

# Job Aid: Default Roles and Permissions Matrix & eCard Inventory Comes From Parameter

## Default Roles and Permissions Matrix

### Default Roles

**Default Roles** are set by AHA for the entire Atlas platform. The default Roles cannot be changed or adjusted except by AHA.

The Role reflects the responsibility level of individuals to a Training Center or Training Site. The roles are:

- **Training Center Coordinator (TCC):** have the potential to govern all aspects of a specific Training Center
- **Training Center Administrator (TCA):** have the potential to do almost anything a TCC can do, governing all aspects of a specific Training Center
- **Training Site Coordinators (TSC):** have the potential to govern all aspects of a specific Training Site
- **Training Site Administrator (TSA):** have the potential to do almost anything a TSC can do, governing all aspects of a specific Training Site
- **Faculty (TF):** an elevated Instructor, they have the potential to do anything an Instructor can do on a broader collection of courses
- **Instructor:** have the potential to govern all aspects of any class they are set to be an Instructor for

**Default Permissions** for all roles are set by AHA for the entire Atlas platform. A TCC has the ability to modify the default permission settings for their Training Center or aligned Training Site, including for the roles of TCA/TSC/TSA/Faculty/Aligned Instructors. A TSC has the ability to modify the default settings for their TSA/Faculty/Aligned Instructors. Permissions can also be modified for an individual TCA/TSC/TSA/Faculty/Aligned Instructor.

An individual may be assigned more than one role. In these situations, the permissions will follow the Role the individual needs to function.

There are two types of conditions for each permission – read and write. The definitions are:

- **Read:** allows the individual who is assigned the role to view information
- **Write:** allows the individual who is assigned the role to edit or make changes to information. Please note: Read must be checked in order for Write to be enabled.

The matrix below lists each permission, the defined Read or Write condition, and the **default setting** for each role on the same line. To read the default permission settings for each Role read **vertically** down the Role column. To compare the default permissions for two or more Roles, read **vertically** down each Role column.

Permission	Read	Write	Roles:													
			Training Center Coordinator (TCC)		Training Center Administrator (TCA)		Training Site Coordinator (TSC)		Training Site Administrator (TSA)		Training Faculty (TF)		Instructor (Inst)			
			Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write		
<b>Class Locations</b>	Search and view the list of classes locations of an Organization, Export a report of the same, View details of each Location and to locate them on Google Maps.	Create, Update, Activate, Deactivate and Delete Class Locations of an Organization.	✓	✓	✓	✓	✓	✓	✓	--	✓	--	✓	--		

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		Roles:		Training Center Coordinator (TCC)		Training Center Administrator (TCA)		Training Site Coordinator (TSC)		Training Site Administrator (TSA)		Training Faculty (TF)		Instructor (Inst)	
Permission	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	
<b>Classes</b>	Search and View the list of Classes held at the Organization, Export a report of the same and view details of each scheduled Class	Create, Update, Duplicate and delete Classes for an Organization.	✓	✓	✓	✓	✓	✓	✓	--	✓	✓	✓	✓	
<b>Class Rosters</b>	Allows to View the details of a specific class roster.	Grants access to add and remove Students to a roster and Finalize it.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
<b>Exam</b>	Search and View the list of Exams available for the Classes the Organization is approved to teach.	Download an Exam File.	✓	✓	✓	--									
<b>Feedback</b>	Allows to View the list of all feedback provided	-----	✓	--	✓	--									
<b>Instructors and Alignments</b>	Search and View the list of Instructors and Faculty in the Organization, Export a report of the same and View details of each Instructor/Faculty.	Invite an Instructor to Align/Unalign, Manage permissions and Promote Instructors to a Faculty or demote a Faculty to an Instructor.	✓	✓	✓	✓	✓	✓	✓	✓					
<b>Instructor Monitoring</b>	Allows to View the Issue Date of an Instructor.	Grants access to Enter the Issue Date for an Instructor Candidate and Update the Issue Date for Instructor Renewals.	✓	✓	✓	✓					✓	✓			
<b>Issue Exams for a Class</b>	-----	Allows to Send Exams to the students of the class.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
<b>ORG Role Permissions</b>	-----	Update the defaults of the permissions of each role at an organizational level.	✓	✓	✓	✓									

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		Roles:	Training Center Coordinator (TCC)		Training Center Administrator (TCA)		Training Site Coordinator (TSC)		Training Site Administrator (TSA)		Training Faculty (TF)		Instructor (Inst)	
Permission	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write
<b>Other Trainings*:</b>	Search and View the list of Other Trainings Export a report of the same and View details of each Other Training sessions.	Create, Update, Duplicate and Delete "Other Training sessions".	✓	✓	✓	✓	✓	✓	✓	--	✓	✓	✓	✓
<b>Print Card Templates</b>	-----	Allows to Edit and customize the Printable Card Templates for the Organization	✓	✓	✓	✓								
<b>Remediation</b>	-----	Allows the user to Remediate a student, granting them more attempts at an exam.	✓	✓	✓	✓	--	--	--	--	--	--		
<b>Training Center Administrators</b>	Search and View the list of Training Center Administrators, Export a report of the same and View details of each TCA	Invite a user as Training Center Administrator, Manage permissions and Remove them from the role.	✓	✓	✓	✓								
<b>Training Center Management</b>	View information of the Training Center the user belongs to.	Update the Enrollment/Withdrawal Cut-Off Dates, eCard Inventory Comes From, and the TC's Image.	✓	✓	✓	✓								
<b>Training Site Management</b>	Search and View the list of all Training Sites belonging to the user's TC, Export a report of the same, View details of each Training Site and the history of Training Site uploads	Create – single or bulk of Training Sites for the user's TC and manage them such as Update, Activate, Deactivate and Delete.	✓	✓	✓	✓	✓	✓	✓	--				
<b>Training Site Administrators</b>	Search and View the list of Training Site Administrators, Export a report of the same and View details of each TSA.	Invite a user as Training Site Administrator, Manage permissions and Remove them from the role.	✓	✓	✓	✓	✓	✓	✓	--				
<b>Training Site Coordinators</b>	Search and View the list of Training Site Coordinators Export a report of the same and View details of each TSC.	Invite a user as Training Site Coordinator Manage permissions and Remove them from the role.	✓	✓	✓	✓	✓	✓						

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Permission	Read	Write	Training Center Coordinator (TCC)		Training Center Administrator (TCA)		Training Site Coordinator (TSC)		Training Site Administrator (TSA)		Training Faculty (TF)		Instructor (Inst)	
			Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write
User Permissions	-----	Update the defaults of the permissions of each role at the user level.	✓	✓	✓	✓	✓	✓	--	--				

\*Other Trainings is a place to track occurrences and attendance for training that falls outside the AHA course structure or does not appear in the Class Management Tool as a course selection.

## eCard Inventory Comes From Parameter

When using the **Class Management Tool** in Atlas, eCards are reserved for students in each class at the time the class roster is finalized. The reservation takes the eCard out of the designated inventory until the eCards are issued to students who pass the class. When a student is marked as “failed” the reserved eCard is returned to the inventory it originally came from.

The matrix below shows the parameter, the definition for the Training Center and the Individual/Instructor condition, and the **default setting** for each role on the same line.

Parameter	Training Center	Training Site	Faculty/Instructor	Training Center		Training Site		Training Faculty (TF)		Instructor (Inst)	
				TC	TF/Inst	TS	TF/Inst	TC	TF	TC	Inst
eCard Inventory Comes From	eCards will be reserved from the inventory located at the Training Center. <b>NOTE:</b> for <b>ALL</b> Instructor eCards the parameter must be set to <b>Training Center</b> .	eCards will be reserved from the inventory that has been distributed to the Training Site by the aligned Training Center.	eCards will be reserved from the inventory distributed to the Faculty or Instructor by the aligned Training Center or Training Site. <b>NOTE:</b> for <b>ALL</b> Instructor eCards the parameter must be set to <b>Training Center</b> .	✓	--	✓	--	✓	--	✓	--

## Where to find the parameter:

### TRAINING CENTER:

The parameter for “eCard Inventory Comes From” for the **Training Center** is in the Training Center Profile.

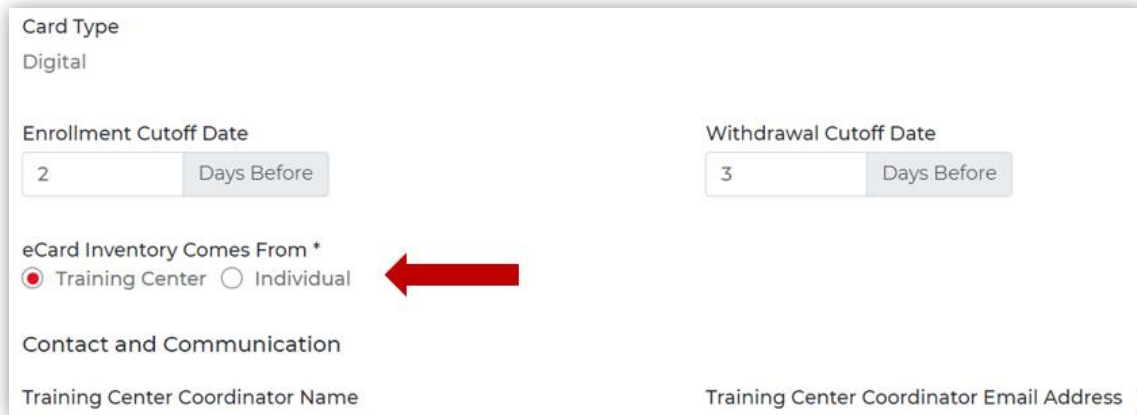
Click the Training Center tab, then click [Training Center](#). From the [Training Center](#) page, click **Edit>**. At this point scroll down to about the middle of the page to see the “**eCard Inventory Comes From**” parameter and make changes to the setting. Click **Update** to save changes and return to the previous page.

### FACULTY:

The parameter for “eCard Inventory Comes From” for **Faculty** is found by editing the Faculty Permissions.

Click the Training Center tab, then click Faculty. From the [Faculty page](#), search and/or sort for the Faculty to modify, click the elipses (...) in the column labeled “Actions”, then select **Permissions**. On the [Manage TF Permission](#) page find the “**eCard Inventory Comes From**” parameter just below the Faculty’s Name listing, make changes to the setting. Scroll to the bottom of the page and click **Update** to save changes and return to the previous page.

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Card Type  
Digital

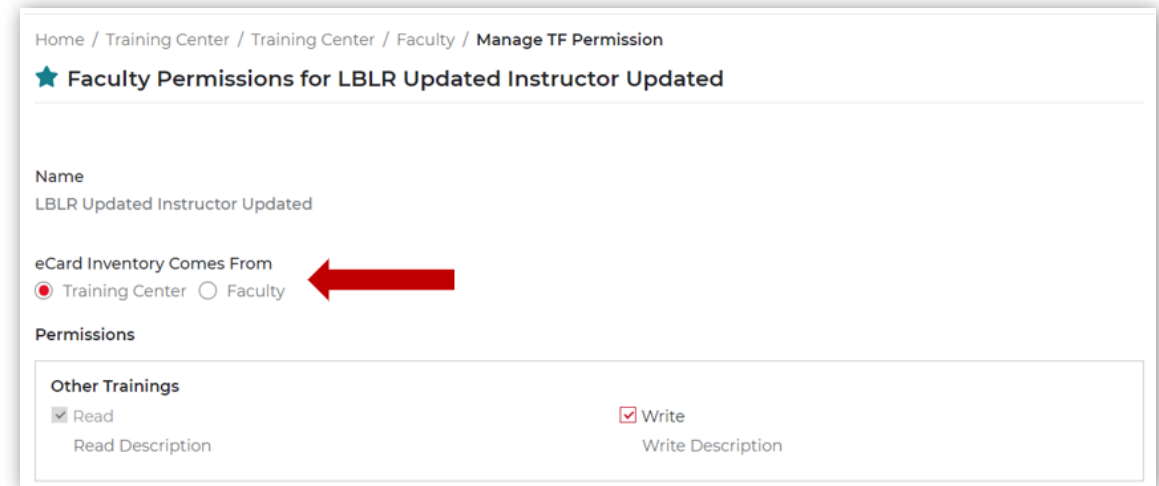
Enrollment Cutoff Date  
2 Days Before

Withdrawal Cutoff Date  
3 Days Before

eCard Inventory Comes From \*  
 Training Center  Individual

Contact and Communication

Training Center Coordinator Name  
Training Center Coordinator Email Address



Home / Training Center / Training Center / Faculty / Manage TF Permission

★ Faculty Permissions for LBLR Updated Instructor Updated

Name  
LBLR Updated Instructor Updated

eCard Inventory Comes From  
 Training Center  Faculty

Permissions

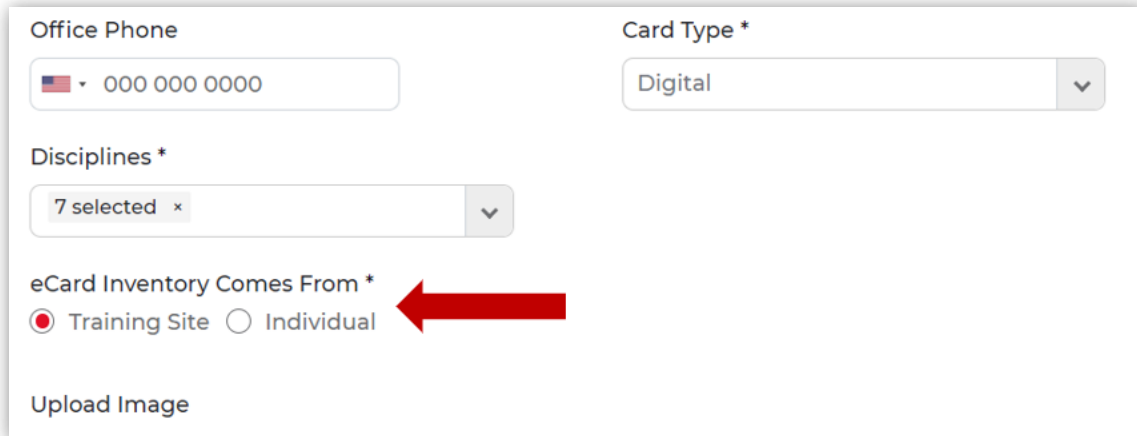
Other Trainings

Read  
Read Description

Write  
Write Description

## TRAINING SITE:

The parameter for “eCard Inventory Comes From” for the **Training Site** is in the Training Site Profile. Click the Training Center tab, then click [Training Site](#). From the [Training Site](#) page, search and/or sort for the Training Site to modify, click the ellipses (...) in the column labeled “Actions”, then select **View/Edit**. From the [Training Site Name](#) page, click **Edit**>. At this point scroll down to below the **Disciplines\*** dropdown selection list to see the “**eCard Inventory Comes From**” parameter and make changes to the setting. Click **Update** to save changes and return to the previous page.



Office Phone  
+1 000 000 0000

Card Type \*  
Digital

Disciplines \*  
7 selected

eCard Inventory Comes From \*  
 Training Site  Individual

Upload Image

## INSTRUCTOR:

The parameter for “eCard Inventory Comes From” for **Faculty or Instructor** is found by editing the Instructor Permissions.

Click the Training Center tab, then click [Instructors](#). From the [Manage Instructor](#) page, search and/or sort for the Instructor to modify, Click the ellipses (...) in the column labeled “Actions”, then select **Permissions and Alignments**. On the [Manage Alignment](#) page scroll down to below the Disciplines list to find the “**eCard Inventory Comes From**” parameter, make changes to the setting. Click **Update** to save changes and return to the previous page.

Disciplines

✓ BLS  
Alignment Expiration  
 None  Specified Date

✓ Heartsaver  
Alignment Expiration  
 None  Specified Date

eCard Inventory Comes From  
 Training Center  Instructor

