| Training Sheet Title:	**How to use Permissions Node**
Date Effective:	**December 11, 2014**
Useful for:	**ALL Portal Users**
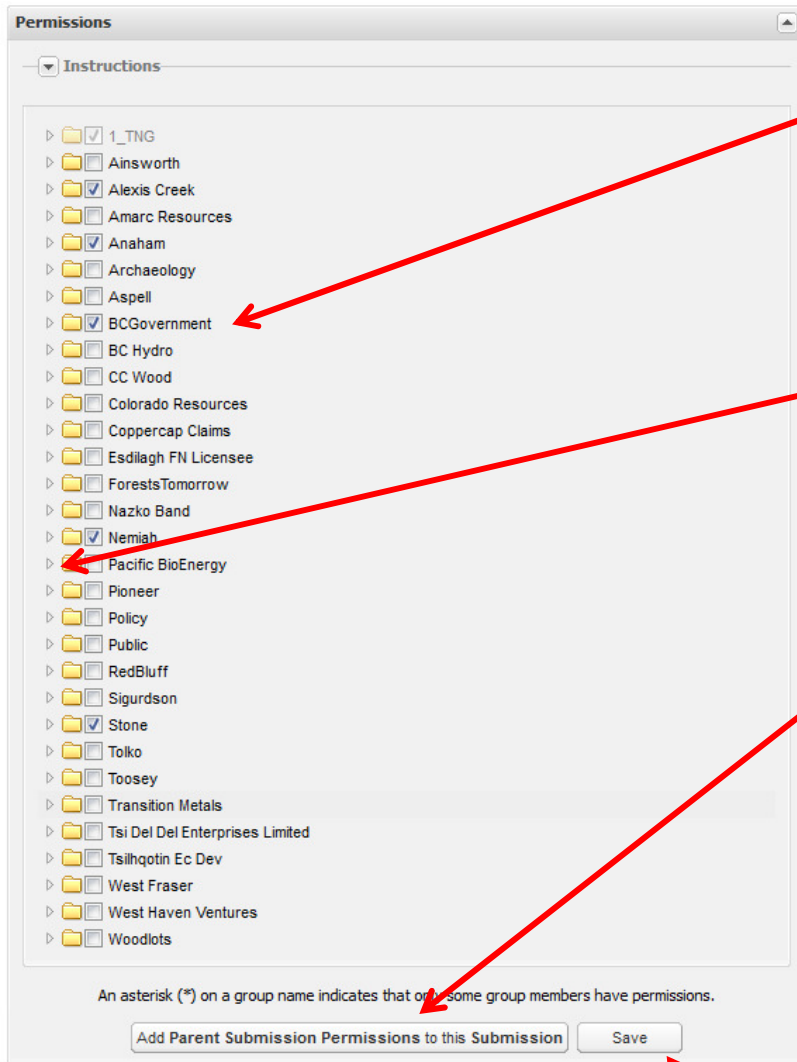
Granting Permissions Manually:

Click on or off groups that you want to grant permissions to view this submission. You cannot modify permissions once you have submitted. *Once a submission is submitted only Portal Administration can modify it. Please call Mary or Sarah, with the Portal ID, to revise permissions on submitted referrals.*

Expand Permission Tree by clicking on the arrow on the left side of the user group folder.

Granting Permissions Automatically:

If this submission has a defined parent submission, the **Add Parent Submission Permissions to this Submission** button will be enabled. Click this button to automate the process of granting permissions from the original submission (and then click Save). Doing this will not revoke any permission you have already set, but may grant permissions to additional users/groups based on what the Parent Submission permissions are. Permission changes can still be made after using the **Add** function. If you are submitting a child submission we recommend that you click this button first and then review for further permission edits. If you make changes to the permissions remember to click **Save.** Otherwise edits will be lost.
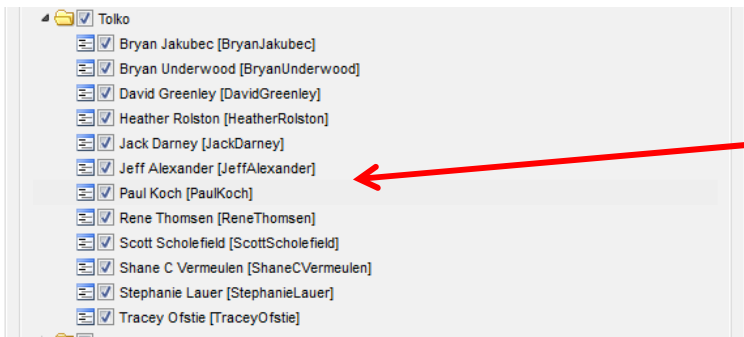
Within the Group Permission Tree you can also click on or off users you wish to add or remove permission for. **If you click permissions off for a user, that user cannot access your submission.** So unless you have specific circumstances to remove permissions, ensure that all users in your group are clicked on prior to submitting. By removing permissions you are effectively cutting your collegues out of the workflow.
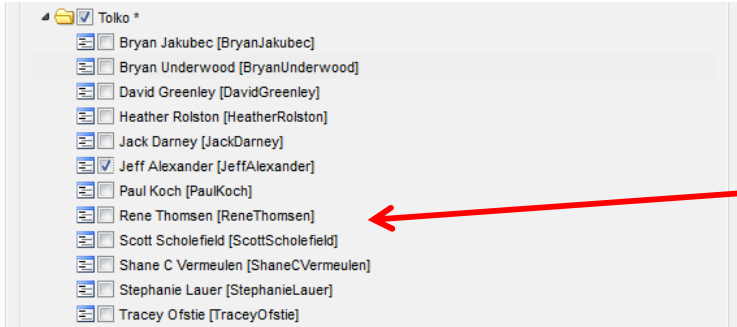
Generally speaking, the user group **should not** look like this.

(Note the asterix (*) next to the Tolko user group folder header – this indicates that not all users in this group have permission)

Permissions are not correlated to email notifications. You can have permission to view a submission, but not be notified that it has been submitted. Alternatively, you can be notified of a submission and not have permission to view it. Or finally, you can have permission and be notified. The significance of this relationship means more people will have permissions than get notified.