## accruent

# §siterra | Knowledge Base Article

### **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).

Libraries Reports Tools Admin					
	Hierarchies				
	Navigation / Hierarchy Manage the hierarchy available when navigating sites.				
	Tags Define tags for categorizing Tasks and Documents within Templates.				
	Security				
	Susers Manage users.				
	Groups Define Groups by assigning users. Use Groups to assign access to sites using Access Rights.				
jin policy.	Before Roles 2 Define Roles by assigning users. Use Roles to grant permissions.				
	Access Rights Assign access rights to sites using groups.				

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).

Admin				
🟡 Admin Home 🛛 🕒 Templates 🔻	🖉 Customization 🔻	Applications •	🔄 Hierarchies 🔻	🧬 Security 🔻
Roles				
Add				
Name 🔺		Description		Program Name
KB Role			Program 1	
3CP_Role_538835			Program 1	
OCP_Role_538892			Program 1	
Permissions Test			Program 1	
PGE Test Role			Program 1	
🥜 Edit			Program 1	
😪 Set Global Permissions			Program 1	
Delete			Program 1	
			Program 1	
			Program 1	
PT Test			Program 1	
Rax Role			Program 1	

## accruent

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).

Lease Straight Line Rent	Select All	<b>₽ \$</b>
Delete		
View		
Manage		
Leases	Select All	무 🛠
Create		
Update 5		
View		
Mark Deleted		
Advanced		
Freeze Version		
Archive/ Activate		

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.

Unit	Select All	<b>₽ ☆</b>
Update		
View		
Vendor	Select All	<b>ч %</b>
Create		
Mark Deleted		
Update		
View		
Where Used		
<b>6 7</b>		
Save Save & Close	lancel	