

Roles and Permissions Assignment

Business Example: You are in the middle of an accounting audit and the audit trail needs to include complete visibility performed by staff especially those with access to investor data. During the audit, you need to find what type of access the Chief People Officer has to your company data. You have just hired a new CPO and want to make sure that they have appropriate permissions to remain compliant.

1. Access the Chief People Officer (CPO) role to see that permissions they have access to.
2. **Story Update:** You have found that there is one permission the CPO needs in addition to perform the job better while remaining compliant. Customize the CPO role to allow them to *only* view the sales order
3. Since you have just hired a new CPO, you will need to make a new employee record with the new CPO and assign the appropriate permissions for this new role with permissions you just created.
4. **Story Update:** Your CPO has been fired so you need to immediately remove access to this permission. Update the employee record.
5. Employee records are often just kept and set to inactive. For this lesson, go ahead and delete the new employee and the new role you created.
6. Go to the “View Login Audit Trail” and see your history. Sort the data to show the most recent.

Lecture Notes

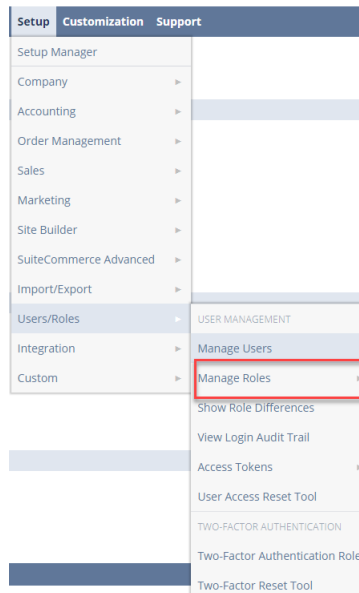


Figure 1: Navigation to Roles

- Understand which compliance laws your business will have to align with
- Roles and Permissions are important to customize for your business to make sure certain people don't have access to view private financial information
- Use roles to help assign appropriate permissions to departments
- Make good use of the levels of record access (i.e. View, Edit, Create, Full)