Windsor Solutions



Security Roles Overview

Updated for Version 4.17

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**Contents**

[Version Control 3](#_Toc63850288)

[Security Roles 4](#_Toc63850289)

[Role Descriptions 4](#_Toc63850290)

# Version Control

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Author | Date | Notes |
| 4.6 | Windsor Solutions | 5/10/3019 | Updated to reflect v4.6. |
| 4.7 | Windsor Solutions | 5/30/2019 | Updated to reflect 4.7. |
| 4.8 | Windsor Solutions | 2/7/2020 | Updated to reflect 4.8. |
| 4.10 | Windsor Solutions | 7/15/2020 | Updated to reflect 4.10. Added Submission Roles. |
| 4.11 | Windsor Solutions | 1/29/2021 | Updated to reflect 4.11. Added Approved Submitter role. |
| 4.12 | Windsor Solutions | 7/20/2021 | Updated to reflect 4.12. Added Viewer Submission role. |
| 4.13 | Windsor Solutions | 5/2/2022 | Updated to reflect v4.13. |
| 4.14 | Windsor Solutions | 8/31/2022 | Updated to reflect release 4.14. |
| 4.15 | Windsor Solutions | 12/19/2022 | Updated to reflect v 4.15. |
| 4.17 | Windsor Solutions | 9/28/2023 | Updated to reflect 4.17. |

# Security Roles

## Role Descriptions

### Global Staff Roles

* **Administrator**: Provides the ability to perform all system functions.
* **User Account Administrator**: Provides the ability to assign/un-assign users to system roles.
* **Common Template Designer**: Provides the ability to manage and design the master Common Template.
* **Payment Account Administrator**: Provides the ability to administer 3rd party payment processor settings.

### Organization Specific Roles

* **Internal Users:**
  + **Confidential Attachment Viewer**: Provides the ability to view confidential attachments for submissions assigned to the organization.
  + **Form Designer**: Provides the ability to design and manage form content for an organization.
  + **Form Publisher**: Provides the ability to publish refined form(s) for an organization.
  + **Internal Form Viewer**: Provides the ability to view and navigate to forms that are considered internal-only.
  + **Internal Organization Viewer**: Provides the ability to view and navigate to organizations that are considered internal-only.
  + **Organization Manager**: Provides the ability to manage submissions for an organization, manage user security for assigned organization and manage organization content.
  + **Organization Publisher**: Provides the ability to publish refined organization content.
  + **Payment Processor**: Provides the ability to adjust Payment information submissions for an organization.
  + **Payment Report Viewer:** Provides the ability to view Payment Processing report for an organization.
  + **Submission Processor**: Provides the ability to perform submission processing functions for submissions assigned to the organization.
  + **Submission Viewer**: Provide the ability to view and search for all submissions and use internal processing features in a read-only state.
* **External Roles:**
* **Electronic Signatory**: Provides the ability to submit forms that require an electronic signature.
* **Verified User**: Provides the ability to submit forms that require verified user level authentication. Note a user which is assigned the Electronic Signatory role is assumed to be a Verified User.
* **Authorized Submitter:** Provides the ability to submit forms that require explicit permission to submit (e.g., Authorized Submitter level authorization).

### All Users (assigned by default)

* **Self-Registered User**: Provides the ability to sign in to system, manage the account information for the user, submit forms that only require Self-Registered User level authorization and view a history of all submissions assigned to the user. Note: all users are assigned this base role by default following registration.

### Anonymous Users

* **Anonymous User**: Provides the ability to view all information that is anonymously available in the system such as organization summary content, forms summary content, form finder, public help content. Note: this role is assigned when a user is not signed into the system.

### Submission Roles

The following roles are assigned to users within a specific submission by other submission users (via Submission Sharing or Signing Invitation features).

* **Viewer:** Provides the ability to view a submission. User is assigned this role via security pre-population service.
* **Editor:** Provides the ability to edit and submit a form. User is assigned this role via submission sharing invitation or security pre-population service.
* **Contributor:** Provides the ability to edit a submission, when in a draft status. No ability to submit a form or edit a submission while not in a draft status. User is assigned this role via submission sharing invitation or security pre-population service.
* **Signer:** Provides the ability to sign and submit a form. No ability to edit a form. User is assigned this role via submission signing invitation or security pre-population service.