

User and Permissions Export

Article Number

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Information

This article will show users how to access the export capabilities for Users and Permissions in Planning. It will also help explain the data points that can be found in each export. These exports will allow users to:

- View a single user's permissions across multiple levels of the organizational chart
- Easily filter into excel to find and verify users with global administrator access
- Determine user access to templates, reports, documents, and permission management
- Cultivate a list of user email addresses for external communication

It is important to note that Permissions in Planning are not bound by time. The permission data applies to the entire Planning Site regardless of the time period, except for one specific column in the User Export. Please note, any changes or modifications to either of the exports will not affect the Planning Site.

Access User and Permission Export Options

Only Planning Site Administrators can access the export option. To locate the export option, a user needs to first navigate to the Settings Tab. The Export option is located under the Imports & Exports heading.

The image shows a screenshot of the 'Planning' application's 'Settings' page. The page has a dark blue header with the 'Planning' logo and name. A left-hand navigation menu contains icons for Home, Reports, Views, and Settings (which is highlighted). The main content area lists several settings categories, each with an icon, a title, and a brief description. The 'Exports & Imports' category is highlighted with a red rectangular box. Below it are 'General Settings', 'Organization', and 'Permissions'.

Planning

Settings

- Announcements**
News and information updates specific to institution's plans and processes.
- Assessment Cycles**
Create and manage assessment cycles.
- Copy Items**
Copy plan items into a new time period.
- Exports & Imports**
Export and import Planning data.
- General Settings**
Adjust time periods, progress options, and confidence indicators used by all plans.
- Organization**
Review and control the organizational structure of your institution for Planning.
- Permissions**
View and modify permissions to plans and templates for users at specific organizational units.

Export Options

There are two types of exports a user can access: *User Data* and *Permission Data*. Clicking either will immediately initiate the download of that export type.

User Export

The User Export will produce a list of all users in your Planning site. The export will produce an excel file with column headings User ID, Federated User ID, First Name Last Name, Primary Email Address, Site Administrator, Last Login, Department ID, Department, and Department Path.

	A	B	C	D	E	F	G	H	I	J
1	User Id	External Id	First Name	Last Name	Primary Email Address	Site Administrator	Last Login	Org Unit Id	Org Unit	Org Unit Path
2	1078	ciannone	Casey	lannone	old.ciannone@campuslabs.com	No	10/18/2017	1550	Institution	Institution
3	1078	ciannone	Casey	lannone	old.ciannone@campuslabs.com	No	10/18/2017	25988	Example Permissions Unit	Hometown University/Division of Academic Affairs/Example Pe
4	1078	ciannone	Casey	lannone	old.ciannone@campuslabs.com	No	10/18/2017	1604	Division of Academic Affairs	Hometown University/Division of Academic Affairs
5	1078	ciannone	Casey	lannone	old.ciannone@campuslabs.com	No	10/18/2017	28404	Anthropology	Hometown University/Division of Academic Affairs/College of I
6	1078	ciannone	Casey	lannone	old.ciannone@campuslabs.com	No	10/18/2017	33322	Division of Academic Affairs	Institution/Division of Academic Affairs
7	1078	ciannone	Casey	lannone	old.ciannone@campuslabs.com	No	10/18/2017	25966	Student Affairs	Institution/Student Affairs
8	1094	nicolas	Chris	Supernic	csupernic@campuslabs.com	Yes	4/1/2020	1550	Institution	Institution
9	1094	nicolas	Chris	Supernic	csupernic@campuslabs.com	Yes	4/1/2020	1335	Hometown University	Hometown University
10	1095	rtthakkar	Batman	Thakkar	RThakkar@CampusLabs.com	No	10/30/2017	1550	Institution	Institution
11	1095	rtthakkar	Batman	Thakkar	RThakkar@CampusLabs.com	No	10/30/2017	1604	Division of Academic Affairs	Hometown University/Division of Academic Affairs
12	1095	rtthakkar	Batman	Thakkar	RThakkar@CampusLabs.com	No	10/30/2017	28402	College of Arts and Science	Hometown University/Division of Academic Affairs/College of I
13	1095	rtthakkar	Batman	Thakkar	RThakkar@CampusLabs.com	No	10/30/2017	28404	Anthropology	Hometown University/Division of Academic Affairs/College of I
14	1097	MHalton	Maureen	Halton	mhalton@notreal.edu	No	10/30/2017	1550	Institution	Institution
15	1097	MHalton	Maureen	Halton	mhalton@notreal.edu	No	10/30/2017	25968	Multicultural Affairs	Institution/Student Affairs/Multicultural Affairs
16	1097	MHalton	Maureen	Halton	mhalton@notreal.edu	No	10/30/2017	25988	Example Permissions Unit	Hometown University/Division of Academic Affairs/Example Pe
17	1097	MHalton	Maureen	Halton	mhalton@notreal.edu	No	10/30/2017	33322	Division of Academic Affairs	Institution/Division of Academic Affairs
18	1100	mphippen	Moir	Phippen	MPhippen@CampusLabs.com	Yes	11/7/2017	1550	Institution	Institution
19	35326	cbeckett	Cameron	Beckett		Yes	1/15/2018	1335	Hometown University	Hometown University
20	35331	wmccormack	Wes	McCormack		Yes	1/15/2018	1335	Hometown University	Hometown University
21	35865	BrianBechel	Brian	Bechel	brianbechel@engageu.edu	Yes	1/29/2018	1335	Hometown University	Hometown University
22	38984	bhardt	Brian	Hardt	bhardt@campuslabs.com	Yes	3/6/2018	1550	Institution	Institution
23	38984	bhardt	Brian	Hardt	bhardt@campuslabs.com	Yes	3/6/2018	1604	Division of Academic Affairs	Hometown University/Division of Academic Affairs

- **User ID:** This is created to map the user to the Permissions Export.
- **Federated User ID:** This is the user's authenticated User ID that exists in Core Data.
- **First Name:** This is the user's first name.
- **Last Name:** This is the user's last name
- **Primary Email Address:** This is the user's email address.
- **Site Administrator:** This field indicates whether a user has Site Administrator access or not. A 'Yes' indicates the user does have Site Administrator permission and a 'No' indicates a user does not have Site Administrator access.
- **Last Login:** This shows the last date the user logged into Planning.
- **Department ID:** This shows the ID of the Department where that user has permission.
- **Department:** This shows the name of the Department where that user has permissions.
- **Department Path:** This shows the path in the most recent Time Period's organizational chart along which the Department in reference can be found. This is intended to make it easier to find Department in the organizational chart in navigation.

Permission Export

The Permission Export will produce a list of all the permissions in your Planning site. If a user has multiple permissions, each permission will appear as a separate row. The export will produce an excel file with column headings User ID, User, Email Address, Object Type, Object Name, Permission Level, Last Modified By, and Department.

	A	B	C	D	E
1	User Id	User	Email Address	Object Type	Object Name
2	1095	Rohan Thakkar	rthakkar@notreal.com	Template	Department Enhancement/Impr
3	1095	Rohan Thakkar	rthakkar@notreal.com	Reports	Manage Reports
4	1095	Rohan Thakkar	rthakkar@notreal.com	Template	Assessment Information
5	1095	Rohan Thakkar	rthakkar@notreal.com	Template	Student Learning Outcome
6	1095	Rohan Thakkar	rthakkar@notreal.com	Documents	Manage Documents
7	1095	Rohan Thakkar	rthakkar@notreal.com	Template	Mission
8	1095	Rohan Thakkar	rthakkar@notreal.com	Template	Test Template 2
9	1095	Rohan Thakkar	rthakkar@notreal.com	Users	Manage Users
10	1095	Rohan Thakkar	rthakkar@notreal.com	Template	Vision
11	1095	Rohan Thakkar	rthakkar@notreal.com	Template	Department Information
12	1095	Rohan Thakkar	rthakkar@notreal.com	Template	Unit Goals
13	1097	Maureen Halton	mhalton@notreal.edu	Reports	Manage Reports
14	1097	Maureen Halton	mhalton@notreal.edu	Template	Assessment Information
15	1100	Moira Phippen	phippenm@gmail.com	Template	Vision
16	1100	Moira Phippen	phippenm@gmail.com	Template	Divisional Goals
17	1100	Moira Phippen	phippenm@gmail.com	Template	Assessment Information
18	1100	Moira Phippen	phippenm@gmail.com	Users	Manage Users

- **User ID:** This references the User Id in the User Export.
- **User:** This is the full name of the user.
- **Email Address:** This is the most current email address of the user.
- **Object Type:** This is the type of object that the permission level applies to. Object type options are
 - Template
 - Reports
 - Documents
 - User
- **Object Name:** This is the name of the object as it appears in the Planning site to which the permission applies
- **Permission Level:** This is the permission level that the user has for the given planning object. The Permission Level options are
 - Reviewer (applies to templates)
 - Contributor (applies to templates)
 - Administrator (applies to templates)
 - View (applies to reports and documents)
 - Manage (applies to users, reports, and documents)
- **Last Modified By:** This is the name of the person who last modified the permission for the user at that Object.
- **Department:** This is the highest organizational unit to which the user has permission.

KB Product

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