

Permissions Tab

The Permission tab provides control over the the operations which responsible parties and task managers are capable of. Permissions may be established for 2 types of end-users - **Responsible parties** (Assignee) and **Task managers** (users that have a right to manage the tasks).

The **Permissions** tab becomes active when responsible parties have been selected on the **Basics** tab.

The article covers all permission features for Responsible parties and Task managers.

- [Permissions for Responsible Parties](#)
- [Permissions for Task Managers](#)
 - [Filter for tasks](#)

Permissions for Responsible Parties

These permissions define what responsible parties can do with the tasks assigned to them.

<p>Permissions for Responsible Parties</p> <p><i>i</i> These permissions define what responsible parties can do with the tasks on portal.</p> <ul style="list-style-type: none">1 <input checked="" type="checkbox"/> Create ad-hoc tasks on portal <i>i</i> Users will be able to create tasks for themselves by filling out a form.2 <input checked="" type="checkbox"/> Allow to modify closed tasks3 <input type="checkbox"/> Edit due date4 <input checked="" type="checkbox"/> Unassign5 <input checked="" type="checkbox"/> Assign to Responsible parties (first_CM) Customize 6	<p>1. Create ad-hoc tasks on portal allows Responsible parties to create tasks by themselves on the portal. If a contact is not a part of the Responsible parties, they will not be able to create tasks on the portal.</p> <p>2. Allow to modify closed tasks, if checked, allows the assignee to change the status of the closed task assigned to them, edit the attached form record of a closed task and perform actions granted in the permissions list below.</p> <p>3. Edit due date checkbox is only visible if the task has Require due date toggle turned on. If checked, this option will allow the assignee to change the due date of the task.</p> <p>4. Unassign option allows responsible parties to make tasks that are assigned to them unassigned.</p> <p>5. If you select the Assign to other Responsible parties option, the Customize (6) button will appear. If you click on that button, the dialog box will pop up allowing to configure settings for a contact group</p>
<p style="text-align: right;"><i>?</i> <i>x</i></p> <p style="text-align: center;">Customize Contact Group</p> <hr/> <p style="text-align: center;">Filters Preview</p> <hr/> <p>1 Group Name: <input type="text" value="Technicians"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>2 Filters Set up</p>	<p>The dialog allows you to customize your contact selection, provide a unique group name in the Group Name field and create a customized filter. Please read the Basics tab articles for more details.</p>

If you **do not want** Portal users to create a task by themselves, **do not check** the **Create ad-hoc tasks on portal** box on the Permission tab.

The dialog box functions similarly to the one that appears after pressing the **Customize** button in the **Responsible parties** section of the **Basics** tab. It allows the assignee to reassign the task to another party from the customized group of contacts.


Permissions for Task Managers

The functionality controls which portal users should have access to tasks through the **Task Management** functionality. It also determines if they can view and re-assign such tasks using complex filters that would allow to define user groups to apply the permissions for, define permissions and in case of re-assigning, define for which groups of users the reassignment is possible.

To add permissions for Task managers:

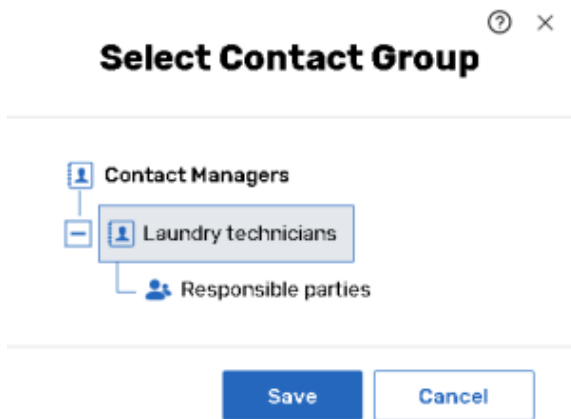
- Click on the **Add permissions** button.

Permissions for Task Managers

 These permissions define what task managers of different roles can do with the tasks on portal.

[Add permissions](#)

- In the pop-up **Select contact group** window, choose a group of contacts for whom you would like to set up permissions, and click the **Save** button . Press the **Customize** button to apply [filters](#) to the selected group.




- Select the permissions.

Task management group:

Responsible parties (first_CM) [Change group](#) [Edit Filter](#)

Permissions:

1 Create ad-hoc tasks on portal  Users will be able to create tasks for themselves by filling out a form.

Next permissions are applied to the following task list: All tasks [Add filter](#)

2 Edit due date

3 Assign to me

4 Unassign

5 Assign to Responsible parties (first_CM) [Customize](#)

1. You can allow your **Task Managers** group to create a task by themselves on the portal. Check the **Create ad-hoc tasks on portal** box to enable the function;

2. **Edit due date** enables task managers to modify the due date of a task.

3. **Assign to me** allows task managers to assign the task to themselves.

4. **Unassign** allows task managers to make tasks unassigned.

5. If you select the **Assign to other Responsible parties** option, the **Customize** button will appear. If you click on that button, the dialog box will pop up allowing to configure settings for a contact group.

Customize Contact Group



Filters

Preview

1 Group Name:

2 Filters

Set up

The dialog allows you to customize your contact selection, provide a unique group name in the Group Name field and create a customized filter.

Please read the [Basics](#) tab articles for more details.

Filter for tasks

You can set up the filter for tasks for which the permissions are being set up. By default, all tasks are selected for the permission setting. However, you can customize the tasks that should be included into the permission rule.

- Click on the **Add filter** button.

Permissions:

Next permissions are applied to the following task list: All tasks

Edit due date

[Add filter](#)

- The system displays the Edit task list dialog. Now you can set up a group of logical expressions and use logical conditions between the groups. This functionality is identical to the same functionality of the [Advanced Logic editor](#).

Edit Task List

Task Definition: **Inspection**
Configure filter to define the task list

NONE

If Status equals

[Remove group](#)

[Add Dynamic Rule](#) [Add rule](#) [Add group](#)

[Add group](#)

Save Cancel

Status
Assign to
Created by (user)
Due date
Date created
Date closed
Date changed
Created by (admin)

You can filter the tasks by creators, assignees, date created/changed/closed, statuses and due dates.

Here is the list of all **available filters**:

- **Status**
 - Equals/Does not equal - applicable to the status selected in the third dropdown.
The **Select value** field is based on the Status' which have been previously created.
- **Assign to**
 - Unassigned/Contact - applicable to the selection in the third dropdown.
The selected contact can only be selected from the Contact Manager assigned.
- **Created by (user)**
 - contact selection dropdown - applicable to a contact selected in the second dropdown.
The selected contact can only be selected from the Contact Manager assigned.
- **Due date**
 - equals
 - does not equal
 - is earlier than
 - is earlier than or equal to
 - is greater than
 - is greater than or equal to

All options are applicable to the Date selected from the Calendar in the the third field.
- **Date created**
 - equals
 - does not equal
 - is earlier than
 - is earlier than or equal to
 - is greater than

- is greater than or equal to

All options are applicable to the Date selected from the Calendar in the the third field.

- **Date closed**

- equals
- does not equal
- is earlier than
- is earlier than or equal to
- is greater than
- is greater than or equal to

All options are applicable to the Date selected from the Calendar in the the third field.

- **Date changed**

- equals
- does not equal
- is earlier than
- is earlier than or equal to
- is greater than
- is greater than or equal to

All options are applicable to the Date selected from the Calendar in the the third field.

- **Created by (admin)**

- select the contact which is the Account admin

- After you are done setting up logical rules or groups of rules, press the **Save** button.

The scope of permissions that the selected task managers can be established from the **Configure permissions** section.