User Permissions

Migration Guide

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1. New Permissions Go-Live

The enhanced Permissions model in Smarter Drafter Pro will go live from 27th March 2025. Once live, there will be **no disruption nor action required** for existing accounts. All users will retain the exact same level of access as they currently do.

2. What's changing?

Previously, Smarter Drafter Pro users were assigned one of 3 roles:

1. **Admin:** unlimited control across all areas of the platform,
2. **Builder:** access to builder functions at a folder and/or form level with 3 additional levels:
   a. **Form Administrator:** unlimited access,
   b. **Form Editor:** edit only access,
   c. **Form Viewer:** view only access,
3. **Filler.** access to published forms at a folder and/or form level for generating documents.

In place of roles, the new model will allow permissions to be configured across all areas of the platform (i.e. **Admin**, **Builder** and **Filler** functions) at an individual user level or by a predefined configuration of access and system functions saves as a Permission Set – for more information, please see the User Permissions Help Guide.

3. Migrating from the Current to Future State

To ensure there is no disruption, permissions for all existing users will be migrated automatically to the new model based on their current role and group access (if applicable).
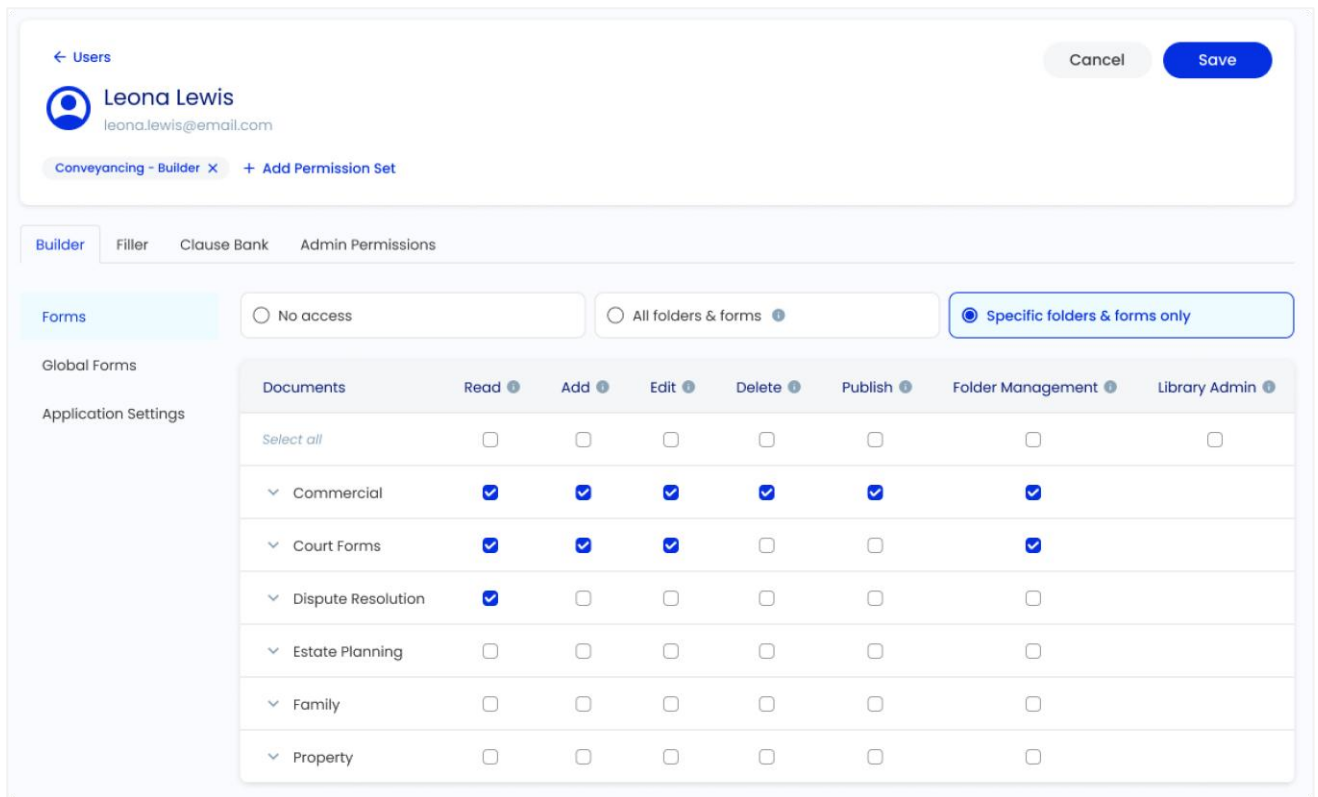
Current Role/Group	Future Permission Set / Custom Configuration	Description
Admin	Permission Set	An "Admin" Permission Set will be created with access to all system functions enabled to reflect the current Admin role.
Builder	Custom Configuration	All users with the Builder role will have the same system functions enabled for the folders and/or forms they currently do. See the Builder Roles Matrix below for more info.
Filler	Custom Configuration	All users with the Filler role will have the same access to the folders and/or forms they currently do.
Groups	Permission Set	A Permission Set will be created for each existing Group with the same name and reflect the same folder and/or form level access as per the Builder roles applied per that group. See the Builder Roles Matrix below for more info.

3.1   Builder Roles Matrix

	Read	Add	Edit	Delete	Publish	Folder Mgmt.	Library Admin
Form Administrator	Y	Y	Y	Y	Y	Y	Y
Form Editor	Y	Y	Y	N	N	Y	Y
Form Viewer	Y	N	N	N	N	Y	N

4.   Permissions Matrix

The new Permissions Model will display all the functions across each platform area as a matrix, allowing for complete customisation. For a complete guide on all system functions across all platform areas, please see the User Permissions Help Guide.