

SOLABS QM 10: Train ID vs. External Account Types

	TRAIN ID Account Type	EXTERNAL Account Type
GENERAL INFORMATION	<ul style="list-style-type: none"> • Train ID users can view and open Approved and Effective documents and use the training section as would any Standard user. They can also open Approved, Not Effective documents that are assigned to them for training purposes. • The system will overwrite their privileges to Read Only in the Document Section even if they have a Role assignment that is set for a higher permission level. • The system will overwrite their privileges to No rights in the Task and Process section, even if they have a Role assignment that is set for a higher permission level. 	<ul style="list-style-type: none"> • External users have restricted access to system functions. • They do not have access to the search engine. • Their access to is limited to outstanding activities directly assigned to them. • They can be assigned a Training Activity, a review or approval task in the Document Section or a Process Task.
ACCESS TO SEARCH	<ul style="list-style-type: none"> • Train ID users have access to the General Search field and the Search Tab. • In the General Search field, the drop-down list displays search criteria only for the Document Section. • In the Search Tab, the Refine Results tab displays only the Document Section search criteria. • Train ID users do not have access to the Navigation tabs. • They can be given access to the SharePoint Reports portal by a System Administrator as needed. 	<ul style="list-style-type: none"> • External users do NOT have access to the General Search field, the Search tabs and the Navigation tabs. • They can be given access to the SharePoint Reports portal by a System Administrator as needed.

SOLABS General User is a Role that is assigned to all users, granting Read Only access. If you have a need to restrict access to External Users for certain Documents or Folders, the SOLABS General User Role could be removed from the document or folder. **CAUTION:** If you choose to remove the SOLABS General User Role on a folder or document(s), be SURE that all of your internal users have at least Ready Only permissions granted to them through another Role assignment such as an organizational or departmental Security role.

User accounts for external parties can be created with any of the three Account Types. They can also be given Role assignments. It is just important to understand the restrictions and how to manage their access through Privileges.

Standard user is the Account Type that grants access to perform activities in the system (document creation/review/approval, acting on a Process Step, Administration, etc.) Privileges can be restricted even for Standard Users when needed, but remember that they would still have access to the Search field, Search tabs and Navigation tabs.

For guidance on specific needs regarding Account Types and levels of access to the system, contact a SOLABS Product Specialist or Trainer.