

## Access rights

Feature	Value
Purpose	Mass changing of access rights to the records of existing sections when administrating access rights by records. Granting the user/role temporary access rights to specific records. Temporary delegation of access rights of a user/role to another user.
Application area	Productivity and security
Compatibility with Creatio	All base products on the Creatio platform 7.10+
Used system objects	System section: <ul style="list-style-type: none"><li>• Users</li></ul>

## List of roles of the process participants

Role	Notes
Administrator	Changes access rights to existing section records. Grants temporary access rights to records. Temporary delegates access rights of user/role to another user.

## Use cases

### Case 1. Granting permanent access rights to records

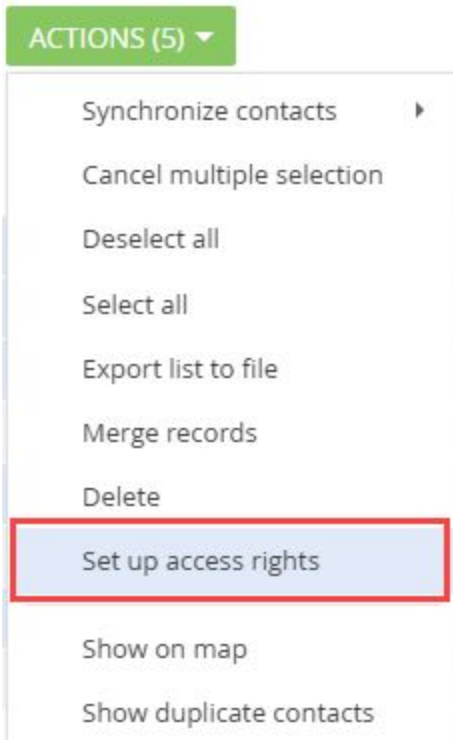
1. Open the section (for example, the [Contacts] section).
2. Filter records in the list and select records for which you want to change the access rights:

ACTIONS (5) ▾

Filter ▾ Tag

Contact name	Account	Job title	Business phone	Mobile phone	Email
<input checked="" type="checkbox"/> Valerie E. Murphy	Our company	Head of department	3090	+44 782 245 8357	valerie.murphy1980@gmail.com
<input checked="" type="checkbox"/> Kate Roberts	Fast Works	Head of department	+1 212 775 9012	+1 212 059 2121	kate.roberts@fast-works.com
<input checked="" type="checkbox"/> Ronald Young	Future Vision	CEO	+44 (15) 7542 7780	+44 (781) 354 5490	ronald_young@futurevision.com
<input type="checkbox"/> Marcus Morgan	Merseyside Trading	Head of department	+44 (20) 2573 5635	+44 (775) 747 6671	m.morgan@merseysidetrading.co.uk
<input checked="" type="checkbox"/> Jane Russel	Nova Pharmaceuticals	CEO	+44 1922 423876	+44 (0) 121 414 6351	russej@n-pharm.com
<input type="checkbox"/> Riley Scott	Elite Systems	Head of department	+44 (15) 1390 3275	+44 (789) 323 4531	r.scott@elitesys.co.uk
<input checked="" type="checkbox"/> Zane Rogers	Global Venture	Head of department	+1 212 711 1285	+1 212 053 9953	zane_rogers@globalventure.com.ny

3. Perform the [Set up access rights] action for the selected records.



4. The page for selecting access rights type will open. Select the [Permanent access rights] and click the [Save] button.

SAVE

PERFORM LATER

CLOSE

What access rights should be customized? ⓘ

- Temporary access rights
- Permanent access rights

5. The access rights configuration page will open. Specify users to grant or revoke access rights:

< GRANT RIGHTS REVOKE RIGHTS RECORDS >

⌵ Granted rights + ⋮

User/Role	Read	Edit	Delete
1st-line support	Yes	Yes	No
All employees	Yes	No	No

< GRANT RIGHTS REVOKE RIGHTS RECORDS >

⌵ Revoked rights + ⋮

User/Role	Read	Edit	Delete
All employees	No	Yes	Yes

The [Records] tab contains a list of users for which the access rights are being configured:

< GRANT RIGHTS REVOKE RIGHTS RECORDS >

⌵ Connected to ⋮

Title ^	Process	Object	Workspace
Jane Russel	Grant access rights	Contact	Default
Zane Rogers	Grant access rights	Contact	Default
Ronald Young	Grant access rights	Contact	Default
Valerie E. Murphy	Grant access rights	Contact	Default
Kate Roberts	Grant access rights	Contact	Default

6. To update rights according to configurations, click the [Update rights] stage on the action panel.

Title \* Permanent access rights update for selected records of the object Contact  
 Access rights period \* Permanent Object \* Contact

If the updating is successful, the stage will automatically change to the [Rights are successfully updated]:

- To check the result, open the page of the record with the changed access rights and select the [Set up access rights] action.

## Access rights: Jane Russel

What can I do for you? >

NEW ▾ SAVE CANCEL

<p>⌵ Read</p>		
1st-line support		Granted
All employees		Granted
<p>⌵ Edit</p>		
1st-line support		Granted
<p>⌵ Delete</p>		

Rights are not specified

## Case 2. Granting temporary access rights to records

1. Open the section (for example, the [Contacts] section).
2. Filter records in the list and select records for which you want to change the access rights:

ACTIONS (5) ▾

Filter ▾ Tag

Contact name	Account	Job title	Business phone	Mobile phone	Email
<input checked="" type="checkbox"/> Valerie E. Murphy	Our company	Head of department	3090	+44 782 245 8357	valerie.murphy1980@gmail.com
<input checked="" type="checkbox"/> Kate Roberts	Fast Works	Head of department	+1 212 775 9012	+1 212 059 2121	kate.roberts@fast-works.com
<input checked="" type="checkbox"/> Ronald Young	Future Vision	CEO	+44 (15) 7542 7780	+44 (781) 354 5490	ronald_young@futurevision.com
<input type="checkbox"/> Marcus Morgan	Merseyside Trading	Head of department	+44 (20) 2573 5635	+44 (775) 747 6671	m.morgan@merseysidetrading.co.uk
<input checked="" type="checkbox"/> Jane Russel	Nova Pharmaceuticals	CEO	+44 1922 423876	+44 (0) 121 414 6351	russel@n-pharm.com
<input type="checkbox"/> Riley Scott	Elite Systems	Head of department	+44 (15) 1390 3275	+44 (789) 323 4531	r.scott@elitesys.co.uk
<input checked="" type="checkbox"/> Zane Rogers	Global Venture	Head of department	+1 212 711 1285	+1 212 053 9953	zane_rogers@globalventure.com.ny

3. Perform the [Set up access rights] action for the selected records.

ACTIONS (5) ▾

- Synchronize contacts ▶
- Cancel multiple selection
- Deselect all
- Select all
- Export list to file
- Merge records
- Delete
- Set up access rights**
- Show on map
- Show duplicate contacts

4. The page for selecting access rights type will open. Select the [Temporary access rights] and click the [Save] button.

Question What can I do for you? > Creatio

What access rights should be customized? ⓘ

Temporary access rights

Permanent access rights

- The access rights configuration page will open. Specify the time period of granting access rights and a user/role to grant rights to:

Title \* Temporary access rights update for selected records of the object Contact

Access rights period \* Temporary

Grant from \* 10/6/2017 2:15 PM

Object \* Contact

Grant till \* 10/8/2017 1:10 PM

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< GRANT RIGHTS RECORDS >

Granted rights + :

User/Role	Read	Edit	Delete
System administrators	Yes	No	No
1st-line support	Yes	Yes	No

The [Records] tab contains a list of users for which the access rights are being configured:

< GRANT RIGHTS RECORDS >

Connected to :

Title	Process	Object	Workspace
Jane Russel	Grant access rights	Contact	Default
Ronald Young	Grant access rights	Contact	Default
Zane Rogers	Grant access rights	Contact	Default
Riley Scott	Grant access rights	Contact	Default
Kate Roberts	Grant access rights	Contact	Default
Valerie E. Murphy	Grant access rights	Contact	Default

- To update rights according to configurations, click the [Update rights] stage on the action panel.

Set up rights Update rights Rights are successfully updated

NEXT STEPS (0)

Title \* Temporary access rights update for selected records of the object Contact

Access rights period \* Temporary

Grant from \* 10/6/2017 2:15 PM

Object \* Contact

Grant till \* 10/8/2017 1:10 PM

If the updating is successful, the stage will automatically change to the [Rights are successfully updated]:

Set up rights Update rights Rights are successfully updated

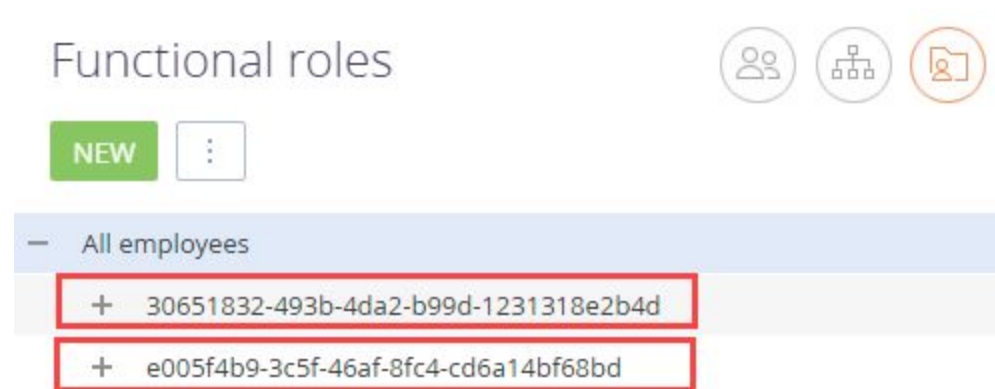
NEXT STEPS (0)

- Check the granted access rights in the specified time period. Open the page of the record with the changed access rights and select the [Set up access rights] action.

Attention! Rights are granted and revoked according to time zone in the profile of user who configured temporary access rights.

To organize temporary access to records, the functional roles that will receive the selected rights are created. The rights are automatically delegated to the corresponding roles/users at the specified time. After the granting period is expired, the delegation is automatically canceled.

Once the temporary access rights have expired, you can delete the functional roles. The names of the these functional roles are automatically generated and can be easily identified:



Click the [Record rights section] link in the [Users and administration] group of the system designer to view the history of permanent and temporary access rights configuration.

## Users and administration

System users

Portal users

Organizational roles

Functional roles

Object permissions

Operation permissions

Audit log

**Record rights section**

### Case 3. Delegating user/role rights for a period

1. In the system designer, click the [System users] link.
2. Open the page of the user for which the access rights will be delegated for the specified period.
3. Open the [Rights delegation] tab and add a new record with the following parameters:
  - [Permissions granted by] – the role or user whose rights will be delegated.
  - [Inherited from] – the field is automatically filled with the name of current user. This user will receive delegated access rights.
  - Specify the validity period for delegated rights in the [Valid] and [Till] fields. These fields are required.

### Implementation instructions

1. Contact the support service to install a package with the [Access rights] business process or install it manually using the [Installed applications] link in the system designer.
2. Record access rights configuration is carried out by clicking the [Actions] button in the section list. To configure access rights:
  - a. The user who makes the configuration must have the access rights to the [CanManageAdministration] system operation.
  - b. The user must be a member of the [System Administrators] organizational role.