Quick Start Guide
for Setting up New Users

SHARE

To set up BALANCE*hub*-only users:
Apply Steps A and B for BALANCE*hub*, then continue with Steps E–J.

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Step A: Add Users to BALANCE*works* Applications

Note: By adding users to BALANCE*works*, access can be granted to multiple applications at the same time, or other applications can be easily turned on in the future.

1. Navigate to **BALANCE*works***.
   a. Choose **System Tools** from the *page header.*
   b. Click the **Security / User Management** link.
2. From the Manage Users screen, click the **Add** button.
3. Enter the Email Address for each user to serve as the user's login ID.

   Caution: Only one user per email address can be added to BALANCE*works*.
4. Enter the user's First Name, Last Name, and Phone Number.
5. Check off one or both of the following:
   - **BALANCE*aap***
   - **BALANCE*hub***
6. Click **Save**.

Other Tools

Edit the User

1. Click the user's Email Address entry.
2. On the **Add User** page, update the fields as appropriate
3. Click **Save**.

Deactivate the User

From the **Add User** page, uncheck the Active box to revoke the user's access, while retaining the user ID in the system.

Associate an Existing User with a new Email Address

1. Deactivate the existing user (as described directly above).
2. Add the user to BALANCE*works* and applications (as described in Step A above).

Step B: Define Profiles for Users

About Profiles and Profile Management

Profiles permit groups of users to perform functions in BALANCE*aap* and BALANCE*hub*. Some Profiles will come standard with your installation, and these will often meet the needs of your organization. However, existing Profiles can be edited, or custom Profiles may be created.

Once Profiles are saved here, they can be assigned to users (as described in the next section).

Review and Edit Profiles

1. Enter either **BALANCE*aap*** or **BALANCE*hub***.

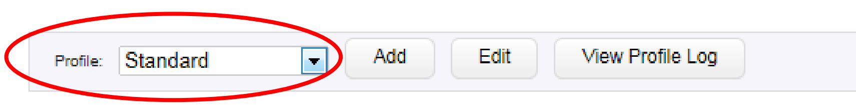
2. From the page header, choose **System Tools.** Then select **Security / Profile Management.**

3. Access the following tabs:

   a. For BALANCE*aap*, access **BALANCE*aap*** tab, and the **Plan Profiles** sub-tab.

   b. For BALANCE*hub* profiles, access the **BALANCE*hub*** tab.

4. A **Profile** drop-down in the *tab header* will be preloaded with available options.



5. Review the displayed Profile, or select a different one from the Profile drop-down.

   a. Using the Profile Options menu, the displayed Profile can be set as the default by checking the box. The default is applied when a new user is added.

   Note: Only one Profile can be the default.

b. For the displayed Profile, a table shows the available software features by Program Module and Function. The Access Level that is currently in place for the feature is shown in the right-hand column.

Example: For BALANCE*aap*, permission to set Availability options has been turned on:

Program Module	Function	Access Level
Availability	Advanced	Read/Write
Availability	External Availability	Read/Write
Availability	Factor Weights	Read/Write

6. Click the **Edit** button, and the settings will convert to drop-downs.

Example: A menu of drop-downs for a BALANCE*hub* Profile:

Reach View Reports	None
Reach View Sources	None
Run Summaries	None
View Dashboard	None
View Plan Overview	Read/Write
View Reports	Read/Write

7. Click **Save** to apply any new settings to the Profile.

(Optional) Add a Custom Profile

1. From the Profile *toolbar*, select the **Add** button.
2. Enter a Profile Name.
    a. Check off whether this profile will be the default when a new user is added.

    Note: Review all the profiles to determine which one should be the default.
3. Use the Profile Functions menu (as described above) to define the Profile.
4. Click **Save**.

The Profile is added to the *toolbar* drop-down.

Step C: Assign BALANCE*aap* Profile by User

From the BALANCE*aap* or BALANCE*hub page header:*

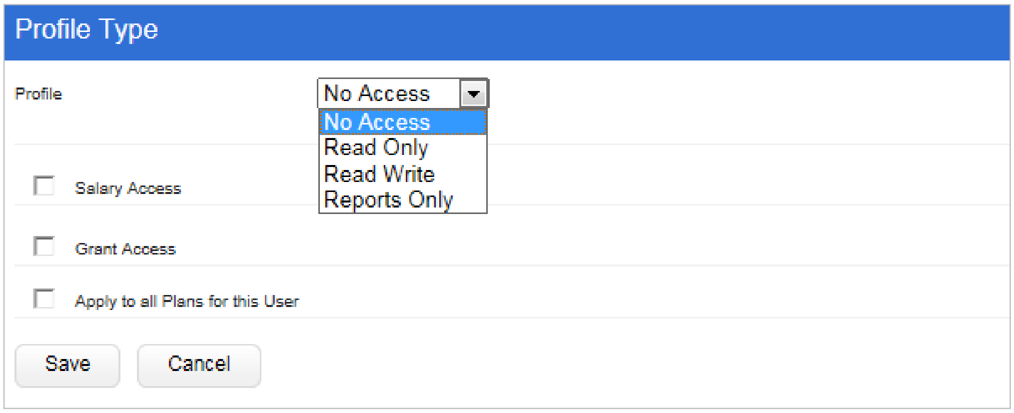
1. Enter System Tools > Security / User Management.
2. Click the **BALANCE*aap*** tab.
3. On the **Users** sub-tab, verify that the new users, added during Step A, are included.

   Quick Tip: If you are unsure whether a person is listed as current BALANCE*works* user, enter part of the name into the Search field, and click **Search**.

4. For the particular user, review the entry in the AAP Permission column, which will be set to the default (as selected during Step B). To change the setting, click the provided **[AAP Permission]** link.
   a. From the Permission drop-down, select a different Profile.
   b. Click **Update**.
5. Remain on the **BALANCE*aap*** tab, and proceed to Step D (described next).

Step D: Assign a BALANCE*aap* Plan to the User

1. From the **User Management** > **BALANCE*aap*** tab, select the **Plan Access** sub-tab.
   a. Select to view the **Plan Access** sub-tab: By User.
   b. Select the user (by Email Address) from the provided drop-down.
2. The available AAPs will display by Company, Establishment, and Plan Name.
   The default Profile will display as: **No Access.** If this is correct, you can retain the setting. To change the setting, click the **No Access** link.
   a. Select an access level for the user from the drop-down:
      - **Read Only**—The user may view plan information, but cannot make any changes.
      - **Read Write**—The user will have full access to view and edit the plan.
      - **Reports Only**—The user's permission will be limited to viewing plan reports.



b. If applicable, check the box for: Apply to all Plans for this User. (This may be edited later, as described in the box below.)

c. If the user will be allowed to give access permission to other users, check the box for: Grant Access.

d. Click **Save**.

3. If you would like to assign permissions in BALANCE*hub* at this time, proceed to Step E on the next page.

Note Regarding Access to Master Plans and Sub-plans

Grant access for each plan separately, as the right to access a sub-plan is not connected with the right to access a Master Plan.

Step E: Define BALANCE*hub* Publish Groups

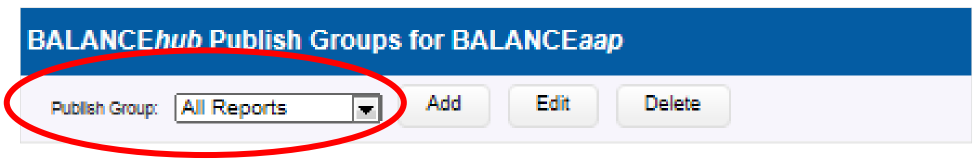
About Publish Groups

Publish Groups are used by BALANCE*hub* to control what reports your audiences will be able to see. Some Publish Groups will come with your installation. Any existing groups may be edited, or custom groups may be defined by the plan owner or a BALANCE*hub* Administrator.

Review and Edit Publish Groups

1. From within **BALANCE*hub*,** open the **Systems Tools** menu. Under **BALANCE*aap*,** click **Publish Groups.**

2. The *upper toolbar* will display a drop-down that lists existing Publish Groups.



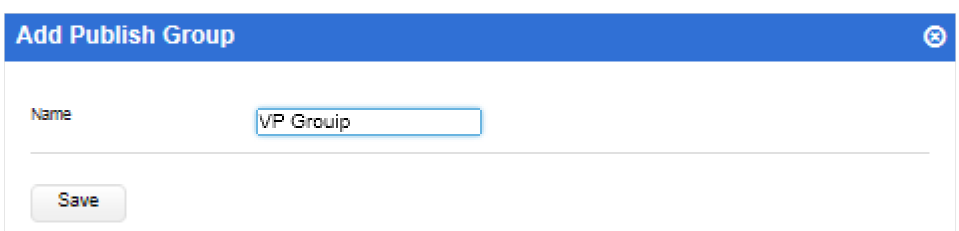
3. Attributes for the displayed Publish Group will be listed on the screen. Select a different one to review that group's attributes.

4. Click **Edit** (the middle button shown above) to make changes to an existing Publish Group.

5. When the settings are satisfactory, click **Save**.

(Optional) Add a Custom Publish Group

1. To add a Publish Group to the drop-down, click **Add**.
2. On the Add Publish Group menu, enter a Name, and click **Save**, which returns you to the main page.



Example (above): A custom Publish Group is named "VP Group" to indicate a group of department heads.

3. Next, check to box for one or both of the following options:

- Set the group as: Default Publish Group

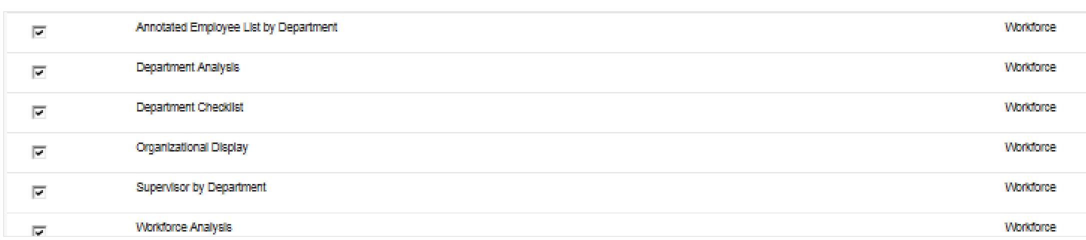
  Note: Only one may be chosen as the default. The default is used when a new user is added by means of **BALANCE*hub* > User Management.**

- Allow: Salary Access

4. Using the Publish Groups Reports menu, check off the reports to be made available to the Publish Group in BALANCE*hub*.

   Note: The reports are shown on this menu in order of the Report Group, which is indicated in the right-hand column. Report Groups were defined previously in Step D.

Example (below): Reports in the Workforce Report Group are checked off:



Step F: Assign BALANCE*hub* Profile by User

1. Select **System Tools > Security / User Management** from the **BALANCE*aap*** or **BALANCE*hub*** *page header*.
2. Click the **BALANCE*hub*** tab.
3. Choose the **Users** sub-tab, and verify that the new users, added during Step A, are included.
4. For the particular user, review the default HUB Permission entry (as determined in Step B). You may retain this setting if it applies.

   To change the setting, click the **[HUB Permission]** entry.

   a. From the provided drop-down, select the appropriate HUB Permission. Typical options include: Admin(istrator), Standard, Reports Only, No Access, and REACH Only.
   b. Click **Update**.
5. Remain in **User Management > BALANCE*hub*** for the next step.

Step G: Add User to Publish Group by Plan

> ***Cross-reference:*** This task may also be accomplished from within an existing BALANCE*aap* plan, as described at the end of this document.

1. From the **BALANCE*hub*** tab, navigate to the **Plan Access** sub-tab.
2. From the Plan menu, choose: Company, Establishment, and Plan.
3. Click the **Add** button from the *lower toolbar*.
4. On the Add User menu, enter an Email Address, which will auto-fill the First Name and Last Name fields.
5. Select a Publish Group from the provided drop-down.
6. Click **Save**.

Step H: Arrange SHARE/Select Reports Menu

About Report Groups

The elective settings for Report Groups are used to control what reports will display on the **Select Reports** screen, how they are grouped, and the order of their display.

> *Cross-reference:* For an example of how the user will see the **Select Reports** display, review the screenshot on the next page.

Review and Edit Existing Report Groups

1. If you are not currently in BALANCE*hub*, choose the application's icon from the **Applications** menu in the *page header*.

2. Select **Systems Tools > BALANCE*aap* / Report Groups** to display the **Report Groups** tab.

3. The drop-down in the *upper toolbar* will display the first available Report Group. Review the components of this group, or select another one.

   a. The Reports list for the displayed Report Group will indicated by check mark.

   b. Check (or uncheck) reports to include (or exclude).

   c. When the settings are satisfactory, click **Save**.

4. Choose **Edit** from the *toolbar* to make changes to the Name for existing Report Group.

   a. Enter a new Name.

   b. Click **Save**, which is located below the list of reports.

(Optional) Add a Custom Report Group

1. To add a Report Group to the drop-down, click **Add**.
2. On the Add Report Group menu, enter a Name, and click **Save**, which returns you to the main page.
3. Check off the reports to include in the Report Group.
4. Click **Save**.

Arrange the Order of Report Groups

1. Remain in, or access, **BALANCE*hub* > Systems Tools > BALANCE*aap* / Report Groups**.

2. Select the **Order Report Groups** tab.

3. Highlight the bar for an Existing Report Group. Use the **Move up/Down** arrows on the right side of the bar to move the Report Group to a different location.

4. When the order is satisfactory, click the **Save** button.

   Quick Tip: A quick link to **Order Reports**, the next step, is available in each Report Group bar.

Arrange the Order of Reports in the Group

1. Remain in, or access **BALANCE*hub* > Systems Tools > BALANCE*aap* / Report Groups**.

2. Access the **Order Reports** tab.

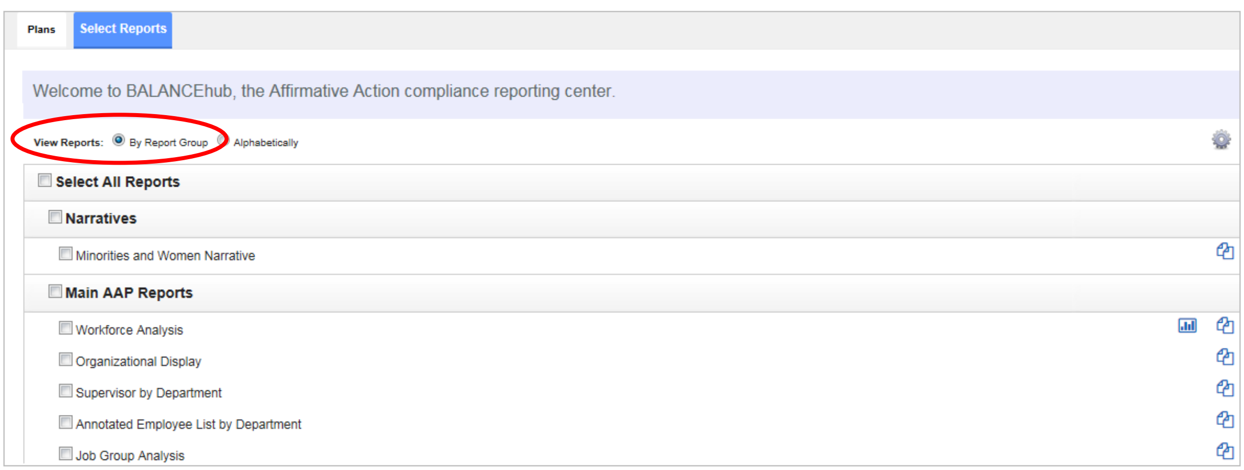
   OR

   Use the **Order Reports** quick link on the **Order Report Groups** tab.

3. Highlight the bar for an existing Report Name. Use the **Move up/Down** arrows on the right side of the bar to move the report to a different location.

4. When the order is satisfactory, click the **Save** button.

Example: Select Reports Menu, By Report Group View



Step J: Turn on BALANCE*hub* Access in Plan

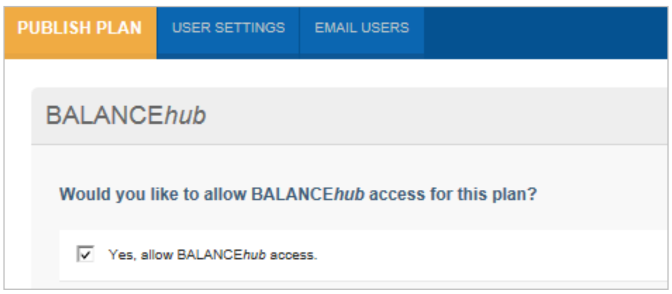
1. Open the desired plan in **BALANCE*aap*.**

   Quick Tip: Make sure the plan is completed before turning on access for BALANCE*hub* viewers.

2. Click **Reports > BALANCE*hub* Settings**.

3. Select the **Publish Plan** tab.

4. Check the box to: Yes, allow BALANCE*hub* access.

   Uncheck the box to deactivate access.

5. Click **Save**.

Quick Tip: For owners or Administrators of single plans, a BALANCE*hub* user may be added to a plan's Publish Group from within the plan. As an alternative to Step G, follow the instructions in the box below.

Add a BALANCE*hub* User to a Plan's Publish Group

1. From an existing **BALANCE*aap*** plan. Use the *side navigation menu* to access **Reports > BALANCE*hub* Settings**.
2. Select the **User Settings** tab.

3. Select the view that organizes the display: By User or By Plan.
4. Proceed to add the BALANCE*hub* user to that plan and select the associated Publish Group.

Note Regarding a Master Plan and Sub-plans

BALANCE*hub* users for a Master Plan or its sub-plans can be managed from **System Tools** or within the Master Plan only.