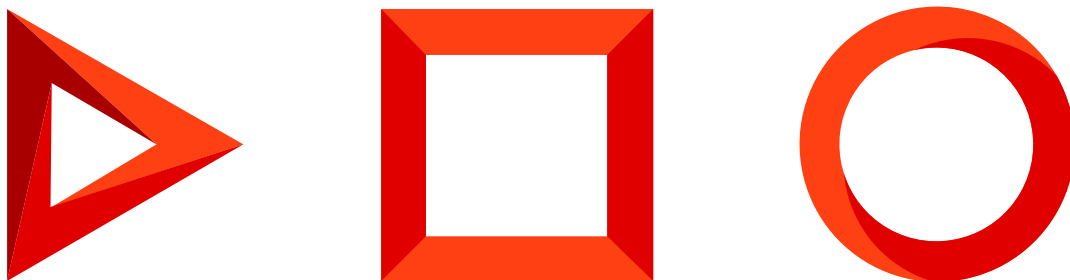


# Remove access permissions

Remove record permissions when changing a contact

Version 7.17



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# Remove record permissions when changing a contact

PRODUCTS: ALL CREATIO PRODUCTS

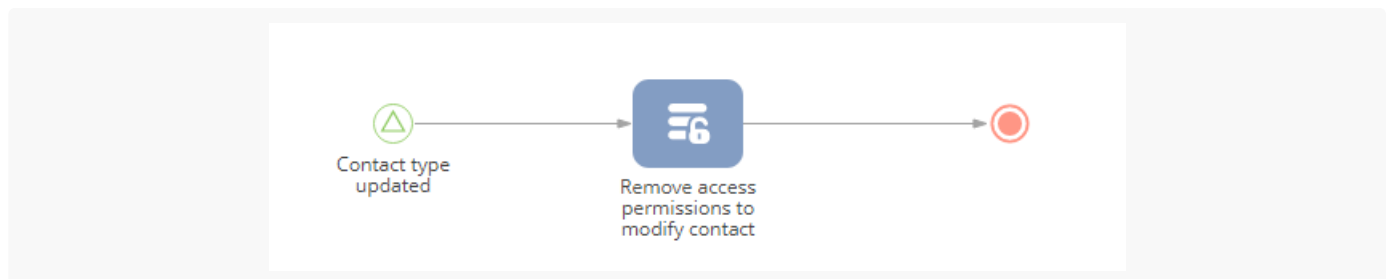
You can use business processes to grant or deny [access permissions](#) to a Creatio record. Any [event](#) can trigger the process automatically on specific conditions.

**Example.** Set up a business process to strip all Creatio users of their permissions to edit or delete a contact whenever its type is changed to “Employee”. Only members of the “HR. Managers group” organizational role can view, edit or delete the contact.

Business process diagram (Fig. 1) elements:

1. [The \[ Signal \] start event](#) triggers the process when a contact’s type is changed to “Employee” and records the Id of the contact record.
2. [The \[ Change access rights \] element](#) sets permissions to update or delete Creatio records. This element can obtain the contact’s id from the [ Signal ] element.

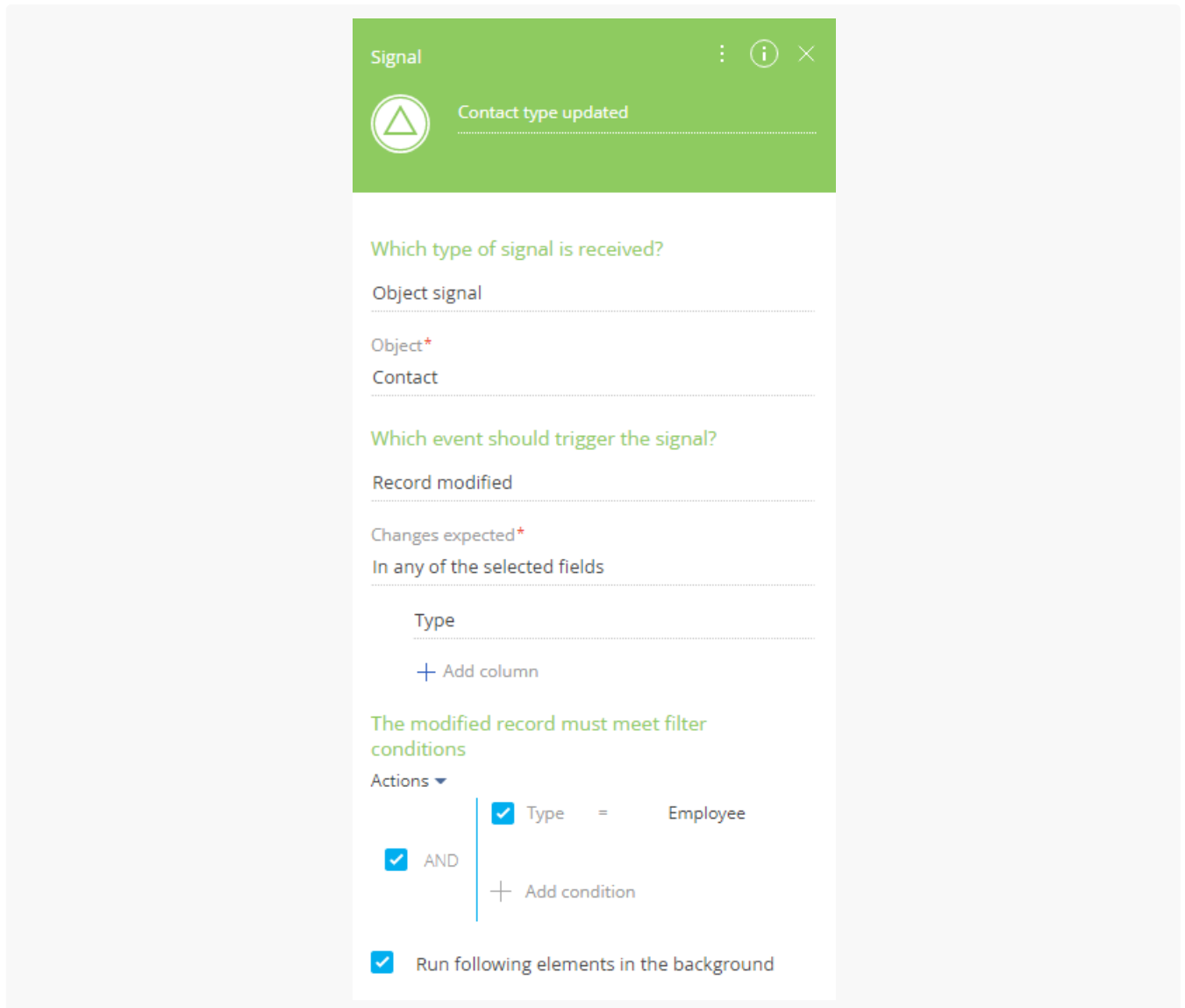
Fig. 1 The “Change access permissions to modify new employee record” business process



To do this:

1. On the process diagram, add the [\[ Signal \] start event](#) and specify its parameter values (Fig. 2).
  - a. In the [ Object ] field, select “Contact”.
  - b. In the [ Which event should trigger the signal? ] field, select “Record modified”.
  - c. In the [ Changes expected ] field, select “In any of the selected fields”, and add the “Type” column.
  - d. In the [ The modified record must meet filter conditions ] field, select “Type = Employee”.

Fig. 2 The [ Signal ] start event parameters

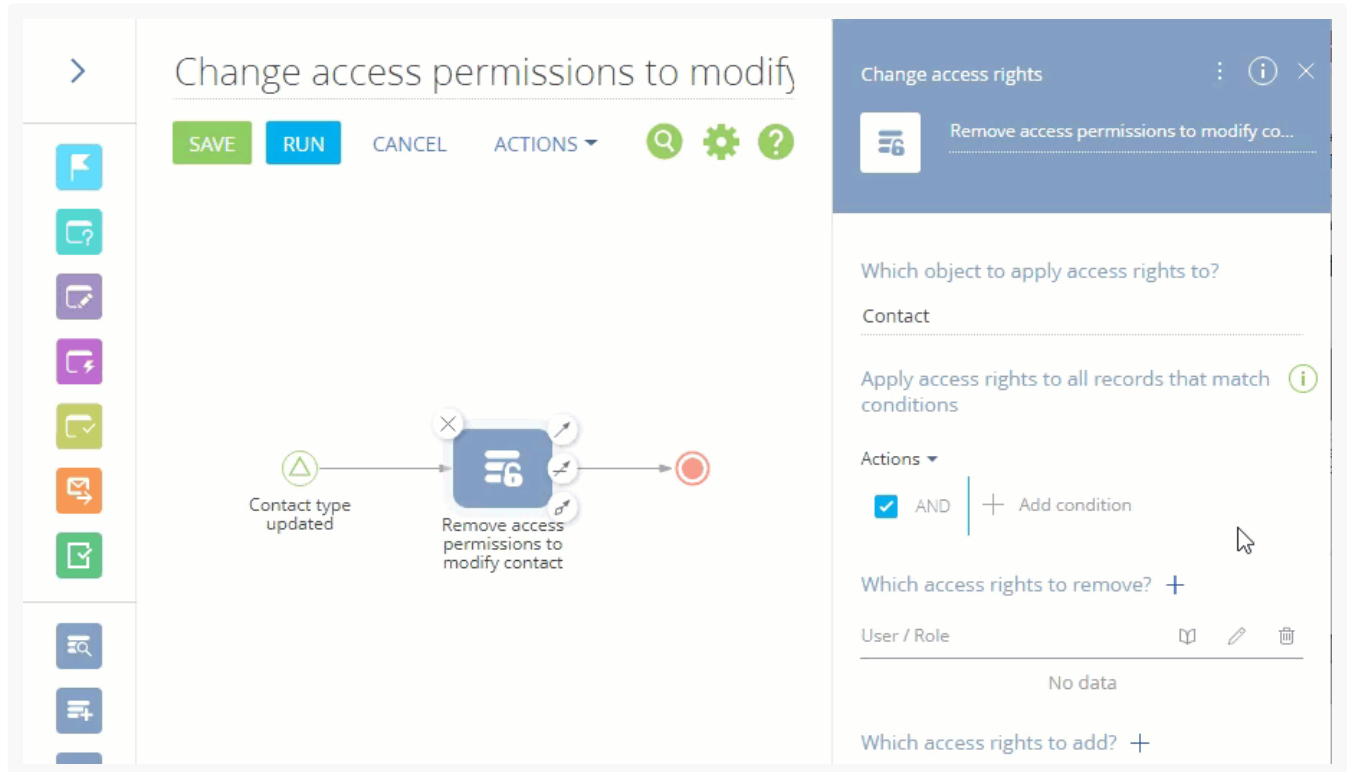


2. Add the [\[ Change access rights \] process element](#) on the process diagram and set up its parameters (Fig. 4).
3. In the [ *Which object to apply access rights to?* ] field, select “Contact”.
4. In the [ *Apply access rights to all records that match conditions* ] field, set up a filter (Fig. 3) by the Id column (“Id=Contact type updated.Unique identifier of record”):

**Note.** You can learn more about passing the unique record identifier (Id) between process elements in the [Process parameters](#) article.

- a. Click [ + *Add condition* ] to add a new filter condition.
- b. In the pop-up window, select “Id” from the drop-down list.
- c. Click <?> and select [ *Compare with parameter* ].
- d. In the pop-up window, under [ *Process elements* ], select the start signal event (on the left).
- e. Select the “Unique identifier of record” parameter on the right.

Fig. 3 Setting up a filter by the Id column





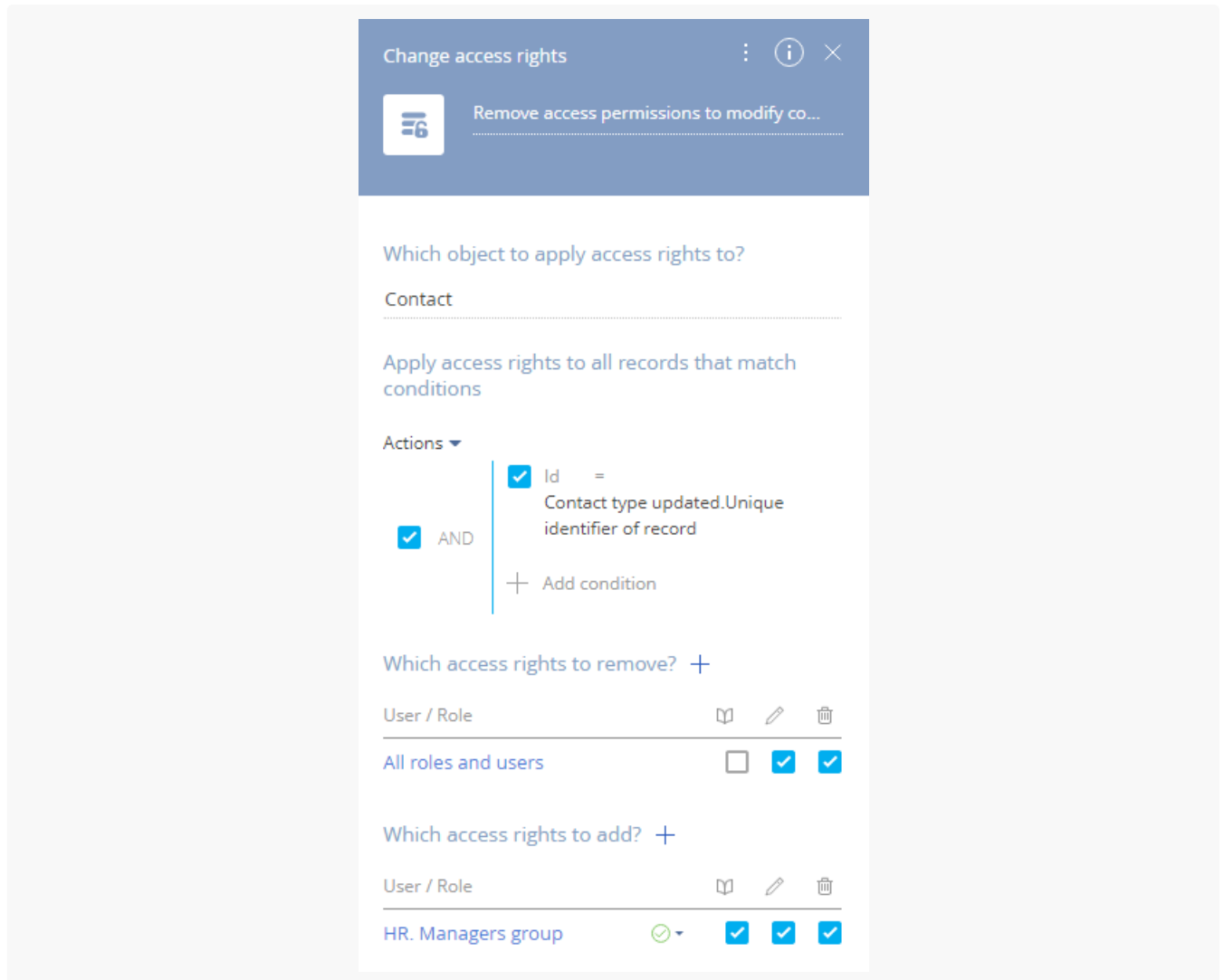
5. Click **+** in the [ *Which access rights to remove?* ] field and select “For all users and roles”. Clear the checkbox under  to remove permissions to edit or delete the record.
6. Click **+** in the [ *Which access rights to add?* ] field and select “For a user role”.
  - a. In the “Role” field that appears, click  and choose “Lookup value”.
  - b. Select the “HR, Managers group” organizational role in the opened window.

Fig. 4 The [ *Change access rights* ] process element parameters



7. After creating the process elements, connect them on the diagram and save the process. As a result, each time a contact's type is changed to "Employee", all Creatio users are stripped of their permissions to edit or delete the contact, and only members of the "HR. Managers group" organizational role obtain full access to the record and can view, modify or delete it."

**Note.** Please make sure that access to operations with the object (in this case, "Contact") is enabled in the [ *Object permissions* ] section in the System Designer. Learn how to set up object operation permissions in the [Object operation permissions](#) article.