

Roles

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Overview

Roles are used in the ERP system to determine user's role in the company.

Roles are used to group sets of permissions, that are required for performing a task or general ERP use.

Roles

viewer

| <input type="checkbox"/> SLUG ^ | LEVEL | PERMISSIONS | USERS | ACTIONS |
|--|-------|-----------------------------------|---|-------------------------|
| <input type="checkbox"/> account-newsletter-viewer | 1 | account-newsletter view | <div></div> <div></div> <div></div> <div></div> <div></div> | <div></div> <div></div> |
| <input type="checkbox"/> announcement-viewer | 1 | announcements view | <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> | <div></div> <div></div> |
| <input type="checkbox"/> authorized-contact-viewer | 1 | contacts view-authorized | <div></div> <div></div> <div></div> | <div></div> <div></div> |
| <input type="checkbox"/> authorized-issued-invoices-viewer | 1 | Invoices-Issued view-authorized | <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> | <div></div> <div></div> |

Create a new role

To create a new role, click the "+" button above the "Roles" table, to navigate to the "Create new authorization role" form.



On the form, fill out the required fields and click save to add a new role.

Add new authorisation role

Basic information

NAME*

Task tester role

SLUG*

task-tester-role

LEVEL

1 000,00

DESCRIPTION

A new tester role, used to try out the system's tasks.

PERMISSIONS 26

own-tasks | view

tasks | cancel cancel-authorized create-media create-tags create create-authorized delete-media delete-tags delete delete_batch include input-serial-assembly-task menu reopen restore restore-authorized unlock update-media update-tags update update-authorized view-media view-tags view view-authorized

task

☐ document-tasks

☒ own-tasks

☐ production

☐ reservation-task

☐ start-later-tasks

☒ tasks

☐ unreservation-task

USERS

john@doe.com

☐ After save, create another

Save

- **Name**
 - Select a descriptive name for the role (eg. a work position, like **Department Lead**)
- **Slug**
 - Is used to identify the role throughout the ERP. Is usually formatted role name (eg. **department-lead**)

- **Level**

- A role's level is used to determine its priority over other roles. Roles with higher priority overrule roles with lower levels.

- **Description**

- Is not required, but it's highly encouraged that it be added. Used to further explain the role's purpose.

- **Permissions**

- Select, which permissions are attached to this role.

- **Users**

- You can list users, that will have this role here, and it will be assigned to them automatically after role is created.

Update an existing role

Roles should be updated only by people, who know their purpose, as deleting a role that is required for a certain tasks will stop users from performing those tasks.

To edit an existing role, find it in the roles table and click on its **"Edit"** button.

Roles

Task tester role

+

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| SLUG ^ | LEVEL | PERMISSIONS | USERS | ACTIONS |
|---|-------|---|-------------------------|-------------------------------------|
| <input type="checkbox"/> task-tester-role | 1000 | <div>own-tasks view</div> <div>tasks cancel cancel-authorized create-media create-tags create create-authorized delete-media delete-tags delete delete_batch include input-serial-assembly-task menu reopen restore restore-authorized unlock update-media update-tags update update-authorized view-media view-tags view view-authorized</div> | <div>john@doe.com</div> | <div><div>✎</div><div>🗑</div></div> |

On the role's page, you can update its name and description, its assigned permissions and manage users, that have this role.

It is not recommended to update a role's slug, as it may be used for programmatic access control.

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Task tester role



Basic information

NAME

Task tester role

*

SLUG

task-tester-role

*

LEVEL

1 000,00

DESCRIPTION

A new tester role, used to try out the system's tasks.

PERMISSIONS 25



own-tasks | view

tasks

cancel cancel-authorized create-media create-tags create create-authorized delete-media delete-tags delete delete_batch include input-serial-assembly-task menu reopen restore restore-authorized unlock update-media update-tags update update-authorized view-media view-tags view view-authorized

tasks

document-tasks

own-tasks

start-later-tasks

☒ tasks

USERS

john@doe.com

x



Save

+ File manager


+ Comments


+ Activity timeline

Delete role(s)

Roles should only be deleted by people, who understand the role's purpose and know it's uses.

To delete a role, find it in the "Roles" table and tick its checkbox. Then click and confirm the **"Trash"** button, that appears above the table.



| <input type="checkbox"/> | SLUG | LEVEL | PERMISSIONS | USERS | ACTIONS |
|--------------------------|------------------|-------|---|--------------|---|
| <input type="checkbox"/> | task-tester-role | 1000 | <div>own-tasks view</div> <div>tasks cancel cancel-authorized create-media create-tags create create-authorized delete-media delete-tags delete delete_batch include input-serial-assembly-task menu reopen restore restore-authorized unlock update-media update-tags update update-authorized view-media view-tags view view-authorized</div> | john@doe.com |  |