



## TA Trip Tracker – Roles & Permissions

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Roles and Permissions control what users can access and manage within TA Trip Tracker. This system ensures that each team member has the appropriate level of access based on their responsibilities within the agency.

### Understanding Roles

A role defines the level of access a user has in the system. Roles help administrators control which features users can view, edit, or manage.

- Administrator – Full access to system settings, user management, and all agency data.
- Associate – Access to manage trips, travelers, and tasks related to their work. Has their own trips and will be included in reporting.
- Assistant – Access to manage trips, travelers, and tasks related to their work. Does not have their own trip and will not be included in reports.
- Hybrid– Advisor who can roles of both an associate and an assistant.

### Administrator Permissions

Administrators typically have the ability to:

- Add and manage agency users
- Assign roles and permissions
- Access all trips and traveler records
- Manage system settings
- View agency-wide information

## **Advisor Permissions**

Advisors typically have the ability to:

- Create and manage trips
- Manage traveler profiles
- Create and update tasks
- Access resources such as the library
- Manage their own client records

## **Changing User Roles**

User roles can be updated by administrators within the Agency Users section. If a team member's responsibilities change, their role can be modified to reflect the appropriate level of system access.

## **Best Practices**

- Assign Administrator roles only to trusted team members
- Use Advisor roles for most travel advisors
- Review roles periodically to ensure correct access
- Update permissions when team responsibilities change

## **Why Roles & Permissions Matter**

Roles and Permissions help maintain system security and organization by ensuring that users only have access to the features they need. This protects agency data while allowing team members to work efficiently within TA Trip Tracker.