

Administrative Roles

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From time to time you may require users to perform particular administrative tasks, yet giving users full Administration access is providing too much privilege. The predefined Administrative Roles allow Administrators to grant users access to specific administrative functions.

In addition, further refinement or customisation of the administrative roles can be achieved by creating new roles and specifying access rules.

Predefined Administrative Roles

Roles	Description
Spreadsheet importer	Role that will allow users to import data only.
Spreadsheet administrator	Role that will allow users to add new configurations and import data.
User administrator	Role that will allow users to manage user accounts, such as disabling accounts, resetting passwords, and assigning roles.
Security administrator	Role that will allow users to create roles, define access rules and assign navigation access.
Survey creator	Role that will allow users to create and manage surveys.
Content administrator	Role that will allow users to configure navigation, reports and screens

Workflows & Schedule Roles	Description
administrator	Role that will allow users to maintain workflows, triggers and schedules, including the ability to create, modify and delete workflows.

For the following roles, you will also need to create separate access rules that grant "create" access for the objects that require administrating.

- Spreadsheet Importer
- Spreadsheet Administrator
- Content Administrator

For example, if the Spreadsheet Importer requires to import a list of Employees, "create" access to Employee records is required.

Customise Administrative Roles

If the predefined Administrative Roles are not exactly what you are after, Administrators are also able to create their own custom administrative roles. Just like how normal access rules are configured to restrict the permissions (Create, View, Edit and Delete) and/or conditionally set restrictions on records, the same applies to administrative functions when setting up the access rules.

To configure a new administrative role:

1. Decide what type administrative tasks the role will need to perform (such as Spreadsheet importing, user manager, role management etc)
2. Create a new custom admin role
3. Determine which **Administrator Base Roles** are required and then add them to the role.
4. For each administrative task that the role will need to perform, configure the access rules and navigation. See [Access Summary for Administrative Roles](#) for a listing the objects that require record access and the reports that require navigation access.

Administrative Base Roles

In addition to the administrative roles, the base roles below are included by the administrative roles to grant special administrative access.

Administrator Base Roles	Description	Roles including this role
Administrator Base - Core	A role used as the foundation for other administrative roles.	<ul style="list-style-type: none"> • User Administrators • Security Administrators • Spreadsheet Importers • Spreadsheet Administrators • Content Administrators • Workflow & Schedule Administrators
Administrator Base - Navigation	Grants selective view access to the navigation structure for the purpose of making administrative changes.	<ul style="list-style-type: none"> • User Administrator • Security Administrators
Administrator Base - Security	Grants administrative access to accounts and security roles	<ul style="list-style-type: none"> • User Administrator • Security Administrators
Administrator Base - Configure	Grants access to configure mode and the navigation structure.	<ul style="list-style-type: none"> • Content Administrators

Navigation

Administrator Base

Roles including this

Administrator Base - Core role will need to be included for *all* custom role created admin roles.

Access Summary for Administrative Roles

To configure custom administrative roles, you will need to determine the type of administrative tasks a user will need to perform and then define the access rules and also grant the appropriate navigation access for that particular task.

Spreadsheet Importers

Object	Access Type	Description
Import Configuration object	Record Access	Record access to be decided by the user
	Navigation	Import Spreadsheet
Import Runs	Record Access	Record access to be decided by the user

Spreadsheet Administrators

Object	Access Type	Description
Import Configuration object	Record Access	Record access to be decided by the user
	Navigation	Import Spreadsheet

Object	Access Type	Description
Schedule Import Configuration	Record Access	Record access to be decided by the user
	Navigation	Schedule Import report
Schedule Export Configuration	Record Access	Record access to be decided by the user
	Navigation	Schedule Export report

User Administrators

Object	Access Type	Description
User Account	Record Access	Record access to be decided by the user
	Navigation	User Accounts
Navigation Container	Record Access	Record access to be decided by the user
Full Role	Record Access	Record access to be decided by the user
	Navigation	User Roles

Object	Access Type	Description
Lite Role *	Record Access	Record access to be decided by the user
Basic Role *	Record Access	Record access to be decided by the user
Person	Record Access	Full (Create/View/Edit/Delete)
Identity Provider	Record Access	Record access to be decided by the user
	Navigation	Identity Providers
Identity Provider User	Record Access	Record access to be decided by the user
OpenID Connect Identify Provider	Record Access	Record access to be decided by the user
SAML Identity Provider	Record Access	Record access to be decided by the user

Security Administrators

Object	Access Type	Description

User Account Object	Record Access Type	Record access to be decided by the user Description
Full Role	Record Access	Record access to be decided by the user
Lite Role *	Record Access	Record access to be decided by the user
Basic Role *	Record Access	Record access to be decided by the user
Logon Audit Log Entry	Record Access	View only
	Navigation	Security Audit Log
Identify Provider	Record Access	Record access to be decided by the user
	Navigation	Identity Providers
OpenID Connect Identify Provider	Record Access	Record access to be decided by the user
SAML Identity Provider	Record Access	Record access to be decided by the user

Identity Provider User Object	Record Access Type	User Description
		Record access to be decided by the user

Content Administrator

Object	Access Type	Description
Board	Record Access	Record access to be decided by the user
Chart	Record Access	Record access to be decided by the user
Document Folder	Record Access	Record access to be decided by the user
Navigation Section	Record Access	Record access to be decided by the user
Private Content Section	Record Access	Record access to be decided by the user
Report	Record Access	Record access to be decided by the user
Screen	Record Access	Record access to be decided by the user
Top Menu	Record Access	Record access to be decided by the user
	Navigation	Administration → Resources → Boards
	Navigation	Administration → Resources → Charts
	Navigation	Administration → Resources → Reports
	Navigation	Administration → Resources → Screens

Workflows & Schedules Administrator

Object	Access Type	Description
Workflow	Record Access	Record access to be decided by the user
Triggers	Record Access	Record access to be decided by the user
Relationships	Record Access	Record access to be decided by the user
Schedule Daily Repeat	Record Access	Record access to be decided by the user

Schedule One Off	Record Access	Record access to be decided by the user
Object	Access Type	Description
Workflow Run	Record Access	Record access to be decided by the user
Workflow Run Log Entry	Record Access	Record access to be decided by the user

* Feature only available for specific client plans
