

Granting Administrative Access for Reservation Systems

2017 - Summer Edition

User Guide - Table of Contents

[Overview](#)

[Use Case\(s\)](#)

[Accessing Role Security](#)

[Granting Admin Access](#)

[FAQs](#)

Overview

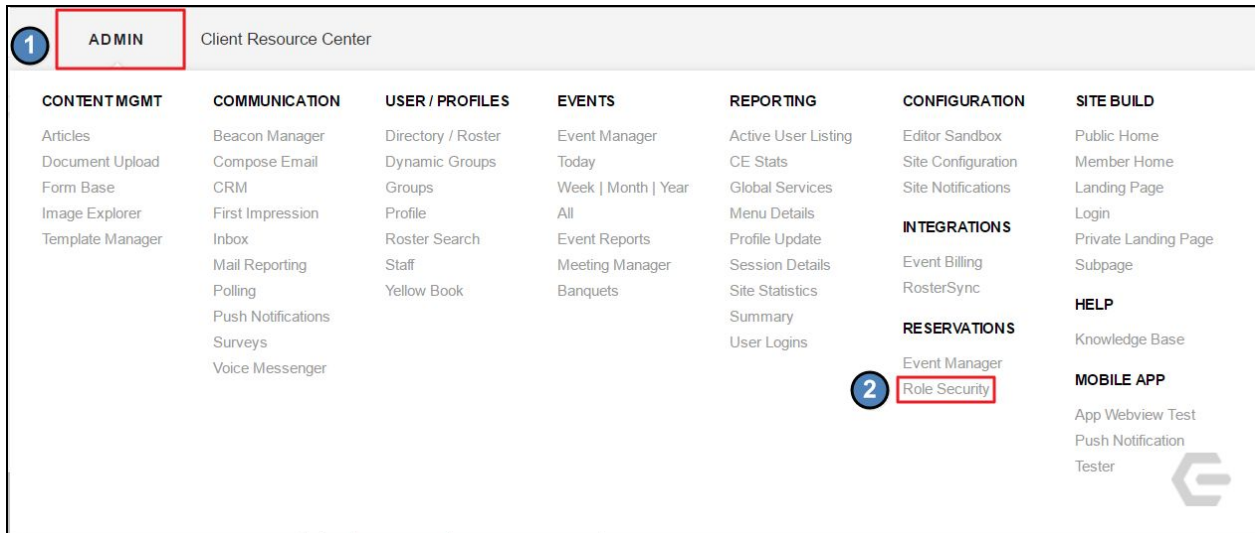
Role Security is an important feature for all **Reservation Systems** as this tool allows **Club Admins** to grant **Admin Status** for all Reservation Systems or select Reservation Systems. This feature can be found under the **Admin Toolbar** and has one entry point for all **Reservation Systems**. In order to grant **Reservation Admin Status**, the user must first be in the **Directory**. Please refer to the [Directory Management Article](#) if the user is not in the **Directory**.

Use Case(s)

Role Security is used to grant **Admin Status** for all **Reservation Systems**. **Role Security** is separate from **Admin Status** of the overall website, so you may grant **Admin** status to only the **Reservation Systems** as needed. Each **Reservation System** is separate, so you must grant **Role Security** to each System individually under the **Role Security Manager**.

Accessing Role Security

To access **Role Security**, hover over **Admin** and click on **Role Security** under the Reservations section.



The screenshot shows a navigation menu with the following structure:

- ADMIN** (highlighted with a red box and a blue circle containing '1')
 - Client Resource Center
 - CONTENT MGMT**
 - Articles
 - Document Upload
 - Form Base
 - Image Explorer
 - Template Manager
 - COMMUNICATION**
 - Beacon Manager
 - Compose Email
 - CRM
 - First Impression
 - Inbox
 - Mail Reporting
 - Polling
 - Push Notifications
 - Surveys
 - Voice Messenger
 - USER / PROFILES**
 - Directory / Roster
 - Dynamic Groups
 - Groups
 - Profile
 - Roster Search
 - Staff
 - Yellow Book
 - EVENTS**
 - Event Manager
 - Today
 - Week | Month | Year
 - All
 - Event Reports
 - Meeting Manager
 - Banquets
 - REPORTING**
 - Active User Listing
 - CE Stats
 - Global Services
 - Menu Details
 - Profile Update
 - Session Details
 - Site Statistics
 - Summary
 - User Logins
 - CONFIGURATION**
 - Editor Sandbox
 - Site Configuration
 - Site Notifications
 - INTEGRATIONS**
 - Event Billing
 - RosterSync
 - RESERVATIONS**
 - Event Manager
 - Role Security** (highlighted with a red box and a blue circle containing '2')
 - SITE BUILD**
 - Public Home
 - Member Home
 - Landing Page
 - Login
 - Private Landing Page
 - Subpage
 - HELP**
 - Knowledge Base
 - MOBILE APP**
 - App Webview Test
 - Push Notification Tester

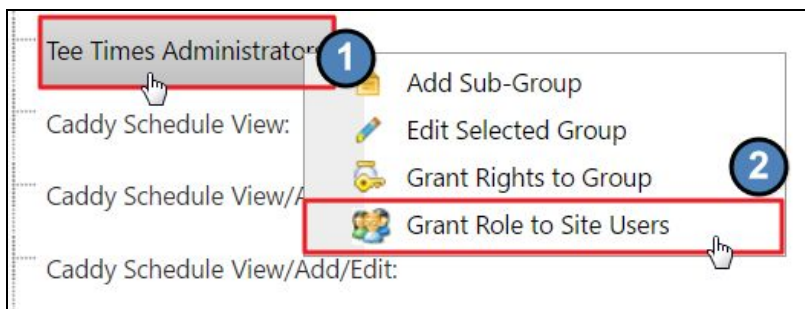
This will launch the **Role Security Manager**. In the **Role Security Manager**, all reservation systems that you have will be listed.



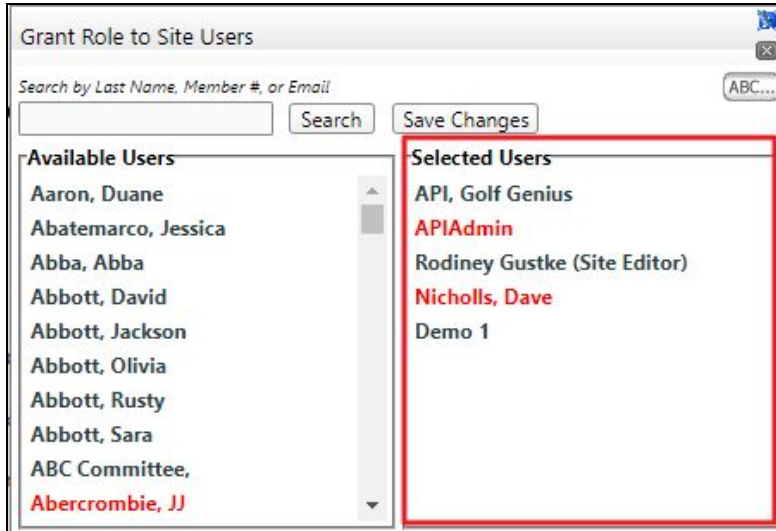
Granting Admin Access

Determine which reservation system the user must have access to, and then **right click** on the reservation system.

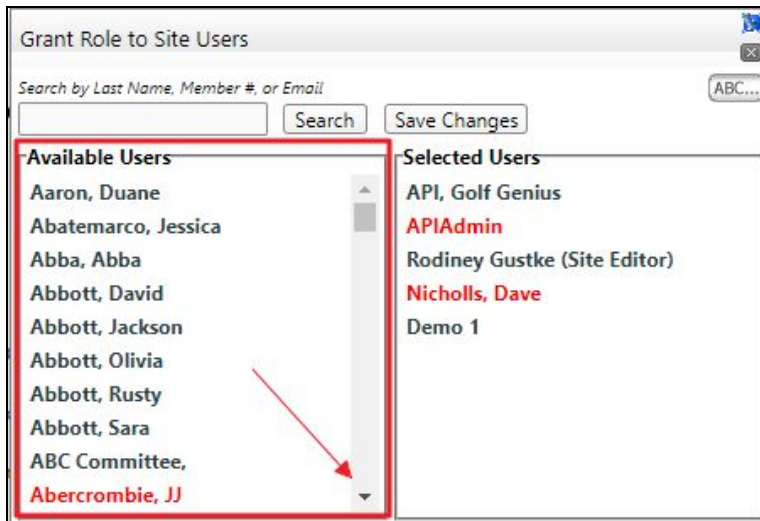
Click Grant Role to Site Users to add access.



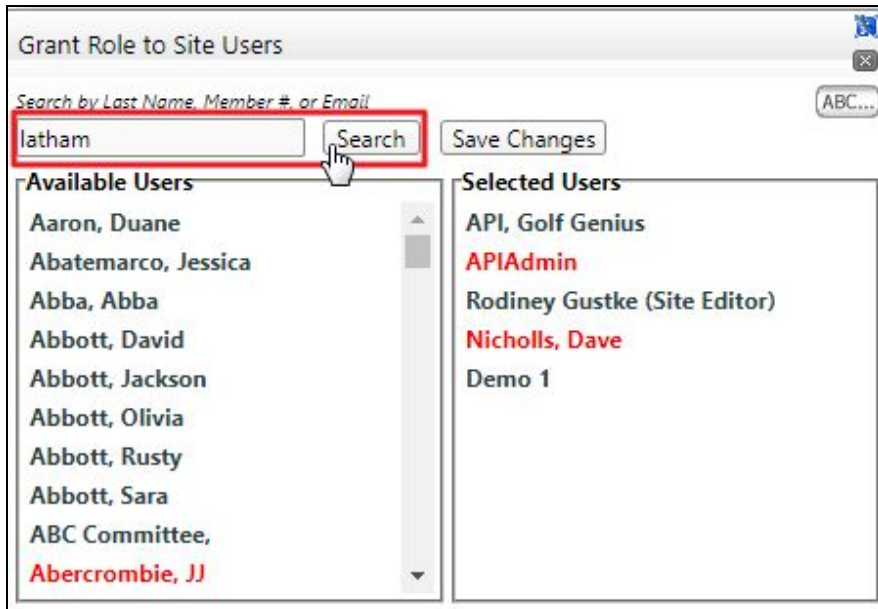
In the **Grant Role to Site Users** interface, the right hand side of the window will list all users that currently have access.



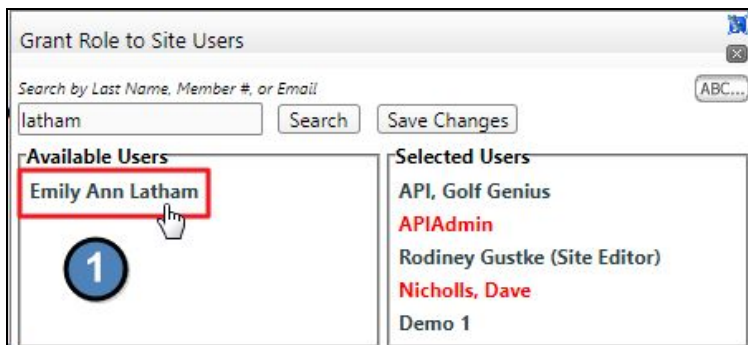
From the left hand side of the window, under **Available Users**, you may **scroll** to find the appropriate user.

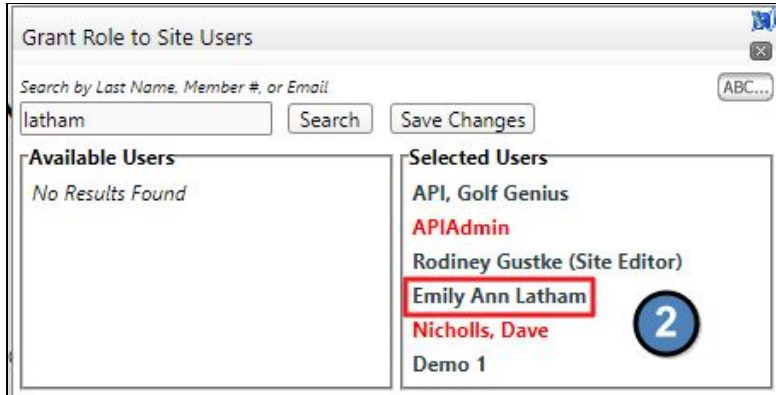


Use the search field to search for the user by **Last Name, Member #, or Email**. Click **Search** to return results.

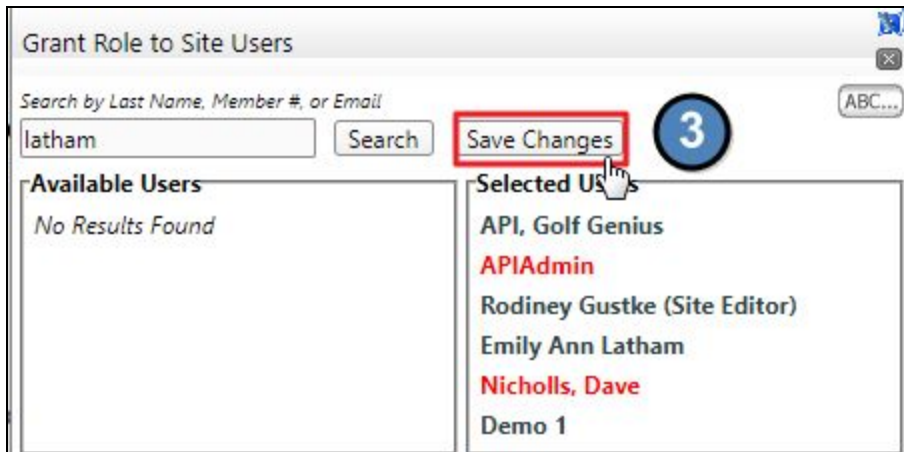


Once you have found the appropriate user, **click** on the **user's name** from the **Available Users** list to bring the user to the right hand side of the window under **Selected Users**.





Click **Save Changes** in order to complete the process.



FAQs

Q: The user I am trying to grant access to is not showing up in the **Available Users** list, why?

A: Before you can grant a user access to the **Reservation System(s)**, they must first be in the **Directory** (typically as a **Staff Account**). If the user is not found in the **Available Users** list,

then this person is most likely not in the **Directory**. Review our [Directory Management Article](#) to begin adding the user before granting **Role Security Access**.

Q: Can a regular staff member have admin access to reservation systems, but not have access to editing the website?

A: Yes! First, we must set up a static group for any staff members that you wish to give reservation access to, but not to editing the website. From there, our team can set up access so that group has access to reservation systems but not to editing the website. Many times this group is set up at the beginning of the process, so you would only need to add staff members to the static group.

Q: I tried clicking on the group to **Grant Role to Site Users** but nothing is opening.

A: You will need to **right click** on the **group** in order to launch the **Grant Role to Site Users** window.