Permission User Guide

Permission Actions

Add Permission

To start this action, click the   Add Permission   button above the Permission listing.

Creates a new Permission.

When this action starts a form is displayed to enter the details of the Permission.

Each field customises or controls some aspect of the Permission display or behaviour.

Some fields are required and must be entered before the Permission can be added, the required fields are Administrative Role.

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the Permission you need to work on, and click the   🔍 View   button in the   ⋮   More Menu on that row.

Display the selected Permission.

This action displays the Permission similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the Permission you need to work on, and click the   ✏   button on that row.

Edits an existing Permission.

When this action starts a form is displayed with the existing Permission and any previous information entered.

Each field customises or controls some aspect of the Permission display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Copy

To start this action, select the Permission you need to work on, and click the   ▢ Copy   button in the   ⋮   More Menu on that row.

Copies an existing Permission.

The selected Permission is copied and the word (Copy) will be added to the name of the new Copy

Delete

To start this action, either select the Permission to work on and click the   🗑   button on that row. Or CTRL+click to select multiple Permissions and click the   🗑   button above the Permission listing.

Deletes an existing Permission.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Permission.

Search

To start this action, click the   🔍   button above the Permission listing.

Allows a Search of Permissions.

This allows a simple text search across all Permissions.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the   🔍 Adv. Search   button above the Permission listing in the   ⋮   More Menu.

Allows an Advanced Search of Permissions.

The Advanced Search opens a new section at the bottom of the Permissions and allows several distinct features:

- Multiple Search Lines : allows Permission matches to be identified where more than one search criteria is required

- Nested Searches : allows a combination of AND and OR logic to find results

- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the   ↻ Refresh   button above the Permission listing in the   ⋮   More Menu.

Refresh the list of Permissions.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the   ☁ Export to List   button above the Permission listing in the   ⋮   More Menu.

Export the Permission results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Permissions shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Permissions will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the   ⤓ Export All   button above the Permission listing in the   ⋮   More Menu.

Export all the Permissions to a List.

Exactly as for "Export to List" except rather than just Exporting the Permission results shown, all Permissions will be expored.

Export Item

To start this action, select the Permission you need to work on, and click the   ☁ Export Item   button in the   ⋮   More Menu on that row.

Export only the selected Permission to a List.

Exactly as for "Export to List" except rather than just Exporting the Permission results shown, only the selected Permission is exported.

Choose Columns

To start this action, click the   ⚙ Choose Columns   button above the Permission listing in the   ⋮   More Menu.

Changes the Columns shown in the Permission Listing.

The Choose Columns screen shows the Selected Columns on the left, and the Permission Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the Permission Listing.

Manage Filters

To start this action, click the   ☰ Manage Filters   button above the Permission listing in the   ⋮   More Menu.

Creates custom Filters for Permissions.

A Filter is a saved Advanced Search. Multiple Filters can be created for Permissions.

These Filters appear at the top of the Permission listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Permissions where these can be managed.

Permission Field Reference

Administrative Role

This field is mandatory.

If set, the Permission is used to describe an Administrative Role and used in granular permission rules.

If not set, the Permission is used for visitors to the website, for example to whether a user may access a page.