sage People

Customer Support Guide

Profiles and Permissions

Contents

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HCM	17.50	30/01/2017
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Purpose

User permissions and access settings specify what users can do within an organization. For detailed information please refer to the Profile & Permission Sets User Manual which can be found in;

Sage Business Cloud People Support

Rationale

Permissions and access settings are specified in user Profiles and Permission Sets. Every user is assigned only one Profile, but can also have multiple Permission Sets.

Permissions control a user's ability to edit an object record, view the Setup menu, empty the
organizational recycle bin, or reset a user's password.
Access settings control access to Apex classes, app visibility, and the hours when users can log in.

User Access

Do not change permissions provided in the profiles and permission sets without good reason, or without a good knowledge of the overall aims of the security model. Granting access to objects, fields within objects, Visualforce pages, or Apex classes not supplied as defaults risks enabling inappropriate levels of access to records that are not intended for general view or manipulation.

If you make changes, please note this is at your own risk as this may inadvertently expose data in your system.

When determining access for your users:

- Use Profiles to assign the minimum permissions and access settings for specific groups of users. Permissions and access settings defined in Profiles can be edited after installation in an org.
- Use Permission Sets to grant additional permissions, or to restrict permissions. Permissions and access settings defined in Permission Sets cannot be edited after installation in an org, contributing to the overall security of a configuration.
- Use sharing settings to further enhance system security if you need to do so.

Because you can assign many Permission Sets to users and Permission Sets are reusable, you can distribute access among logical groupings of users, regardless of their primary job function or their Profiles. For example, you could:

- Create a Permission Set that gives read access to a custom object and assign it to a large group of users.
- Create another Permission Set that gives edit access to the object and assign it to a small   subset of those users.

Sage Business Cloud People Support is supplied with a range of Profiles and Permission Sets. You can use these as supplied. Alternatively, copying the Profiles or Permission Sets and then modifying them enables you to tailor permissions and access settings to more closely match the requirements of your organization.

Profiles

Administrator
The highest level of access to all objects and fields, enabling an authorized and knowledgeable user to make changes to configuration on behalf of all users of the system.

HR Manager
Mid-level access to a wide range of objects and fields for the user with some responsibility for the employment records of a number of end users.

Team Member
Access to a base level of objects and fields enabling end users to use the system effectively for maintaining a range of their own data records without security compromise.

Modifying Profiles

The default Profiles supplied with Sage Business Cloud People Support define sets of permissions and access settings for
standard types of user. To view or change the settings in the default profiles, follow the guidance in this section.

To display and edit settings in a Profile.

1. Go to **Setup > Administration Setup > Manage Users > Profiles**
2. Click the Name of the Profile you want to view. In my example I will be amending the **Fairsail Administrator** Profile as I do not wish the users assigned to this profile to be able to delete Absence Adjustments.

Select **Edit**.
Scroll down to the **Custom Object Permissions** section. The section lists all custom objects alphabetically in two columns, with the level of access granted to this Profile indicated with checkboxes. The access levels are as follows;

Read The lowest level of access, enabling users to view records of this object type. Sharing settings are respected.
Create Users can read and create records. Sharing settings are respected.
Edit Users can read and update records. Sharing settings are respected.
Delete Users can read, update, and delete records. Sharing settings are respected.
View All Grants read access to all records of the selected object type, regardless of the sharing settings for the object. Sage Business Cloud People Support recommends restricting View All access to HR personnel.
Modify All Grants full access to all records of the selected object type, regardless of the sharing settings for the object. Full access means Read, Create, Edit, Delete, Transfer, Share, and Administer records in an Approval Process. Sage Business Cloud People Support recommends restricting Modify All access to HR personnel.

In my example, I do not want users assigned to this profile to be able to delete Absence Adjustments. Therefore, I need to uncheck the **Delete** checkbox and select **Save** to update the profile.

Modifying Permission Sets

To display and edit **User Permissions** for a Profile:

1. Go to **Setup > Administration Setup > Manage Users > Profiles**
2. Click the Name of the Profile you want to view.

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User Profiles

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

Profile [New]

| Action	Name	User License	Custom
Edit	Chatter External User	Chatter External	☐
Edit	Chatter Free User	Chatter Free	
Edit	Customer Portal Manager Standard	Customer Portal Manager Standard	
Edit	Customer Portal User	Customer Portal User	☐
Edit | Del	Fairsail Administrator	Salesforce	✓
Edit | Del	Fairsail HR Manager	Salesforce	✓
Edit | Del	Fairsail Platform Team Member	Salesforce Platform	✓

Select **Edit**.
Scroll down to the **General User Permissions** section. The section lists all custom objects alphabetically in two columns, with the level of access granted to this Profile indicated with checkboxes. The access levels are as follows;

General User Permissions

Activate Contracts	☑ ⓘ	Import Solutions	☑ ⓘ
Activate Orders	☑ ⓘ	Insert System Field Values for Chatter Feeds	☐
Approve Contracts	☑ ⓘ	Manage Cases	☑ ⓘ
Assign Topics	☑	Manage Connected Apps	☑
Connect Organization to Environment Hub	☑	Manage Content Permissions	☑
Convert Leads	☑ ⓘ	Manage Content Properties	☑ ⓘ
Create and Customize Reports	☑ ⓘ	Manage Content Types	☑ ⓘ
Create and Share Links to	☐	Manage Force.com Flow	☑ ⓘ

Check or uncheck the actions you want to enable for users of this Profile. Actions with dependencies have an information link. Click the link to display the dependency:
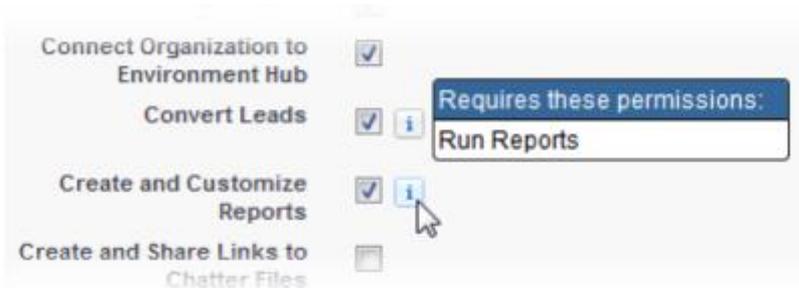
Select **Save**.

Modifying Field-Level Security

To display and edit **field-level security** for a Profile:

1. Go to **Setup > Administration Setup > Manage Users > Profiles**
2. Click the Name of the Profile you want to view.

3. Scroll down to the **Field-Level Security** section and click View next to the object for which you want to change.

Field-Level Security

Standard Field-Level Security

Account	[View]	Opportunity	[View]
Asset	[View]	Opportunity Product	[View]
Campaign	[View]	Order	[View]
Idea	[View]	User	[View]
Lead	[View]		

Custom Field-Level Security

Absence	[View]	Indicator	[View]
Absence Accrual	[View]	Indicator Comment	[View]
Absence Accrual Pattern	[View]	Indicator Library Item	[View]
Absence Accrual Rule	[View]	Indicator Library Language	[View]

4. Click **Edit** to enable the checkboxes so that you can change the settings.

Absence Accrual Field-Level Security for profile   Help for this Page

Fairsail Platform Team Member

Save   Cancel

Field Name	Field Type	Visible	Read-Only
Absence Accrual #	Auto Number	✓	✓
Absence Accrual Pattern Name	Text	☑	✓
Absence Accrual Rule	Lookup	☑	☐
Accrual	Number	☑	☐
Carry Over	Number	☑	☐
Created By	Lookup	✓	✓
Effective Date	Date	☑	☐
Employment	Lookup	✓	☐
Last Modified By	Lookup	✓	✓
Next Accrual	Number	☑	☐

Visible to show a field.
Read-Only to restrict a Visible field so that it cannot be edited.

Settings for some fields cannot be edited, for example:
Auto numbered fields containing unique reference data that must remain read-only.
Lookup fields with content derived from other objects.
Click **Save**.

Related Documentation

Licenses & Profiles
Create a User Record