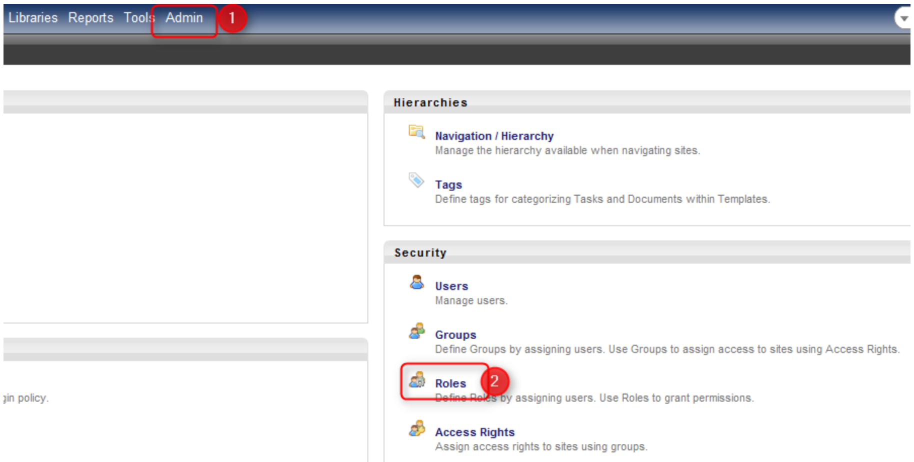
Users & Security – Setting Role Permissions

Question:

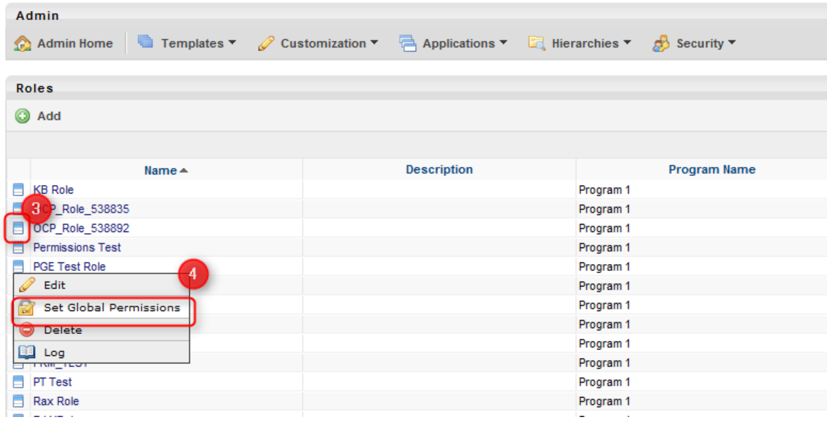
How do I edit a Role's Permission settings?

Answer:

In order to edit the Role's Global Permission settings (those not governed by library or schedule templates), navigate to the list of Roles in the Admin section of Siterra. To get here, click "Admin" (1) from the top toolbar, then choose "Roles" (2).



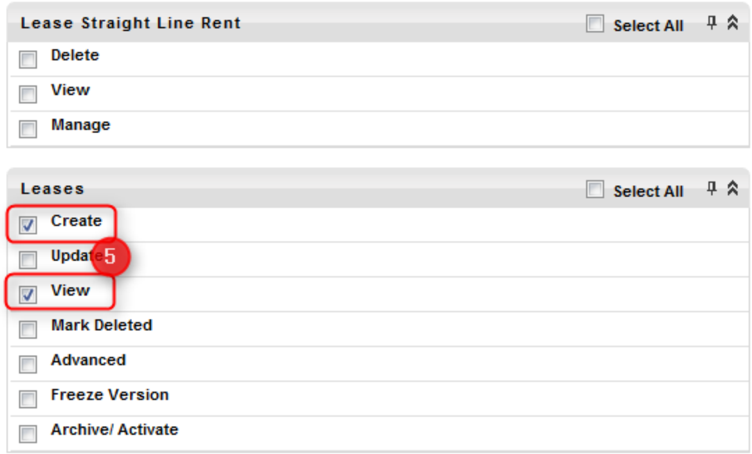
Once you have located the desired Role, click on the blue and white icon (3) next to the Role name and select "Set Global Permissions" (4).



All of the available Permission settings are organized alphabetically by functional area, with any Permissions currently held by that Role already checked.

In order to view a lower level object, the user must at minimum have "View" Permissions on all higher level objects. For Example, a user cannot see a Lease if they do not have Permission to see the Site the Lease is on, the Search Ring the Site is on, and Unit that the Search Ring lives in. This user would need at least "View" Permissions on Unit, Search Ring, Site and Lease.

For this example, this Role already has Permissions to view Sites, Search Rings and Units, but are unable to view and create Leases under their Sites. To add the appropriate Permissions to see and add Leases, navigate to the *Leases* section of the permissions list and check off both "Create" and "View" (5).



Finally, select either the "Save" (6) (if you would like to keep the window open for additional review or edits) or the "Save & Close" (7) button at the bottom of the list to commit the changes. Any updates to Role Permissions should take effect immediately.