Edit Permissions in Atlas

The Training Center Coordinator (TCC) or the Training Site Coordinator (TSC) can edit permissions in Atlas. The TCC may edit the default permissions for all roles for their Training Center and all aligned Training Sites. They may also edit permissions for all aligned TC Admins (TCAs)/TS Coordinators (TSCs)/Training Site Admins (TSAs)/Faculty/Instructors individually. The TCC may choose to activate the permission to allow their aligned TCAs/TSCs, as a default of by individual, the ability to edit permissions.

NOTE: Please also see the "Job Aid: Default Roles and Permissions Matrix" that defines the roles and permissions in Atlas. This document can be found on the Atlas Information & Resources page.

Edit Default Permissions

The default permissions establish the permissions given to each role at the Training Center and Training Site level. These are the permissions that each role starts out with as a default.

1. From the Training Center tab, select Roles under the Training Center heading (Figure 1).

American Heart Asso Atlas	bciation,			
Dashboard Classes 🗸	Training Center 🔨	Training Resources ¥	Help & Support 🗸	
	Training Center >			
	Roles	Admins	Faculty	Instructors
	Primary Alignments	Classes	Exams	
	Training Site >			
	Coordinators	Admins	Faculty	Instructors
	Primary Alignments	Classes		
	Class Locations >			
	eCards 🛃			
	Classes I Teach >			
	My Alignments >			
	Program Administra	tion Manual >		

Figure 1

2. On the Default Role Permissions page, scroll down to view the roles (Figure 2).

		Organization	AHA - Int'l Banglore
Home / Training Cer	ter / Training Center / Roles		
🛊 Default Role	Permissions		
The permissions defined Proceed with caution.	I here set the defaults for all Training Centers and users v	vithin this platform. As a result, cha	anges made can have broad consequence
Training Site Coord	inator		
Training Site Coordina	ors have the potential to govern all aspects of a particula	r Training Site.	
User with Role 6	Last Changed on 03-30-2023		Edit Defaults
Training Site Admir	istrator		
Training Site Administ	ators have the potential to do almost anything a TSC car	n do, governing all aspects of a par	ticular Training Site.
User with Role 5	Last Changed on 03-30-2023		Edit Defaults
Faculty			
As an elevated instruct	or, Faculty have the potential to do anything an Instructo	or can do but on a broader collecti	on of courses.
User with Role 13	Last Changed on 05-08-2023		Edit Defaults
Instructor			
Instructors have the po	tential to govern all aspects of any class they are set to b	e the Instructor for.	
User with Role 39	Last Changed on 05-06-2023		Edit Defaults

Figure 2

- a. The display for each role (Figure 3):
 - i. Defines the role
 - ii. Shows the number of users in the TC who are assigned the role
 - iii. Shows the last date the role was changed
 - iv. Includes an Edit Defaults button

Training Site Coordinator	4	
Training Site Coordinators have the potential to govern all aspects of a particular Training	Site.	
Jser with Role 6 Last Changed on 03-30-2023		Edit Defaults
		Edit Defaults

Figure 3

Edit Permissions

- 1. Select the role to edit and then click the Edit Defaults button
 - a. The Default Permissions: Role Name page is displayed
 - b. Each permission is defined
 - c. Each permission can be designated as
 - i. **Read** only (the <u>**Read** check box</u> is checked), allows the holder of the role to search and view the specific permission
 - ii. **Read/Write** (both the <u>Read and Write check boxes</u> are checked), allows the holder of the role to take action for the specific permission
- 2. Edit each permission or leave as the default
- 3. The Cancel button may be selected to cancel any changes made and return to the permissions page

- 4. Reset to Default button will reset any changes that were made and return all permissions to the default for the Training Center or Training Site
 - a. When the Reset to Default button is selected, a confirmation pop-up will appear (Figure 4)





- i. Select Cancel and the user is returned to the Default Permissions: Role Name
- ii. Select the Reset to Default button to reset the permission
 - 1. The user will be returned to the Default Role Permissions page
- 5. When editing is completed as desired, select the Update button (Figure 5)
 - a. The user will be returned to the Default Role Permissions page
 - b. A confirmation notification message will appear above the title



Figure 5

Edit Permissions by Role

The default permissions may be edited by role for each individual with that role. This allows the TCC/TSC to set business rules or allow specific individuals to have additional or less authority within the role.

For Example: A TCC may want 3 TCAs to create all classes in the Class Management tool. This is accomplished through editing the individual permissions to allow the selected individuals to have this responsibility.

 From the Training Center tab, select the specific Role, such as Instructor, under the Training Center heading (Figure 6)

NOTE: A TSC would select the specific Role under the Training Site heading

Job Aid: Edit Permissions in Atlas

Dashboard Classes 🗸	Training Center 🔺	Training Resources 🗸	Help & Support 🗸	
	Training Center >			
	Roles	Admins	Faculty	Instructors
	Primary Alignments	Classes	Exams	•
	Training Site >			
	Coordinators	Admins	Faculty	Instructors
	Primary Alignments	Classes		
	Class Locations >			
	eCards 🗹			
	Classes I Teach >			
	My Alignments >			
	Program Administra	tion Manual >		

Figure 6

- 2. The page for the Role selected will be displayed, in this example we are using Instructors)
- 3. Scroll down to the list of Instructors
- 4. Find the Instructor whose Role should be edited
 - a. In the Actions column, click on the ellipsis (...) (Figure 7)
 - b. Click Permissions and Alignments in the dropdown menu

First Name/Instructor ID	Last Name	Email Address	Organization	Discipline	Actions
Ronymole 12110068283	Varghese	ronysaju1@mailinator.com	AHA - Int'l Banglore	PALS (a) BLS (a)	
Pamela 23014682692	Rojas	mytccoordinator@gmail.com	Pamela Test Site	Classes BLS Unalign Permissions and Aligr Promote to Faculty	iments
Pamela 21091147019	Rojas	pamela.rojas@heart.org	AHA - Int'l Banglore	ACLS	

Figure 7

c. The Alignment page for the specific Instructor is displayed, and the title on the page includes the Instructor's name (Figure 8)



Figure 8

- d. Please note that on this page the TCC may set the inventory source for the Class Management tool to reserve eCards for a class taught by this Instructor to the Instructor's eCard inventory.
 - NOTE: This setting overrides the selection in the TC Details settings for the TC
 - i. Under the heading eCard Inventory Comes From* (see red circle in Figure 8)
 - ii. If "Training Center" is selected, the Class Management tool will reserve eCards from the Training Center's eCard inventory
 - iii. If "Instructor" is selected, the Class Management tool will reserve eCards from the Instructor's eCard inventory
 - iv. This setting overrides the TC setting for this Instructor
- e. Under the Permissions heading, click Custom (Figure 9)



Figure 9

- e. The permissions for this individual will be displayed at the bottom of the page
- f. Follow the instructions above under the Edit Permissions heading to edit this individual's permissions

g. When completed and the Update button is clicked, a success notification will appear above Role title on the Role page