

ADMINISTRATIVE ACCESS PERMISSIONS

Agiloft Release 8.0 (2015_01) enhanced support for administrative access permissions; there are now two categories of admins: **Table Admins** and **System Admins**. Table Admins are granted administrative access to specific tables, so that departmental administrative groups may administer their own tables in Agiloft, without access to the system setup menus or affecting the permissions and setup of tables outside the department's domain.

For example, you may wish to give the Support Manager group the ability to modify the Support Cases table. Table Admin access enables:

- Creating fields, including **linked fields** from any other table.
- Setting ownership and field permissions
- Modifying **layouts**
- Creating **action bars**
- Changing the table icon
- Creating **business rules***
- Creating **actions** for use in action buttons and rules*
- Creating subtables**

Rules and actions that interact with more than one table, such as **linked record actions, require admin access to all of the involved tables. See [LIMITATIONS ON TABLE ADMIN FUNCTIONS](#).*

***Only System Admins may create new **top-level** tables.*

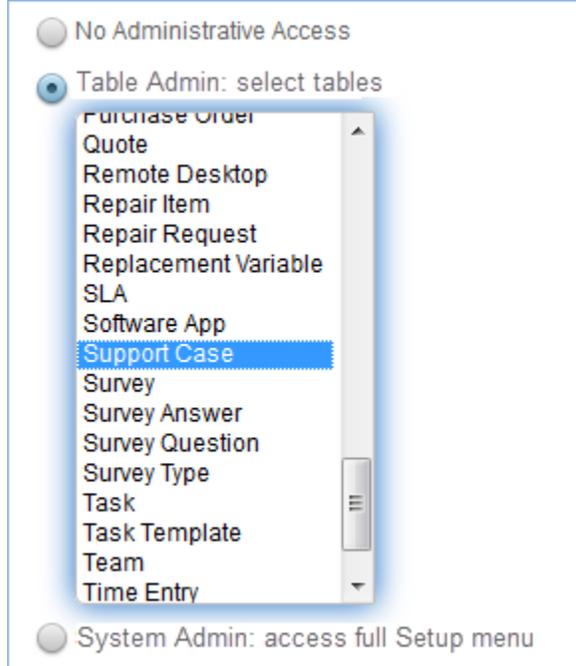
Granting Administrator Permission

Note: You must have System Admin privileges to access the Groups wizard.

1. Go to **Setup > Access > Manage Groups**.
2. **Edit** the group, e.g. Support Manager.
3. On the **General** tab of the group wizard, select which type of administrative access the group will have:

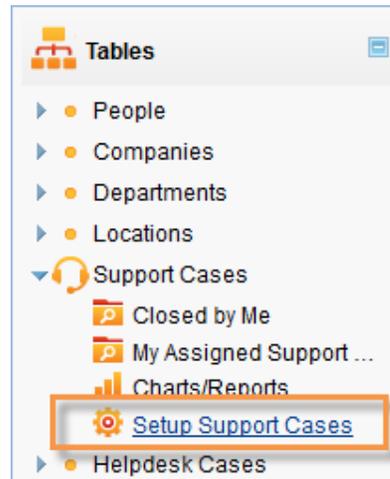
Note: The selected group must be designated a **Staff** group on the **Overview** tab.

- a. To grant table-based administrative permission, select [Table Admin: select tables](#). From the drop-down, select the tables the group will administrate.



- b. To grant access to the entire Setup menu, select [System Admin: access full Setup menu](#).

When a group has been granted Table Admin access, users will see the [Setup \[Table\]](#) link in the left-pane **Tables** menu.



Limitations on Table Admin Functions

Note that the following limitations are applied to admin users with access to specific tables only.

Rules and Actions. Some types of rule actions, such as *linked record actions* and *conversion actions*, require access to both the source and donor tables.

Examples:

- To create a *conversion action* from the Contracts table to the People table, the admin needs access to both the Contracts and People tables.
- To create a *linked record action* starting from the Companies table and updating fields in the Contracts table, the admin needs access to both the Companies and Contracts tables.

Tables and Subtables. Permissions for subtables are not differentiated from the parent tables. When admin access is granted for a top-level table, the user will be able to modify any of its subtables. Only System Admins may create new top-level tables; Table Admins may create subtables only.