

Chainformation Admin User Guide (Sharing Selection)

Last Updated: April 25, 2021

In this manual, we will learn how to manage **Sharing Selection** of different modules on the **Chainformation** platform.

Chainformation allows you to specify the audience to which a particular module or its content will be available. The feature **Sharing Selection** is available on every module across the entire Chainformation platform. It will seamlessly allow you to share content with a specified audience. You can update the audience of existing content any time by editing the **Sharing Selection** on the **Edit** content page of a module.

Here is a list of topics that we will discuss in this **Sharing Selection** manual.

- Scope of Sharing Selections
- Make a Manual Sharing Selection
- Manage Your Quick Sharing Selections
 - Create a New Quick Selection
 - Update a Quick Selection
 - Set a Quick Selection as the Default Sharing Selection
 - Delete a Quick Selection

Scope of Sharing Selections

Here is a list of all the modules that use **Sharing Selection**.

- Pages
- Page Templates
- Files
- Forms
- Forum
- Checklists
- Tags

The Role Based sharing and access feature in Chainformation allows you to create different access levels in multiple levels.

In the Platform you have Units and Users.

A **Unit** is corresponding to your stores, restaurants, sites, branches, workplace etc.

A **User/Colleague** is the individual co-worker connected to a specific Unit.

The Selections available are:

Role = The organizational function or job description a User can be assigned to

Area= The geographical Area within which the User is located/work

BusinessArea= e.g Franchise vs Corporate Owned or Flagship Stores vs Mobile Units etc.

You can choose a set of **Roles**, **Areas**, and **Business areas** to which the content of the above mentioned modules will be available.

You can also share this content with your colleagues of one or more **Units** instead of or together with the selected **Areas**.

Likewise, **Chainformation** also allows you to share the content of the modules listed above with one or more **Colleagues** irrespective of their role in your organization, the unit and business area to which they are associated.

In the next section of this manual, we will learn how to use different options of a **Sharing Selection** on the **New** item or **Edit** content page of a module.

Make a Manual Sharing Selection

Follow these navigation steps to make a **Sharing Selection** manually.

1. Navigate to the **Sharing Selection** section on the **New** item or **Edit** content page of the module for which you are creating this sharing selection.

2. Click the **Manual Selection** button to create a new sharing selection.

3. Select one or more **Roles**.

This means that your colleagues with the selected roles will have access to this content.

4. Select one or more **Business areas**.

This means that all the users associated with the selected business areas will have access to this content.

5. Select one or more (geographical) **Areas**.

This means that all the users associated with the selected geographical areas will have access to this content.

6. Select one or more individual **Units** or **Clusters** instead of an **Area** if you want to share this content only with the users associated with the selected units and not with the other units in that area.

Note: You can also select both an area and individual units simultaneously. This will share this content with all units in the selected areas **plus** the additionally selected units.

7. Select one or more **Colleagues** and leave all other options unchecked if you want to share this content only with the selected colleagues and no other users in your organization.

Remember, in the Module **Checklist** you cannot share with individuals/colleagues. Here the lowest level is Unit..

Note: You can also select other options and individual colleagues simultaneously. This will share this content with all units in the selected areas, all users with the selected roles **plus** the additionally selected units or colleagues. It is the **AND** operator.

8. Check the checkbox next to the **Save as new quick selection** option to save your selected options as a new quick selection for the future use. A quick selection will greatly speed up your process and save time+clicks. See User guide for [Quick Selections](#)

9. Important: A new sharing selection will be effective only if you have saved these changes by clicking the **Save** button in the top right corner of the **New** item or **Edit** content page. Your saved Quick Selection will then be available across all Modules, but it is your INDIVIDUAL shortlist and cannot be shared with other Admins.

Manage Your Quick Selections

Chainformation allows you to create predefined quick selections for sharing options of your content under different modules. In this section, we will learn how to create, edit, or delete a quick selection.

1. Create a New Quick Selection

You can create a new quick selection by checking the checkbox next to the **Save as new quick selection** option on the New item or Edit content of a module.

You can also create a new quick selection by editing an existing quick selection.

2. Update a Quick Selection

When you check the checkbox next to the **Update quick selection** after editing sharing options for an existing quick selection then the system will update it instead of saving as a new selection.

3. Set a Quick Selection as the Default Sharing Selection

You can set a quick selection as the default sharing selection by checking the checkbox next to the **Set as default** option. Now, the system will automatically use this selection as the default sharing selection every time you create new content.

Remember, you cannot use a quick selection that has individual colleagues only and no other sharing options.

However, you can still modify the sharing options using the **Manual selection** option. See user guide for [Manual Selections](#).

4. Important: Any changes in a sharing selection will be effective only if you have saved these changes by clicking the **Save** button in the top right corner of the **New** item or **Edit** content page.

4. Delete a Quick Selection

1. Navigate to the **Quick selection** menu on the **New** item or **Edit** content page and hover your mouse over the name of the quick selection you want to delete.
2. Click the **Delete** icon next to the selection name.

3. Click the **DELETE** button in the pop-up message shown on the screen to delete the selection.

