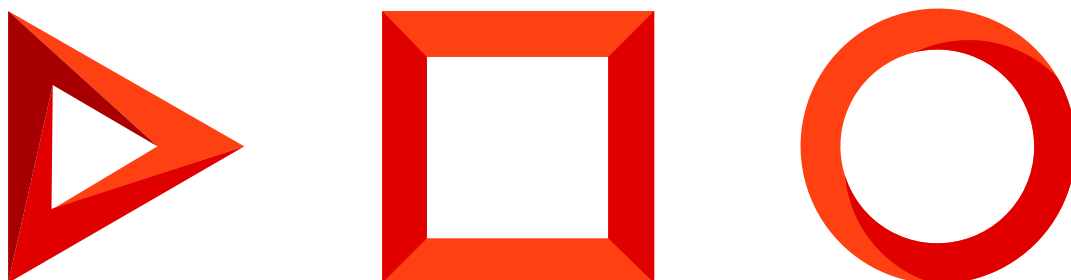


# Access management

## Delegate permissions

Version 8.0



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# Delegate permissions


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The functionality of delegating permissions enables granting all access permissions of a user to another user for a limited time. This is useful when, for example, an employee is out of the office or otherwise unavailable and someone should take over their duties. You can delegate permissions of individual users or roles to any number of other users or roles.

To delegate permissions, a user must have access to the “**Manage user list**” (CanManageUsers) and “**Change delegated permissions**” (CanChangeAdminUnitGrantedRight) system operations.

## Delegate permissions of a user to other users and roles

To delegate user permissions to another employee or employee group:

1. Click  → [ **System users** ].
2. Open the user page, **whose permissions you want to delegate**.
3. Click [ **Rights delegation** ] → [ **Delegate permissions** ].
4. In the opened window, select the user or employee group that **will receive the delegated permissions**, e.g., the “Accounting department” organizational role.
5. Click [ **Select** ]. Click [ **Close** ] on the user page.
6. Click [ **Actions** ] → [ **Update roles** ] to apply the changes.

As a result, the users and roles who received the permissions will be displayed in the [ **Who receives permissions** ] column, and the user/role, whose permissions were delegated, will be displayed in the [ **Who grants permissions** ] column on the [ **Access rights delegation** ] detail ([Fig. 1](#)).


Fig. 1 Delegating permissions of a user to another user/employee group

The screenshot shows the 'Users' page in a CRM system. The left sidebar contains navigation options: Sales, Dashboards, Feed, Leads, Accounts, Contacts, Activities, Opportunities, Orders, Contracts, and Invoices. The main content area displays a table of users with the following columns: User login, Active, Job title, Name, and Type. The 'Name' column is currently expanded to show a dropdown menu.

User login	Active	Job title	Name	Type
William Walker	Yes	Specialist	William Walker	4
Valerie E. Murphy	Yes	Head of department	Valerie E. Murphy	4
V.Murphy	Yes	Head of department	Valerie E. Murphy	4
SysPortalConnection	Yes		SysPortalConnection	4
S.Clarke	Yes	Marketing manager	Symon Clarke	4
Supervisor	No		Supervisor	4
SSPRegPortalUser	Yes		SSPRegPortalUser	4
Shela Andry	Yes		Shela Andry	4
Sharyn Mccraney	Yes		Sharyn Mccraney	4
Sandy	Yes	Head of department	Sandy	4
Peter Moore	Yes	Head of department	Peter Moore	4
Nick1404	Yes		Nick Dickens	4
Megan Lewis	Yes	Sales manager	Megan Lewis	4
Mary King	Yes	Sales manager	Mary King	4
Portal user 1	Yes	CEO	Henry Wayne	4
Flordv Johnson	Yes		Flordv Johnson	4

## Delegate permissions of other users and roles to a user

To delegate permissions of other users and roles to a user:

1. Click  → [ **System users** ].
2. Open the page of a user, who **will receive the delegated permissions**.
3. Click [ **Rights delegation** ] → [ **Get permissions** ].
4. In the opened window, select the user or role whose **permissions must be delegated** to the current user, e.g., the “Accounting department” organizational role.
5. Click [ **Select** ]. Click [ **Close** ] on the user page.
6. Click [ **Actions** ] → [ **Update roles** ] to apply the changes.

As a result, the user who received the permissions will be displayed in the [ **Who receives permissions** ] column, and the user/role, whose permissions were delegated, will be displayed in the [ **Who grants permissions** ] column on the [ **Access rights delegation** ] detail ([Fig. 1](#)).

Fig. 1 Delegating permissions of an alternative user/employee group to the current user

The screenshot displays the 'Users' management interface. At the top, there are navigation icons and a search bar with the placeholder text 'What can I do for you?'. Below the search bar, there are buttons for 'NEW' and 'ACTIONS'. A 'Filters/folders' dropdown is also present. The main content is a table of users with the following columns: User login, Active, Job title, Name, and Type. The table contains 15 rows of user data.

User login	Active	Job title	Name	Type
William Walker	Yes	Specialist	William Walker	4
Valerie E. Murphy	Yes	Head of department	Valerie E. Murphy	4
V.Murphy	Yes	Head of department	Valerie E. Murphy	4
SysPortalConnection	Yes		SysPortalConnection	4
S.Clarke	Yes	Marketing manager	Symon Clarke	4
Supervisor	No		Supervisor	4
SSPRegPortalUser	Yes		SSPRegPortalUser	4
Shela Andry	Yes		Shela Andry	4
Sharyn Mccraney	Yes		Sharyn Mccraney	4
Sandy	Yes	Head of department	Sandy	4
Peter Moore	Yes	Head of department	Peter Moore	4
Nick1404	Yes		Nick Dickens	4
Megan Lewis	Yes	Sales manager	Megan Lewis	4
Mary King	Yes	Sales manager	Mary King	4
Portal user 1	Yes	CEO	Henry Wayne	4
Flordv Johnson	Yes		Flordv Johnson	4

## Remove the delegated user permissions



1. Click  → [ **System users** ].
2. Open the page of the user, whose **delegated permissions you want to remove**.
3. Open the [ **Rights delegation** ] tab, **click the record** you want to delete.
4. Click  → “Delete” ([Fig. 1](#)). **Close the user page**.
5. Click [ **Actions** ] → [ **Update roles** ] to apply the changes.

Fig. 1 Removing the delegated permissions

The screenshot shows the 'Users' page in a CRM system. On the left is a dark blue sidebar with navigation icons and labels: Sales, Dashboards, Feed, Leads, Accounts, Contacts, Activities, Opportunities, Orders, Contracts, and Invoices. The main content area has a header with 'Users', a search bar 'What can I do for you?', and buttons for 'NEW' and 'ACTIONS'. Below the header is a table of users.

User login	Active	Job title	Name	Type
William Walker	Yes	Specialist	William Walker	4
Valerie E. Murphy	Yes	Head of department	Valerie E. Murphy	4
V.Murphy	Yes	Head of department	Valerie E. Murphy	4
SysPortalConnection	Yes		SysPortalConnection	4
S.Clarke	Yes	Marketing manager	Symon Clarke	4
Supervisor	No		Supervisor	4
SSPRegPortalUser	Yes		SSPRegPortalUser	4
Shela Andry	Yes		Shela Andry	4
Sharyn Mccraney	Yes		Sharyn Mccraney	4
Sandy	Yes	Head of department	Sandy	4
Peter Moore	Yes	Head of department	Peter Moore	4
Nick1404	Yes		Nick Dickens	4
Megan Lewis	Yes	Sales manager	Megan Lewis	4
Mary King	Yes	Sales manager	Mary King	4
Portal user 1	Yes	CEO	Henry Wayne	4
Flordv Johnson	Yes		Flordv Johnson	4

As a result, the delegated permissions will be deleted. The user will only have the initially assigned permissions.