

FOCUS – User Groups and Permissions Matrix

Glossary

CLTA	Contractually Limited Term Appointment
custom field	a new field (not fed from HRIS) created by a user with <u>manage data</u> feature rights
custom record	a profile of a person whose record was not fed from HRIS. Department users with <u>manage data</u> feature rights can create custom records.
faculty	clinicians and non-clinicians with appointment(s) in the FoM
feature rights	permission to use specific functions or see specific groups
FoM	Temerty Faculty of Medicine
FWU	Faculty Wide Unit – with specific criteria, allows access to faculty records and, if granted, staff records, from all departments in the FoM
HRIS Restricted Data	Data to which access must be explicitly granted to an individual user (Birth Date, Personnel Number, Nationality, Start Date, Permanent residence (home address), UTORid)
OUA	Other University Appointments – a container in FOCUS for FoM faculty records
Pnum	personnel number
Sensitive	refers to the custom field setting “Sensitive”- controls visibility of the field values in custom fields
staff	non-faculty employees (ie. PM, USW, CUPE, Casual, Teaching Assistants, Research Associates)
User Session Log	FOCUS login activity records for a department or FWU of user accounts that logged in, date and time of login, and their IP addresses

User Types

There are five user types. A user can be assigned to only one of them.

- Basic user (this is the default, it does not show an icon in FOCUS)
- FoM Contact List (this is a faculty wide unit account with very limited information access)
- Dept Admin
- HR Admin
- Sys Admin

Each of these user groups are assigned a set of default feature rights (rights to use or see specific functions) and more feature rights can be added individually.

Default Access and Feature Rights: (Automatically granted to all User Types except for FoM Contact List Users)

- All faculty within the applied department or FWU
- The data inside the Other University Appointments container
- Medic Specialty
- The data inside the Appointment Details container (This includes Job, Job Description (job level may be indicated), Payroll (interval), Work Contract)
- Grad Appt
- Contract Elements
- Career Progress

- Actions
- Tenure and Rank
- Post Secondary
- Prof Designation
- Awards
- First Name, Last Name, Office Address, Telephone and Email
- End Date
- Custom records

Additional Access and Feature Rights: (may be a default for a User Type or explicitly granted to an individual user (see table below))

1. View Faculty records (End Date field is visible)
2. View Staff records (End Date field is visible)
3. View all HRIS Restricted Data (includes: Birth Date, Pnum, UTORid, Nationality, Start Date, Permanent residence)
4. View HRIS Restricted Data but limit to UTORid
5. View HRIS Restricted Data but limit to Pnum
6. Send Email
7. Assign Sensitive, Edit, Staff, Email, or Manage Data
8. Assign Dept Admin role
9. Assign HR Admin role
10. Assign FoM Contact List role
11. Assign HRIS Restricted Data Access, UTORid, Pnum
12. Manage Data (when this right is granted, items 13-20 are also granted)
13. View User Session Log (Basic users (if granted this right) can only see login session records for their own account; Dept Admins can see login session records for all users from their dept or FWU; HR Admins (if granted this right) can see login session records for all users across all depts and FWUs; Sys Admins can see login session records for all users across all depts and FWUs)
14. Customize Department Display
15. View Email Status
16. Manage your Email Settings (personal email signature)
17. Manage Department Email Settings (department email signature)
18. Add a Custom Record (custom records are visible to user accounts in the same department). The custom records function is not available in FWUs.
19. Manage Fields (ie. add, edit, set sensitive, delete custom fields)
20. Manage Login Group / List

Access and Feature Rights default settings

Dept or FWU	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
User Group Roles	View Faculty records (End Date field is visible)	View Staff records (End Date field is visible)	View all HRIS Rest. Data (includes: Birth Date, Pnum, UTORid, Nationality, Start Date, Permanent residence)	View HRIS Rest. Data but limit to UTORid	View HRIS Rest. Data but limit to Pnum	Send Email	Assign Sensitive, Edit, Staff, Email, or Manage Data	Assign Dept Admin role	Assign HR Admin role	Assign FoM Contact List role	Assign HRIS Rest. Data Access, UTORid, Pnum	Manage Data (when granted, this enables items #13-20)	View User Session Log	Customize Dept Display	View Email Status	Manage your Email Settings (personal email signature)	Manage Dept Email Settings (dept email signature)	Add a Custom Record (visible to all users in the same dept.) Not available in FWUs.	Manage Fields (ie. add, edit, set sensitive, delete custom fields, delete custom record)	Manage Login Group / List
Basic User	Yes	If granted	If granted	If granted	If granted	If granted	No	No	No	No	No	If granted	If granted	If granted	If granted	Yes	If granted	If granted	If granted	If granted
FoM Contact List	Yes – End Date is not visible	Yes – End Date is not visible	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No	No
Dept Admin	Yes	Yes	If granted	If granted	If granted	Yes	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
HR Admin	Yes	If granted	If granted	If granted	If granted	If granted	If granted	Yes	Yes	Yes	Yes	If granted	If granted	If granted	If granted	Yes	If granted	If granted	If granted	If granted
Sys Admin	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes

FoM Contact List: This user access type provides limited access to generate faculty wide contact lists. The Search by function is available to lookup people by First Name, Last Name, CPSO# or Personnel #, but only displays the Name and Email fields. (Note: Only HR Admin or Sys Admin can create FoM Contact List User accounts, Departmental Administrators cannot.) The following fields are exportable to an XLS file:

- Last Name
- First Name
- Known As
- Form of Address
- Email Faculty Wide
- TFOM Academic Unit
- Clinical Appointment Type
- Is Status-Only
- Is Adjunct-Only
- Personnel Subarea

Faculty Wide Units (FWU)

A user account can be assigned access to the records in either a department or a FWU (not both). Access and feature rights for User Group roles is the same whether the user is assigned to records in either a department or FWU, the same default settings will be applied (except for the custom records function that is not available to FWUs). The difference is the filtering of access to records when assigned to a department or FWU. For example, if assigned to a department records will include all personnel with any faculty appointment type in their specified department. If assigned to a FWU the records will include personnel from across all departments within the FoM but only those meeting the set criteria.

FWUs differ from Groups in that user accounts can be assigned to a FWU. Within their department or FWU a user can create sub-Groups.

Faculty Wide Unit	Scope	Criteria
Clinical Affairs	Able to view Clinical Full-time, Clinical Part-time, and Clinical Adjunct faculty records from all departments.	[OUA -> Appointment Type Text = Clinical (MD) Full Time Appt] OR [OUA -> Appointment Type Text = Clinical (MD) Part Time Appt] OR [OUA -> Appointment Type Text = Clinical (MD) Adjunct Appt]
FoM Contact List	Able to view limited faculty and staff records across all departments in the FoM.	[Is Active Faculty = TRUE] OR [Is Active Staff = TRUE]
FoM HR	Able to view all faculty records across all departments in the FoM. Individual users may be granted access to staff records.	[Personnel Number != null]
FoM Research Office	Able to view faculty holding an OUA, Tenured/Tenure Stream, Teaching Stream, or CLTA appointment from all departments.	[OUA Table != null] OR [isTenured/Tenure Stream = TRUE] OR [Is Teaching Stream = TRUE] OR [Is CLTA = TRUE]
GLSE	Able to view all Active Faculty records.	[Is Active Faculty] = True
OIME	Able to view Clinical Full-time, Clinical Part-time, and Clinical Adjunct faculty records from all departments.	[OUA -> Appointment Type Text = Clinical (MD) Full Time Appt] OR [OUA -> Appointment Type Text = Clinical (MD) Part Time Appt] OR [OUA -> Appointment Type Text = Clinical (MD) Adjunct Appt]
PGME	Able to view Clinical Full-time, Clinical Part-time, and Clinical Adjunct faculty records from all departments.	[OUA -> Appointment Type Text = Clinical (MD) Full Time Appt] OR [OUA -> Appointment Type Text = Clinical (MD) Part Time Appt] OR [OUA -> Appointment Type Text = Clinical (MD) Adjunct Appt]
Rehab Sector	Able to view records for faculty who hold appointments in any of the three Rehab Departments (includes historical records). <ul style="list-style-type: none">Occupational Sciences and Occupational Therapies (OSOT)Physical Therapy (PT)Speech Language Pathology (SLP)	[Appointment Details -> Org Unit Text = OSOT] OR [Appointment Details -> Org Unit Text = PT] OR [Appointment Details -> Org Unit Text = SLP] OR [Grad Appt -> Graduate Unit Text = OSOT] OR [Grad Appt -> Graduate Unit Text = PT] OR [Grad Appt -> Graduate Unit Text = SLP] OR [OUA -> Organization Unit Text = OSOT] OR [OUA -> Organization Unit Text = PT] OR [OUA -> Organization Unit Text = SLP]
UME	Able to view faculty holding Other University Appointment, or Primary Appointment, or Tenured/Tenure Stream, or Teaching Stream, or CLTA	[OtherUnivAppointments != null] OR [Primary Appointment Type != null] OR [isTenured/Tenure Stream = TRUE] OR [Is Teaching Stream = TRUE] OR [Is CLTA = TRUE]