

# Administration Module

## Admin Module: Customized Rights

**Customized Rights** allow system administrators to grant extremely fine-grained permissions to users whose profile permissions are set to Customized Rights in the User Profile tab of the Users screen. **IMPORTANT:** if Customized Rights are used, a user will **not** have access to a project **unless** they are a member of **at least one group and one profile** for that particular project.

Customized rights in Delta are granted in two ways: project data permissions are handled by **user groups**, and system permissions are handled by **user profiles**.

**User groups** are used to assign fine-grained permissions to the project data. A best practice is to create user groups for users with similar tasks or roles, for example, who require similar levels of access.

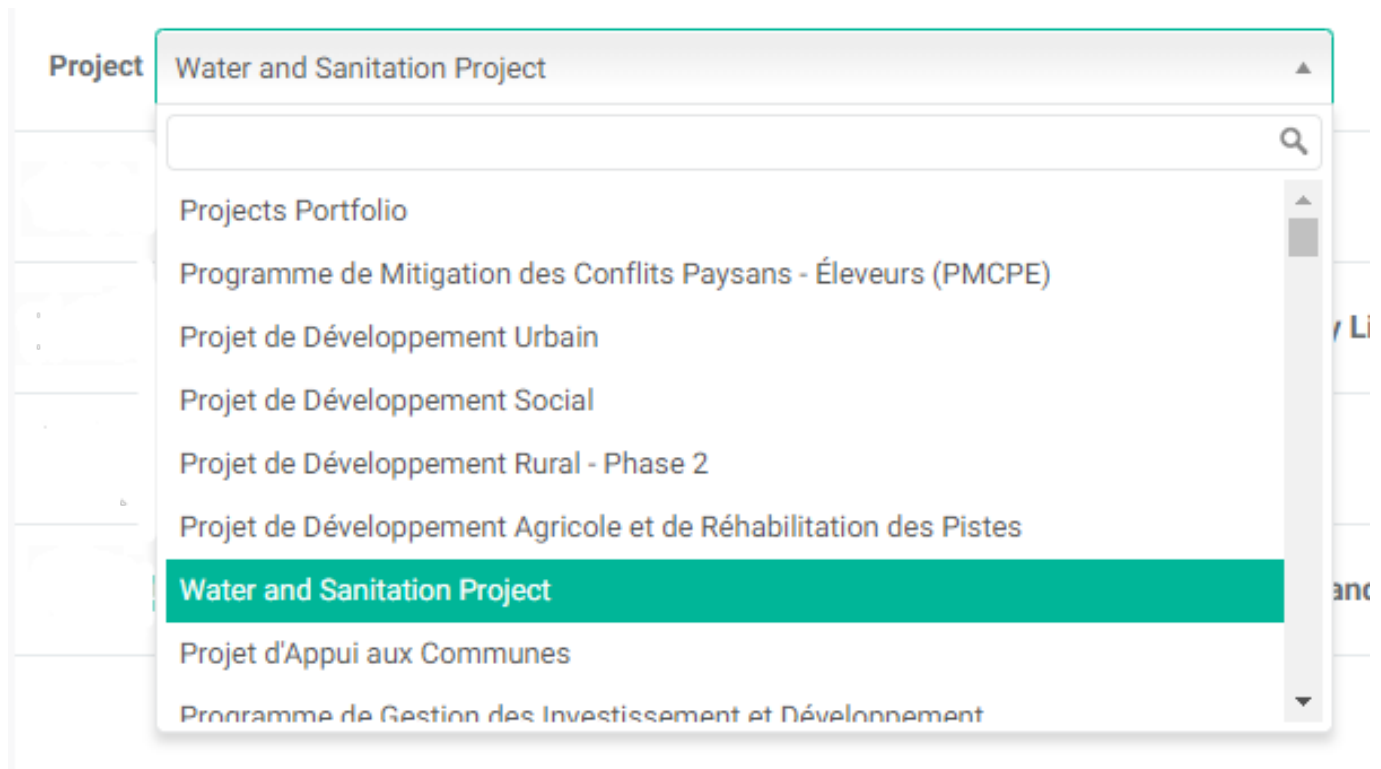
The screenshot displays the Delta Administration interface. The top navigation bar includes the Delta logo, 'PROJECTS PORTFOLIO', and user icons. The left sidebar contains navigation links: Home, Settings, Proj. Mgmt, Log frame, Data Collect, Dashboards, Learning, and Admin. The main content area is titled 'Administration' and features a sub-navigation bar with 'Users', 'Customized rights' (highlighted with a red box), 'Audit Trail', 'Deleted Items', and 'Security'. Below this, there are tabs for 'Groups' and 'Profiles' (both highlighted with red boxes). A 'Project' dropdown menu is set to 'Water and Sanitation Project', and a search bar is present. The main table lists four user groups with their respective permissions:

| Group Name             | Permissions                                                                                  | Actions      |
|------------------------|----------------------------------------------------------------------------------------------|--------------|
| ALL_ACCESS             | Group has access to the whole project's data                                                 | Edit, Delete |
| GEOLOGIST - 11 BUNGOMA | Users in this group only have access to 11. Bungoma data in the Geography List.              | Edit, Delete |
| NEW GROUP              | This group can only view.                                                                    | Edit, Delete |
| DATA COLLECTION        | Users in this group are assigned to data collection, verification, validation, and approval. | Edit, Delete |

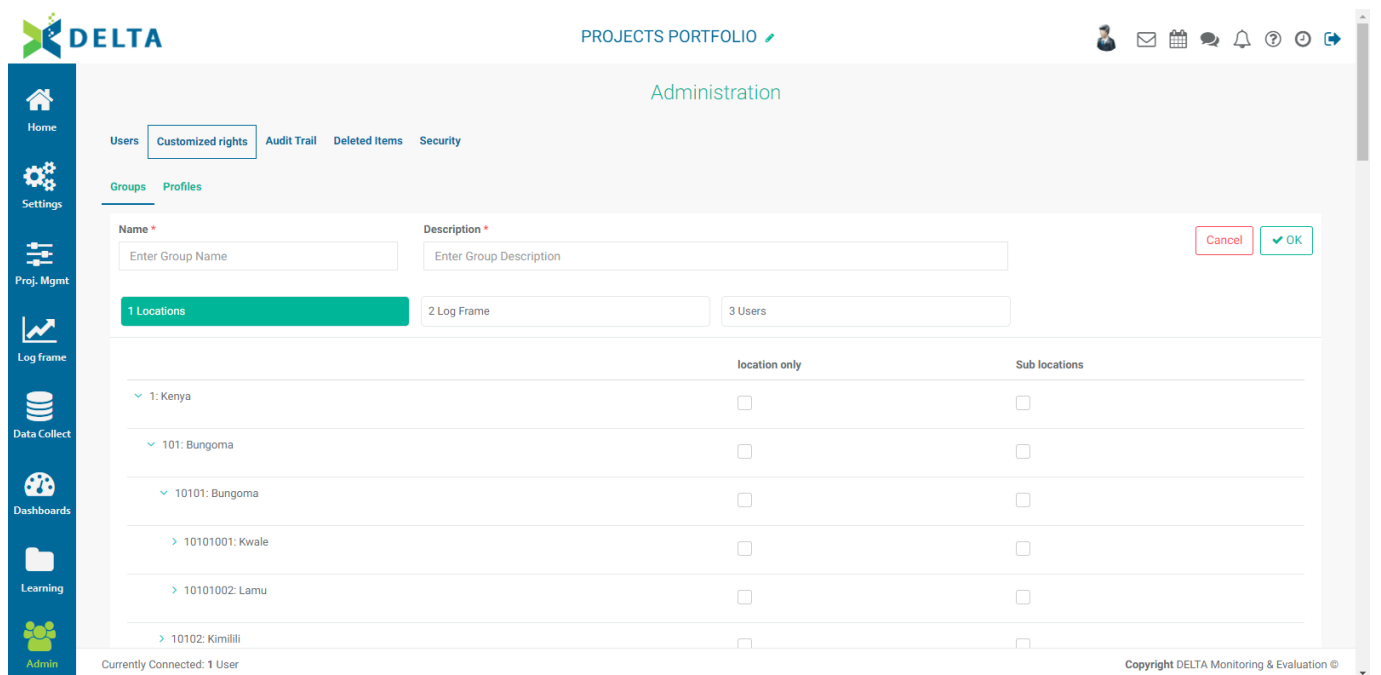
At the bottom, it shows 'Currently Connected: 1 User' and a copyright notice: 'Copyright DELTA Monitoring & Evaluation ©'.

To create a user group, you must first select the project for which you want to apply the permissions. Click the Project picklist and make your selection from the project list.

# Administration Module



Click the +Add button at the top right of the Customized Rights screen. The first tab of the Group definition screen is Locations.



Enter a **name** and a **description** for the user group. A good description should include a summary of the permissions. The summary appears on the Groups list screen and makes it easier to locate a user group in the list.

The **Locations** appear on the left. You can assign permissions at any level of geography (Location Only), and choose to include access to sub-levels in the Geography List (Sub Location). Note that unless you explicitly grant a specific permission by checking a box, the members of the group will have no access to those items' data.



# Administration Module

DELTA PROJECTS PORTFOLIO

Administration

Users Customized rights Audit Trail Deleted Items Security

Groups Profiles

Name \* Description \*

Enter Group Name Enter Group Description

1 Locations 2 Log Frame 3 Users

☐ All (\*)

Guinko François TRAORE Marie Jeanne Coulibaly Bass Mamadou Kantalou Stephane BERNARD KOUASSI 1 Test

OMC Consultant Ouattara Myriam Coulibaly Bass SISSAO Test

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Click OK to save your work and return to the Groups page. The new user group appears in the list, along with its description.

Administration

Users Customized rights Audit Trail Deleted Items Security

Groups Profiles

Project Water and Sanitation Project Search + Add

STAFF Project staff

To edit a user group, click its Edit icon. Note that the name of the user group is not editable once it's been created and saved. To delete a user group, click its Delete icon.

**User Profiles** are used to assign fine-grained permissions to the system itself. A best practice is to create profiles for users with similar roles. Profiles are an effective way to ensure that users can only use the modules of Delta to which they should have access.

# Administration Module

DELTA PROJECTS PORTFOLIO

Administration

Users Customized rights Audit Trail Deleted Items Security

Groups Profiles

Project Water and Sanitation Project Search + Add

**Viewers or Observers**  
Users with this profile cannot update data. View only.

**Editors**  
Users with this profile can view and edit data, but cannot delete data.

**Data Collection**  
Users with this profile can be assigned data collection tasks, including verification, validation, and approval

**Full access**  
l'utilisateur a accès à tous les menus

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To create a user profile, you must first select the project for which you want to apply the permissions. Click the Project picklist and make your selection from the project list.

Project Water and Sanitation Project

Projects Portfolio

Programme de Mitigation des Conflits Paysans - Éleveurs (PMCPE)

Projet de Développement Urbain

Projet de Développement Social

Projet de Développement Rural - Phase 2

Projet de Développement Agricole et de Réhabilitation des Pistes

**Water and Sanitation Project**

Projet d'Appui aux Communes

Programme de Gestion des Investissement et Développement

Click the +Add button at upper right of the Profiles screen to enter the Profile Definition screen.

# Administration Module

DELTA PROJECTS PORTFOLIO

Administration

Users Customized rights Audit Trail Deleted Items Security

Groups Profiles

Profile: Enter profile name Description:

Cancel OK

Permissions Users

| Function           | View                     | Edit                     | Delete                   |
|--------------------|--------------------------|--------------------------|--------------------------|
| Settings           |                          |                          |                          |
| Log Frame          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Stakeholders       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Budget Categories  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Units of measure   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| KPI Disaggregation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Flag               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Alerts             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Project Management |                          |                          |                          |

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Note that the categories on the left are the modules of Delta, corresponding to the Delta navigation bar on the far left of the screen. User profiles allow the system administrator to hide entire functions and modules of Delta from users. Note also that the Admin module does not appear at all, since only superusers have access to it, and the module will be invisible to regular users.

Enter a profile name and a short description. A good description should include a summary of the permissions. The summary appears on the User Profile list screen and makes it easier to locate a user profile in the list.

Select the items for which this user profile will grant access. **NOTE:** unless you explicitly grant a specific permission by checking a box, the members of the user profile will have no access to those modules and functions.

DELTA PROJECTS PORTFOLIO

Administration

Users Customized rights Audit Trail Deleted Items Security

Groups Profiles

Settings

| Function               | View                                | Edit                                | Delete                   |
|------------------------|-------------------------------------|-------------------------------------|--------------------------|
| Settings               |                                     |                                     |                          |
| Log Frame              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Stakeholders           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Budget Categories      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Units of measure       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| KPI Disaggregation     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Flag                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Alerts                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Project Management     |                                     |                                     |                          |
| Activity Plan & Budget | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Funds Disbursement     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Project Timeline       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |
| Log Frame              |                                     |                                     |                          |
| Indicators (KPIs)      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

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When you're done, click the Users tab. Click All to select all users, or click on a user tile to select the user. Selected users are highlighted. Please note that superusers will not appear on this screen, since they have global permissions for everything in the system by virtue of their status as superusers.

# Administration Module

DELTA PROJECTS PORTFOLIO

Administration

Users Customized rights Audit Trail Deleted Items Security

Groups Profiles

Profile: Enter profile name Description: Cancel OK

Permissions Users

☐ All (\*)

Guinko François TRAORE Marie Jeanne Coulibaly Bass Mamadou Kantelou Stephane BERNARD KOUASSI 1 Test

OMC Consultant Ouattara Myriam Coulibaly Bass SISSAO Test

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Click OK to save your work and return to the Profiles screen. The new profile appears in the list, along with its description.

To edit a profile, click its Edit icon. To delete a profile, click on its Delete icon.

**NOTE:** Permissions for Data Collection Forms are handled in the Data Collection module. Forms are a special case for permissions, and the only Forms permission that can be granted in the Admin module is View.

Previous: [Admin Module: Users](#) | Next: [Admin Module: Audit Trail](#)

Unique solution ID: #1026

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