



CREATING SECURITY ROLES

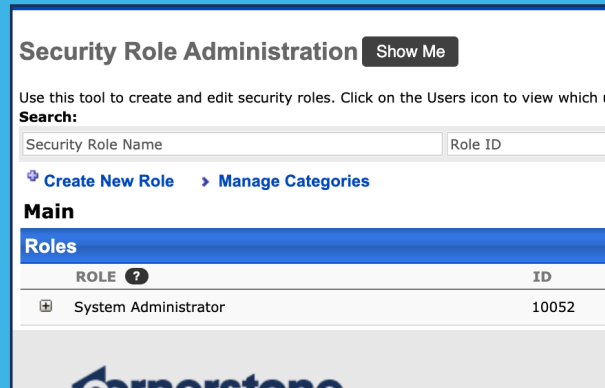
Core Fundamentals - System Administrator Training

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**.

Enter the name, description and parent for this role. The parent will inherit any permissions added to this role that do not already exist in the parent.

Role Details

Name:

ID:

Category: System Administration

Parent:

Description:

Active:



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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.

The screenshot shows a 'Create Role' form with the following fields: Name: ILT Administrator, ID: ILTAdmin, Category: System Administration, Parent: System Administrator, Description: The ILT Administrator role allows you to view and create Events & Sessions., and Active: checked. The Stone logo is visible at the bottom left.

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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.

The screenshot shows the 'Create Role' form with the 'Role Permissions' section. It includes links for 'Add Permissions' and 'Copy Permissions from Another Role', and buttons for 'Back', 'Cancel', 'Save', and 'Next'.

The screenshot shows the 'Select Permissions' page with a search bar and a list of permissions. The 'CHECK / UNCHECK ALL' button is visible at the top left of the list. The list includes permissions such as '21 CFR Part 11 - Transcript Details Report', 'Absence Management - SSO Link - View', 'Access Edge Import', 'Access FTP Account - View', 'Access Partner Authorization - Manage', 'Action Items - Employee Chosen', 'Action Items - EPM', 'Action Items - Forms', 'Action Items - LMS', 'Action Items - View', 'Activate Exempt Reason Preferences', 'Activate Session Cancellation Reasons Preferences', 'Activate Session Withdrawal Reasons Preferences', 'Activate Training Removal Reasons Preferences', 'Admin Search Preferences - Manage', 'Agency Portal', 'Announcements - Post', 'Announcements - View', 'Applicant and Application Custom Fields - Edit values', and 'Applicant Compliance Report'.

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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.