Basic Administrator Training

Exercise: 4
System Roles

Version Information

Version	Date Released	Notes
2019-1	Jan 7th 2019	Updated Format
2019-2	May 17th 2019	Re-Branded to meet Galvanize design guidelines
2020-1	Jan 29th 2020	Updated Screenshots after Version 10 Update

Contents

Overall Objectives

Prerequisites

This Administrative Groupings guide requires a basic understanding of the data and configurations utilized   in Rsam Questionnaires, Record Types and Workflow. While you may complete the tutorial, you will need   a foundation of Rsam knowledge in order for the concepts and relationships referred to in the explanations and exercises to be fully understood. It is assumed that certain structures, elements and workflow components are in place in your Rsam instance or, that you already have the knowledge and skills to add the needed configurations. Although these items are referenced, this guide does not go into   detail on how to create them. If your templates in Rsam look different than those described here, simply   select your own desired elements.

Scenario Descriptions

This exercise builds upon the Administrative Grouping Exercise completed earlier.
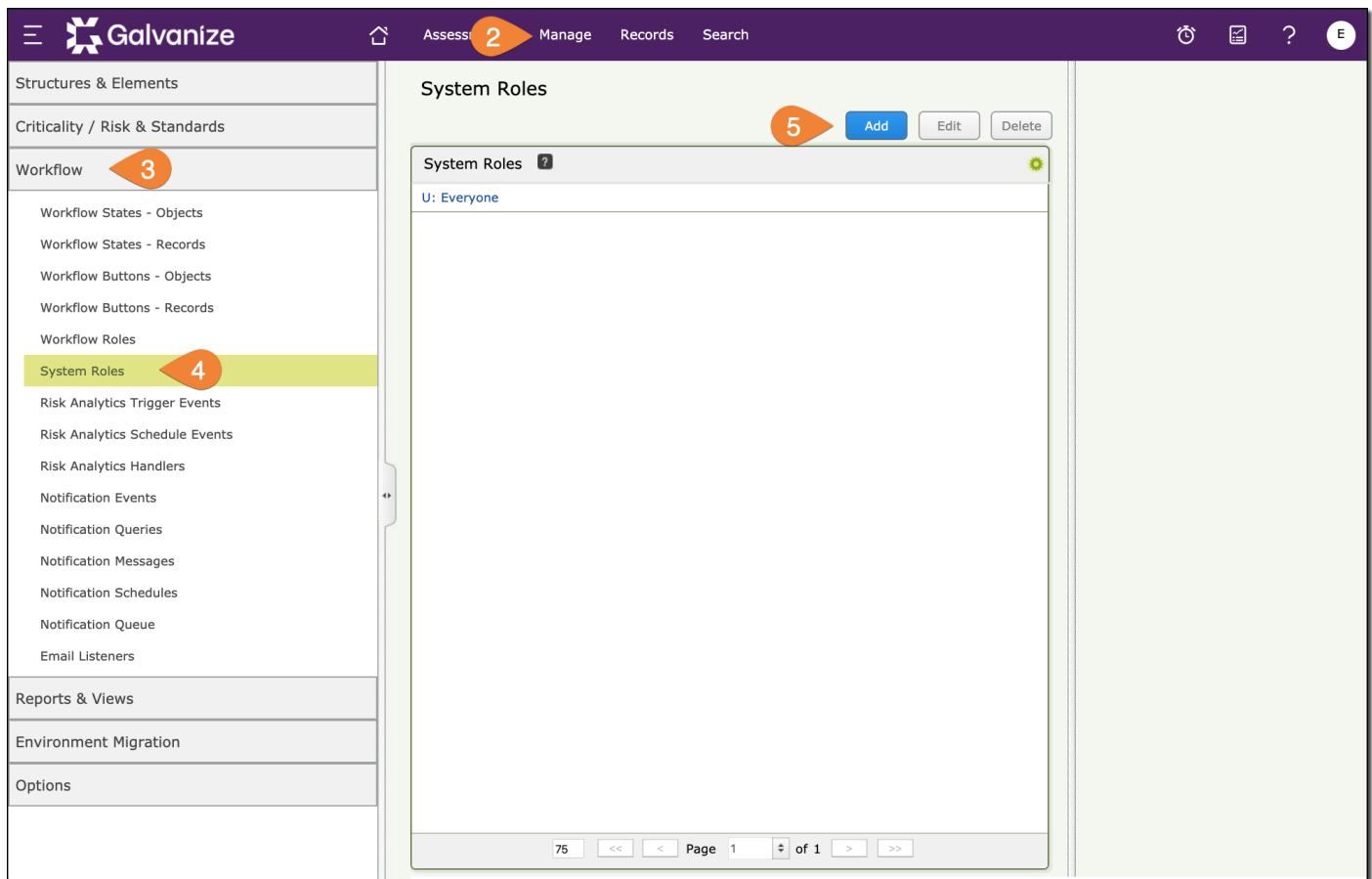
Through this process we will:

- Create a new user account and assign the permissions to this group

- Review the administrative user interface from this user's perspective

Session 1: Creating System Roles

Steps to Follow:

1. Login as the administrator: **r_admin**

2. Select Manage - Administration

3. Expand Workflow

4. Select System Roles

5. Select **Add**

6. At the **Add System Roles** dialog box enter the following values

| Fields	Values
System Role Name	Audit Application
System Role Description	Template for Audit Application

7. Select **Save**

8. Ensure that **Audit Application** is selected in the middle window pane.

9. In the Admin Group panel on the right, check **Show All**

10. Select the **Audit Application** administrative grouping. A dialog box will appear.

11. Check [**X**] **Read/Modify**
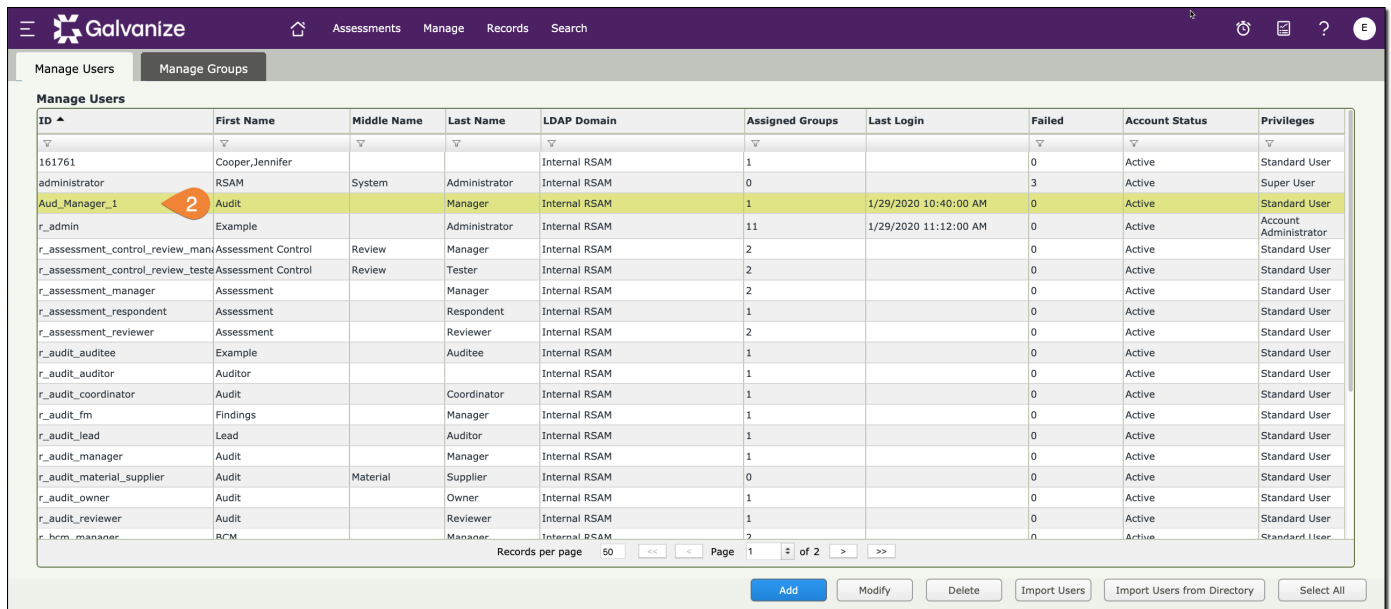
12. Check [**X**] **Add**

13. Check [**X**] **Disassociate**

14. Select **Save**

Session 2: Assigning the System role to the Aud_Manager_1 Account
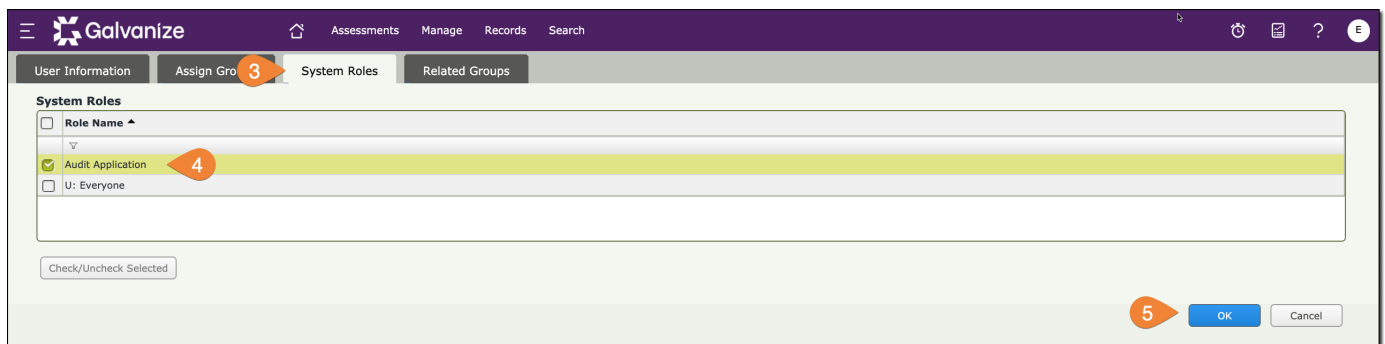
Steps to Follow:

1. Select Manage → Users/Groups
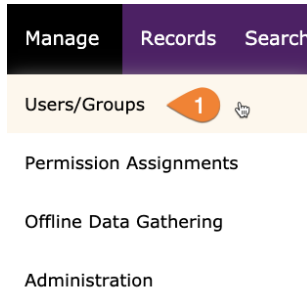
2. Locate and Double click **AUD_MANAGER_1**

3. Select the **System Roles** tab

4. Check the new System Role we created **[X] Audit Application**

5. Select **OK**

6.

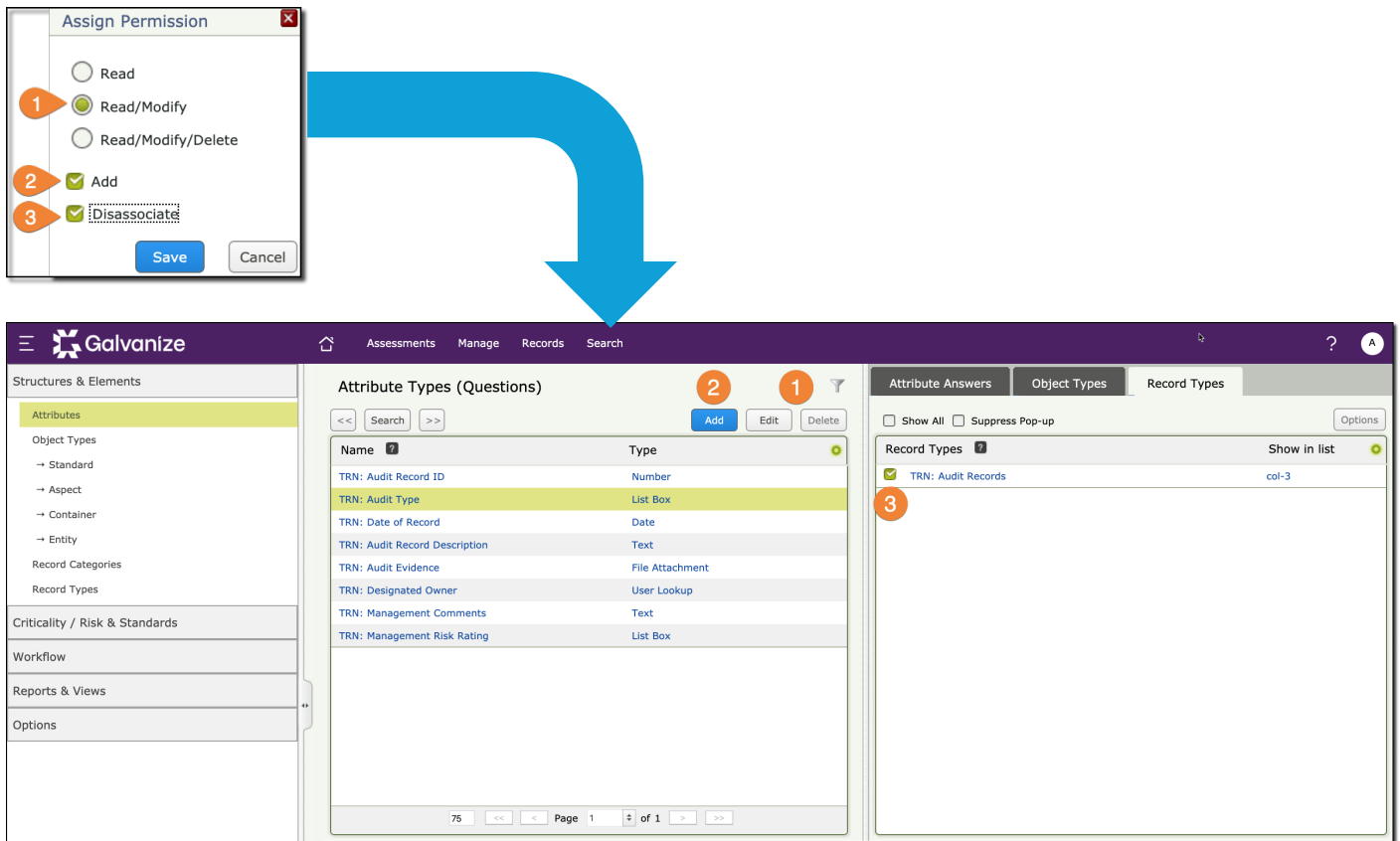## Session 3: Login as Template Application Administrator

We can now login as the Audit Manager to see what additional privileges we have based on being given a certain system role, that was previously configured.

Steps to Follow:

1. Logout as the **Administrator** (r_admin account)

2. Login as **Aud_Manager_1**

3. Select **Manage - Administration**

4. Expand **Structures & Elements**

5. Select **Attributes**

At this point, you can only see the administrative items that were assigned to your system role.

The privileges we set earlier now apply to the elements displayed: