

CREATING SECURITY ROLES

Core Fundamentals - System Administrator Training

To allow for better control of an administrator's access to within the system, individual user's rights are controlled in Security Role Administration. Security roles allow system administrators to create a standard grouping of permissions that can be assigned to users, and these roles determine what data and functionality individual users can access within the system.

To access Security Role Administration, go to: ADMIN > TOOLS > CORE FUNCTIONS > SECURITY ROLE ADMINISTRATION

Select the Create New Role link.

Security Role Administration Show Me Use this tool to create and edit security roles. Click on the Users icon to view which a Search:				
Security Role Name Role ID				
 ◆ Create New Role → Manage Categories Main Roles 				
ROLE ? ID				
System Administrator	10052			
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Z On the **General** page, administrators define the **name** of the role, a unique security role ID, a category for the role, and a description.





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Select a **Parent** role for the new role. The Parent role determines the permissions that are available for this role.

Only permissions available in the parent role can be selected for use in the new role.

Name:	ILT Administrator	
ID:	ILTAdmin 2	
Category:	System Administration \$	
Parent:	System Administrator	
escription:	The ILT Administrator role allows you to view and create Events & Sessions.	
Active:		
stone		

4 The **Permissions** page allows you to add permissions or copy permissions from another role. An administrator can only add permissions to a role using permissions available to them.

- Select the **Add Permissions** link.
- Search for available permissions by name in the select field or by category.
- Click the Add box next to each permission or the CHECK/ **UNCHECK ALL** button.
- Click **SUBMIT**. The selected permissions will be added to this role.

Unchecking the box next to the permission will remove it from the role.

Create Role Show Me			
General			
Add the appropriate permissions for this role. If a permission exists in one or more child role	, it can		
Add Permissions Copy Permissions from Another Role			
Role Permissions			
« Back Cancel Save Next »			

Select Permissi	ons	
select:		
	NI NI	t G search
Check / Uncheck All		
Permissions		
ADD PERMISSION		DESCRIPTION
21 CFR Part 11 - T	ranscript Details Report	Grants ability to view training details for completed ocurses. This is an administrator permission.
Absence Managem	nent - SSO Link - View	Users with this permission can view the Absence Management SSC link the Universal Profile options dropdown. Should only be used by clients us
 Access Edge Impo 	et	Allow access to Edge Import
 Access FTP Account 	nt - View	Grants access to the FTP account landing page where the available accounts are displayed
 Access Partner Aut 	thorization - Manage	Grant access to partner authorization function
 Action Items - Emp 	loyee Onboarding	Grants ability to view Onboarding actions via the Universal Profile - Actions page or the Welcome/Custom page Actions widget. This is an end use
 Action Items - EPN 	1	Grants ability to view EPM actions via the Universal Profile - Actions page or the Welcome/Custom page Actions widget. This is an end user permi
 Action Items - Form 	ns	Grants ability to view Form actions via the Universal Profile - Actions page or the Welcome/Custom page Actions widget. This is an end user perm
 Action Items - LMS 		Grants ability to view LMS actions via the Universal Profile - Actions page or the Welcome/Custom page Actions widget. This is an end user permis
Action Items - View	1	Grants ability to view actions via the Universal Profile - Actions page or the Welcome/Custom page Actions widget. This is an end user permission.
 Activate Exempt Re 	eason Preferences	Grants ability to choose which exempt training reasons will be available to choose when requesting exemption from training or when administrator object. This is an administrator permission.
 Activate Session C Preferences 	ancellation Reasons	Grants access to Session Cancellation Reasons Preferences page. This is an administrator permission.
 Activate Session W Preferences 	ithdrawal Reasons	Grants access to Session Withdrawal Reasons Preferences page. This is an administrator permission.
 Activate Training R Preferences 	temoval Reasons	Grants ability to activate Training Removal Reasons by organizational unit. When activated, these reasons are available to administrators when re-
 Admin Search Pref 	lerences - Manage	Grants the ability to configure admin search preferences in addition to global search preferences in the search preferences page.
 Agency Portal 		Grants access to manage the Agency Portal page.
 Announcements - I 	Post	Grants ability to view, create and update/edit announcements that will appear to populations of users via the Welcome Page Inbox widget or Anno, permission.
Announcements - \	view	Grants ability to view announcements created by others, via the Welcome Page Inbox widget or the Announcements page. This is an end user per
 Applicant and Appl Edit values 	ication Custom Fields -	Grants access to edit Applicant custom field values on the Applicant Profile Snapshot > Custom Fields tab and to edit the Application custom field
 Applicant Compliant 	nce Report	Greats access to the Applicant Compliance report, which tracks applicants' self-reported responses to disability, gender, race, ethnicity, and EED q Cancel Submit

5 The **Constraints** page displays all constraints for each permission in the role. Constraints enable an organization to give permissions to users to see data or access certain functionality but restrict them to a specific area or group of people.

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