

Edit Permissions in Atlas

The Training Center Coordinator (TCC) or the Training Site Coordinator (TSC) can edit permissions in Atlas. The TCC may edit the default permissions for all roles for their Training Center and all aligned Training Sites. They may also edit permissions for all aligned TC Admins (TCAs)/TS Coordinators (TSCs)/Training Site Admins (TSAs)/Faculty/Instructors individually. The TCC may choose to activate the permission to allow their aligned TCAs/TSCs, as a default of by individual, the ability to edit permissions.

NOTE: Please also see the “Job Aid: Default Roles and Permissions Matrix” that defines the roles and permissions in Atlas. This document can be found on the Atlas Information & Resources page.

Edit Default Permissions

The default permissions establish the permissions given to each role at the Training Center and Training Site level. These are the permissions that each role starts out with as a default.

1. From the Training Center tab, select Roles under the Training Center heading (Figure 1).

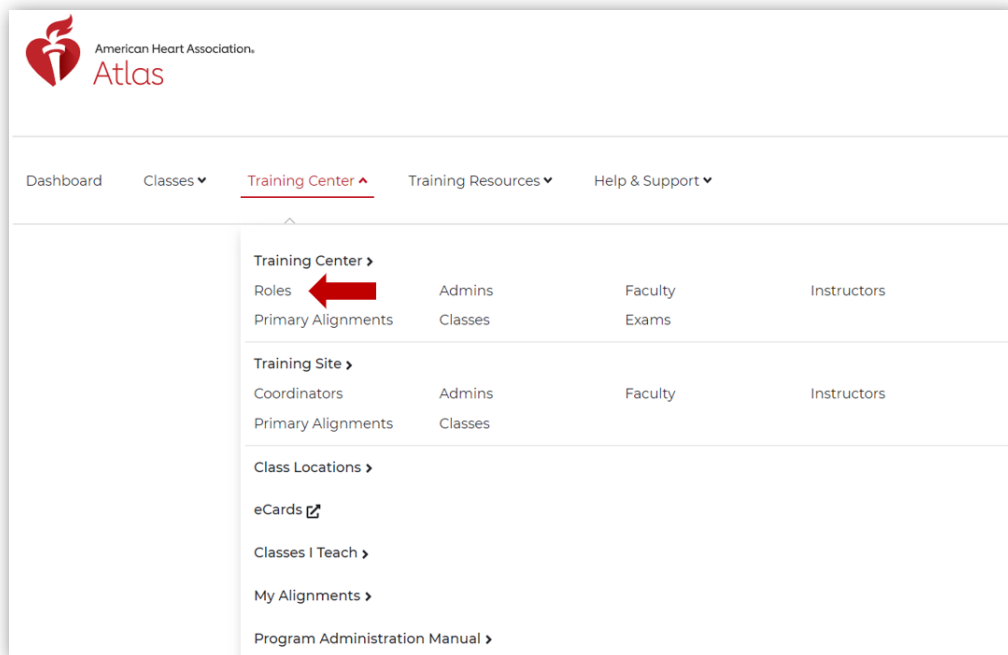


Figure 1

2. On the Default Role Permissions page, scroll down to view the roles (Figure 2).

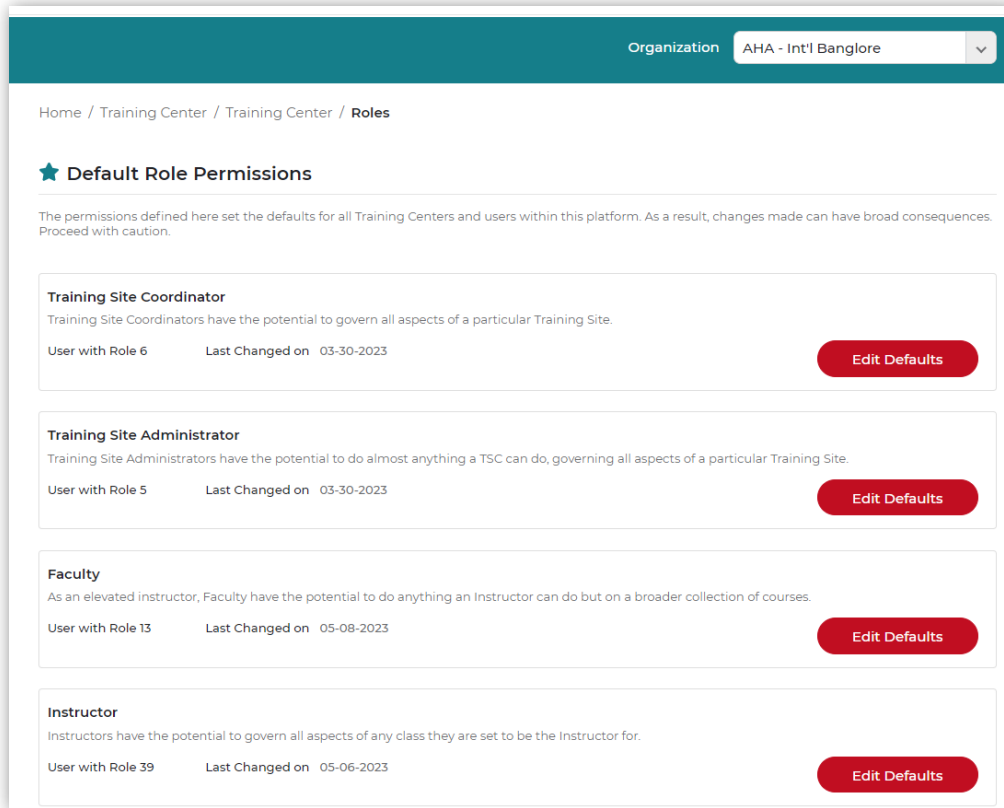


Figure 2

- a. The display for each role (Figure 3):
 - i. Defines the role
 - ii. Shows the number of users in the TC who are assigned the role
 - iii. Shows the last date the role was changed
 - iv. Includes an Edit Defaults button

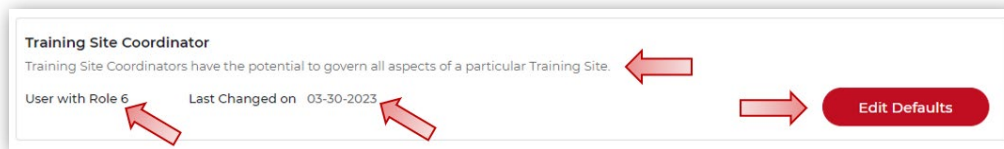


Figure 3

Edit Permissions

1. Select the role to edit and then click the Edit Defaults button
 - a. The Default Permissions: Role Name page is displayed
 - b. Each permission is defined
 - c. Each permission can be designated as
 - i. **Read only** (the **Read check box** is checked), allows the holder of the role to search and view the specific permission
 - ii. **Read/Write** (both the **Read and Write check boxes** are checked), allows the holder of the role to take action for the specific permission
2. Edit each permission or leave as the default
3. The Cancel button may be selected to cancel any changes made and return to the permissions page

Job Aid: Edit Permissions in Atlas

4. Reset to Default button will reset any changes that were made and return all permissions to the default for the Training Center or Training Site
 - a. When the Reset to Default button is selected, a confirmation pop-up will appear (Figure 4)

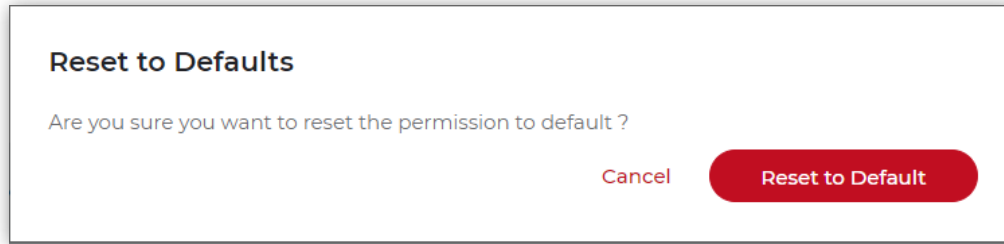


Figure 4

- i. Select Cancel and the user is returned to the Default Permissions: Role Name
 - ii. Select the Reset to Default button to reset the permission
 1. The user will be returned to the Default Role Permissions page
5. When editing is completed as desired, select the Update button (Figure 5)
 - a. The user will be returned to the Default Role Permissions page
 - b. A confirmation notification message will appear above the title

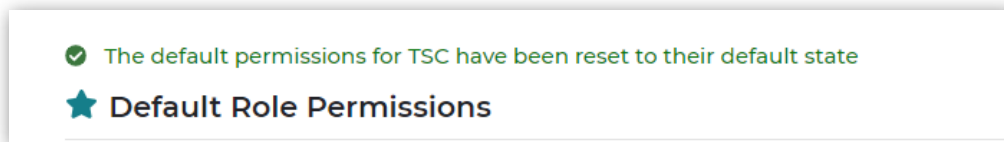


Figure 5

Edit Permissions by Role

The default permissions may be edited by role for each individual with that role. This allows the TCC/TSC to set business rules or allow specific individuals to have additional or less authority within the role.

For Example: A TCC may want 3 TCAs to create all classes in the Class Management tool. This is accomplished through editing the individual permissions to allow the selected individuals to have this responsibility.

1. From the Training Center tab, select the specific Role, such as Instructor, under the Training Center heading (Figure 6)
NOTE: A TSC would select the specific Role under the Training Site heading

Job Aid: Edit Permissions in Atlas

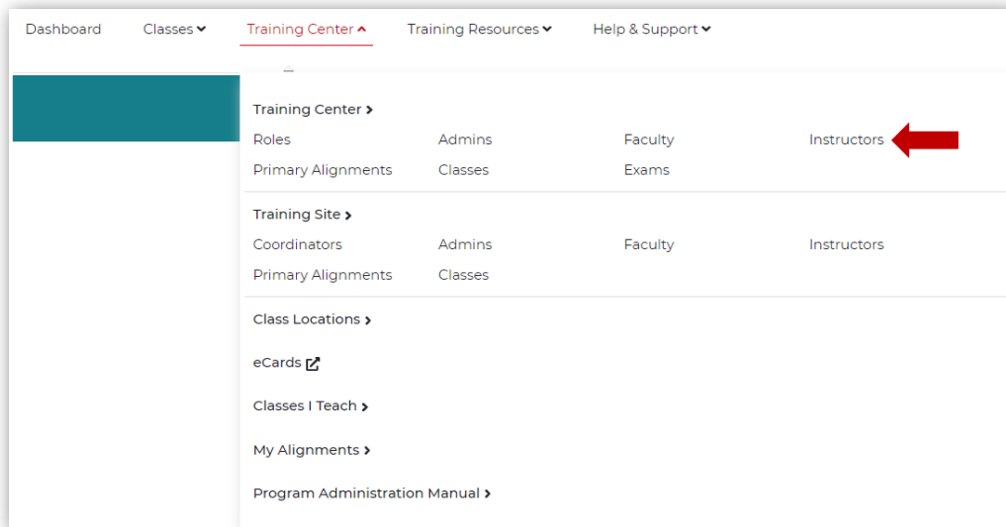


Figure 6

2. The page for the Role selected will be displayed, in this example we are using Instructors)
3. Scroll down to the list of Instructors
4. Find the Instructor whose Role should be edited
 - a. In the Actions column, click on the ellipsis (...)
 - b. Click Permissions and Alignments in the dropdown menu

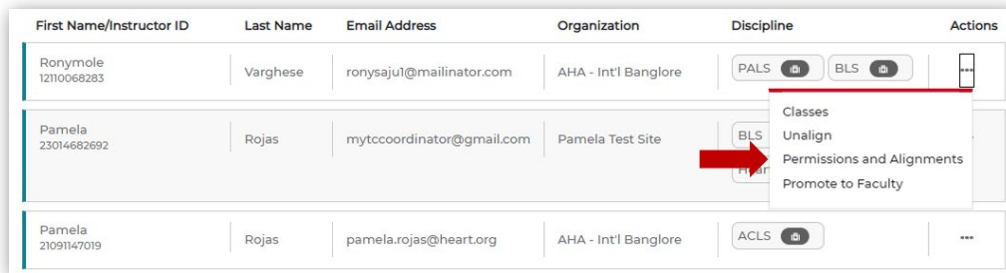


Figure 7

- c. The Alignment page for the specific Instructor is displayed, and the title on the page includes the Instructor's name (Figure 8)

Alignments for Ronymole Varghese

Here you can manage any existing alignments Ronymole Varghese has with AHA - Int'l Bangalore.

First Name Ronymole **Last Name** Varghese

Email Address
ronysaju1@mailinator.com

Disciplines

✓ BLS
Alignment Expiration
 None Specified Date

✓ PALS
Alignment Expiration
 None Specified Date

eCard Inventory Comes From
 Training Center Instructor

Permissions
 Default Custom

Cancel Update

Figure 8

- d. Please note that on this page the TCC may set the inventory source for the Class Management tool to reserve eCards for a class taught by this Instructor to the Instructor’s eCard inventory.
NOTE: This setting overrides the selection in the TC Details settings for the TC
 - i. Under the heading **eCard Inventory Comes From*** (see red circle in Figure 8)
 - ii. If “Training Center” is selected, the Class Management tool will reserve eCards from the Training Center’s eCard inventory
 - iii. If “Instructor” is selected, the Class Management tool will reserve eCards from the Instructor’s eCard inventory
 - iv. This setting overrides the TC setting for this Instructor
- e. Under the Permissions heading, click Custom (Figure 9)

Permissions

Default Custom

Cancel Update

Figure 9

- e. The permissions for this individual will be displayed at the bottom of the page
- f. Follow the instructions above under the Edit Permissions heading to edit this individual’s permissions

Job Aid: Edit Permissions in Atlas

- g. When completed and the Update button is clicked, a success notification will appear above Role title on the Role page