









User Roles in PolicyStat

There are 9 assorted user "roles" or permissions: Guest, Staff, User, Owner, Collaborator, Approver, Area Editor, Area Manager, and Site Administrator. Any of these permissions are assigned by a user with Site Administrator permissions.

Role	What Does The Role Do?	How is this assigned?	What documents can I edit?
<p>Guest</p>	<ul style="list-style-type: none"> View and read a single policy (e.g. Vendor, Lawyer, Auditor, etc.) 	<p>Guest is provided a Read-Only Policy Sharing Link specific to a policy.</p>	<p>No edit permissions.</p>
 <p>Staff</p>	<ul style="list-style-type: none"> Search for, view, and read any non-restricted policies across PolicyStat 	<p>Staff are provided a Global Guest Access link.</p>	<p>No edit permissions.</p>
 <p>User</p>	<ul style="list-style-type: none"> Search for, view, and read any non-restricted policies across PolicyStat Acknowledge an assigned policy 	<p>A User account is created to login to PolicyStat.</p>	<p>No edit permissions.</p>

 <p>Owner</p>	<ul style="list-style-type: none"> • Edit any policies for which they are designated as the Owner • Edit their own documents • Start the review process • Approve if included in the workflow • Comment during collaboration • Retire policies (if allowed by Site Administrator) 	<p>The User is assigned as an Owner for at least one policy.</p>	<p>Edit and manage their policies, drafts, and pending documents.</p>
 <p>Collaborator</p>	<ul style="list-style-type: none"> • Read and review a policy in a pending status • Review comments made by other collaborators on a pending policy • Add comments to a pending policy • Invite other Users to collaborate on a pending policy 	<p>Any Users involved in the review process (e.g. Approver, Collaborator, etc.) can invite another User to collaborate through the comments section of a pending policy.</p>	<p>No edit permissions, but Collaborators can comment on pending documents and suggest changes.</p>
 <p>Approver</p>	<ul style="list-style-type: none"> • Review and approve or edit policies as part of an Approval Workflow • Edit a pending policy if they are part of the Approval Workflow • Cannot start the Approval process or create drafts from active documents 	<p>User is assigned to a step in an Approval Workflow.</p>	<p>Edit pending documents for which they are on the Approval Workflow during their step.</p>

 <p>Area Editor</p>	<ul style="list-style-type: none"> • Create new or edit any existing policies within the assigned Area(s) • View Restricted policies within their Area (or site-wide) 	<p>A user is assigned create/edit permissions for a given Area or site-wide (if desired).</p>	<p>Create and Edit new, existing, and pending documents within their area(s).</p>
 <p>Area Manager</p>	<ul style="list-style-type: none"> • Create new or edit any existing policies within the assigned Area(s) • Oversee and manage policies within assigned Area • Assign and view Acknowledgments for any policy in their Area • View restricted policies within their Area (or site-wide) • Retire policies (if allowed by Site Administrator) • Create and Edit User Groups • Cannot manage users or other settings and permissions 	<p>A user is assigned create/edit/manage permissions for a given Area or site-wide (if desired).</p>	<p>Create and Edit new, existing, and pending documents within their area(s).</p>

 <p>Site Administrator</p>	<ul style="list-style-type: none"> • Create new or edit any existing policies within any Area(s) • Oversee and manage any Areas via reports and notifications • Assign and view Acknowledgments for any policy in their Area • View restricted policies site-wide • Create, edit, and manage Areas, Approval Workflows, User profiles/permissions, and User Groups • Perform policy overrides • Retire and delete policies • Reinstate retired policies • Produce reports 	<p>A User is assigned Site Administrator permissions site-wide.</p>	<p>Create, Edit, and Override new, existing, and pending documents on the site(s) they have administrative privileges.</p>
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Additional Information:

- The assigning of roles or elevated permissions is restricted to [Site Administrators](#).
- For more information on setting user permissions, please [see this article](#).
- Assigning roles (or permissions) are assigned to a user's profile or by an [Area](#).
- Users may be created via a sync with Active Directory or Single Sign-On services.
- Some terms or role names may differ for your location, but the concepts are universal.
- Roles are not mutually exclusive.
- An [Owner](#) can also be an [Approver](#)
- An [Area Manager](#) can be an Owner *provided the user has been granted permissions for both roles*.
- Users can proxy for another user. For more on serving as a proxy, [see this article](#).

Permissions and Restriction Matrix

The matrix below shows you what actions you have permission to perform based on the assigned PolicyStat user role.

	Individual Document Owner	Owner Permissions in a Document Area	Manager Permissions in Document Area(s)	Approver (Member of a Workflow)	Site Administrators
Create a new document	NO	YES	YES	NO	YES
Edit an existing document	YES (Limited)	YES	YES	YES (Limited)	YES
Retire a document	YES (Limited)	NO	YES (Limited)	NO	YES
Delete a document	NO	NO	NO	NO	YES