

# 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.

<input type="checkbox"/> SLUG ^	LEVEL	PERMISSIONS	USERS	ACTIONS
<input type="checkbox"/> account-newsletter-viewer	1	account-newsletter   view	[REDACTED]	
<input type="checkbox"/> announcement-viewer	1	announcements   view	[REDACTED]	
<input type="checkbox"/> authorized-contact-viewer	1	contacts   view-authorized	[REDACTED]	
<input type="checkbox"/> authorized-issued-invoices-viewer	1	invoices-issued   view-authorized	[REDACTED]	

# 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.

A screenshot of the 'Add new authorisation role' form. The form has a title 'Add new authorisation role' and a section for 'Basic information'. It contains three input fields: 'NAME' (Task tester role), 'SLUG' (task-tester-role), and 'LEVEL' (1 000,00). Below these is a 'DESCRIPTION' field with the text 'A new tester role, used to try out the system's tasks.' The 'PERMISSIONS' section shows a search bar with 'task' and a list of permissions with checkboxes. The 'USERS' section shows a list of users with 'john@doe.com' selected. At the bottom right, there is a checkbox for 'After save, create another' and a 'Save' button.

**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 x

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.

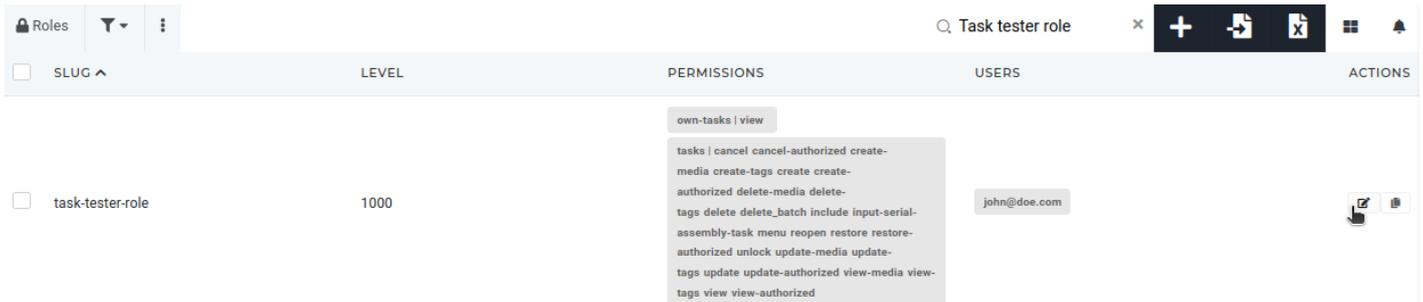
- **Users**

- 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.



SLUG	LEVEL	PERMISSIONS	USERS	ACTIONS
<input type="checkbox"/> task-tester-role	1000	<ul style="list-style-type: none"><li>own-tasks   view</li><li>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</li></ul>	john@doe.com	 

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.

# ← Task tester role



## Basic information

NAME *	SLUG *	LEVEL
Task tester role	task-tester-role	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

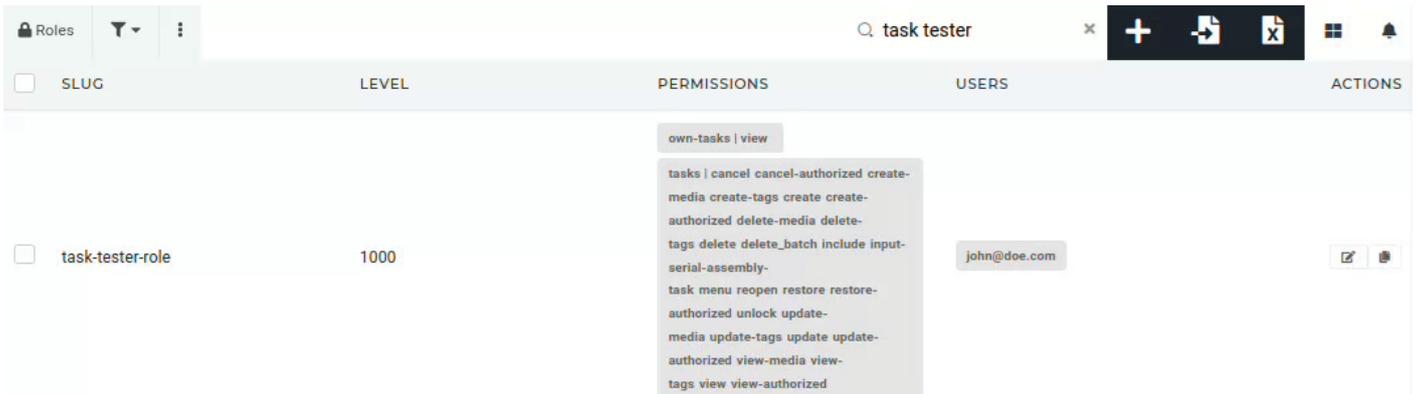
+ Comments

+ 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	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	john@doe.com	 