HowNow user privileges

The privilege settings control a users rights in HowNow

Privilege options and meaning:

This Fact Sheet was created to provide you with an understanding of all the possible privilege options available in HowNow.

When adding/editing a team member in HowNow, the Privileges tab displays the various settings that control the person's privileges. Go to *Administrator>People>Privileges Tab*

Note: This tab is not visible to standard HowNow users.

System

HowNow Administrator - The HowNow Administrator is responsible for the day-to-day maintenance of HowNow within your organisation. For example, tasks such as adding people, setting up the Organisation section of HowNow and downloading Content and Software Updates are normally the responsibility of the HowNow Administrator.

HR Administrator - The HR Administrator is a special type of HowNow Administrator who can only administer the HR functions. i.e. Position Types, Positions, People and Teams.

Note: Selecting HowNow Administrator overrides this option

Content Administrator - The Content Administrator is a special type of HowNow Administrator who is equivalent to a Knowledge Content Author but who can also make documents current or change the status.

Note: Selecting HowNow Administrator overrides this option

Software Updater - The Software Updater is the person responsible for administering software updates.

Note: There can be only be one software updater

Contact Data Updater - The Contact Data Updater can refresh the contact data at any time.

The position types below if selected, enable the person to appear in profile wizard selections and relating filter selections mostly in the Records module.

Partner - Select Partner/Director if this person is a partner or director of the organisation.

Manager - Select Manager if this person is a manager.

Reviewer - Select Reviewer if this person is a reviewer of records.

Signatory - Select Signatory if this person is a signatory to letters and other documents.

Knowledge:

Content Updater – The Content Updater is the person responsible for administering the content updates.

Note: The content updater does not have to be an administrator.
Note: There can be only be one content updater.

Content Author - A Content Author is able to add and edit Documents in HowNow.

Content Reviewer - A Content Reviewer is a person responsible for reviewing new and updated HowNow content within your organisation. *Note: You can set up multiple Content Reviewers within HowNow.*
Note: A Reviewer can edit, but not add, Documents to HowNow.

Record Settings:

(Applicable only if the Records module is installed).

Can Un-Finalise Records - Select Can Un-Finalise Records if this person is not an administrator but can remove the Final status from records.

Show Change Status Dialog on Record Close - Select Show Change Status Dialog on Record Close to display the Record Change Status Dialog each time this person closes a non-final record.

Can Import Records - Select Can Import Records to allow this person to import records. This setting controls the *Records > Import menu*.

Can Import via MailScan - Select Can Import via MailScan to allow this person to import records via MailScan.
Note: This option is only available if the HowNow MailScan™ module is installed.

Can Edit Record Profiles - Select Can Edit Record Profiles to allow this person to edit record profiles even though they are not an administrator.

Record Status Level - Select a Record Status Level to specify the level up to which this person can change record statuses.
Note: Records can be filtered by Partner, Manager, Reviewer and Signatory

Contacts Settings:

(Applicable only if the Contacts tab is enabled).

Allow Adding Contacts - Select Allow Adding Contacts to allow this person to add contacts to the contacts database.

Allow Editing Contacts - Select Allow Editing Contacts to allow this person to edit contact details

Note: These options should only be used if Contacts is your main database and you are not importing contacts from another database.

Workflow Settings:

(Applicable only if the Workflow module is installed).

Allow Job Creation - Select Allow Job Creation to allow this person to create jobs even though they are not an administrator.

On Workflow Dialogs behaviour - Select the option that specifies how this person uses the job selection field on Workflow dialogs.

The options are:

Start at the job selection field. The job selection field has focus and default values can be changed.

Don't Start at the job selection field. This allows jobs to be used only if required.

Force the use of jobs and don't allow default values to be changed.

Don't Show the job selection field at all. This is equivalent to not having Job Management installed.

Can Start Inactive Tasks - check this box to allow this person to start inactive tasks. If it is not checked, a task can only be started by completing the previous task.