

Managing Security in New Core Applications

Article Number: 679 | Rating: 1.5/5 from 2 votes | Last Updated: Sat, Feb 10, 2018 at 10:42 PM

Security within Evanced's new core applications (SignUp, Spaces, D!BS, and Wandoo Reader), as well as BrainHQ, consists of Users and Roles. Roles are created first and consist of granular permissions. Roles are then applied to users when new users are created. Roles are broken down by product. This allows you to grant a user a certain role for each product or no role for specific products if you do not wish to grant the user access to those products. Product-specific permissions are defined in the remainder of this article.

To review frequently asked questions about the new security process, please see [Frequently Asked Questions: Managing Security](#). To review default roles/permissions, please see [Default Security Roles](#).

Note: This security update does not affect our classic products such as Events, Room Reserve, and Summer Reader.

[Global](#)
[BrainHQ](#)
[D!BS](#)
[SignUp](#)
[Spaces](#)
[Wandoo Reader](#)

Permissions marked with an asterisk () are "Cross-Location" permissions and enable the user to perform the associated action for any location.*

GLOBAL

Images

allows access to the media uploader across all products

Add*	add a new image
Edit*	edit an existing image's details
Â	Â
<i>Locations</i>	<i>allows access to Settings > Location Setup</i>
Add*	create a new location
Delete*	remove an existing location (all spaces within the location must be removed first)
Edit*	manage an existing location
View Locations/Spaces * Â Â	view the list of locations and spaces
Â	Â
<i>Patrons</i>	<i>allows access to patron records across all products (these only apply to the products for which the account has a role assigned)</i> Â
Delete*	remove the patron from a product
Edit*	manage a patron's record in a product
View*	view patron records
Â	Â
<i>Security</i>	<i>allows access to Settings > SecurityÂ (only the "admin" user can grant these permissions to other users)</i>
Manage Roles*	create, edit, or delete roles
Manage Users*	create, edit, or delete users
Â	Â
<i>Spaces</i>	<i>allows access to Settings > Location Setup</i>

Â

BRAINHQ

Access Â grants access to the BrainHQ product

D!BS

Reports

Create Saved Report * Â Â	generate a new report and save it with a unique name
Delete Saved Report*	remove an existing saved report
Edit Saved Report*	manage an existing saved report
Run Report*	generate a new report and run it; also allows the running of a saved report
Â	Â

<i>Reservations</i>	<i>allows access to reservation functions</i>
Cancel Reservation	cancel an existing reservation
Create with Override	create a new reservation while not being limited to the same restrictions placed on patrons
View Reservation	view the details of an existing reservation
SIGNUP	
<i>All Locations</i>	<i>allows access to branding options including banners and colors for all locations in the system</i>
Edit Branding	edit branding settings
View Branding	view existing branding settings
Â	Â
<i>Attendance</i>	<i>allows access to event attendance information</i>
Add Attendance Notes	add text to the Notes field on an event's attendance page
Attendance Absence	mark a patron as absent from the event
Email Attendees	send an email to the list of attendees using your default email client
Transfer Attendance	transfer a patron to a different event
Update Attendance	add actual attendance figures after the event has passed
Update Status	move a patron to and from the main list, waiting list, or cancelled list
View Attendance	view the attendance list
Â	Â
<i>Events</i>	<i>allows access to event functions such as creating, publishing, editing, and deleting</i>
Add Age Group	create a new age group
Add Event Type	create a new event type
Add Tag	create a new tag
Bulk Publish Events	publish all unpublished events
Cancel Event (All)	cancel an event
Create Event	create a new event
Create Event (from Template) Â Â Â	create a new event based on an existing template
Create Template	create a new template to use for quickly creating new events
Delete Age Group	remove an existing age group
Delete Event (All)	remove an event and send it to SignUp's Recycle Bin
Delete Event Type	remove an existing event type
Delete Tag	remove an existing tag
Delete Template (All)	remove a template
Edit Age Group	edit the name of an existing age group
Edit Tag	edit the name of an existing tag
Restore Recycled Event (All)	restore a deleted event from the Recycle Bin
Unpublish Event	unpublish a published event
View Recycle Bin	view the deleted events inside the Recycle Bin
Â	Â

<i>Patrons</i>	<i>allows access to change patron "upcoming events" subscription notifications</i>
Â	Â
<i>Registration</i>	<i>allows access to registration functions</i>
Add Custom Stipulation	add a new question which will appear on the registration form
Edit Custom Stipulation	edit an existing registration form question (<i>this permission does not exist currently and is planned for a future release</i>)
Group Registration	register a group of patrons; a group limit greater than zero must be entered
Register Patron	register on behalf of a patron
Registration Override	increase the main list or wait list when registering a new patron if that patron would exceed the maximum number of allowed attendees
Â	Â
<i>Reports</i>	<i>allows access to report functions</i>
Create Saved Report*	generate a new report and save it with a unique name
Delete Saved Report*	remove an existing saved report
Edit Saved Report*	manage an existing saved report
Run Report*	generate a new report and run it; also allows the running of a saved report
Â	Â
<i>Single Location</i>	<i>allows access to branding options including banners and colors for only the location at which the role is assigned</i>

SPACES

<i>Organizations</i>	<i>allows access to organization functions</i>
Approve/Deny Organization Relationship Â Â	allow or disallow a patron's requested relationship to an organization
Create Organizations* Â Â	create a new organization
Delete Organization*	remove an existing organization
Edit Organization*	manage an existing organization's details
View Organizations*	view existing organizations
Â	Â
<i>Reports</i>	<i>allows access to report functions</i>
Create Saved Report*	generate a new report and save it with a unique name
Delete Saved Report*	remove an existing saved report
Edit Saved Report*	manage an existing saved report
Run Report*	generate a new report and run it; also allows the running of a saved report
Â	Â
<i>Reservations</i>	<i>allows access to reservation functions</i>
Access Recurring	create a recurring reservation
Cancel Reservation	cancel an existing reservation

Create with Override	create a new reservation while not being limited to the same restrictions placed on patrons
Manage Reservations	edit, copy, or restore a reservation
Save Payment	send payment reminders and apply payments made by the patron
Save Staff Adjustment	apply an adjustment to the total cost of a reservation
Update Status	approve, deny, or ignore a reservation

^
^

WANDOO READER

<i>Drawings</i>	<i>allows access to Random Drawing functions</i>
Delete	remove a saved random drawing
Edit	manage a saved random drawing
Run	run a new or saved random drawing
Save	save a new random drawing
^	^
<i>Logs/Challenges</i>	<i>allows access to patron logs and challenges</i>
Add Challenge Entry	submit a challenge on behalf of the patron
Add Log	add a new log on behalf of the patron
Delete Challenge Entry ^ ^ ^	remove an existing challenge entry
Delete Log	remove an existing log
Edit Challenge Entry	manage an existing challenge entry
Edit Log	manage an existing log
^	^
<i>Patron</i>	<i>allows access to register a patron in a program</i>
^	^
<i>Prizes</i>	<i>allows access to award prizes to patrons</i>
^	^
<i>Program</i>	<i>allows access to creating and managing programs</i>
Edit Program	edit an existing program's details
Manage Program	create, copy, reset, and delete a program
^	^
<i>Reports</i>	<i>allows access to report functions</i>
Create Saved Report	generate a new report and save it with a unique name
Delete Saved Report	remove an existing saved report
Edit Saved Report	manage an existing saved report
Run Report	generate a new report and run it; also allows the running of a saved report

^

Custom Fields

- **Applicable To:** Admin Users
- **Attachments:** No
- **Summary:** Managing Security Roles and Permissions

Online URL: <http://kb.demcosoftware.com/article.php?id=679>