

# Assignment: Homework for the NPGS *after* the Security Webinar

---



## Revision Date

Thursday, August 01, 2013

*This exercise should be completed **after** you attend the webinar session in which we cover ownership and permissions.*

In this exercise you will practice exploring transferring ownership and using the Security Wizard to assign permissions. To do this exercise, you will need a “homework buddy.” Since you only have one UserID, you need to arrange with someone else who has access to the CT on the training server. Why? Because you will be practicing transferring record ownership to someone else, and also practicing assigning permission rights to other users.

## 1. Create some new Accession records

Create a dozen records or so. Use Accessions with which you are familiar. There are several quick ways to do this; one way is to:

- search for existing Accessions
- drag approximately a dozen of these Accession records into Excel
- delete data in the **Accession ID** cells; edit the data (use your initials) in the **Accession Suffix**
- with the Curator Tool *in Edit mode*, drag the new accessions from Excel into the CT (since they have no **Accession IDs**, when you save them, the CT will add these as new records and assign **Accession IDs**

alternatively...

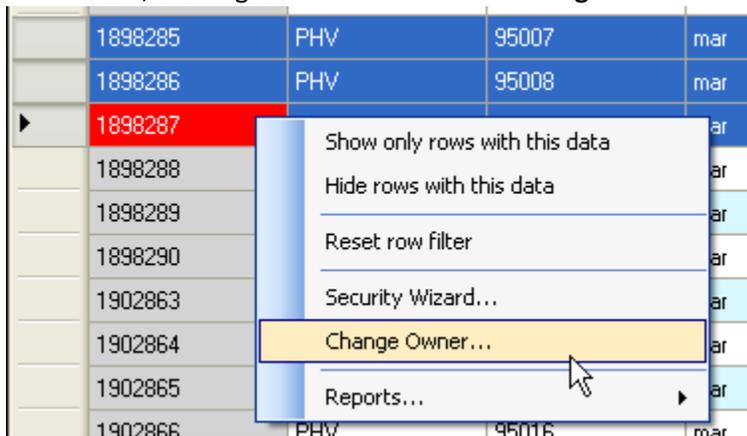
- search for existing Accessions
- start a new list in the Curator Tool and drag these Accessions into the list
- click the **Edit** button
- use the Ctrl-N method to insert a duplicate record below an existing record; then change the **Accession Suffix** of the new record – now you will have two distinct records. Repeat this so that you eventually have a few new records.

## 2. Review & Change the Ownership Information

Scroll to the right to view the **Owned By** data on these new records. The records should reflect the cooperator associated with your current User Name.

Change the **Owned By** data for several of these new records. Keep several of these records unchanged --- that is, you want to continue owning them.

Select them; then right-click and select the **Change Owner...** menu option:



The screenshot shows a table with columns for Accession ID, Suffix, and Date. Row 1898287 is highlighted in red. A context menu is open over this row, with the 'Change Owner...' option selected and highlighted in yellow. A mouse cursor is pointing at the 'Change Owner...' option.

1898285	PHV	95007	mar
1898286	PHV	95008	mar
1898287			
1898288			
1898289			
1898290			
1902863			
1902864			
1902865			
1902866	PHV	95016	mar

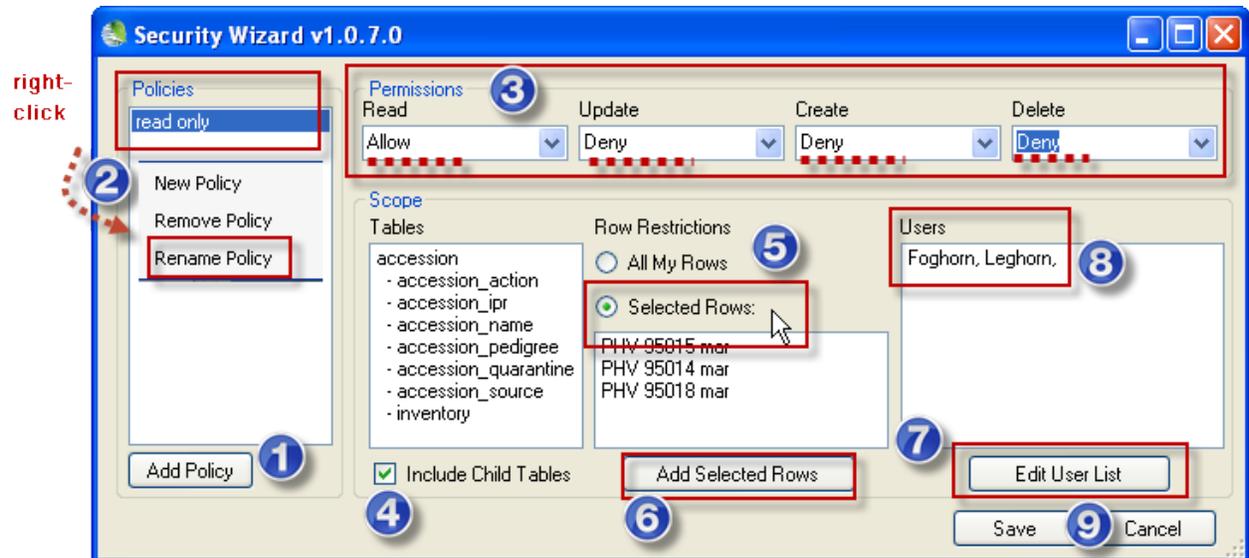
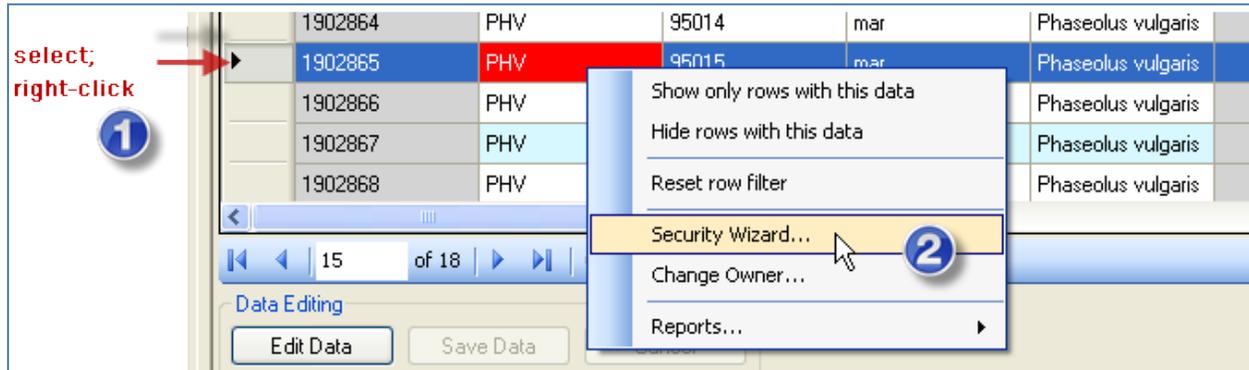
Assign them to your homework buddy.

Now review the **Owned By** data for these records – did the Ownership change as you expected?

### 3. Permissions

During the webinar we discussed how the owner of a record can determine who can access a record and what level of access they may have. Practice changing permissions, and when using the security wizard, select your homework buddy as the user to whom you assigning certain permission privileges.

(a) In this first permissions exercise, assign “Read Only” permission to a record or two:



(b) Open a second Curator Tool window, but log on with your second user name to test the permission. You will, of course, need to have the records displayed in your dataview in the data grid.

(c) In a second exercise for assigning permissions, set up the permission so that the second user cannot even see a specific record. Ask him or her to test this.

(d) In this next practice exercise, set up the permission so that the second user can update the record, but cannot delete it. Have the second user try this – that is, have your buddy edit the record and save the changes.

If you originally created accession records for this lesson today, create an accession one or two accession source records. Then have the buddy attempt to delete these source records– the second user should not be able to delete the records.



In step 3 above, you were selecting rows and then assigning permissions. Alternatively, you could have selected **All My Rows** to set up a permission for all of your records, which may be more realistic.