How to setup Class Restrictions

For any higher level access within CPOMS each user would require a Soft Key.

The Soft Key can then be restricted to allow access to a certain Year Group/ Tutor Group only, and to only view certain categories/ types of incidents.

To setup Class Restrictions please follow the below instructions (Admin key holders only):

**N.B please ensure that when turning on class restrictions that all pupils belong to a group of that type, i.e. if you turn on class restrictions by house, that all pupils belong to a house.**

**Step 1 – Switch on Group Restrictions**

To switch on Group Restrictions, firstly please access the ‘Admin’ area > ‘Groups’ tab.

At the top of the page you will have options to restrict by different groups, tick the relevant option that you would like to restrict by, i.e. Tutor Group or Year Group, by clicking on the name and then ticking the ‘Restrict access’ check box.

(Screenshot below)
Step 2 – Choose who should be able to access each Group/Class

Once you have ticked to restrict access, you will have an extra option to ‘Edit’ next to each group name.

Click on ‘Edit’ next to each group/class and choose who should be able to access each grouping by moving their name from the left-hand side ‘These users will not be able to see students in this class’, to the right-hand side ‘These users will be able to see students in this class’ and ‘Save Group’. You will need to follow this process for each grouping/class.

The double arrow will move all users that match your search criteria, i.e. if you search by user group name ‘SLT’ for example.

The single arrow will move the selected user only, i.e. if you search and click on their specific name.

(Screenshot below)
Step 3 – Choose which categories and permissions the Users should have access to

The permissions for each user are set by the User Group they are placed in. You can check and amend your User Groups within the ‘Admin’ area > ‘Users’ tab by clicking into an existing User Group name, or choose ‘New Group’ to create a brand new one.

Once you have clicked into the User Group name, you will see a list of your categories, and tick boxes for the following Category Permissions:

- **View Students** – would you like the users in this group to be able to **view students monitored** for this category
- **View Incidents** – would you like the users in this group to be able to **view the incident details** for this category
- **Add Incidents** – would you like the users in this group to be able to **add new incidents** to this category

(Screenshot below)
Further down the page you will see further tick boxes for ‘System Permissions’, these are:-

<table>
<thead>
<tr>
<th>System Permissions</th>
<th>General</th>
<th>Reporting</th>
<th>Administration</th>
<th>Planner</th>
<th>Files</th>
<th>Library</th>
<th>User Group</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>View students list</td>
<td>Run reports</td>
<td>Manage system</td>
<td>View calendar</td>
<td>View files</td>
<td>View files</td>
<td>Save User Group</td>
</tr>
<tr>
<td></td>
<td>View student details</td>
<td>Share saved reports</td>
<td>Edit own user settings</td>
<td>Add events</td>
<td>Add files</td>
<td>Add files</td>
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<td></td>
<td>Edit incidents</td>
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<td>View student information</td>
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<td>Add new investigation</td>
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<td>View audits</td>
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Under **General**, please tick:-

- **View Student List** – To allow the user to click into the class structure from the main dashboard
- **View Student Details** – To allow the user to access a student’s profile
- **Add new Incident/ Action** – To allow the user to add incidents and actions to your CPOMS system

Other permissions you may wish to allow for the user group are:-

- Reporting > Run Reports
- Planner
- Files
- And Library

**Administration privileges should only ever be given to senior members of staff.**

Once you are happy with the permissions set, please click ‘Save User Group’.
Step 4 - Check the users are in the correct User Group

Now that you have set the correct permissions for the user group, please ensure that the relevant staff are in the correct user group.

Under ‘Admin’ > ‘Users’ you can sort your user list by ‘User Group’ to quickly see who is in which group by clicking on the title ‘Group’ and scrolling through your list.

(Screenshot below)

If you need to adjust a users user group, please click on their name (into their profile), and to the left ‘Permissions’. You can then select the relevant User Group from the drop-down list, and ‘Save’.

Step 5 – Ask the users to setup a Soft Key.

Please ask each user to create a soft key, by following the ‘CPOMS Help Sheet – Soft Key Setup’ on their own device.

For help on setting up any of the above please do not hesitate to contact us for assistance on 0845 345 1155 or ServicePoint@cpoms.co.uk.