User Access and Roles

This website offers a flexible role-based system to manage user access and permissions, ensuring that each individual has the appropriate level of interaction with your protocols. Here's how you can customize roles to suit your organization's needs: Under **Settings -> Roles:**

- **Role-Based Access Control:** Assign specific roles to users to define their access levels. For example, some organizations may restrict login access to users with permission to directly edit protocols, while others might enable broader access for viewing purposes only.
- **Integration with Single Sign-On (SSO):** Seamlessly connect this platform with your organization's SSO provider, such as Okta, OAuth, or LDAP, to streamline authentication and user management.
- **Custom Role Creation:** Tailor roles to match your organizational structure. For instance:
  - Create a "Provider" role limited to viewing protocols without editing permissions.
  - Designate roles like "Tactical Medic" or "911 Medic" for departments with distinct teams and specialized protocols.
- **Granular Access Control:** Specify who can view or edit each protocol book. Assign roles to users and configure viewing or editing permissions directly within the platform, ensuring guidelines are accessible only to the appropriate personnel.

Create New Role

Role Details

Role Name

Short Description of Role

☐ Requires Multi-Factor Authentication

System Permissions

Toggle All

☐ Manage all document, chapter & page permissions

☐ Manage permissions on your own document, chapter & pages

☐ Manage page templates

☐ Access system API

☐ Export content

☐ Change page editor

☐ Receive & manage notifications

☐ Manage app settings

☐ Manage users

☐ Manage roles & role permissions

Be aware that access to any of the above three permissions can allow a user to alter their own privileges or the privileges of others in the system. Only assign roles with these permissions to trusted users.

Asset Permissions

These permissions control default access to the assets within the system. Permissions on Documents, Chapters and Pages will override these permissions.

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