





USER ROLES QUICK REFERENCE

There are 9 assorted user roles, each determined by an individual's assigned 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?
 Guest	<ul style="list-style-type: none"> View and read a single policy (e.g. Vendor, Lawyer, Auditor, etc.) 	Guest is provided a Read-Only Policy Sharing Link specific to a policy.	No edit permissions.
 Staff	<ul style="list-style-type: none"> Search for, view, and read any non-restricted policies across PolicyStat 	Staff are provided a Global Guest Access link .	No edit permissions.
 User	<ul style="list-style-type: none"> Search for, view, and read any non-restricted policies across PolicyStat Acknowledge an assigned policy 	A User account is created to login to PolicyStat.	No edit permissions.
 Owner	<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) 	The User is assigned as an Owner for at least one policy.	Edit and manage their policies, drafts, and pending documents.

PolicyStat User Roles Matrix



<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>
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<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>
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<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>
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<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>
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PolicyStat User Roles Matrix

Area Administrator



<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 • Create and Edit User Groups • Perform policy overrides (including Approval Simulations) 	<p>A user is assigned administer permissions for a given Area.</p>	<p>Create, Edit, and Override new, existing, and pending documents within their area(s).</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>

Additional Information

- Only [Site Administrators](#) can assign elevated permissions.
 - For more information on setting user permissions, please [see this article](#).
- Roles / permissions can be assigned to an individual user on their profile or in bulk to multiple users for an [Area](#).
- User accounts can be provisioned through integrations with Single Sign-On providers or your local Active Directory.
- 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](#). PolicyStat's best practice is to have the Owner serve as the first Approver on a Workflow.
 - 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](#).
- Users can only view pending and draft documents in Areas they have been assigned permissions to Edit.

PERMISSIONS AND RESTRICTIONS MATRIX

The matrix below shows what actions a user has permission to perform based on an assigned PolicyStat [user role](#).

	Owner (individual document)	Owner (permission assigned for Area)	Area Manager	Area Administrator	Approver (member of any workflow)	Site Administrator
<i>Create a New Document</i>	NO	YES	YES	YES	NO	YES
<i>Edit an Existing Document</i>	YES (limited)	YES	YES	YES	YES (limited)	YES
<i>Retire a Document</i>	YES (limited)	NO	YES (limited)	YES (limited)	NO	YES
<i>Delete a Document</i>	NO	NO	NO	NO	NO	YES
<i>Override a Document</i>	NO	NO	NO	YES (limited)	NO	YES

For additional help, visit support.policystat.com or contact support@policystat.com.

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