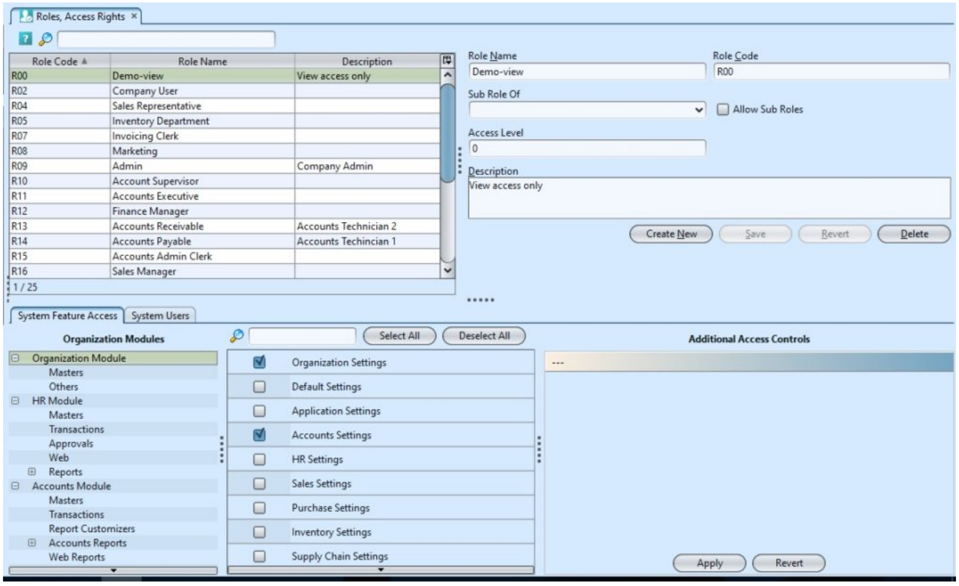
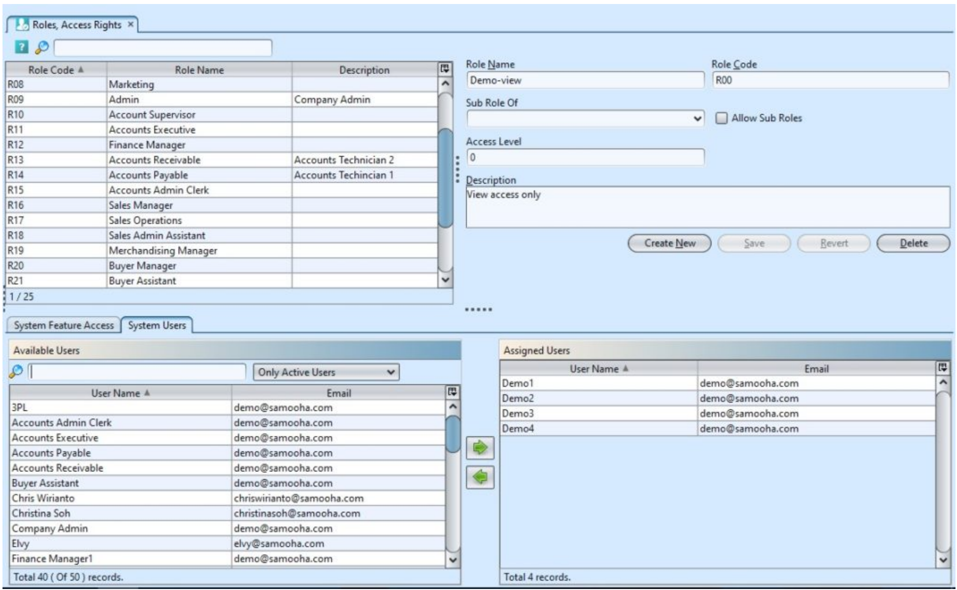
Roles, Access Rights

This view allows user to define access rights for different users. Below actions are available under ***“Roles, Access Rights”***:

- Create the role, modify, search and delete
- Assign & un-assign user to/from the role.
- Apply system features access level for the role.



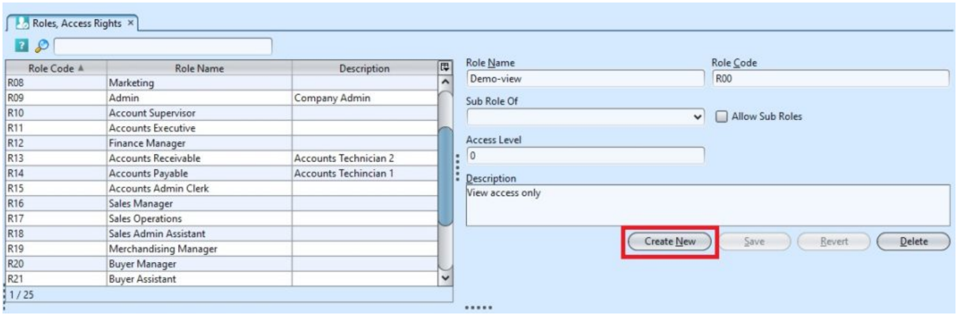


Field Name	Description	Mandatory Information

Role Name	Name of role	Y
Role Code	Custom code for the role	Y
Sub Role of	Select the main role, for grouping purpose	N
Access Level	Access level in the system	Y
Description	Description	N

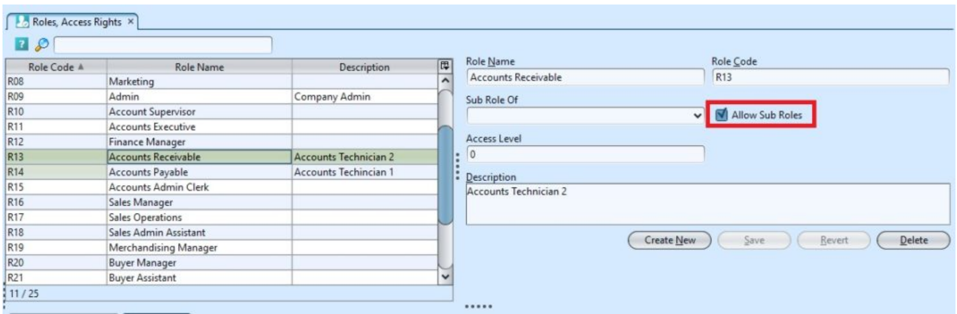
Create New Roles, Access Rights:

1. Click on ***"Create New"*** button at the middle of the screen

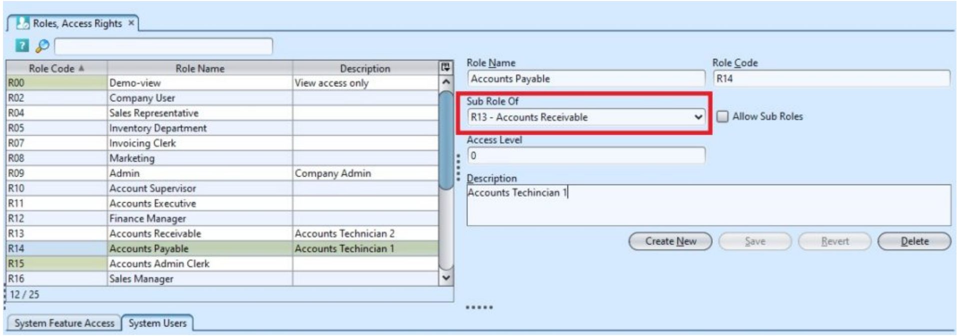


2. Fill up the information on top right of screen.

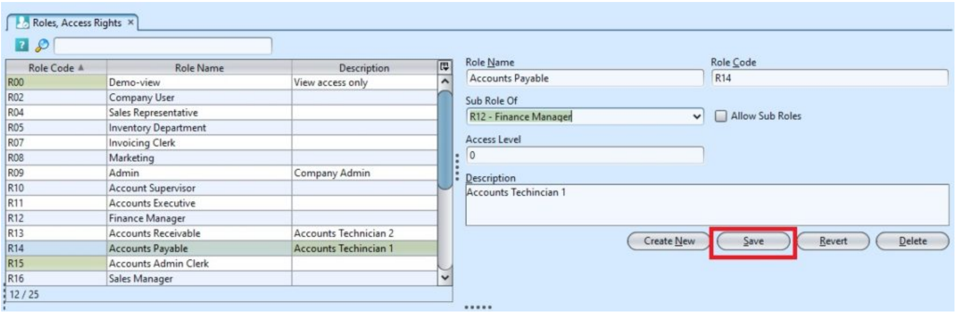
3. Optional: Tick the ***"Allow Sub Roles"*** box to set the role as (parent) grouping role



4. Optional: User may select a parent role from "***Sub Role Of***" drop down list, if the role is a grouping role (see steps #3 above).



5. Click on ***"Save"*** *button* to save

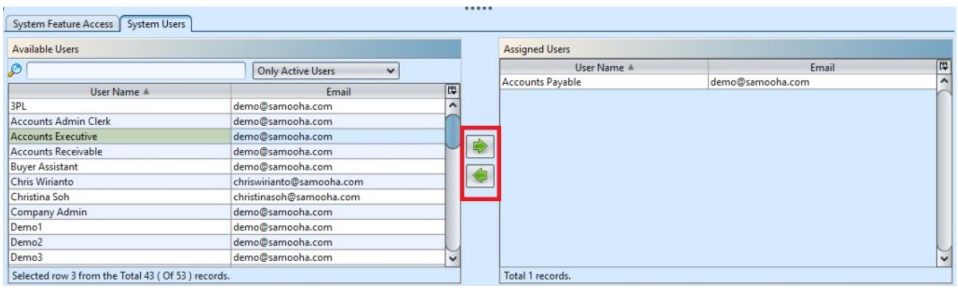


Assign & Un-Assign User to/from Roles

1. Click on a role in the list on top left of screen.

2. On "***System Users***" tab, select a user name from the "***Available Users***" list and click on the "  " button to assign the user for the role.

3. Select a user name from the "***Assigned Users***" list and click on "  " to unassign the user.



Modify Roles, Access Rights:

1. Select the role to modify from the list on top

left of screen.

2. Update the information required

3. Click on the ***“Revert”*** button to undo changes.

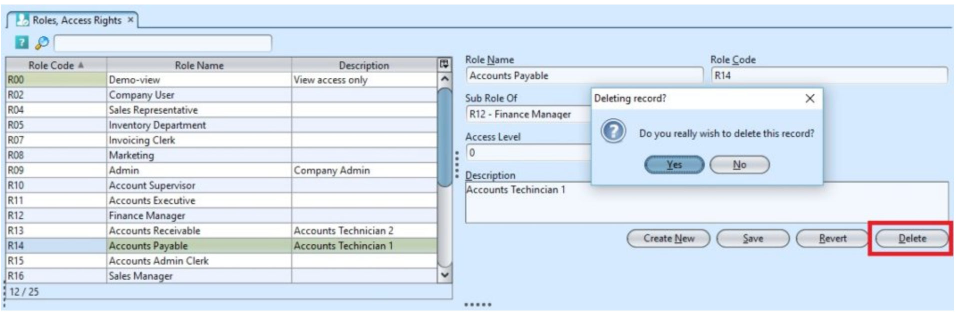
4. Click on the ***“Save”*** button to save the changes

Delete Roles, Access Rights:

1. Select the role to delete from the list on top left of screen.

2. Click on ***“Delete”*** button at the bottom of screen

3. Click on ***“Yes”*** button on the pop-up window to confirm record deletion.



Apply System Features Access Level for Roles:

1. Select the role to modify system features access level from the list on top left of screen.

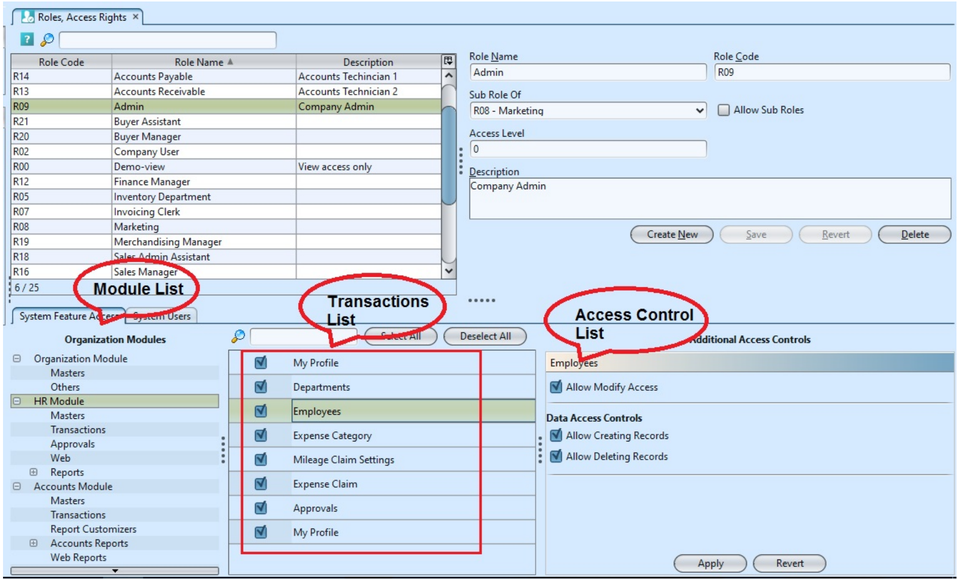
2. Select a module from list of “***Organization Modules***” in the “***System Feature Access***” tab

3. Select a transaction from list of the selected module’s transactions to make changes

4. Tick a transaction checkbox to give “***VIEW***” access to role. Or untick a transaction checkbox to remove

“***VIEW***” access to role

5. Tick an access control checkbox to give “***Create***“, “***Modify***“, “***Approve***“, or “***Delete***” access to role. Untick an access control checkbox to remove specific access to role



6. Click on ***“Apply”*** button at the bottom of screen to apply the changes to the system feature access level