Granting Roles Permission to Set Segment Values on Records

> ## WARNING
> This feature is not currently enabled in your account. To enable this feature, please contact your administrator.

For every segment, you can control which roles can view and interact with the segment as a field. You control this access by defining the Record Access level for each role. You can also set a default access level, which applies to all roles that do not have an access level explicitly defined.

For details, see the following sections:

- Scope of the Record Access Permission
- Assigning the Record Access Permission

Scope of the Record Access Permission

The following table describes the access associated with the various levels of the Record Access permission.

Level	Users can:	Users cannot:
None	—	View or set values for the segment on the records where the segment has been applied. For these users, the segment — both its label and value — are hidden.
View	View segments on the records where the segment has been applied (if the user has permission to view or edit the record type). Users can view both the segment label and the selected value, if a selection has been saved. For users with this access level, the segment field is read-only, even if the user has permission to edit the record.	Set values for the segment.
Edit	View and set values for the segment on records where the segment has been applied (if the user has permission to edit the record type).	—

Assigning the Record Access Permission

Use the following steps to assign the Record Access permission to a role.

To assign the Record Access permission to a role:

1. Edit the custom segment.
2. Click the **Permissions** subtab.
3. For a role to have access, the role must be referenced in the Permissions sublist. Review the sublist to see if the role is already listed, then do one of the following:
   - If the role is not listed, add a line to the sublist: In the **Role** column, select the appropriate role. In the **Record Access Level** column, select the required access level. Review the values for this role in the columns labeled **Value Management Access Level** and **Search/Reporting Access Level**. Make any changes as needed. Be aware that the Value Management Access permission gives the

         user permission to create values, so review this column with care. For details, see Granting a Role Permission to Manage Custom Segment Values. Then click **Add**.

- If the role is already listed but does not have the ability to manage values, then edit the role's access. Locate the role in the sublist. Edit the corresponding value in the **Record Access Level** column. Then click **OK**.

4. From the **Default Record Access Level** list, set the default record access level for a segment. This access level applies to any role that is not listed in the Permissions sublist with a specific access level.

5. Click **Save**.

Related Topics