

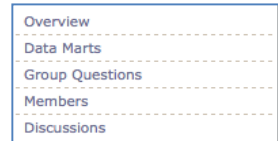
# Help – Share

## Setting up groups for sharing data and questions

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## 1. Getting Started

Group settings and activities are controlled from the **Groups & Sharing** tab. The interface is very similar to the **My Stuff** tab, however this area is aimed at sharing data with others. Whether that is coworkers or a more public body, nVISION On Demand can control and maintain the security of your data. Remember that the drop down menu is used to navigate within the **Groups & Sharing** tab.



## 2. How do I create a Group?

From the **Groups & Sharing** tab select Create Group. Define the properties in three steps:

- **General Info** - Give the group a name and description, similar to the **Data Mart Details** tab. Select whether or not you want group members to be notified after all Group Activity, and select a desired Group Banner Color.
- **Invite Members** - Making a group is a good first step, but for them to make sense multiple members are required. Insert the email of all the members you would like to invite. You may also personalize the default message.
- **Privacy** - There are two types of Groups. Private Groups do not appear in the public database, and can only be joined upon invite, while Public Groups can be seen by all nVISION On Demand users. Note: All the data in Private Groups is fully secure, while the data in Public Groups has zero security.

### 3. How do I invite members to a Group?

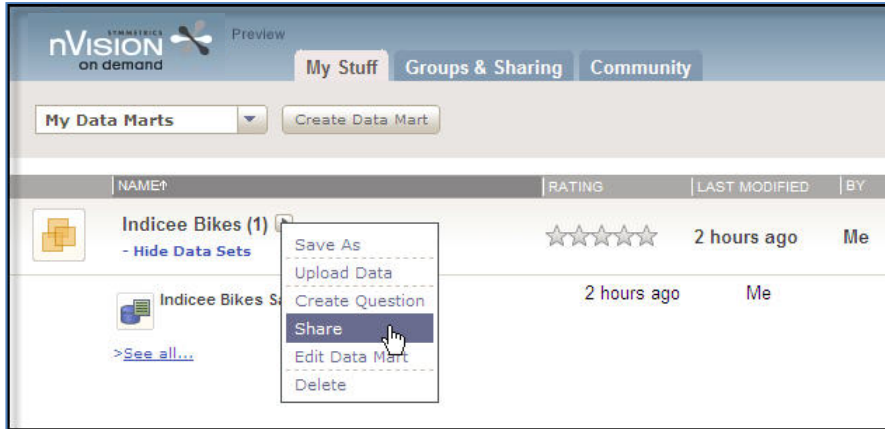
From the **Groups & Sharing** tab, select the group that you want people to be invited to, and select **Send Invitation**. Next, enter the email of each member you want to invite. Here, you may also customize the invite that will be sent. Finally, select **Send Invitation**.

### 4. How do I remove members from a Group?

From the **Groups & Sharing** tab, select the right-arrow beside the Group that you want to remove members from, and select **Members**. Select the right-arrow beside the member that you wish to remove, and select **Remove from group** and select **Ok**.

### 5. How do I share a Data Mart?

1. Click the **My Stuff** tab
2. Select **My Data Marts** from the drop-down menu
3. Click the arrow beside the Data Mart that you wish to share and select **Share** from the list
4. A pop up window will provide a list of the groups that you belong to and give you the option of sharing the ability to *ask questions or save empty*.



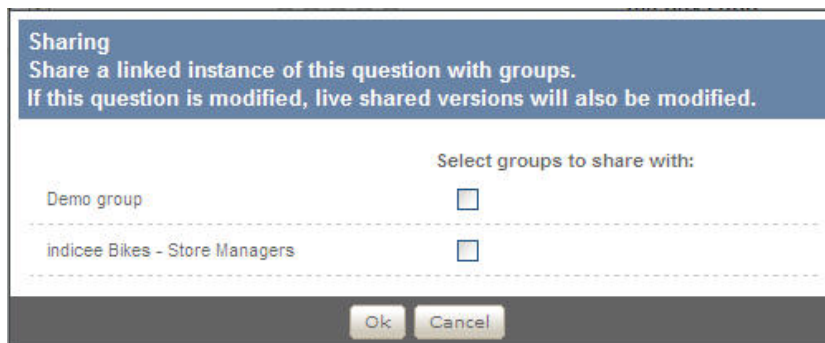
*Ask questions* means that group members will be able to create new question from your Data Mart. Use this when you want to collaborate on the same data.

*Save empty* means that group members will be able to create a new, empty Data Mart that understands the same report sources. They will be able to upload their own data to their Data Mart but will not see your data.

## 6. How do I share a Question?

Once you have created and saved a question (refer to *Help – Ask Questions* tutorial), you can share it to a group.

1. Click the **My Stuff** tab
2. Select **My Questions** from the drop-down menu
3. Click the arrow beside the Question that you wish to share and select **Share** from the menu
4. Select the group that you want to share with from the list of your groups
5. The **My Questions** list will be updated to indicate that your question has been shared



Now every member of the group will be able to see your question but they won't be able to change the **How**, **What** or **When** in the question definition.

## 7. How do I let someone else create a question from my Data Mart?

Once a data mart is shared with a user, they have the ability to ask questions of that data from the **Groups & Sharing** tab.

## 8. How do I let someone else upload data to my Data Mart?

By default, nVISION On Demand does not allow users to upload to Data Marts of which they did not create themselves; however, this can be enabled upon request. Feel free to email us at [ondemand@symmetrics.com](mailto:ondemand@symmetrics.com) or call us at (604) 891-5571 and let us set it up for you.