CREATING SECURITY ROLES

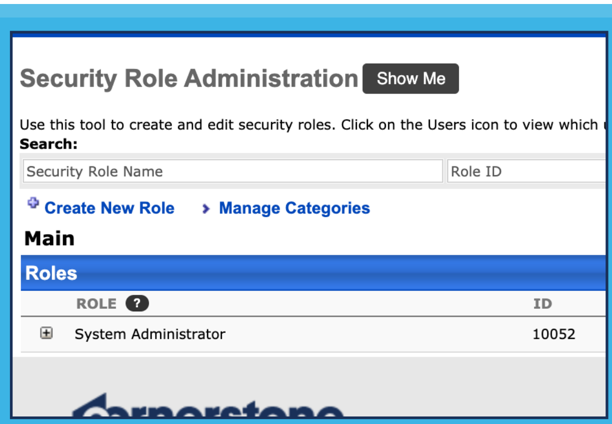
Core Fundamentals - System Administrator Training

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.

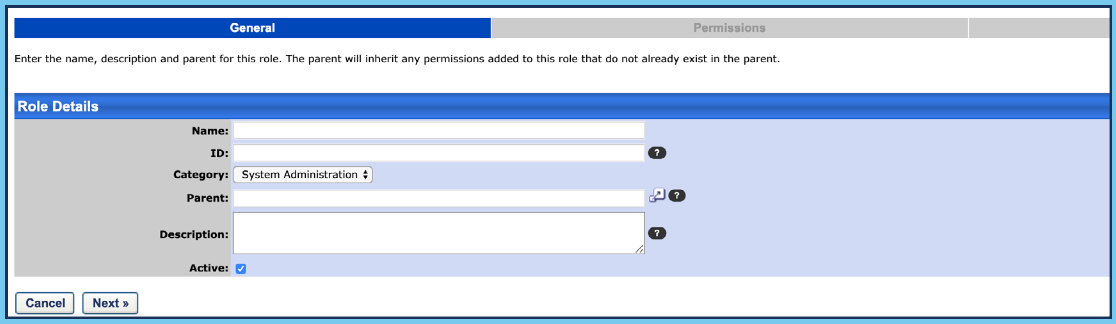
To access Security Role Administration, go to:

ADMIN > **TOOLS** > **CORE FUNCTIONS** > **SECURITY ROLE ADMINISTRATION**

1 Select the **Create New Role** link.



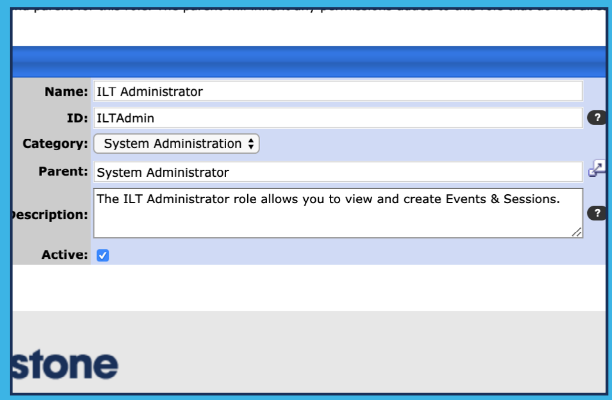
2 On the **General** page, administrators define the **name** of the role, a unique security role **ID**, a **category** for the role, and a **description**.



3

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.



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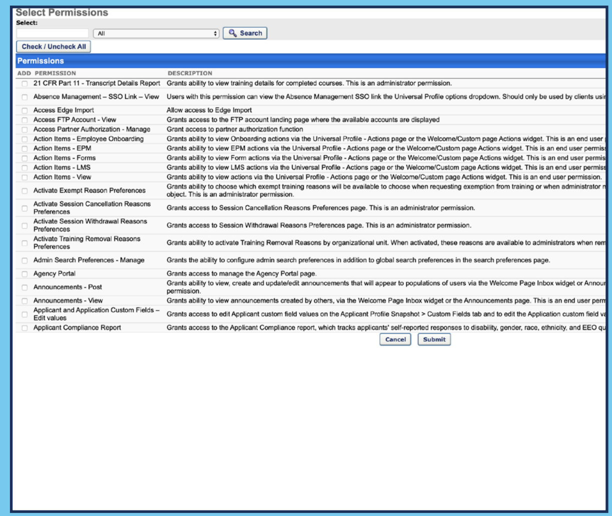
The **Permissions** page allows you to add permissions or copy permissions from another role. An administrator can only add permissions to a role using permissions available to them.

- 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.



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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.