

Implementation of Access Rights Best Practices

Template implementations have some of the access rights preconfigured. Any other access rights may be customised for individual client's needs.

User vs. Group Access Rights

When defining new access rights, please rather use **Groups** instead of **Users**. Users and their roles may change time from time, so it would be easier to hand over the role in the company to someone else just by changing user's group membership.

Assign User to Groups

Power Users

All Power Users should be placed into group **Everyone** or **Internal** at least.

All Power Users should be placed into role **Creator** & role based on person's working relationship to the company.

All Power Users should be set to one Profile (used for GUI) - the default is based on template.

External Associates

All External Associates should be placed into group **External Users**.

All External Associates should be set to one **Profile** (used for GUI) - the default is based on template.

Clients

All Clients should be placed into group External Users.

All Clients should be set to one Profile (used for GUI) - the default is based on template.

Access Rights to Estimates, Invoices, Orders

All access rights are based on the group access rights level set-up for each individual node in Atollon Directory Administration.

Estimates, Invoices, Orders

Estimate / Invoice Approver

Estimate / Invoice / Order Editor

Estimate / Invoice / Order Reader

Time Sheet

Timesheet Approval group - users enabled to see / approve timesheets of other users.

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