start loading your policies and taking advantage of all that Access Policies sp Manager has to offer, please take a moment to consider the brief set-up recommendations in this document.

This document addresses particular settings within the App (after it has been installed). If you have questions about installing the App, please refer to the following documents available at [www.AccessPoliciesSP.com/Support.html](http://www.AccessPoliciesSP.com/Support.html):

- *Before Downloading the App*
- *Installing the App*

For general questions about the App, please refer to the *User Guide*.

Thank you.

## Setup Recommendations

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### Overview

Within the Access Policies sp Manager App, there are a few dropdown menus for various fields. Most relate to the Properties of a Policy (Policy Owner, Review Groups, Categories and Policy Types) and one for available Publication Sites (used in the Publish workflow).

The items for each of these dropdown menus can be managed in the Settings section of the App (available from the Left Navigation bar). Only members of the App Administrators group (site owners) have access to the Settings section.

Use the options in Settings to define the items in these dropdown menus.

## Users

### Policy Owners

Each Policy in the Access Policies sp Manager App must be assigned to an Owner. Besides App Administrators (site owners), only the Owner of the Policy has access to a Policy in the Drafts library.<sup>1</sup>

To add a user to the list of possible Policy Owners, click [+ new item](#).

The follow page will load:

Owner *	<input type="text"/>
Read Group	<input type="text" value="Enter a name or email address..."/>
Edit Group	<input type="text" value="Enter a name or email address..."/>
	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

The only required field is for the Owner. Enter the name of the new Policy Owner. The name must correspond to an existing user of the App. You can select any user of the App to be a Policy Owner; however, the user's permissions will be based on the user group that he/she is assigned (App

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<sup>1</sup> Strictly speaking, this is the case; however, as noted later in the document, other users can gain access to a Policy in the Drafts library by 1) being a member of the Owner's Read or Edit groups or 2) being assigned to review the Policy (members of a Review Group assigned to a Policy are not given access to that Policy until a Review workflow has been started).

Administrators (Site Owners), Policy Owners (Site Members), Policy Reviewers (Site Visitors)).

Assigning a user as the Owner of a policy (within the policy Properties) will give that user access to the policy in the Draft Policies library. Except for the Drafts library, access to policies is based on the permissions of the group that the user belongs to at the site level:

	Drafts	Approved	Archived
<b>App Administrators</b> (Site Owners)	All (Full Control)	All (Full Control)	All (Full Control)
<b>Policy Owners</b> (Site Members)	Limited* (Full Control)	All (Read Only)	All (Read Only)
<b>Policy Reviewers</b> (Site Visitors)	Limited** (Contribute)	All (Read Only)	All (Read Only)

\* Policy Owners (Site Members) only have access to policies in the Draft Policies library for which they are the Owner.

\*\* Policy Reviewers (Site Visitors) only have access to the policies in the Draft Policies library that they have been assigned a review task.

### *Read and Edit Groups*

There are two optional fields for each Policy Owner: Read Group and Edit Group. As mentioned earlier, when a Policy is in the Drafts library, in

In addition to App Administrators (site owners), only the assigned Policy Owner and those who have been asked to review the Policy have access to the Policy.

You can expand the number of users who have access to policies that a Policy Owner is assigned by using the Policy Owner's Read and Edit groups.

These groups must be defined in *Site Settings > Users and Permissions > People and Groups* for the site that the App is in before they can be added to a Policy Owner. A "Read Group" should be set up with Read and View Only permissions. An "Edit Group" should be set up with Edit permissions.

You can set these groups up in any way that you would like. For instance, you may choose to setup just two groups—one Read and one Edit—and then assign them to each Owner. Or you may elect to setup a unique group for each Owner.

## Review Groups


A Review Group is a list of users who you want to weigh in on the review process for a Policy. For instance, you may elect to create a "Compliance Review Group" and list all the users who you want to comment on a compliance policy during a review process.

A Review Group can be assigned to a Policy and, then, when a Review is started for the Policy the assigned Review Group will be set as the default

review Group for the review. When you start the review, individual tasks and emails will be sent to each user in the Review Group.

A Review Group must be defined in *Site Settings > Users and Permissions > People and Groups* for the site that the App is in before it can be added to the list of Review Groups.

To add a group to the list of possible Review Groups:


- Click on the Review Groups link
- Click  new item
- Enter the group name
- Click Save

## Publication Sites

Publication Sites are sites that are available in the Publish workflow. These are sites that you have setup within the same Site Collection as the Access Policies sp Manager app that you will use to host policies for employee access. (Policies are managed in the Access Policies sp Manager app, but made available to employees in the Publication Sites.)

You may publish a Policy to more than one Publication Site; however, the Policy Overview page will only show the site to which you last published. Additional published sites can be viewed by clicking the View History link on the same page.

To add a site to the list of possible Publication Sites:

- Click on the Publication Site link
- Click  new item
- Enter the name that you want the site to be known as (or is known as)



- Enter the URL for the site
- Click Find
- Select the appropriate library for the Policies within the site
- Click Add


## Categories

Category is a property of a Policy. Access Policies sp Manager has default categories that include:

- Administrative
- Government Operations
- Human Resources
- Information Security
- Legal
- Regulatory Compliance

You may add to or delete items from the list.

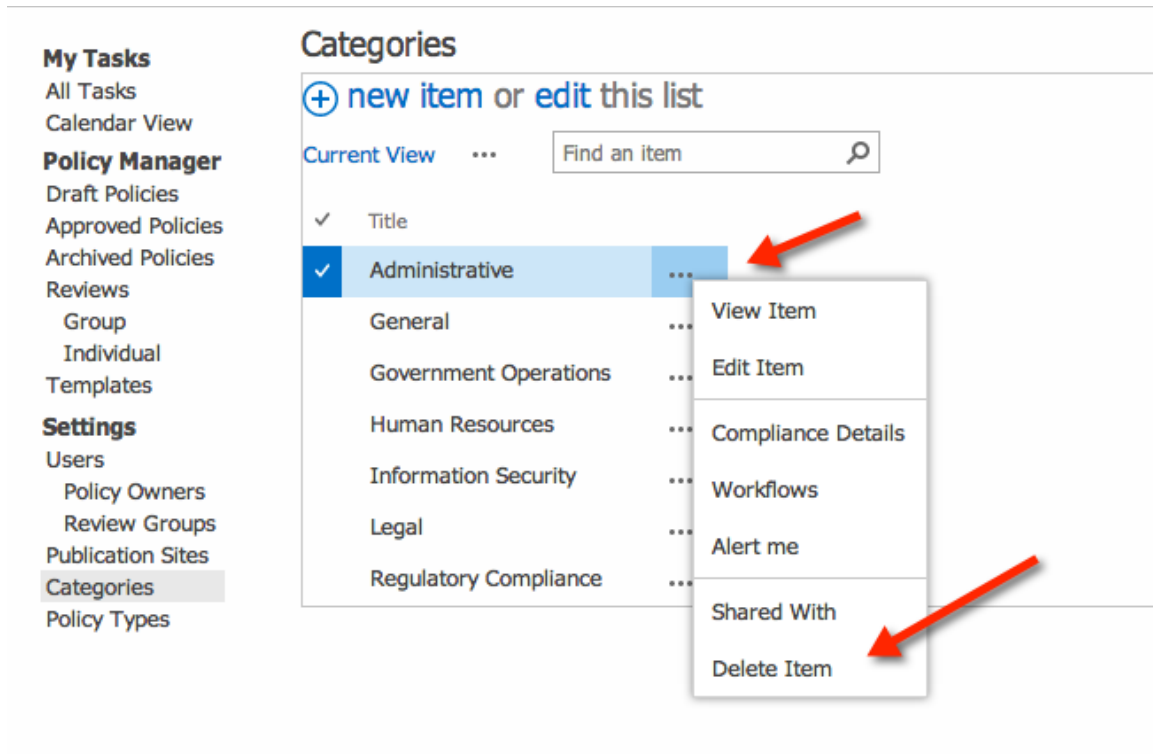
To add a category to the list:

- Click on the Categories link
- Click  new item
- Enter the name of the Category
- Click Save

To delete an item for the list:

- Click on the Categories link
- Click on the ellipsis (...) next to the item that you want to delete

- Click Delete Item
- Click OK to send the item to the site recycle bin.




## Policy Types

Policy Type is a property of a Policy. Access Policies sp Manager has default policy types that include:

- Policy
- Procedure
- Guidance
- Other

You may add to or delete items from the list.

To add a policy type to the list:

- Click on the Policy Types link
- Click  new item
- Enter the name of the Policy Type
- Click Save

To delete an item for the list:

- Click on the Policy Types link
- Click on the ellipsis (...) next to the item that you want to delete
- Click Delete Item
- Click OK to send the item to the site recycle bin.

(See graphic above in Categories for a similar screen shot.)