Setting up Class Restrictions in CPOMS

For any type of higher-level access in CPOMS, each user would require a **'Soft Key'**, using an **Authenticator App.**

Access can then be restricted to allow access to a certain Year Group/ Tutor Group only, and to only view certain categories/ types of incidents by setting their User Group permissions.

To setup Class Restrictions please follow the below instructions. This can be setup by an **Admin Key Holder in school only**:-
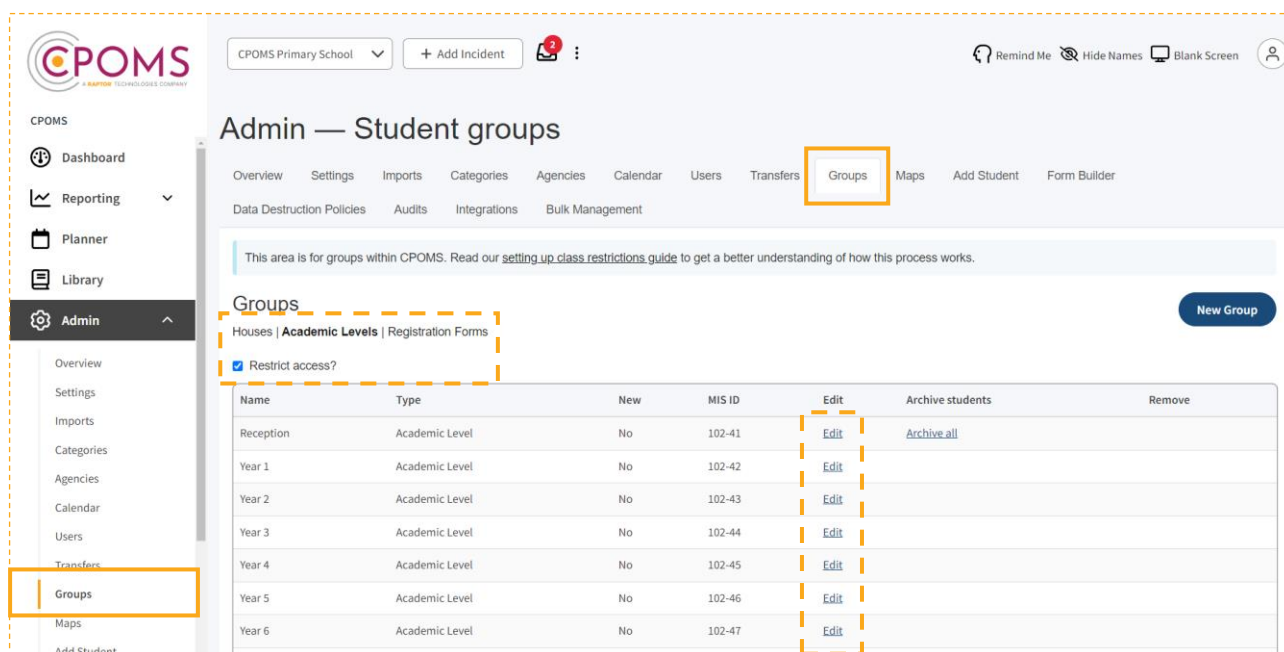
> *When switching on class restrictions, please ensure that all pupils belong to a group of that type, i.e. if you switch on class restrictions by house, that all pupils belong to a house.*

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 groupings, tick the relevant option that you would like to restrict by, *i.e. Tutor Group or Year Group*, by clicking on the group name and then ticking the **'Restrict access?'** check box.

We recommend that you only tick to restrict by one group, as they can counteract one another.

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. <u>Please remember to also move across any existing key holders</u> *i.e. your SLT/ Safeguarding team.*

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.


Please note, a user can only see a student's profile, if they have access to <u>all</u> of the groups that the student belongs to (if more than one).

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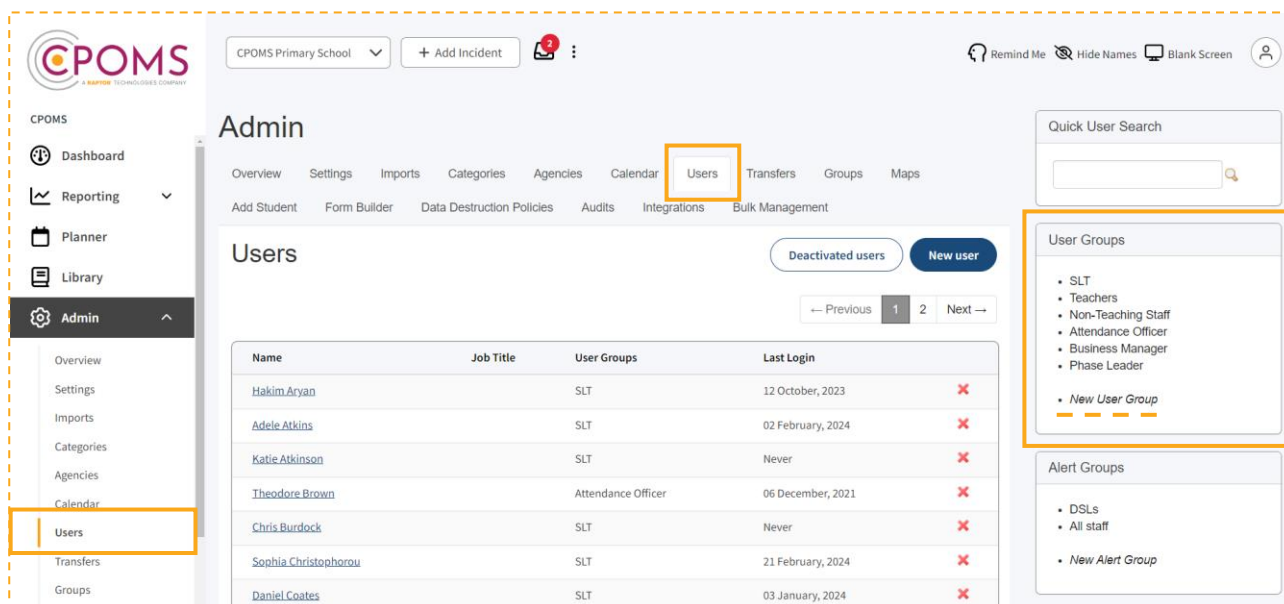
Once you have clicked into the User Group name, you will see a list of your categories, and tick boxes for the following **Category Permissions:-**

View Students	View Incidents	Add Incidents
This permission allows users in the group to see if a student is 'monitored' for this category.	This permission allows users in the group to view incidents assigned to this category.	This permission allows users in the group to add new incidents to this category.

Set the category permissions for this group by ticking the relevant boxes against each of your category names.

Further down the page you will see further tick boxes for **System Permissions**:-

Under **General,** we recommend you 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**
- 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 this 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 'User Groups' and scrolling through your list.

Name	Job Title	User Groups ▲	Last Login

If you need to adjust a user's user group, please click on their name (into their profile) and the **'Permissions'** tab. You can then select the relevant User Group from the drop-down list, and **'Save details'.**

Step 5 – Ask each User to create a 'Key', using an Authenticator App

For higher-level access in CPOMS, each user will require a 'Soft Key' for Two-Factor Authentication via an Authenticator App.

Please ask them to set up an Authenticator App. Setup instructions are provided below:-

- [Microsoft Authenticator App – Setup Instructions](#)
- [Google Authenticator App – Setup Instructions.](#)

Please note that other authenticator apps can also be used as alternatives, if needed.

For further assistance on any of the above please do not hesitate to contact us on
01756 797766 or **support@cpoms.co.uk**.

www.cpoms.co.uk