Permissions

- What are Roles and Permissions?
- How do I create, edit, and delete Roles?
- Let's assign Roles to Users
- Permissions Overview

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User vs Role

User

- Each individual on a Team must register in Florence as a **unique User**
- Team Administrators may assign Users **one or more Roles** based on their participation needs on the Team
- Users may be participants on many Teams

Role

- Roles are used in Teams to assign the same Permission levels to **multiple Users** at once, rather than individually
- Roles improve Permission Management by allowing Teams to "**group" similar Users** together and select the appropriate Permissions for all Users in the group instead of having to manage Permissions directly for each User on a Team
- Updating the Permissions for the Role **updates** the Permissions for all Users assigned to that Role

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Object Level Permissions

4 Florence Object Types

- Team
- Binder
- Folder
- Document

Permissions may be assigned at each of these Object levels in hierarchical fashion:

- **Team Level Permissions** – currently assigned directly to Roles
- **Binder Level Permissions**
- **Folder Level Permissions**
- **Document Level Permissions**

Permissions assigned directly at higher levels WILL impact all levels below them (Permissions will be inherited - just as children inherit the genes from their parents)

Permissions assigned at lower levels will NOT impact the levels above them (parents cannot inherit genes from their children)

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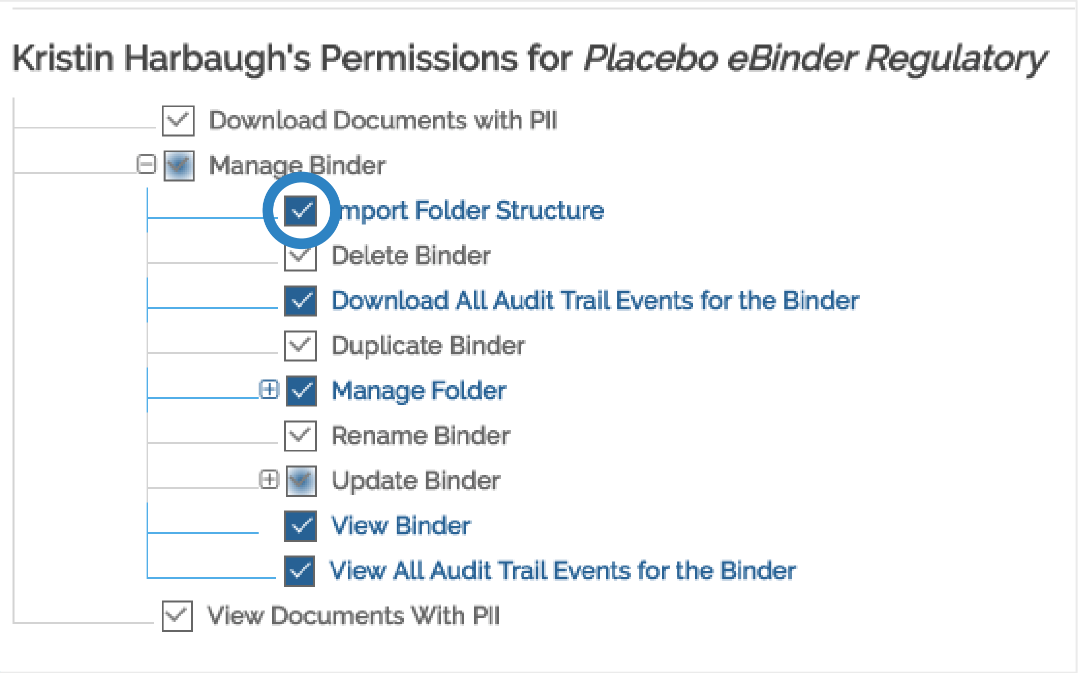
Direct vs Inherited Permission

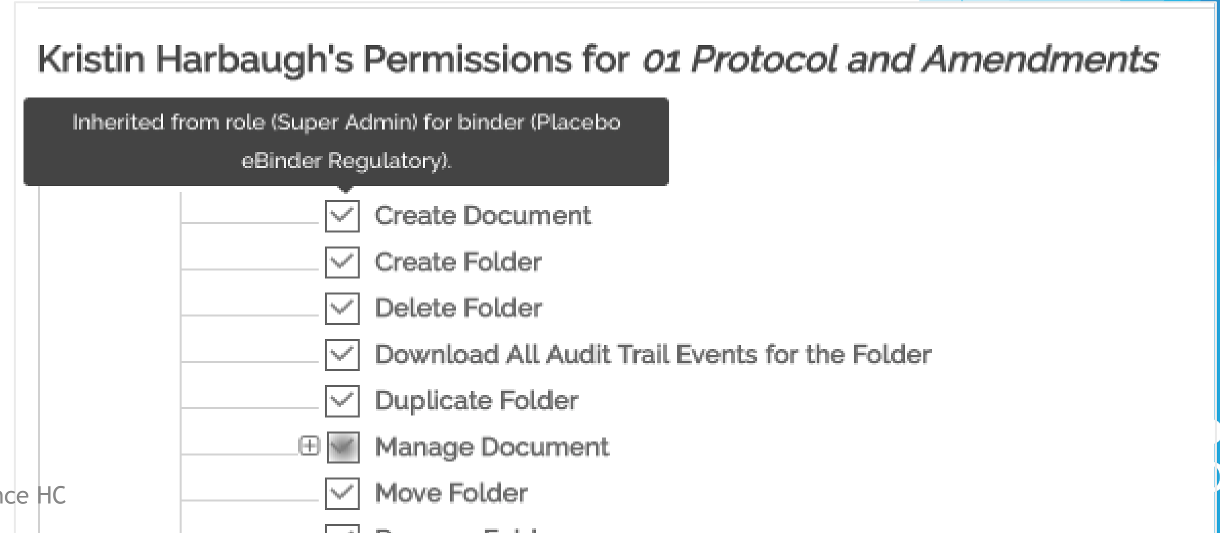
Direct Permissions

- Permissions placed **directly** on Object and not **inherited** from a higher-level Object
- **Direct Permissions** will display as **dark blue** in the pop-up window



Inherited Permissions

- Permissions **inherited** from higher level Objects
- **Example**: Placing **Direct Permission** at Binder level will show as an **Inherited Permission** at Folder and Document levels below it
- **Inherited Permissions** will display **grey** in the pop-up
- When Users hover over the item, the tooltip describes where the Permission is being **inherited** from such as a Binder or higher-level Folder



Permission Overview

What is the Permission Overview useful for?

It allows you to see what Permissions a Role or User has on each Object (Team, Binder, Folder, and Document) and to edit them. You can also what items a Role or User has restricted.

Who can access it?

Users assigned a Role with the Manage Permissions for Entire Team can view it Permission Overview and edit permissions from it.

How do I access the Permission Overview?

Option One: Settings dropdown menu and select "Permission Overview"

Option Two: Roles main page

Option Three: Manage Permissions for a specific Role from the Manage Role Page via the "Click here to see folder and document permissions" link

Option Four: Team Members page

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Permission Overview: Filter Boxes

All Items:

- Displays **ALL Objects** in the Team regardless of Permissions assigned
- Useful for managing Permissions on Objects the User or Role does not currently have Permissions assigned

Permitted Items:

- Includes **only Objects** the Role or User selected has **access** to
- Replicates the Role or User's **Global View**

Restricted Items:

- Includes all Binders but only Objects under the Binder the Role or User selected does NOT have access to
- Click the + to expand to confirm Objects restricted in each Binder

Directly Permitted Items:

- Highlights Objects the Role or User selected has **direct** Permissions on and will not include any that are **inherited** from a parent Folder, Binder, or Team
- Useful for pinpointing the location where the Permission was assigned to assist in managing the Permission

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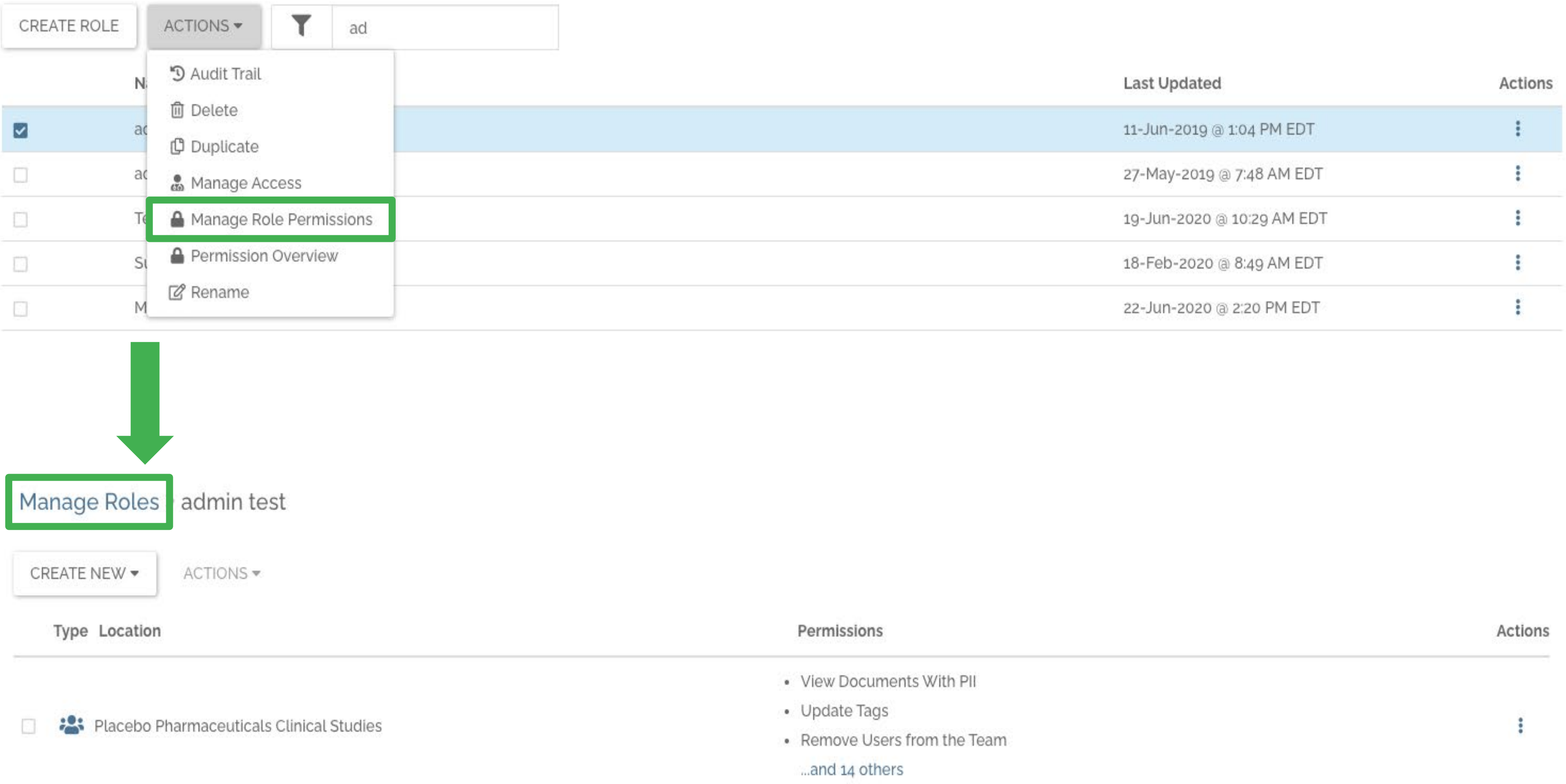
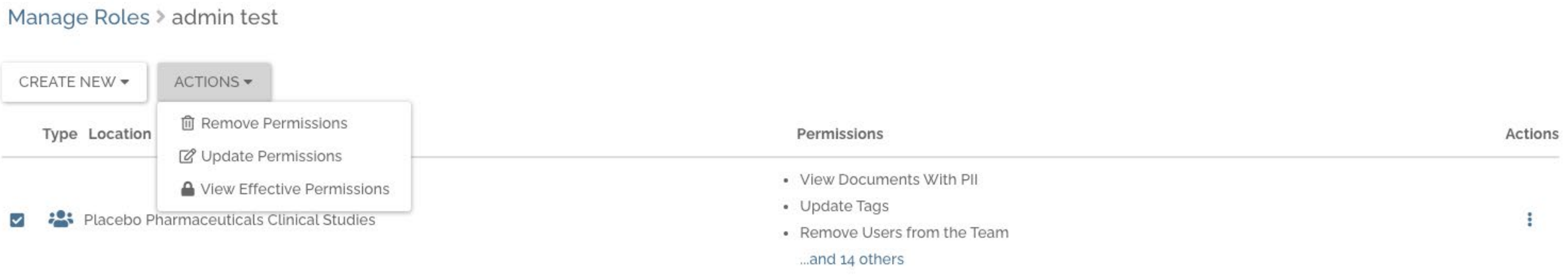
Manage Role Permissions



Manage Role Permissions



- "Remove Permissions" will delete the item from the role's access
- "Update Permissions" will allow you to add or remove permissions
- "View Effective Permissions" will show you all permissions granted to that role in the binder you've selected
- "Create New" will allow you to add permissions on a team-level, binder-level or folder-level.

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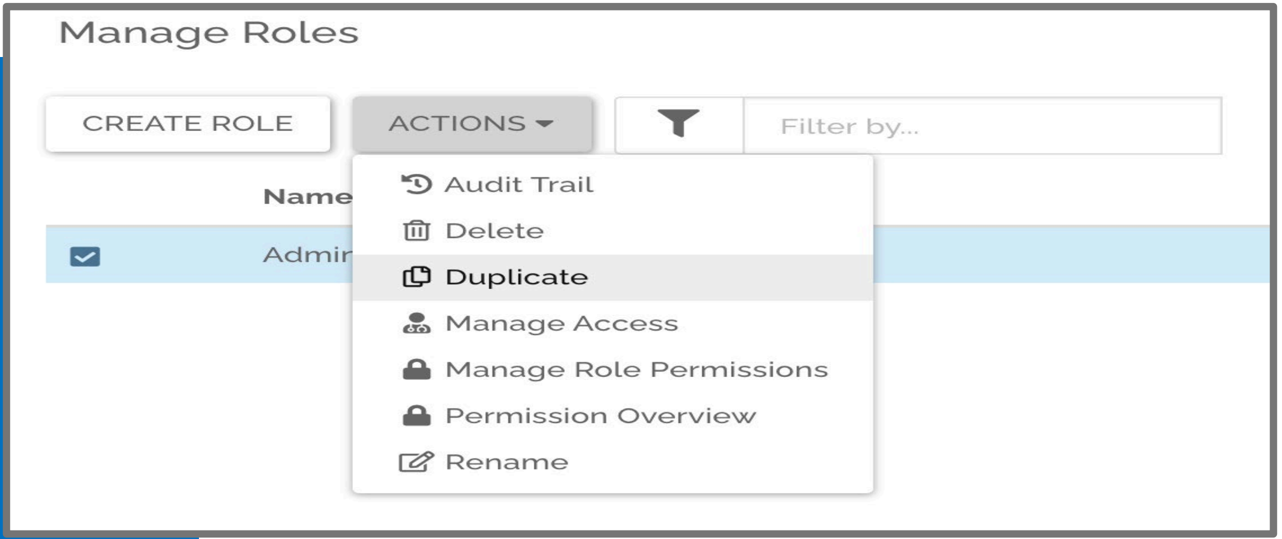
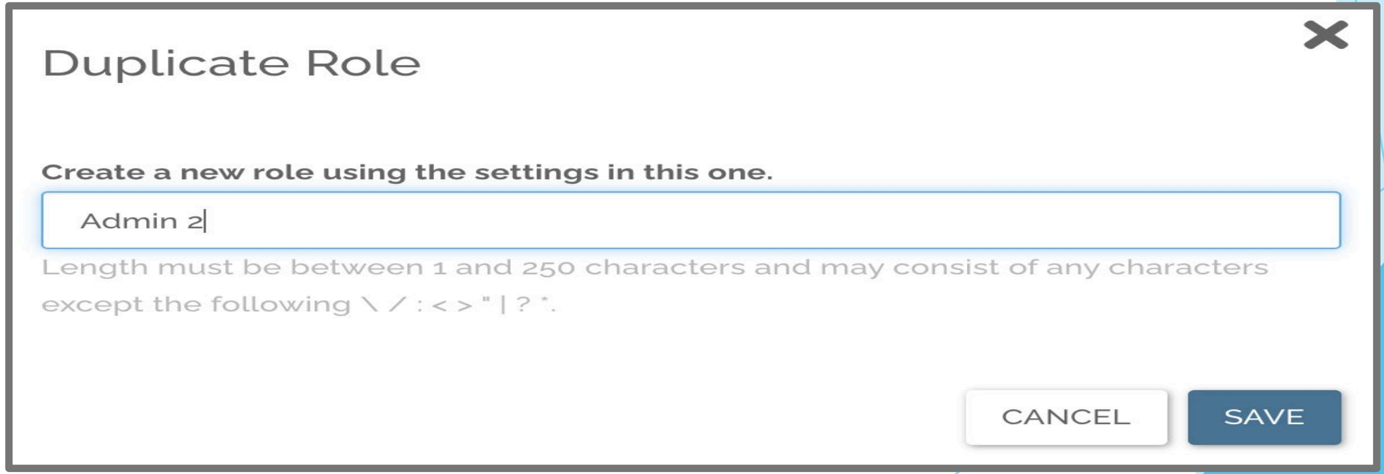
Duplicating Roles

- Select role
- Select Actions
- Select Duplicate

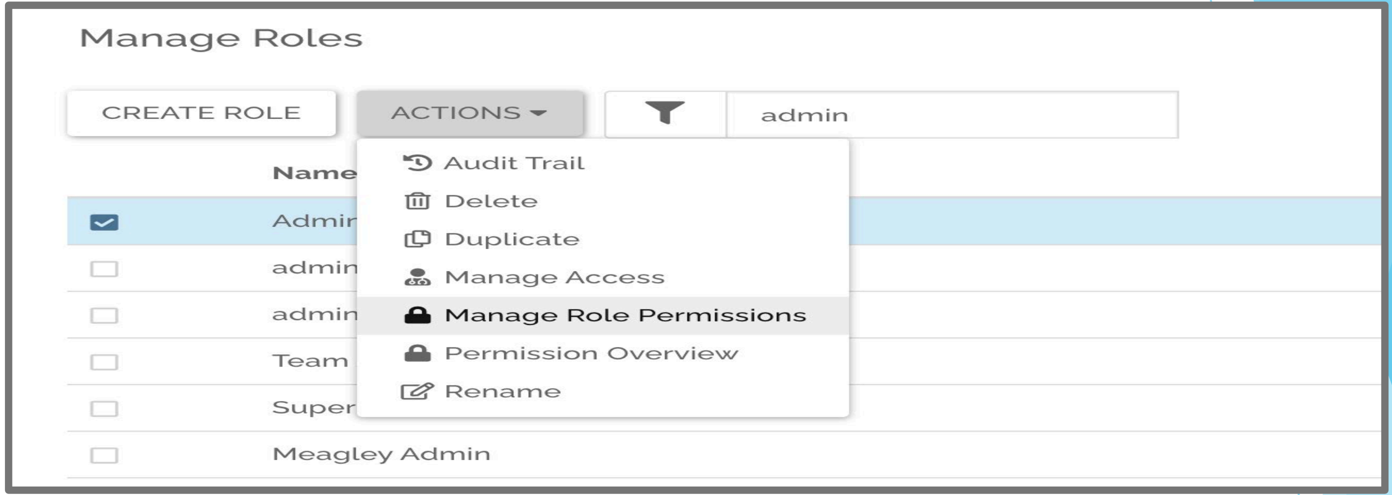


- Rename new role according to your naming convention



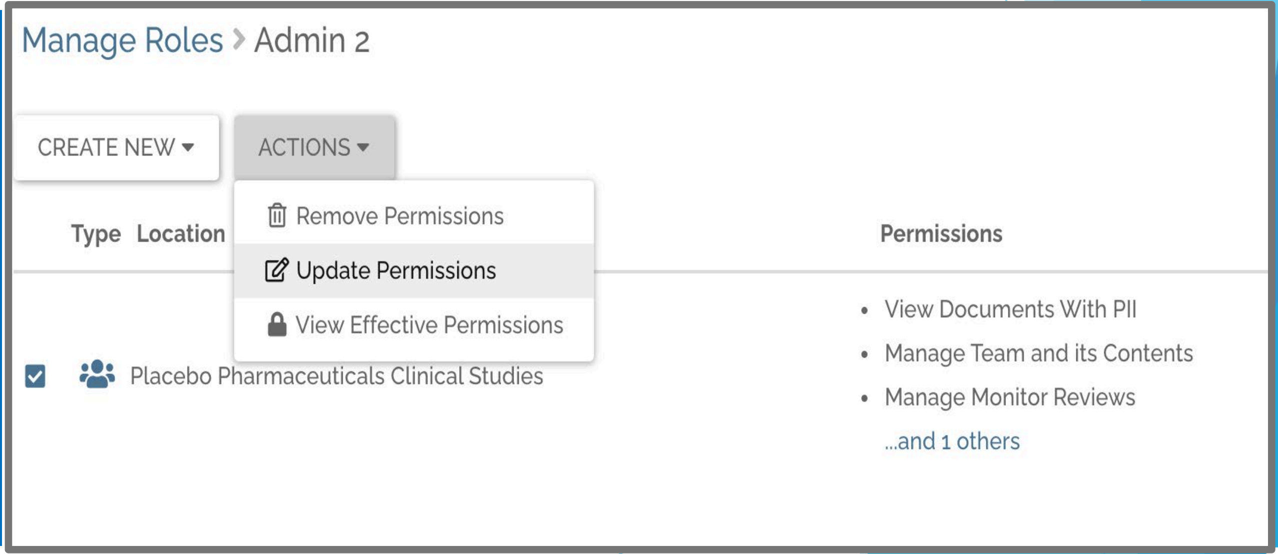
Duplicating Roles

- Select newly created role
- Select Manage Role Permissions



- Select Binder or Folder > Actions > Update Permissions to change Binder or Folder-Level permissions.

The same permissions will be granted to this new Binder or Folder that were assigned to the original role You can remove permissions to any Binder or Folder the new role should not have access to from this screen as well



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Adding Users

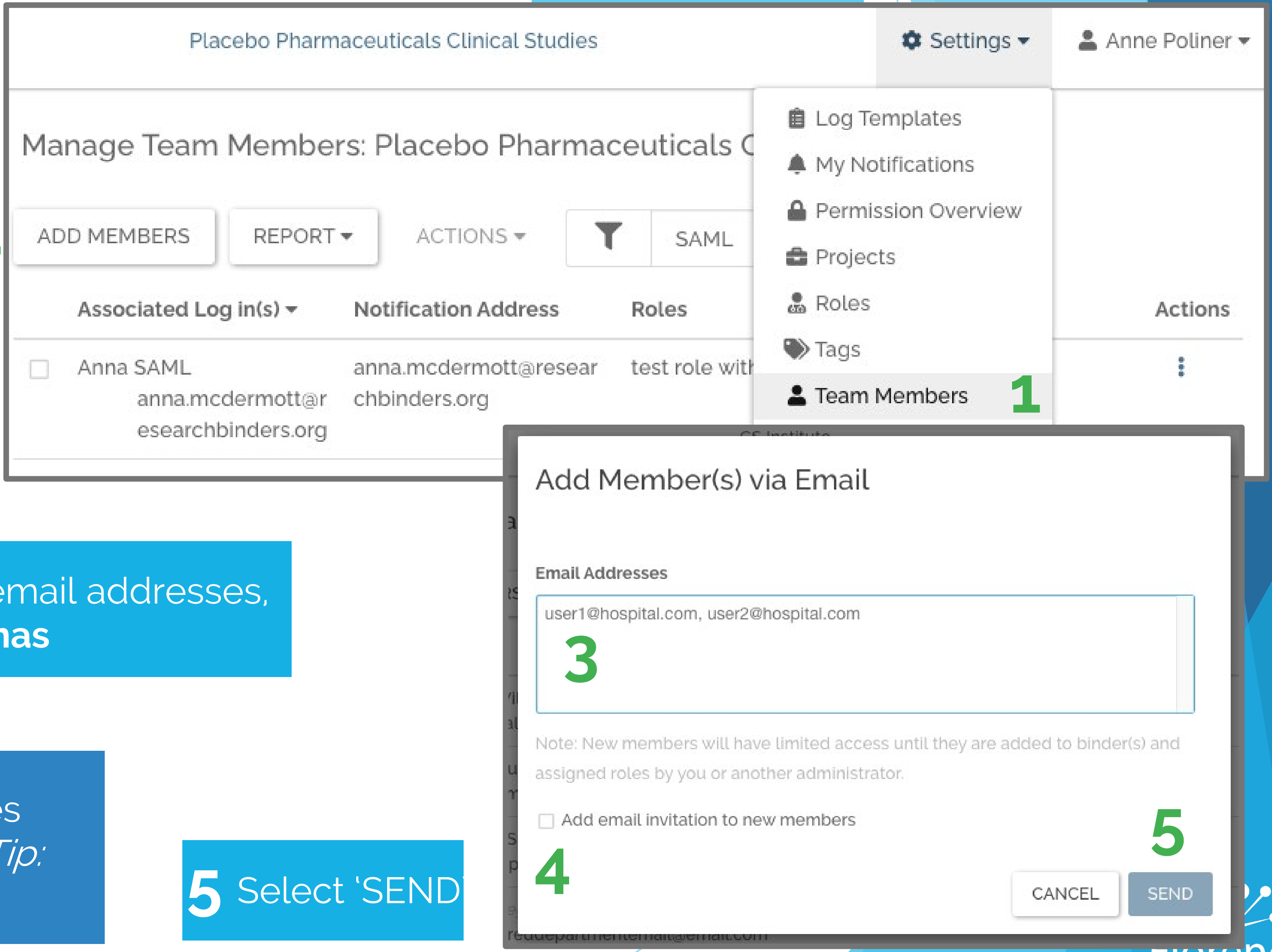
1 From Settings menu, select “Team Members”

2 Click “Add Members”

3 Enter one or more email addresses, separated by **commas**

4 Check box if you want invites emailed to new users **Pro Tip: don’t select for SSO users*

5 Select ‘SEND’

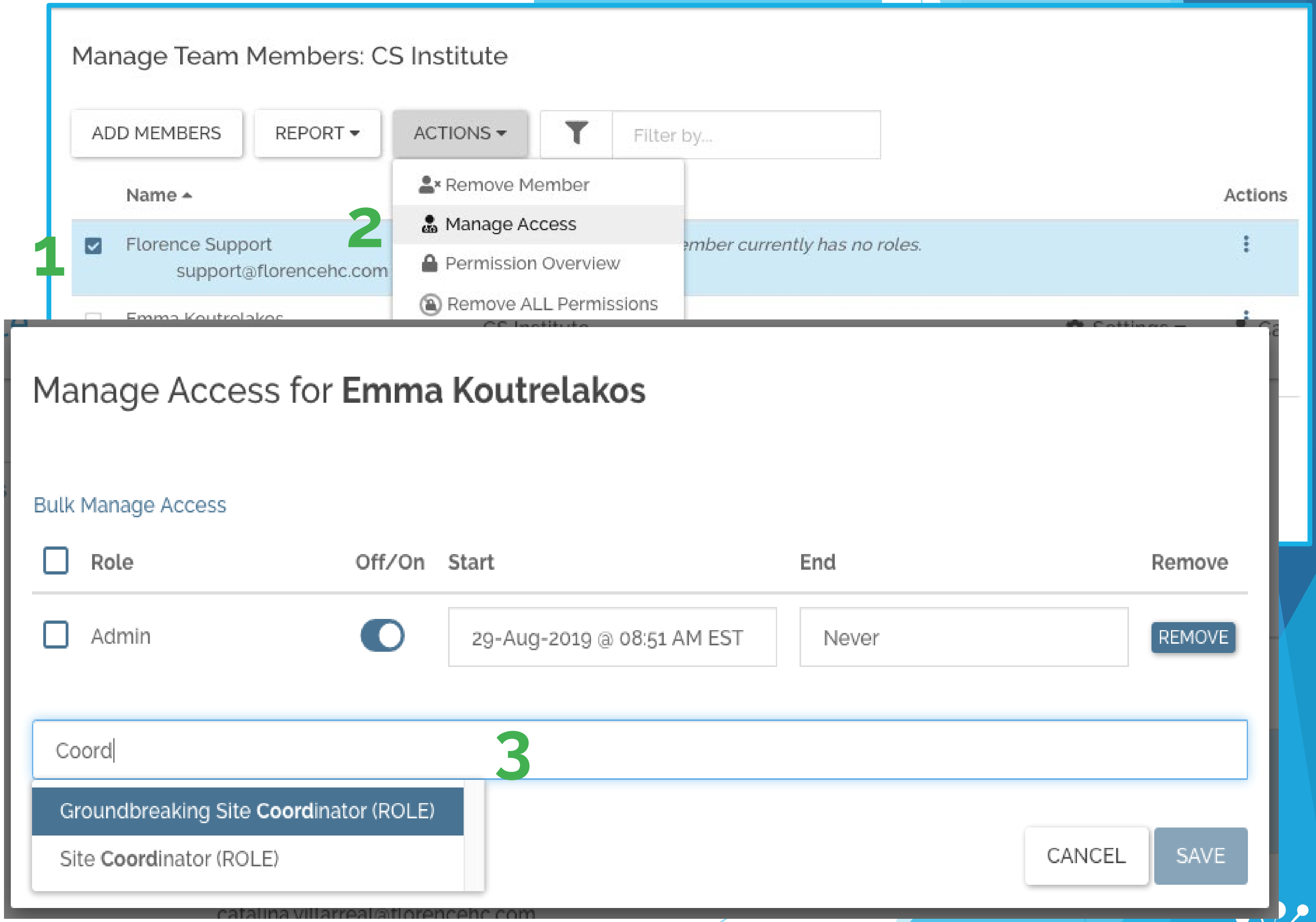


Assigning Roles

1 On Manage Team Members page, select a user

2 From Actions Menu, select Manage Access to display current access

3 Start typing the Role you want to assign them and repeat for all Roles needed.



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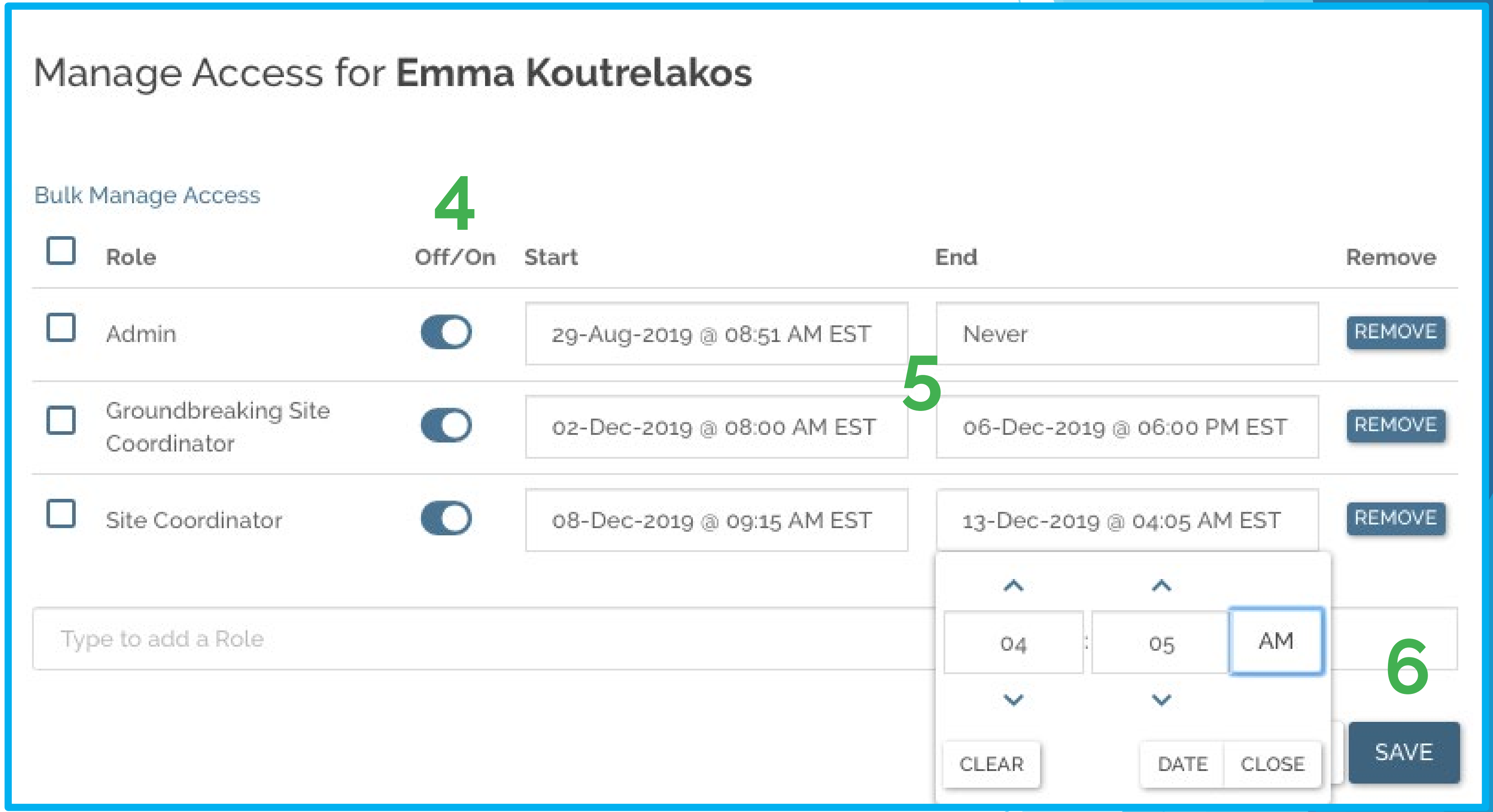
Assigning Roles

4 All Roles are OFF by default, toggle ON

5 When turned ON, default dates are NOW to NEVER. Edit if needed

6 Click SAVE when you have added all Roles and desired dates.



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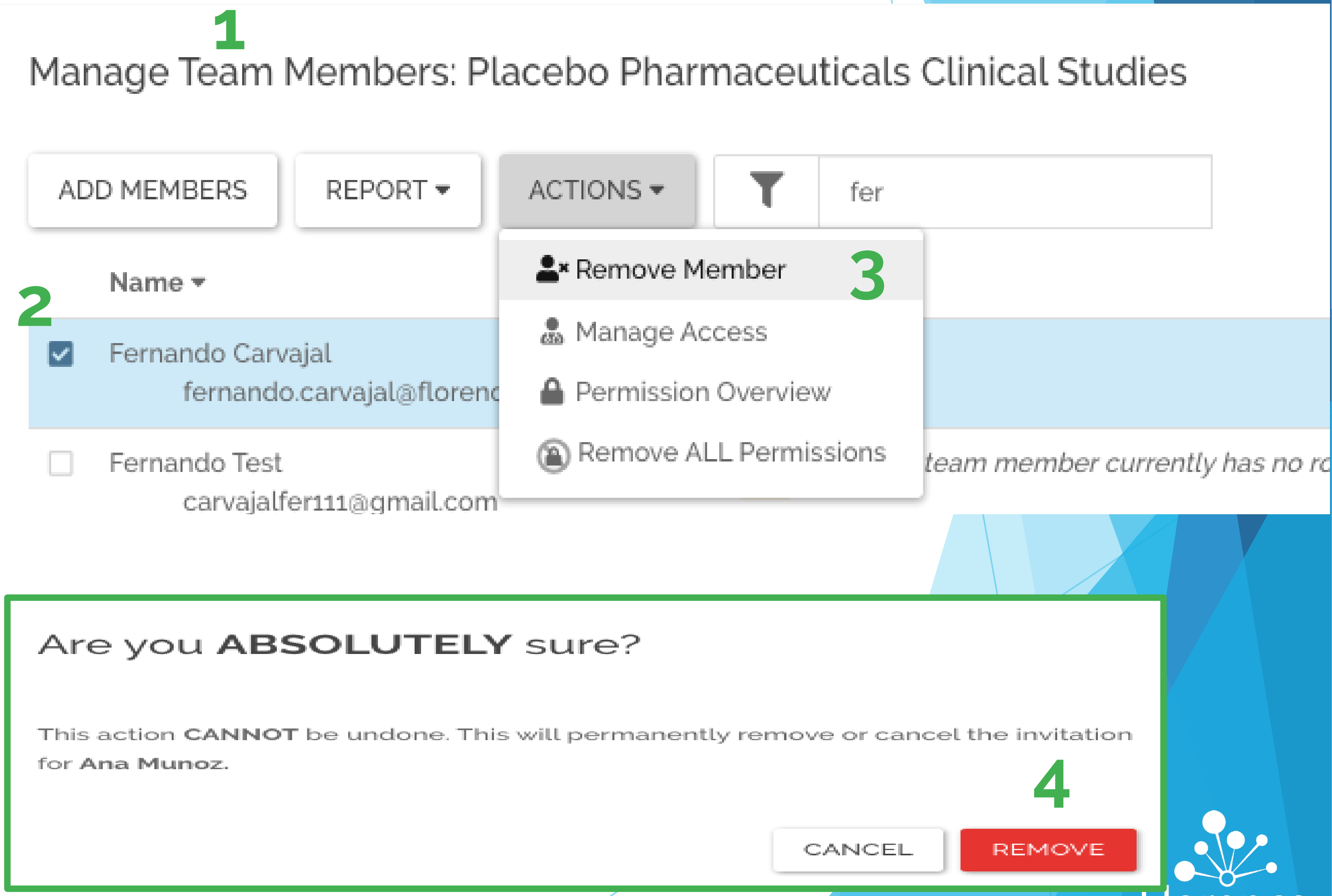
Removing Users

1 From Settings menu, select "Team Members"

2 Select checkbox of Team Member you want to remove

3 Open Actions menu - Choose **Remove Member**

4 Click **REMOVE** to confirm



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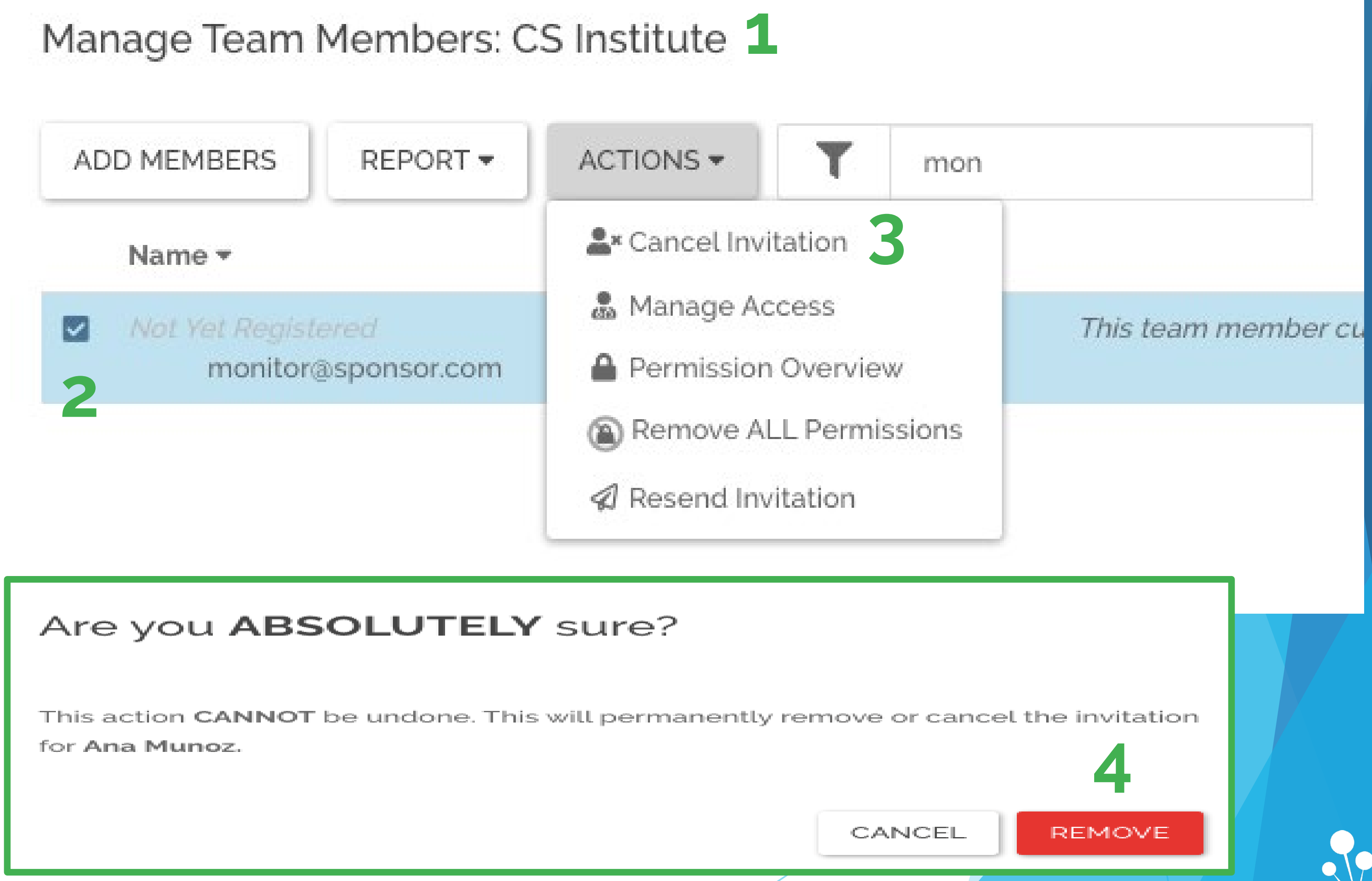
Removing Users: Not Registered Users

1 From Settings menu, select "Team Members"

2 Select checkbox of unregistered Team Member you want to remove

3 Open Actions menu - Choose **Cancel Invitation**

4 Click **REMOVE** to confirm



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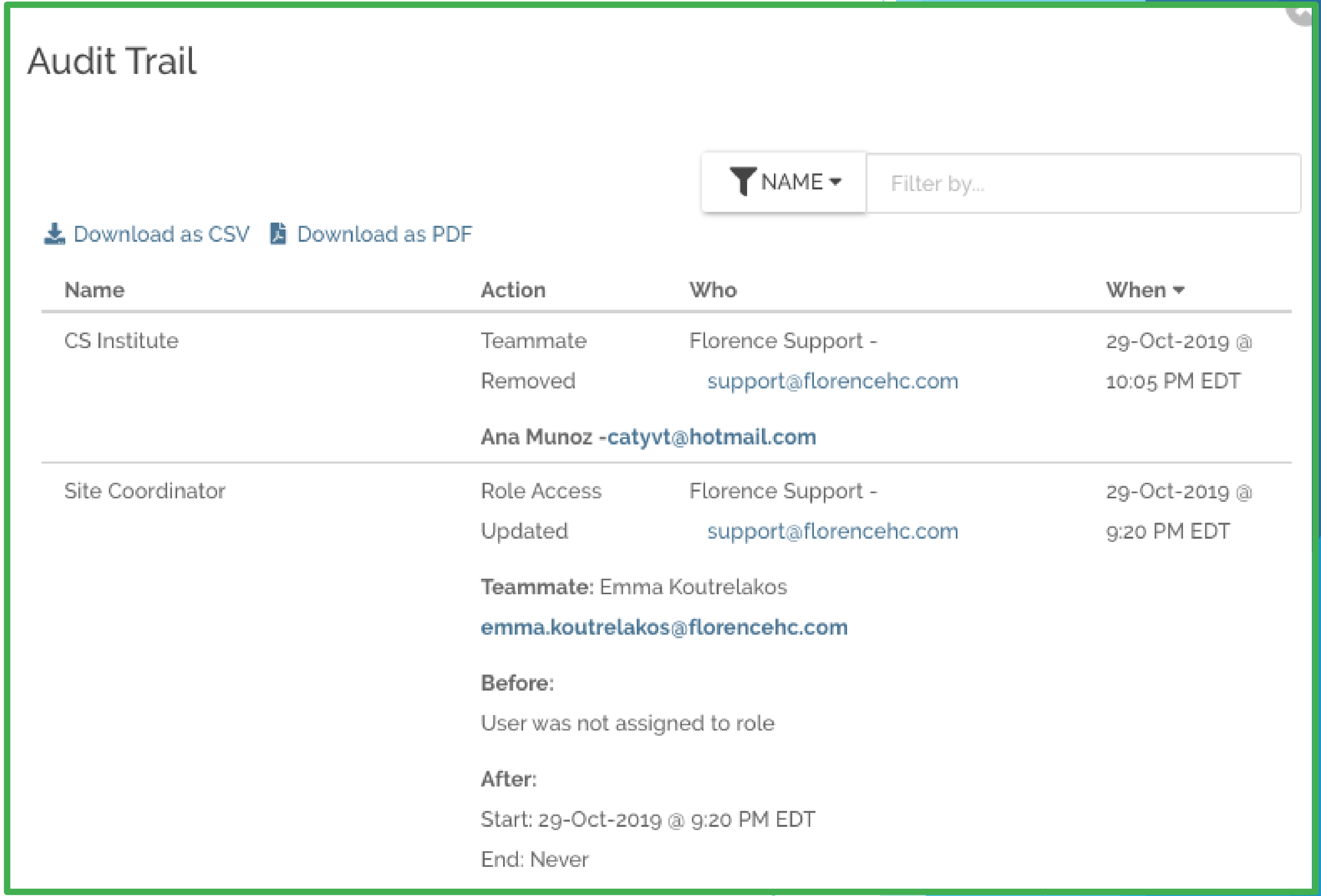
Reports

The Manage Team Members page offers two Report Options:

- **Access Dates**: shows all the users in the Team, their assigned Roles and their start and end date
- **Audit Trail**: all the users who have been added and changes in permissions and Roles

Both Reports can be downloaded


Audit Trail

NAME ▾ Filter by...

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Name	Action	Who	When ▾
CS Institute	Teammate Removed **Ana Munoz -catyvt@hotmail.com**	Florence Support - support@florencehc.com	29-Oct-2019 @ 10:05 PM EDT
Site Coordinator	Role Access Updated **Teammate:** Emma Koutrelakos emma.koutrelakos@florencehc.com **Before:** User was not assigned to role **After:** Start: 29-Oct-2019 @ 9:20 PM EDT End: Never	Florence Support - support@florencehc.com	29-Oct-2019 @ 9:20 PM EDT