

Scope management - how to create a new scope

Last updated by | Łukasz Bott | 29 gru 2022 at 12:51 CET

Contents

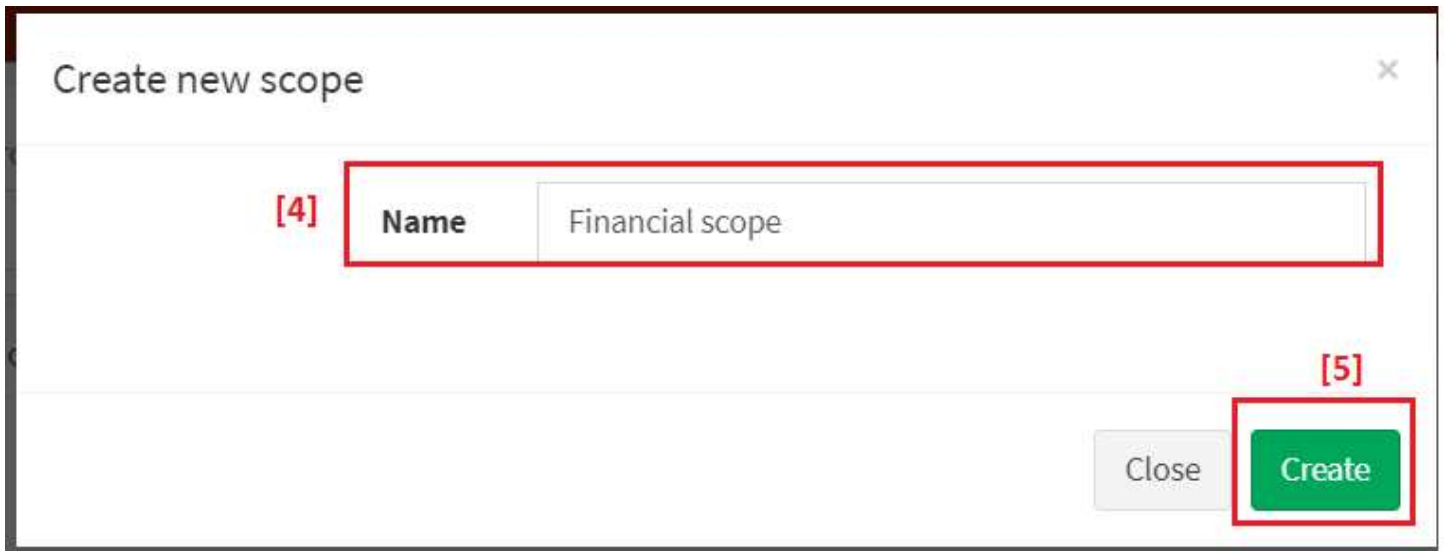
- [Creating a new scope](#)
- [Adding items to the scope](#)
- [The scope settings](#)
- [The scope placement in AMODIT navigation](#)

This document shows how to create a new scope step-by-step.

Creating a new scope

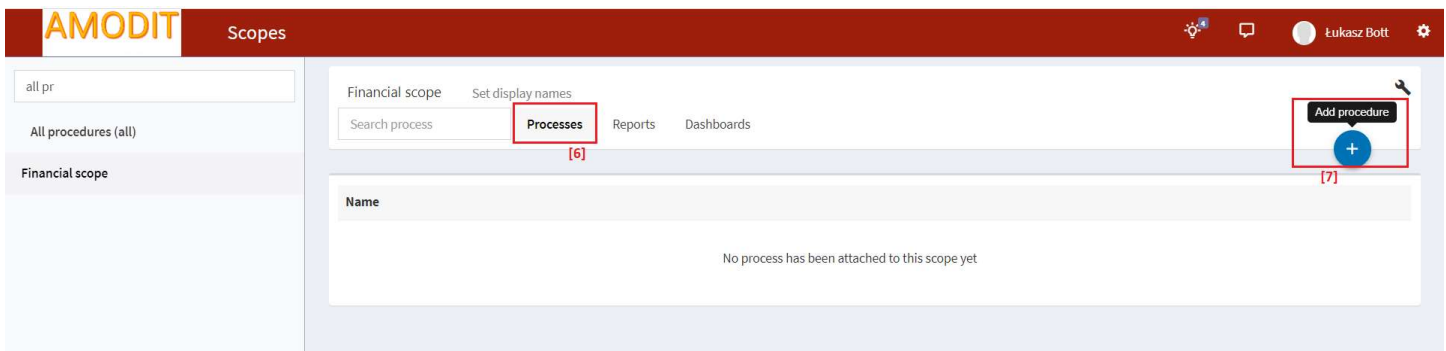
The screenshot displays the AMODIT Scopes management interface. The top navigation bar includes the AMODIT logo, the word 'Scopes', and user information 'Łukasz Bott'. A search bar is present on the left. The main content area shows a list of scopes with various names like 'Test uprawnień do pola', 'Header w tabeli', etc. In the bottom-left corner, a button labeled 'Create new scope' is highlighted with a red box and labeled [3]. In the top-right corner, the 'Scopes' menu item in the navigation dropdown is highlighted with a red box and labeled [2].

1. Go to system settings menu.
2. Select "Scope" menu item.
3. In the bottom-left corner click on "Create new scope".

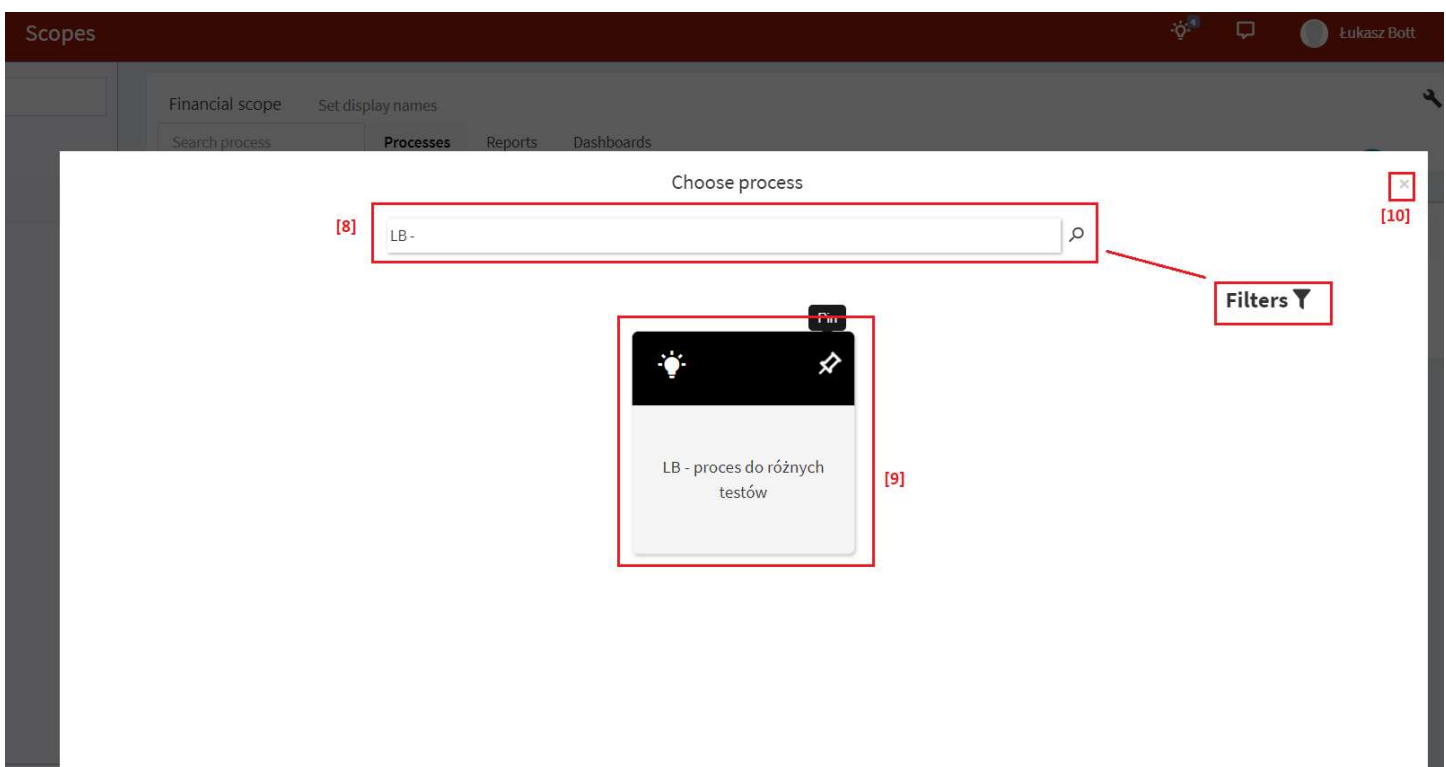


4. A window pops up where you type a new scope's name.
5. Click "Create" button.

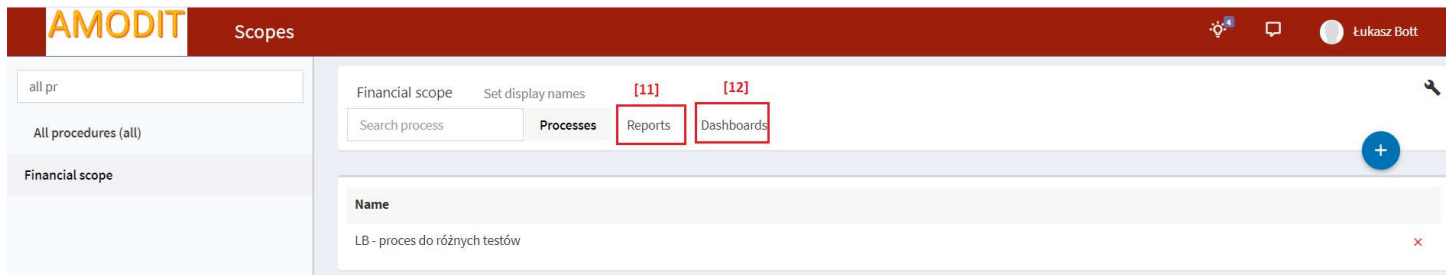
Adding items to the scope



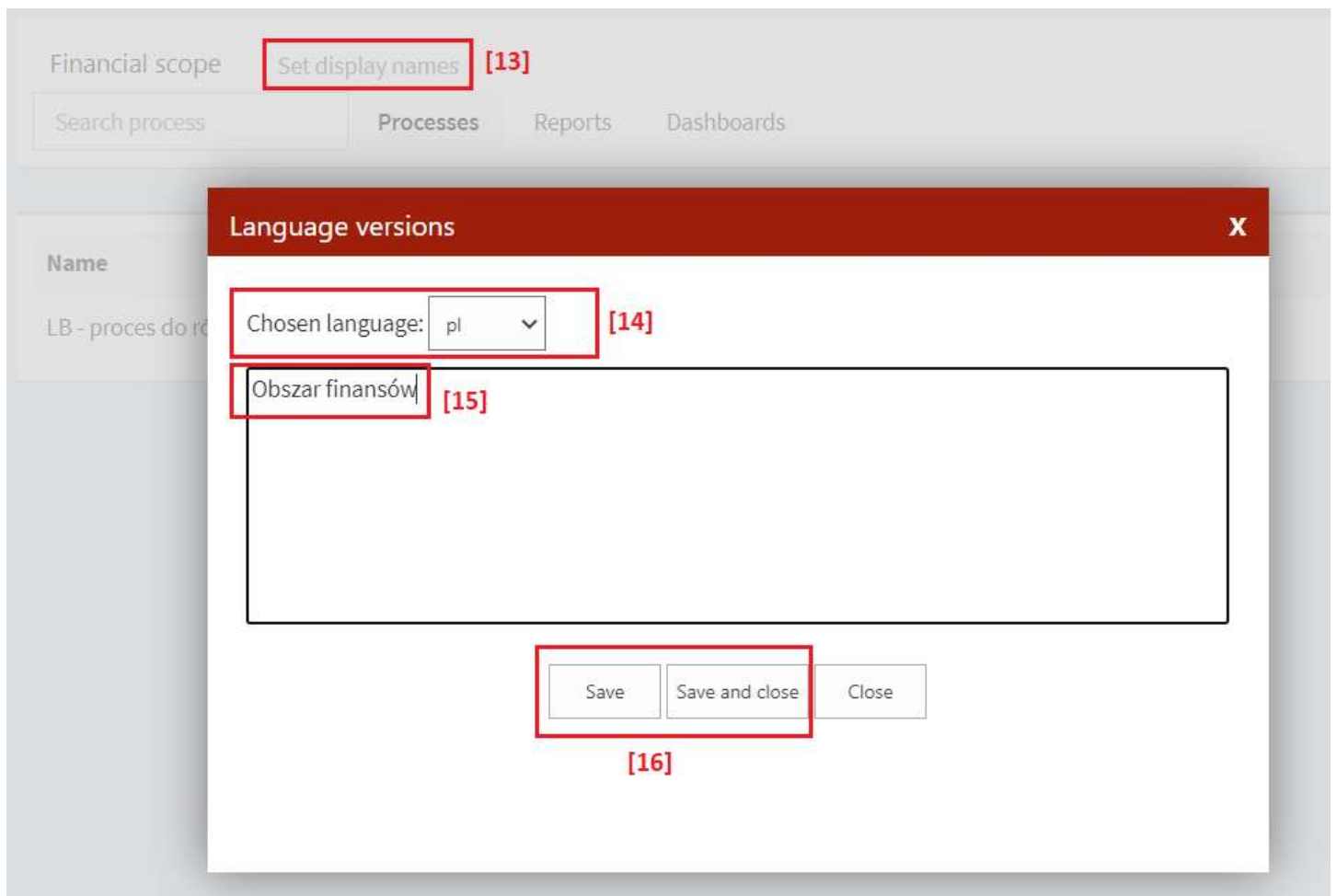
6. Select "Processes" (procedures) tab to add a list of processes that will be available in the given scope.
7. Click on plus sign in the blue circle to choose some process (procedure).



8. A selection window pops up. You can use search or filter functionalities to find the required process.
9. Select the process and pin it to the list.
10. Close the selection window.

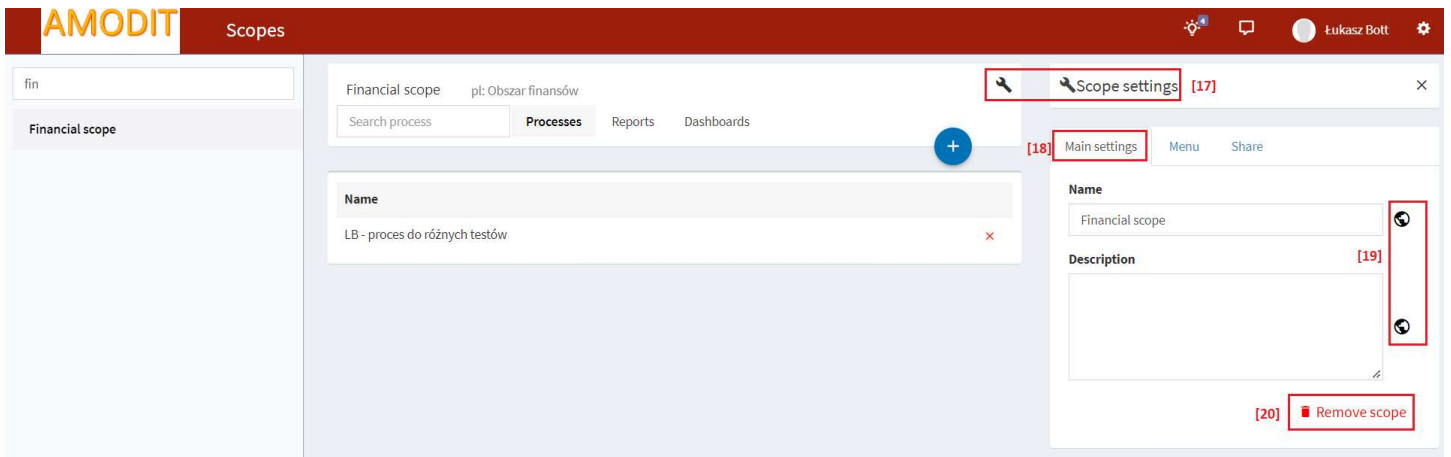


11. Repeat steps from [7] through [10] to add some report(s) to the scope.
12. Repeat steps from [7] through [10] to add some dashboard(s) to the scope.



13. Optionally you can set display names of the scope for other languages. A language selection window pops up.
14. Choose the language.
15. Type a scope name translation (a display name) for the selected language.
16. Click on "Save" button and continue for another language or click "Save and close" button to finish.

The scope settings

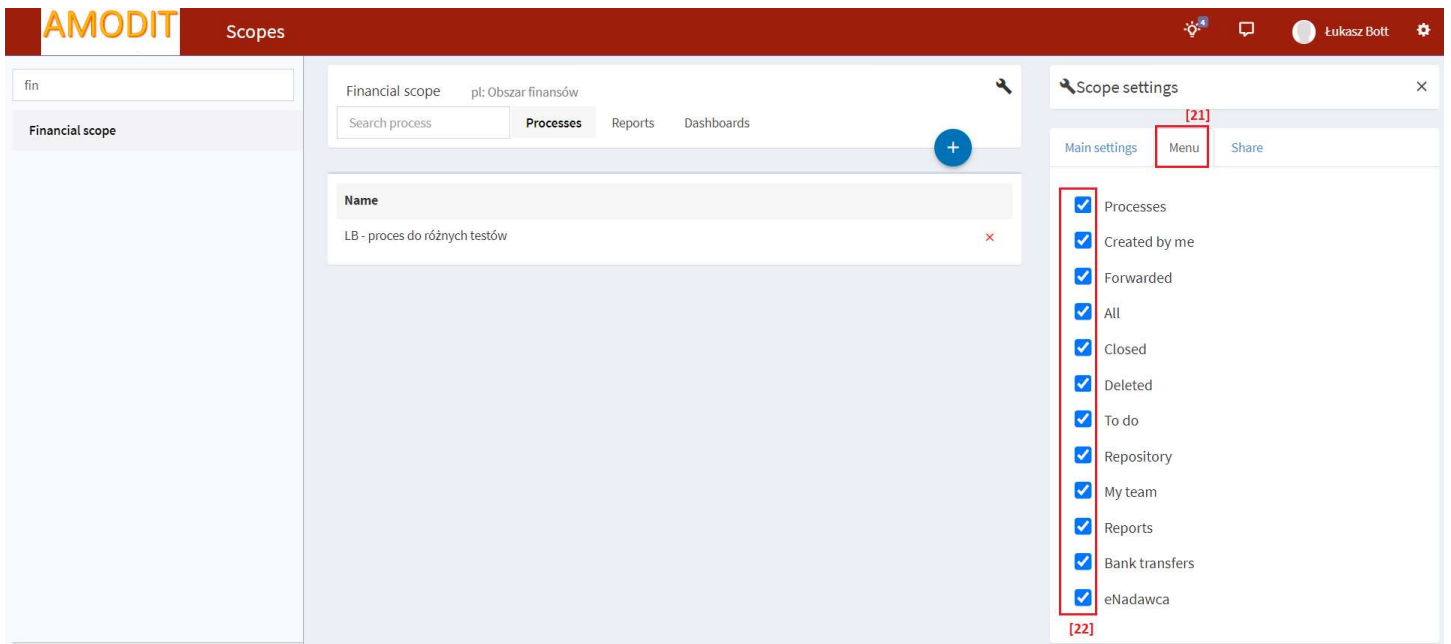


17. Go to the scope settings.

18. Select "Main settings" tab to ...

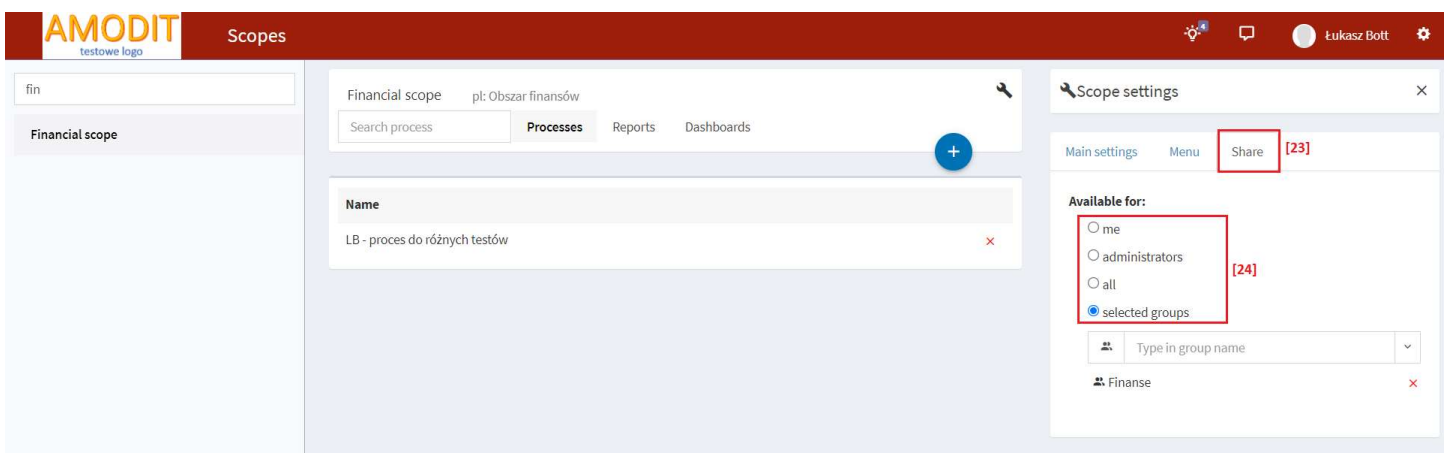
19. ... change the scope's name or description or their language translations (click on the globe icon).

20. You can also remove the scope.



21. Select "Menu" tab to ...

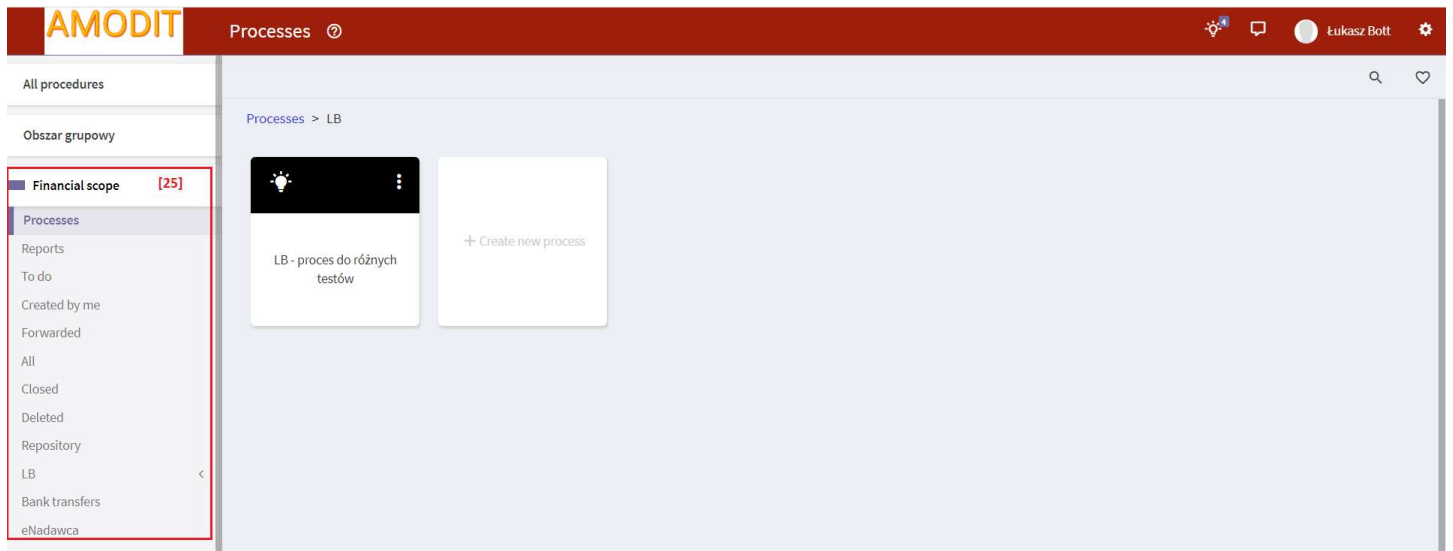
22. ... choose left navigation menu items that will appear in the scope.



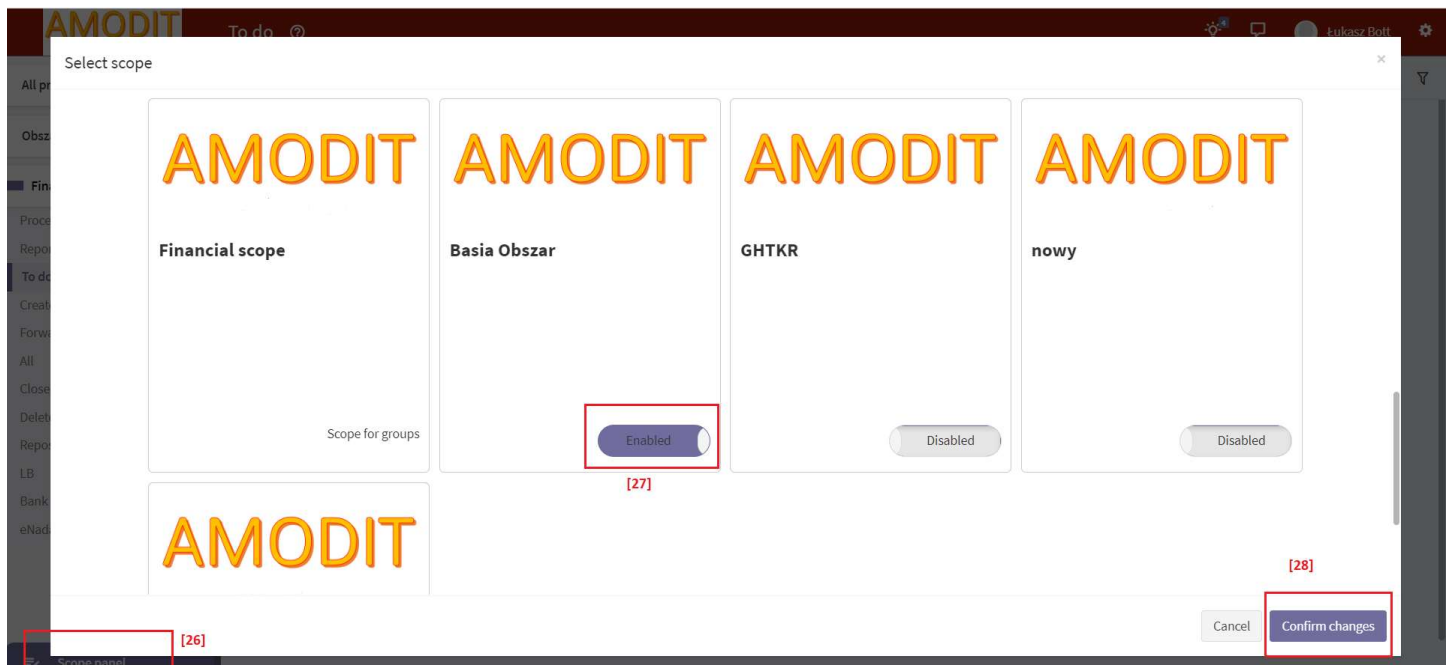
23. Select "Share" tab to ...

24. ... set the scope availability.

The scope placement in AMODIT navigation



25. Depending on its sharing the scope will be available in the left navigation panel.



26. In order to choose another scope(s) click on "Scope panel" in the bottom-left corner of the main AMODIT window.

27. Click on the switch to enable or disable the selected scope.

CAUTION! Scopes available for groups are automatically displayed for members of the given groups.

28. Confirm changes.